Users Manual

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E2C2 - Energy Efficiency & Consumer Competency

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OPUS User Manual
For Windows

For OPUS System v2.3 and above

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Notices: OPUS User Manual for Windows for OPUS System v2.3 and above.

Help Us Improve this Manual

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Note: Sections Five and Six below cover Management 'Permission Only' areas of the OPUS system. Therefore, these screens are only available to assigned fiscal and management personnel to work within.

Section Six – Management - How to Setup a Local Program

Section One

Basic Operations

Internet Explorer Settings

Internet Explorer (IE) Settings

It is likely that internet browser software was installed with the default settings, therefore the default settings need to be adjusted for web-based data entry operations. Making the following adjustments allows the application and database to communicate in 'real-time' as information is entered and saved to the database.

Setup:

1. Open Internet Explorer (IE). Using the Main Tool Bar, Click Tools, point to Internet Options *(reference figure 1-1).*
2. In the Internet Options Panel (middle section of the window under 'Temporary Internet Files', click the Settings button *(reference figure 1-1A).*

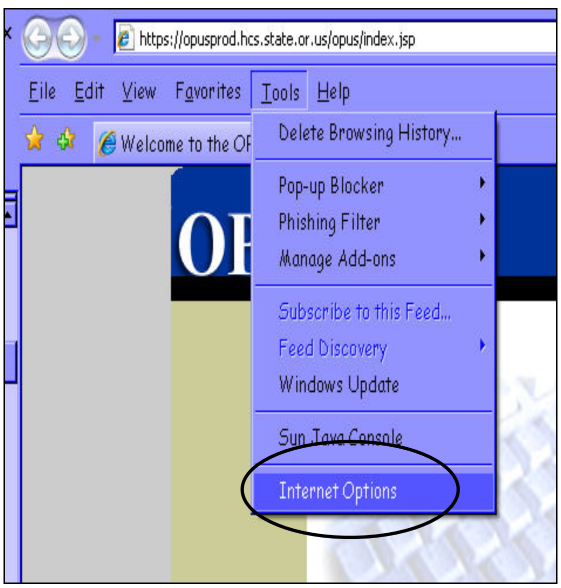


Figure 1-1: Internet Options screen.

Figure 1-1A: Internet Options Advanced Settings

3. In ‘Settings’ screen, click the option "Every Visit to the Page", then click “OK” button *(reference figure 1-2)*. You are ready to login using OPUS.

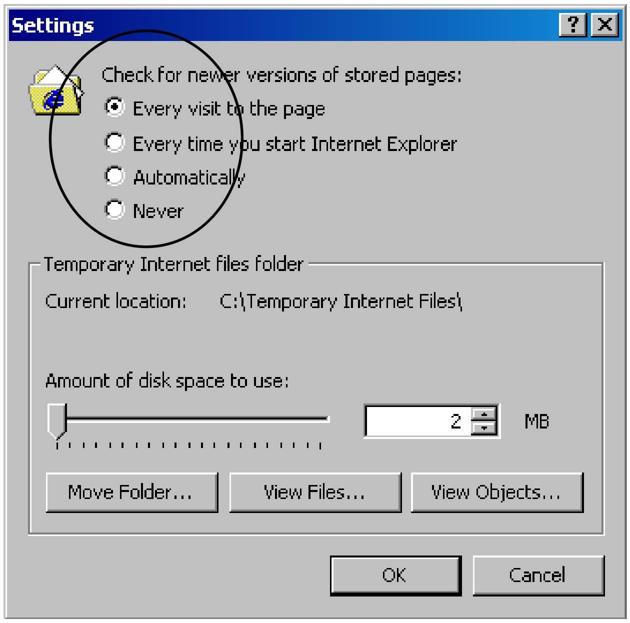


Figure 1-2: Settings Panel

Logging into OPUS

Setup:

1. Start Internet Explorer (IE).
2. Type the address: *http://opusprod.hcs.state.or.us/*
3. A popup window will ask you to accept a security certificate, Click the ‘OK’ button. This is the security certificate to protect the database.
   Note: Check the box next to the phrase, "In the future, do not show this warning", so that you will not repeatedly see the message popup on each visit to OPUS.
4. On the OPUS screen, click the ‘Login to OPUS’ link *(reference figure 1-3)*.

Figure 1-3: Client View - Employer and Income Updated

5. On the ‘Login’ screen, type the ‘User Name’ and the password *(reference figure 1-3A)*. For new users, a temporary password will be issued to the user by the manager. The user will be prompted to change it on the next screen. The ‘User Name’ is not case sensitive. The ‘Password’ ***is*** case sensitive.

Figure 1-3A: Login screen

6. Click the ‘Login’ button.
7. The ‘Change Password’ screen will appear. For the ‘Old Password’; type the temporary (default) password again *(reference figure 1-4).*

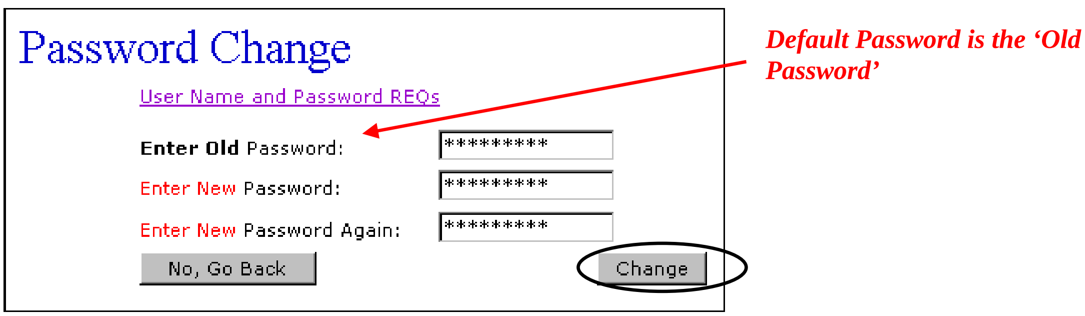


Figure 1-4: Password change screen.

8. Type a new password (this will be the permanent one to use on a regular basis unless there is a password reset). Permanent passwords need to be at least eight (8) characters, at least one upper-case letter, at least one lower-case letter, and at least one number or special character in the middle somewhere (characters such as #, *, -, @, $). A password can <u>not</u> begin with a number.
9. In the next box, re-type your new password, to confirm.

10. Click the ‘Change’ button. The ‘Agency & Module Select’ screen will appear. Some OPUS users have more than one module to work in, if so, the user has the opportunity to select the module they are approved to work in. Users with one module will only need to click ‘submit’. If a user has multiple modules, use the dropdown button in ‘OPUS Module’ to select the required module then click ‘Submit’ *(reference figure 1-5)*.

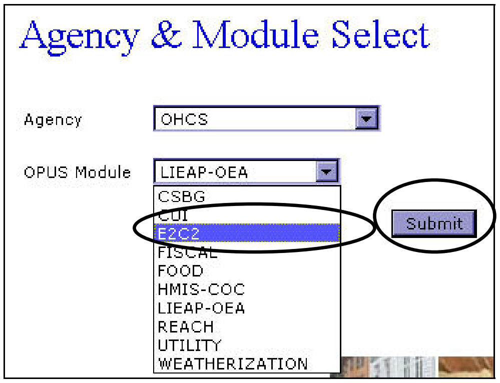


Figure 1-5: Agency & Module Select screen.

After clicking on the ‘Submit’ button, the ‘Message of the Day’ screen will appear.

Message of the Day

The ‘Message of the Day’ screen is known as the OPUS Home Page. Users will be alerted to notices of upcoming system-upgrades, program updates, and OPUS helpdesk procedures. To initiate a client search, click the ‘Search Client’ link or use the Main Menu, scroll over ‘Client’ to ‘Search’.

HOME and the Log Out Screen

The ‘HOME’ and ‘Log Out’ links are located on the Main Menu *(reference figure 1-6)*. The ‘HOME’ link goes to the "Message of the Day" screen.

Figure 1-6: Main Menu - Links for HOME and Log Out screen.

To end a session, click the 'Log Out' link. The 'Log Off' screen will appear. To continue logging off, click the "Yes" button. To cancel from logging off, and return to the last screen visited, click the "No, Go Back" button *(reference figure 1-7)*.
The 'Log Off' screen has a five minute timer before logging the user totally out. All other OPUS screens have a 20 minute timer. If there isn't activity in a screen, the system will go to 'log out'.

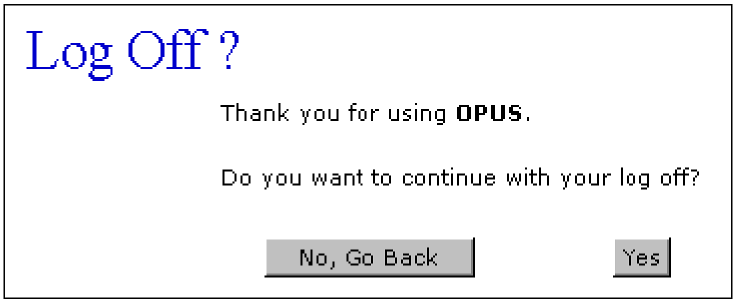


Figure 1-7: Log Off screen

Types of Screens and Buttons

There are four types of screens: 'Search', 'View', 'Edit' and 'New'.

- **Search Screen**
  The 'Search' screen is used to search for existing database records.

- **View Screen**
  A 'View' screen provides a view and/or review of information entered. This screen usually appears after saving data from a 'New' or 'Edit' screen.

- **Edit Screen**
  An 'Edit' screen displays existing database records so a user can edit regions/fields requiring updating and to be saved.

- **New Screen**
  A 'New' screen creates new records, a new client, a new residence, or a new payment.

- **The Save Button**
  On 'New' screens, the "Save" button is used to save information to the database. On 'Edit' screens, the "Save Changes" button is available.

Screen Timer

Each OPUS screen is programmed with a 20 minute timer *(reference figure 1-8)*. If a screen is inactive for more than 20 minutes, the 'Log Off' screen will appear. The 'Log Off' screen has a five (5) minute timer. You will need to click either "No" or "Yes" within 5 minutes. If a response is not completed within five minutes, the session will end and the user will be logged off. To continue using OPUS, the user must re-log into OPUS. This process is a security measure programmed into the system to protect client and agency information.

Figure 1-8: Screen Timer

Note: Log out of the system if leaving your desk for any amount of time. If you have saved each screen you have completed beforehand, you can log-in and go back to where you left off.

Screen Navigation

Main Menu, Left Navigation Bar (Left Nav Bar), and Drop-Down Menus

OPUS screens have two navigational sections: Main Menu and Left Navigation Bar.

Main Menu

The 'Main Menu' is the horizontal section located on the top area of the screen *(reference figure 1-9)*. The active 'Agency' is displayed in the 'Main Menu'. The main menu provides top level drop-down menus. Drop-down menus appear under: Client, Program, Fiscal, Management, Reports and Help.

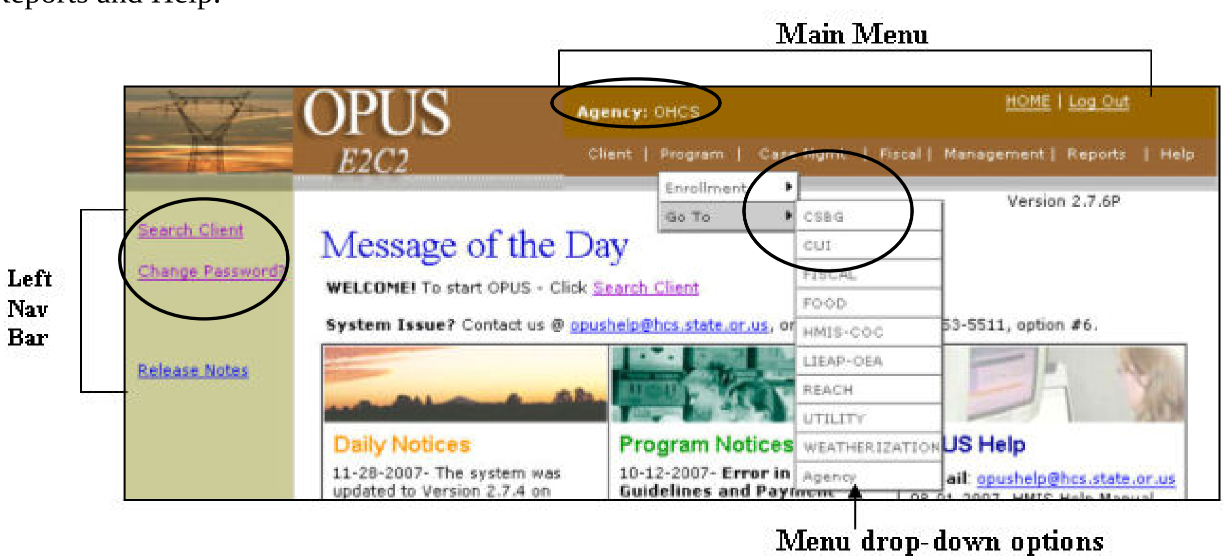


Figure 1-9: Main Menu and Left Nav Bar

A drop-down menu may include sub-menus when the mouse scrolls over a topic. For each menu item, you may see a black arrow pointing towards the right. When the mouse is scrolled over a menu, the arrow will display additional sub-menu items. In the example above, the ‘Program’ menu has a drop-down menu with a ”Go To” item menu, which has a sub-level menu listing other modules. The menu includes an “Agency” item which leads the user to the Agency-Module Select screen.

Left Navigation (Nav) Bar

The Left Nav Bar is bar area has text links *(reference figure 1-9)*. Text links change on the ‘Left Nav Bar’, from screen to screen, depending on what screens have been accessed, or need to be completed through the client intake process.

Section Two

Client Intake - New

New household records are created in this section. From there, a household (HH) can be enrolled in agency programs, services and household transactions.

All SSNs throughout this manual have be covered for confidentiality purposes even though the test database was used.

Client Search

There are two types of client search screens, ‘Client Search’ and ‘New Client Search’.

When to use each specific Search Screen

Client Search: Use the ‘Client Search’ screen to find *current records* in the OPUS database.
New Client Search: Use the ‘New Client Search’ screen during a *client intake* session.

Setup:

Log in and start from ‘Message of the Day’ Screen.

1. Click the ‘Client Search’ link. The ‘Client Search’ screen will appear next. (*reference figure 2-1*).
2. An individual search needs to be conducted for each new client and/or each client in the household. Search for clients by name or SSN/System ID (SID or SYSID) without dashes.
3. Click the ‘Search’ button.

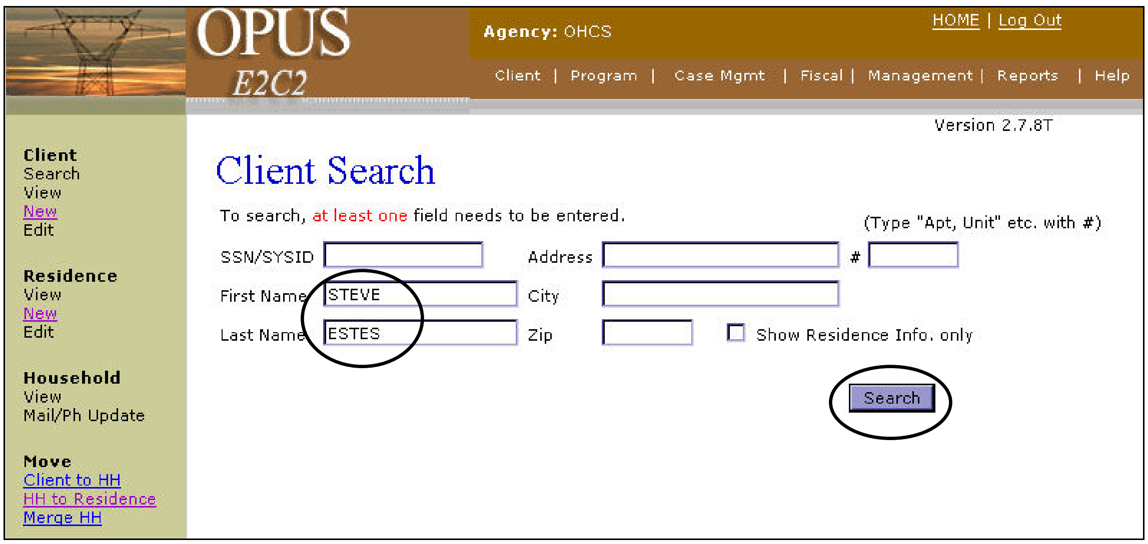


Figure 2-1: Client Search Screen

When a search is unsuccessful, a message ‘No Results Found’ will display under the ‘Search Results’ section. Repeat the search for each “new client” or “client in the household” (HH) before adding a client to a household. When a search is successful, a client's information will display in the Search Results *(reference figure 2-2).*

If a person or HH is new and is not in another household (HH), a client search will indicate ‘No Results Found’. The client or HH can be entered as a ‘New Client’.

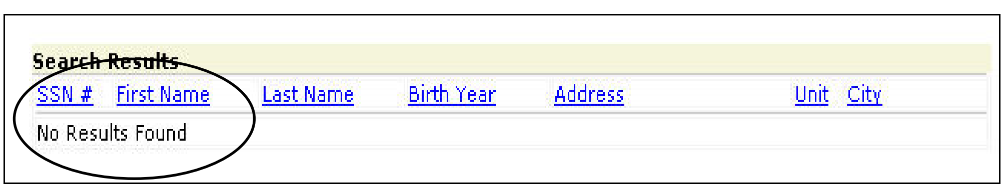


Figure 2-2: No Results Found

A search can be completed by any of the fields provided: SSN, first name, last name, birth year, address or system ID. When a client has a system ID (SYSID or SID) different from their social security number, it might be beneficial to remove the SID from the search box, and search only by the first and last name.

Client New Search:

The 'Client New Search' screen finds possible matches using the required search fields. *(reference figure 2-3)*.

Setup:

On the 'Client Search New' screen.

1. Enter required fields: first name, last name, SSN/SID, and date of birth (DOB) *(reference figure 2-3)*. The "Create ID" button will automatically create an SID to search for a client who may be assigned a system ID versus a SSN. System ID is created by OPUS (or can be manually done): SYSID sequence is as follows: "S" + first 5 letters of the clients first name + month, day, year (MMDDYY) of client's birth date.
2. Click the "Search" button. The search button becomes activated when information is typed into any of the boxes. If "No Results found" is displayed, the client can be added as a new client to the OPUS database *(reference figure 2-3)*.

Note: 'Search Results' are displayed for the first 100 records randomly matching the criteria you enter in a given 'search'. A list resulting up to 100 individual result records are generated randomly (as of the published date of this manual). Specific search criteria entered will result in a more defined search result and will narrow down in the list generated. *Fields marked * are required*.

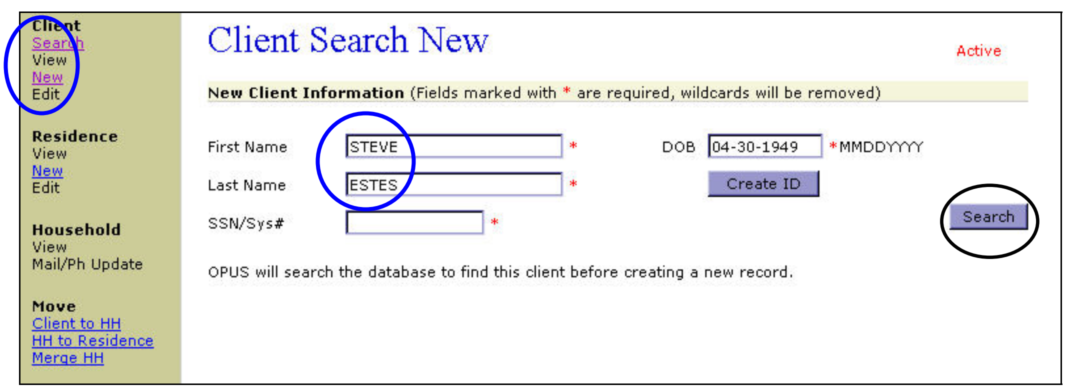


Figure 2-3: Client New Search, no match

Client New

This step is only used after determining the client is not in the system and <u>*all*</u> search attempts have been exhausted.

Setup:

Using the 'Client Search New' screen.

1. Click the 'Add New Member' button *(reference Figure 2-3)*. The 'Client New' screen appears *(reference figure 2-4)*.

Figure 2-3: Client Search New screen.

2. Client name, birth date, SYSID/SSN is already filled in from being entered on the 'Client New Search' screen. Complete the rest of the new client information. *Fields marked * are required*. There are several buttons with dropdown arrows for different choices.
   - Title; salutation if necessary. First name, middle name (if necessary), last name.
   - The SSN/SYSID. Use 'Create ID' button if SSN is not available. **Note:** a System ID is created by OPUS: OPUS creates a SYSID as follows: "S" + first 5 letters of the clients first name + month, day and two digit year of client's birth date. This can be completed manually if desired.
   - SSN Quality Code. This is to describe if the SSN is full, 'don't know', 'refuse' to give one.
   - Phone number, extension, and type.
   - E-mail address.
   - Gender.
   - Language.
   - Education.
   - Ethnicity.
   - Race.
   - Nationality options (up to three).
   - Tribes options (up to three).
   - Mailing Address: The first client created for a household, type their mailing address in provided boxes. For subsequent clients, the select from drop-down menu will display previous mailing addresses.
   - Street number, Street direction: S, N, NE, NW, etc.
   - Street name.

- Street type: Ave, Lane, etc.
- Unit type: Apt., Unit, PO Box, etc.
- Enter an apt number or PO Box number.
- Select all the services and benefits that the client receives.
- Click the 'Save' button.

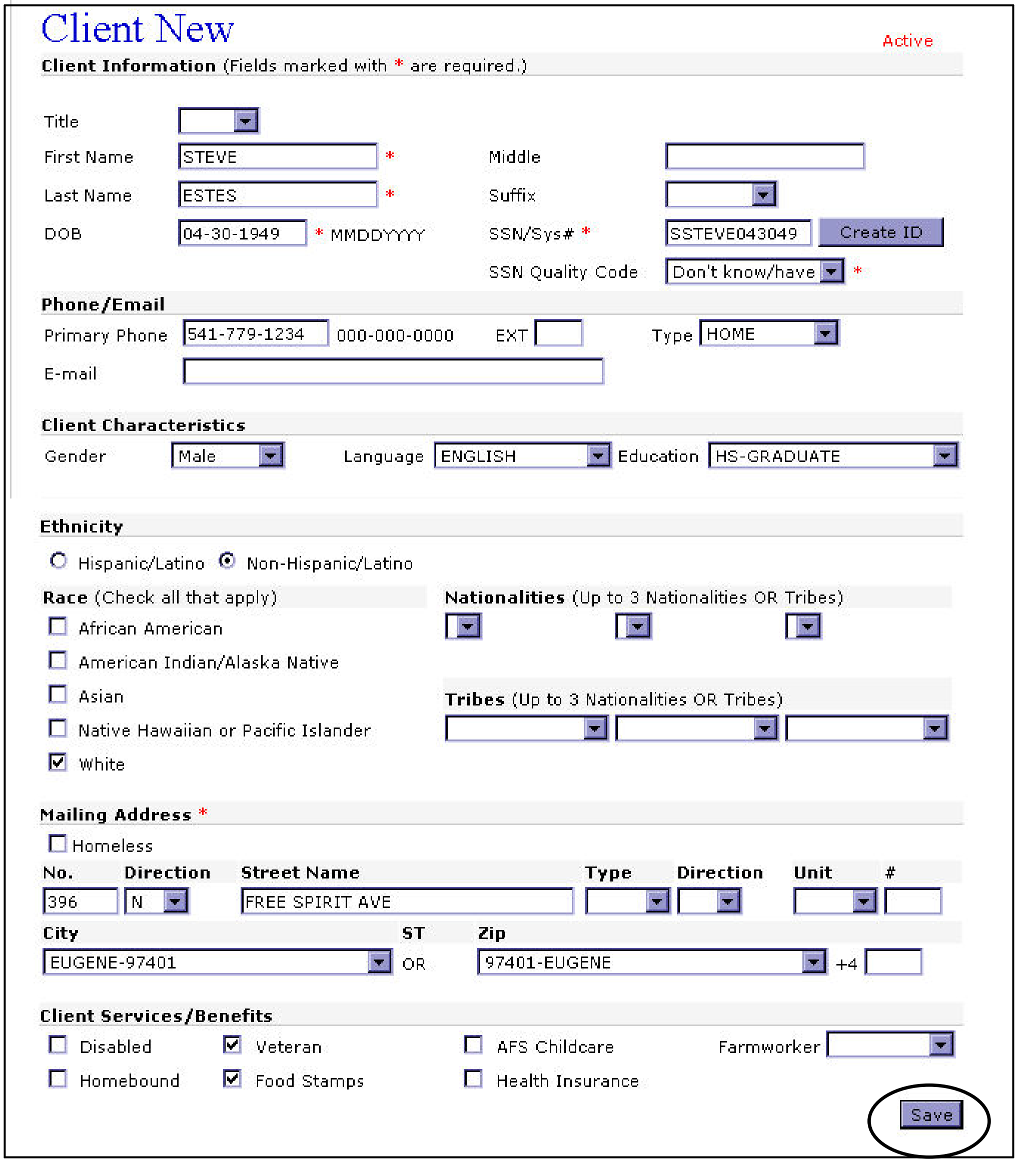


Figure 2-4: Client New screen.

Client View

The 'Client View' screen will appear after a new client record is created or edited (*reference figure 2-5*). Use this screen to review the accuracy of information entered from the 'New' or 'Edit' screens. If the client hasn't been assessed for a program, then you can follow the steps in the following section titled, "Assessment New". Viewing the HH View screen to verify information will be covered several times throughout this manual.

Figure 2-5: Client View with Income/Employer information screen

Residence Search

A residence may exist in the database but may be linked to an old household record. If a client is located at an old address or linked to another household, go to **Section 3 - Move Client(s) to Unknown** and follow the steps. This process moves clients from an old residence record in order for you to use it for processing a new intake.

Note: If a client is "Active" in another program enrollment, possibly in another OPUS module for services, the client *can not* be moved from the HH without being exited from the 'other' open enrollment. The OPUS user can search other modules he/she has access to or contact their agency's OPUS Administrator for assistance. If the agency does not have access to another module and receives an error message "The client can not be moved due to another open enrollment, contact OPUS Helpdesk **opushelp@hcs.state.or.us**".

Residence New

Setup:

While in the 'Client Search' screen *(reference figure 2-6)*.

1. In the address box, type a street number and street name (with spaces between as needed). If a street number isn't available, use a "%" in front of the street name, such as % Stevens St.
2. If there is an apartment or unit number, use one of these formats: Apt #, Unit #, or Space #.
3. Type a city and zip code to narrow the results to this region of the state.

Note: At any time, searching for a client by address, the percent symbol (%) is considered a 'wild card'. Enter the percent sign followed by the street name then click 'Search', the system will search for any addresses close to matching what you entered.

Figure 2-6: Client Search, Residence New Search – no results found.

4. When a residence is found in the database, the address, city and zip code will be displayed in the 'Search Results'.

5. If the residence is not in the result list, you'll see 'No Results Found'. A new household and new residence can be created *(reference figure 2-6, previous page)*. When household members have not been found in the database, click the 'New' link under 'Client' on the 'Left Nav Bar'. The goal is to find any records from the client's application first, and find out which household members already exist in the database before creating new records.

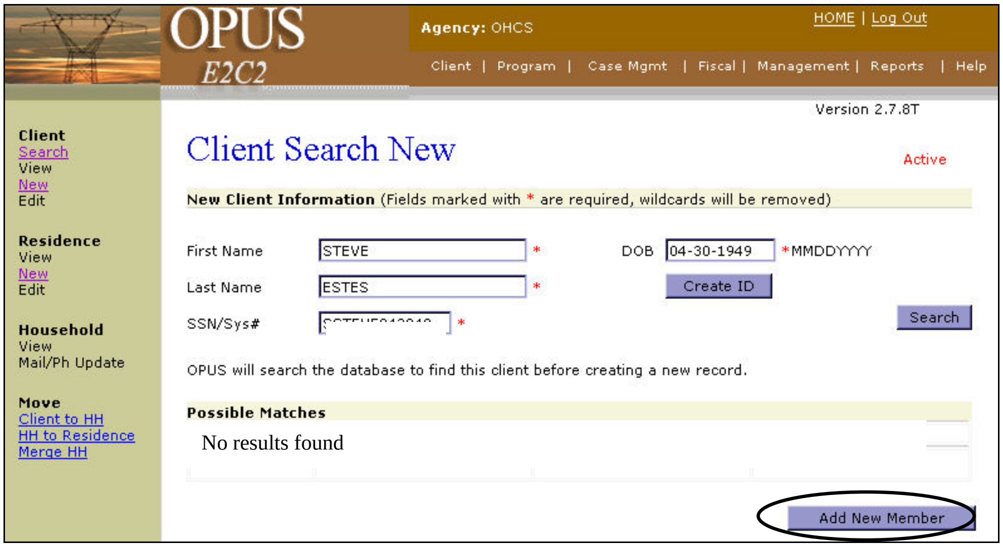


Figure 2-7: Client Search New, add new member.

Income & Employer

Setup:
Using the 'Client View', click on the individual household member 'SSN/SYSID' to open 'Client View' screen.

1. Click the button "New Income/Employer" (*reference figure 2-8*). The 'Income & Employer New' screen will appear next.

Figure 2-8: Income/Employer screen

2. On the Income and Employer screen, (*reference figure 2-9*).
Type or Select:

- Source (such as employer's name)
- Type of the income: ie. SSI
- Start Date
- Frequency
- Asset Value
- Verified how, verified by who
- Verified Date, who verified
- Enter Comments as needed
- Employer Information & address (follow steps as required)

Click the 'Save' button. If the client has an employer, you can enter this information by following the same steps done for income *(reference figure 2-9).*

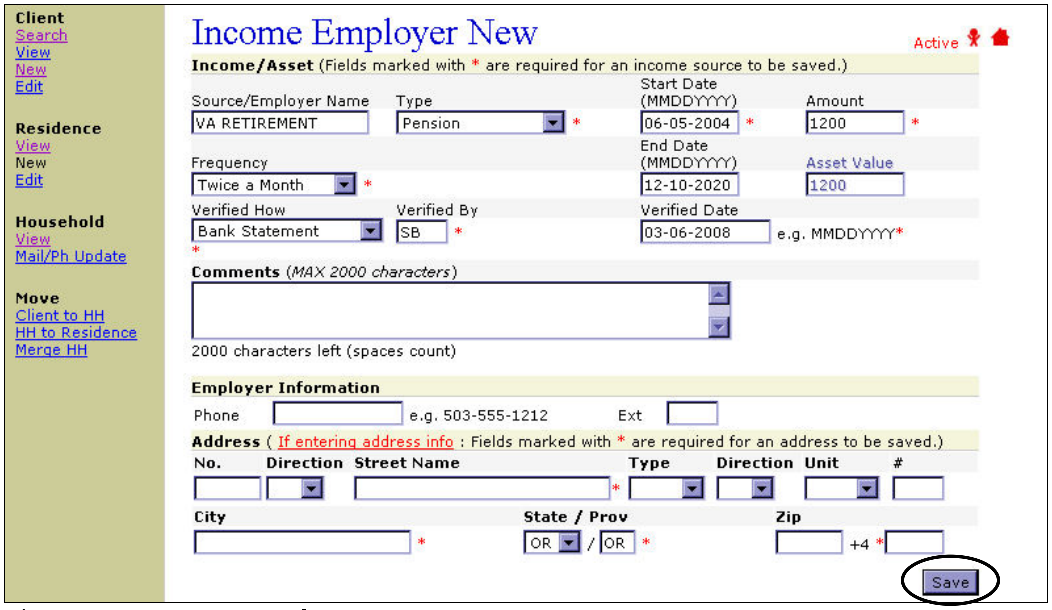


Figure 2-9: Income & Employer

If the client has another employer or source of income, click the 'New Income' button, or if done, click 'Save' *(reference figure 2-10)*.

Figure 2-10: Income & Employer screen.

Verifying Data on Views

In general, for all view screens, you should review to verify data entered. If information needs to be edited, the 'Edit' links or buttons are available to update or correct information. Most "View Screens" are for viewing purposes, the <u>*one exception*</u> is the 'Household View' screen. Intake workers would use this screen to add new vendors.

Add Clients to Household

Adding clients to an existing household is easiest when at least one client and the residence have been created initially *(reference figure 2-11).*

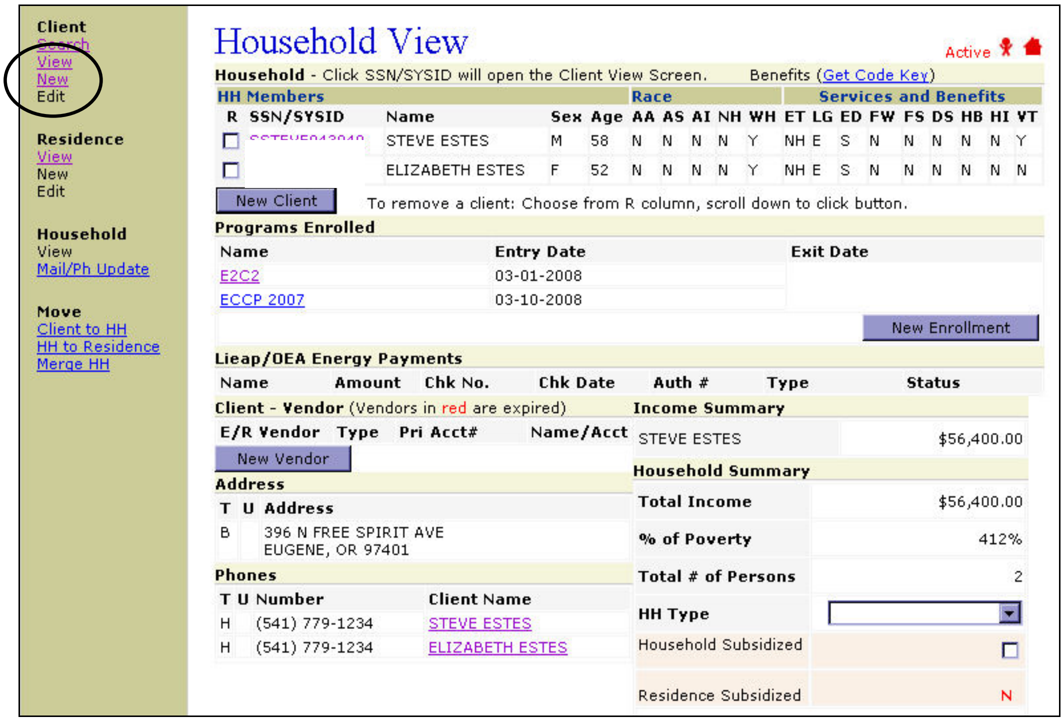


Figure 2-11: Adding new client to HH

Setup:

On the 'Household View' screen:

1. On the Left Nav Bar, under 'Client', click the 'New' link. The 'Client New' screen will appear. If the client's HH member is not listed, click 'Add New Member' *(reference figure 2-12).*

Some household information will be previously entered due to the first client enrolled such as: address, home phone number. Drop-down menus are available to select from for subsequent household member(s) entered or you can manually enter new mailing addresses or phone numbers for each individual.

Figure 2-12: Add new HH member search

Adding Clients to Household (cont).

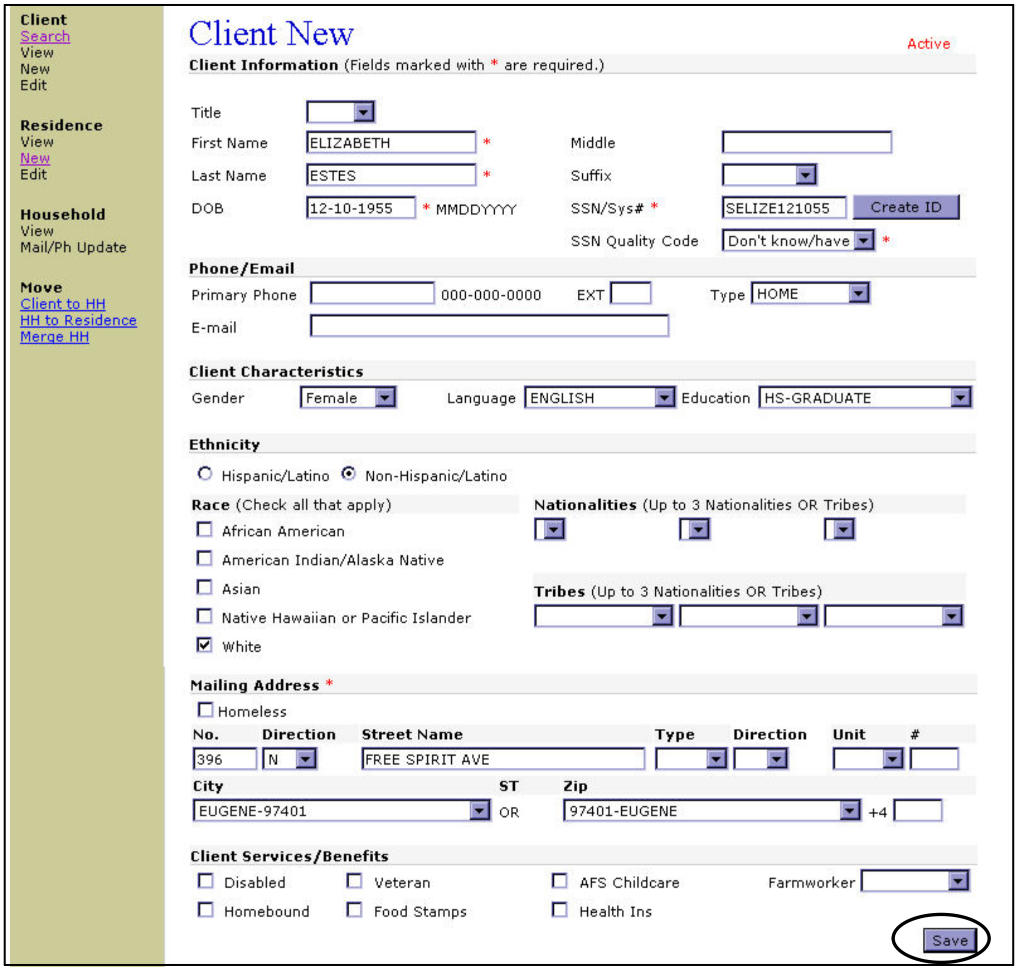


Figure 2-13: HH member new

2. For each household member, enter or select from the following:

- Salutation, if needed, First Name, and Last Name.
- Date of birth and SSN or click the ‘Create System ID’ button. As stated in creating a new client, a System ID is created by OPUS: OPUS creates a SYSID as follows: "S" + first 5 letters of the clients first name + month, day and two digit year of client's birth date.
- Phone number. **Note**: If the client's phone number is the same as another client in the household, use the drop-down menu to select an existing home number.
- PH Extension, PH Type.
- Select gender, language, ethnicity, race, nationality, and education level.
- Mailing Address. Select an address from the drop-down menu if the mailing address has been entered previously for another member in household, or enter a new address.
- Enter an E-mail address, if needed.
- Select the Services and Benefits for this person.
- Click ‘Save’ Button.

Figure 2-14: HH member added view

The 'Client View' screen will appear *(reference figure 2-14)*. If changes need to be made, click the 'Client Edit' link in the left Nav Bar, or the 'Edit Client' button. Make the necessary changes, and click 'Save Changes' button. More clients can be added to the household as necessary by repeating the same steps. If all the clients have been added to the household, proceed to the 'Household View' screen to finish the client intake process, see next section for this process.

Note: There are two sections on the Household View screen that need to be completed before a client or household can qualify for LIEAP/OEA program assistance:

- Client-Vendor Section
- Household Summary Section

What are the RED ICONS for?

There are two red icons that are displayed at the top of client screens *(reference figure 2-15)*. The red "person" icon represents an active client record added, and the red "house" icon represents an active physical residence created for this household. Scrolling the mouse over the red person icon shows the name of the client that is being worked on and the red house icon will display the physical address for the current household.

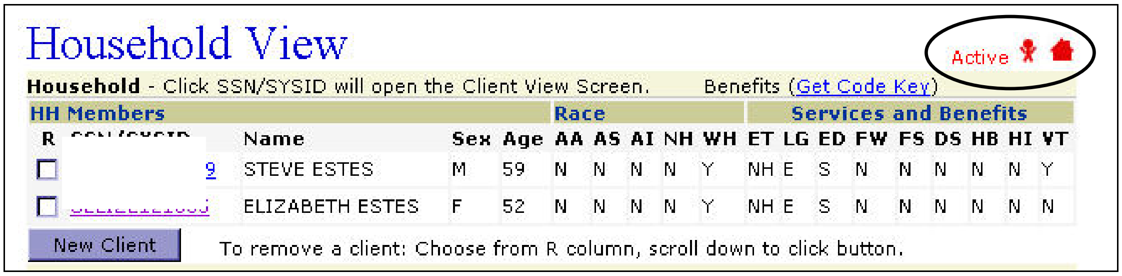


Figure 2-15: Household view Red Icons

Household View

Household view provides an overview of the household view screen and instructions for completing the final steps for a household to receive program assistance.

Setup:

On the ‘Client View’ screen:

Use the ‘Left Nav’ bar, click the ‘Household View’ Link, the ‘Household View’ screen will appear or scroll over ‘Client’ in the top navigational bar and HH view will appear. *(reference figure 2-16)*. This screen is organized as follows:

- HH Members information - top section
- Programs - below client section
- Vendors - left side under program
- Household Summary - right-side under program section
- Addresses - left side under vendor section
- Phone numbers - left side under address section

Figure 2-16: HH View, Programs, Vendor, Summary screen.

In the ‘Programs’ section, under ‘HH Members’, program assistance records the household received are listed by year. This screen is mainly a "view only" screen, except for two sections in the middle of the screen: ‘Client-Vendor’ and ‘Household Summary’ sections. Both sections need to be completed to qualify household for assistance.

Client Vendor New

Setup:
On the 'Household View' screen, click the 'New Vendor' button in the Client-Vendor section.

- The 'Client Vendor New' screen will appear *(reference figure 2-17)*.
- Type or Select *(fields marked * are required)*:
- Select the Applicant's name.
- Enter the Name on the Account (this may/may not be the Applicant).
- Client's Account number.
- Vendor Name.
- Verify by Intake Worker initials.
- Intake Date.
- Verification Type.
- Comments for Vendor, if needed.
- Click the Save button to save.

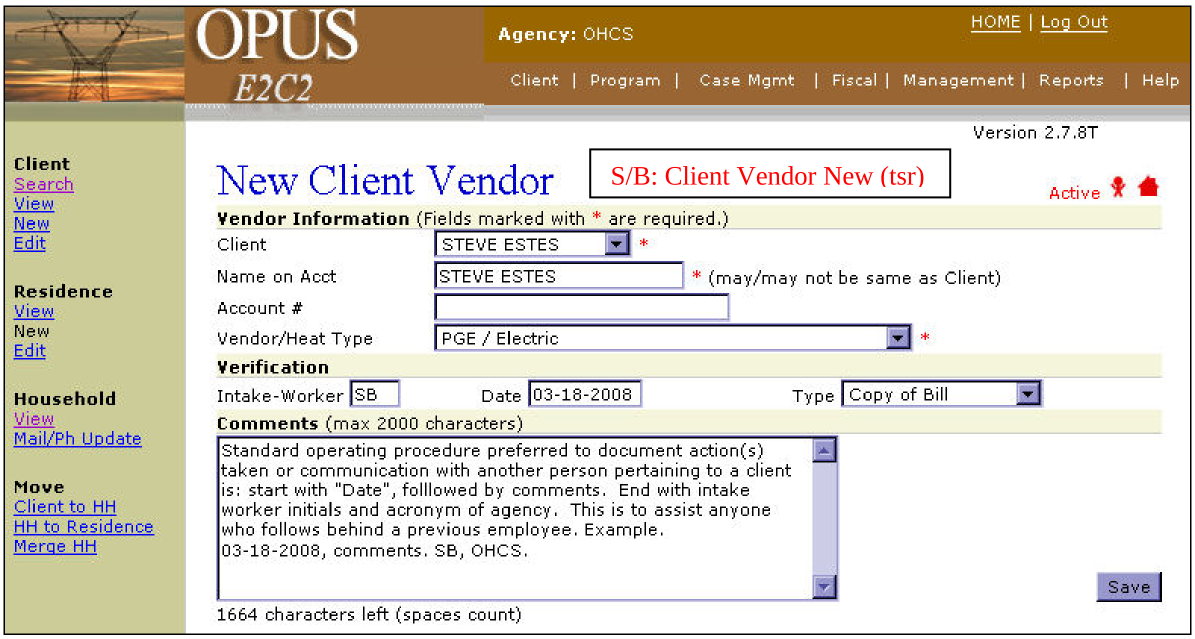


Figure 2-17: Client Vendor New

The ‘Household View’ screen will re-appear with the vendor information entered in the Client Vendor section *(reference figure 2-18)*. To add another vendor, click the ‘New Vendor’ button and repeat the setup steps listed above.

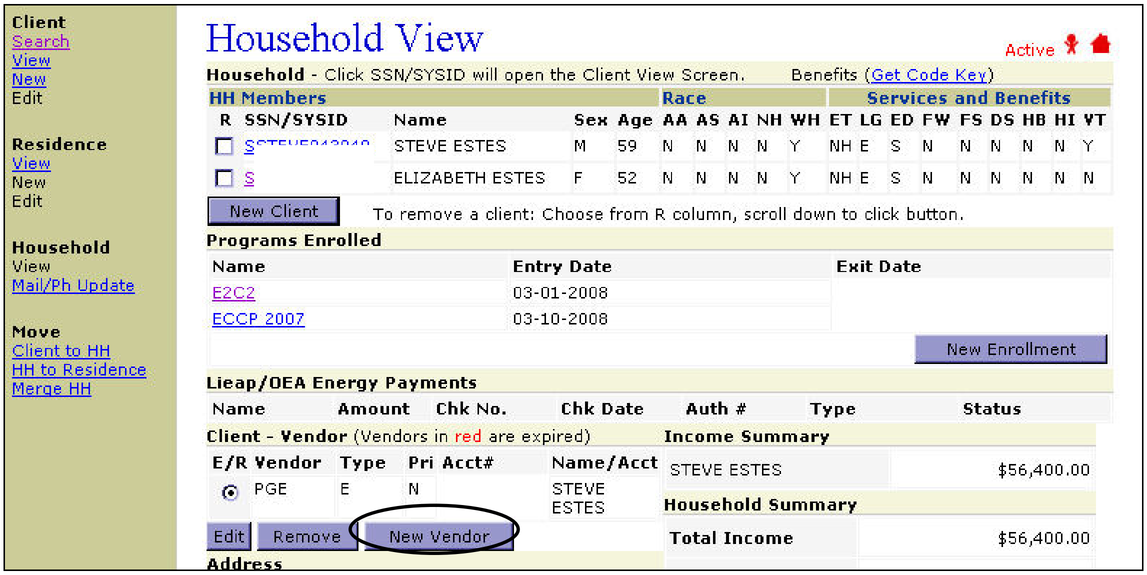


Figure 2-18: New Vendor section on the Household View screen.

If all the vendor information is complete, proceed to the next section ‘**Household Summary’**.

Household Summary

This section provides steps to complete the household summary section on the ‘Household View’ screen.

Setup:

There are two areas on the ‘Household View’ screen *(reference figure 2-17)* is the ‘Household Summary’ section has two sections to be completed.

- Household Type - drop-down list. This describes the composition of the household.
- Subsidized Status Boxes: This id for when the household receives a housing voucher to live in an approved subsidized housing development.

Always check the box when a residence is subsidized for the LIEAP program. If the ‘Household Subsidized’ box is checked when the residence information is initially entered (reference ‘Add Residence’ screen). The ‘Residence Subsidized’ box should be checked when working on the household summary. ‘HH Comments’ should be used for any documentation related to household.

Note: All users with "view-only" access will be able to view the comments entered *within* the energy module only. It is strongly suggested to enter the ‘Date’ followed by comments and completed by intake worker initials. This will allow future agency OPUS users to follow the record(s) when staff turn-over takes place. Click the ‘Save’ button. The Household View screen will "blink" while the database is saving the information, then the screen will remain steady.

Section Three

Client Intake – Existing

The user will learn how to update and edit existing household records in the OPUS database in this section. These records include client, residence, income, employer, vendor and household summary. Using data-entry screens, all records updated and edited prepare the database to assimilate required information to qualify a household for program assistance.

All SSNs throughout this manual have be covered for confidentiality purposes even though the test database was used.

Client Search

Search the OPUS database for existing client information before creating new records and to prevent duplicate records.

Setup:

On the ‘Message of the Day’ Screen.

1. Click the ‘Search Client’ link on the ‘Left Nav Bar’ or from the ’Main Menu’ under ‘Client’.
2. For each client in the household, and with one search at a time, type a person’s first, last name OR SSN/SYSID - **without dashes** *(reference figure 3-1)*.

Note: The search results will display only 100 records results at random that match the criteria you entered. It’s important to provide as much search criteria as possible, so that your results will narrow down to a reasonable number returned records. Or the search results will indicate ‘No Results Found’. *Fields marked * are required*.

3. Click the ‘Search’ Button. The search button becomes activated when information is typed into any of the boxes.

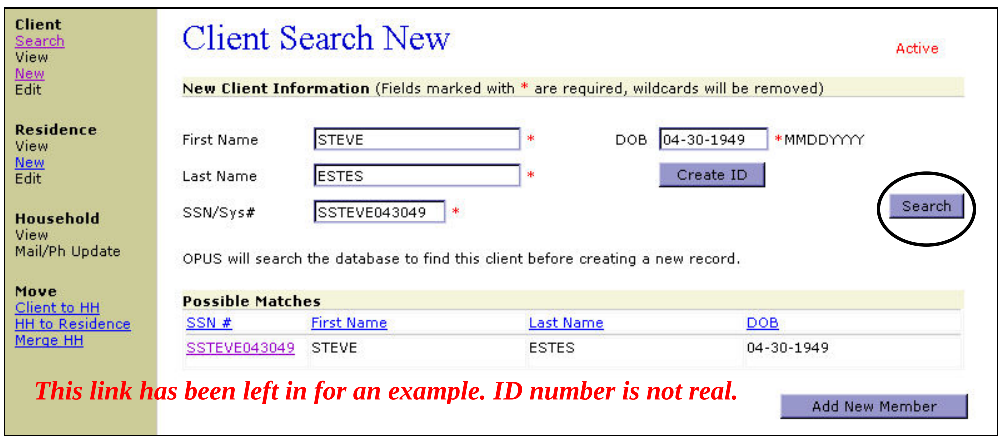


Figure 3-1: Client Search Screen

When the search is successful, the client's information will show in the ‘Search Results’ section *(reference figure 3-1)*. Repeat a search for each client in household. In the ‘Search Results’, client's system ID, first name, last name, address, city and zip code will display.

Figure 3-2: Client search with results

When a search is unsuccessful, a message 'No Results Found' will display under the 'Search Results'. Be sure to repeat a search for *each client* in the household before adding a client to a household. **Note:** Searching by other fields on the search screen, such as first name or last name can be attempted. Be sure to remove the SYSID/SSN when searching by first and last name. This allows the system to find a person if they have a different ID number. Click on the 'Add New Member' button to add other household members *(reference figure 3-2).*

4. Estes was found in the database. The blue and underlined links in the columns signify links to other screens. After a link has been used, it turns to a dark pink color for a period of time *(reference figure 3-1).*

The following linked columns take you to respective view screens:

- Click on SSN/SYSID to view 'Household View' screen.
- Click on the first or last name links to view the 'Client View' screen.
- Click on the address, unit or zip to view the 'Residence View' screen.

The 'Household View' Screen "The Most Useful Screen"

It is recommended that following a client search, to view a client's household View Screen by clicking the client's social security number or system ID number. From the Household View screen, the user will be able to see if there are other client(s) associated with the household (HH). If a user finds household members in a specific HH, the user won't have to search each client individually, since the client was found within the HH and the user will know they have a record in the database. Click Estes' SYSID to bring up the HH view.

Household View: (cont.)

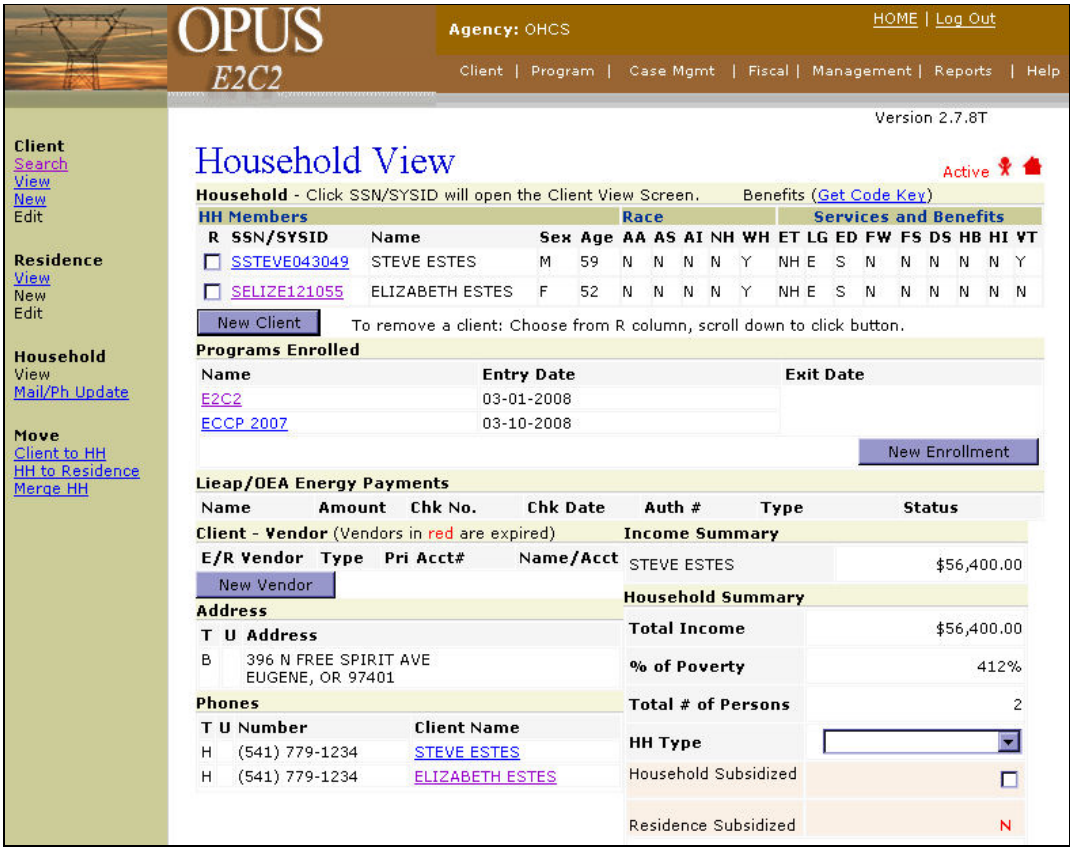


Figure 3-3: HH view

The 'Household View' screen will appear *(reference figure 3-3)*. On Estes' HH View screen, it displays the following:

1. Estes' household includes other members.
2. The Estes' address. If the address on the application is different from what is displayed on the HH view screen, the address will need to be updated. To update the address and/or phone number, click on 'Residence View' from the 'Left Nav Bar'. The 'Residence View' will appear *(reference figure 3-4).*

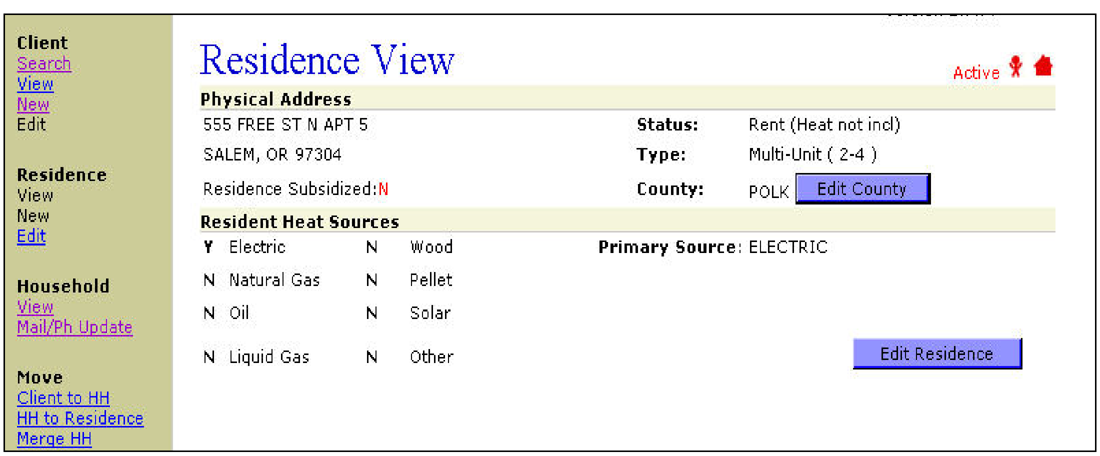


Figure 3-4: Residence View and Edit

3. The HH includes a third person who meets the definition of a HH member. If a new application was to include a fourth person not yet in the system, the HH information would require an update to add another person.

   A review of the 'Household View' screen from the initial client search makes it easy and quick to discover any information that would require to be updated. When updating residence information, always search for the *new* address first. From a residence search, you can determine how to proceed from one of the following scenarios:

   - If the residence address is found in the database without a household living in it, the address can be used for the household. Use guidelines in topic **Move Household to Residence**.
   - If the address is found in the database with a household in it and the HH is not active in a program, then the "old HH" can be moved into "Unknown" and the new HH can use the address. Use the guidelines in topic **Move Household to Unknown**, and **Move Household to Residence**.
   - If a HH is in the system with an old address and the new residence does not exist, it can be added then moved to the HH from the old residence to the new one, using steps in topic **Move Household to a new Residence**. Remember to complete a "Residence Search" before adding a new one.

Residence Search

A residence may exist in the database but may be linked to an old household record. If a client is located at an old address or linked to another household, go to **Section 3 - Move Client (s) to Unknown** and follow the steps. This process moves clients from an old residence record in order for you to use it for processing a new intake.

Note: If a client is "Active" in another program enrollment, possibly in another OPUS module for services, the client *can not* be moved from the HH without being exited from the 'other' open enrollment. The OPUS user can search other modules he/she has access to or contact their agency's OPUS Administrator for assistance. If the agency does not have access to another module and receives the message that the client can not be moved due to another open enrollment, contact OPUS Helpdesk **opushelp@hcs.state.or.us.**

Setup:
On the 'Client Search' screen.
1. In the address box, type a street number and street name (with spaces between as needed). If you don't have a street number, use a "%" in front of the street name, such as % Stevens St.
2. If there is an apartment or unit number, use one of these formats: Apt #, Unit #, or Space #.
3. Type a city and zip code to narrow the results to this region of the state.

Note: Reference figure 3-5. At any time, searching for a client by address, the percent symbol (%) is considered a 'wild card'. Enter the percent sign followed by the street name then click 'Search', the system will search for any addresses close to matching what you entered.

- If the residence is not in the result list, you'll see 'No Results Found'.

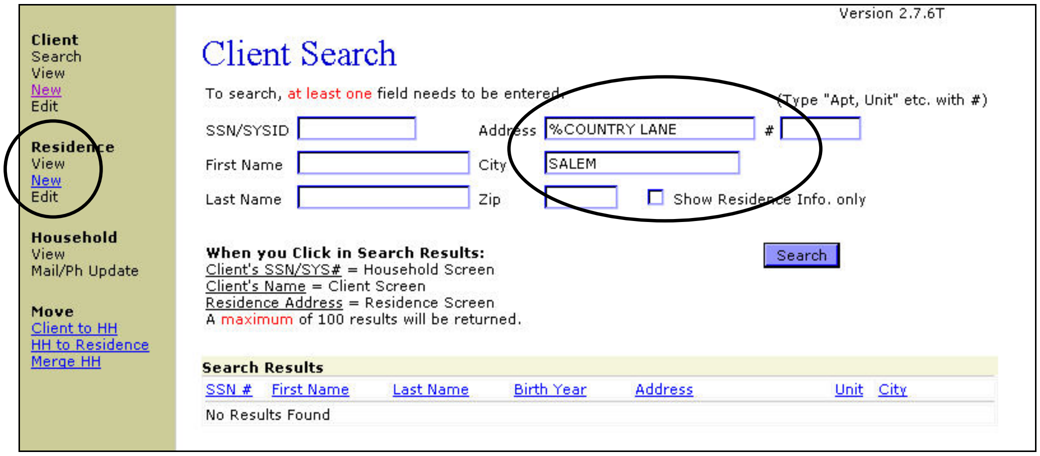


Figure 3-5: Client Search

- When household members have not been found in the database, click the 'New' link under "Client" on the Left Nav Bar. The goal is to find any records from the client's application first, and find out which household members already exist in the database before creating new records.

- When a residence is found in the database, the address, city and zip code will be displayed in the 'Search Results'.

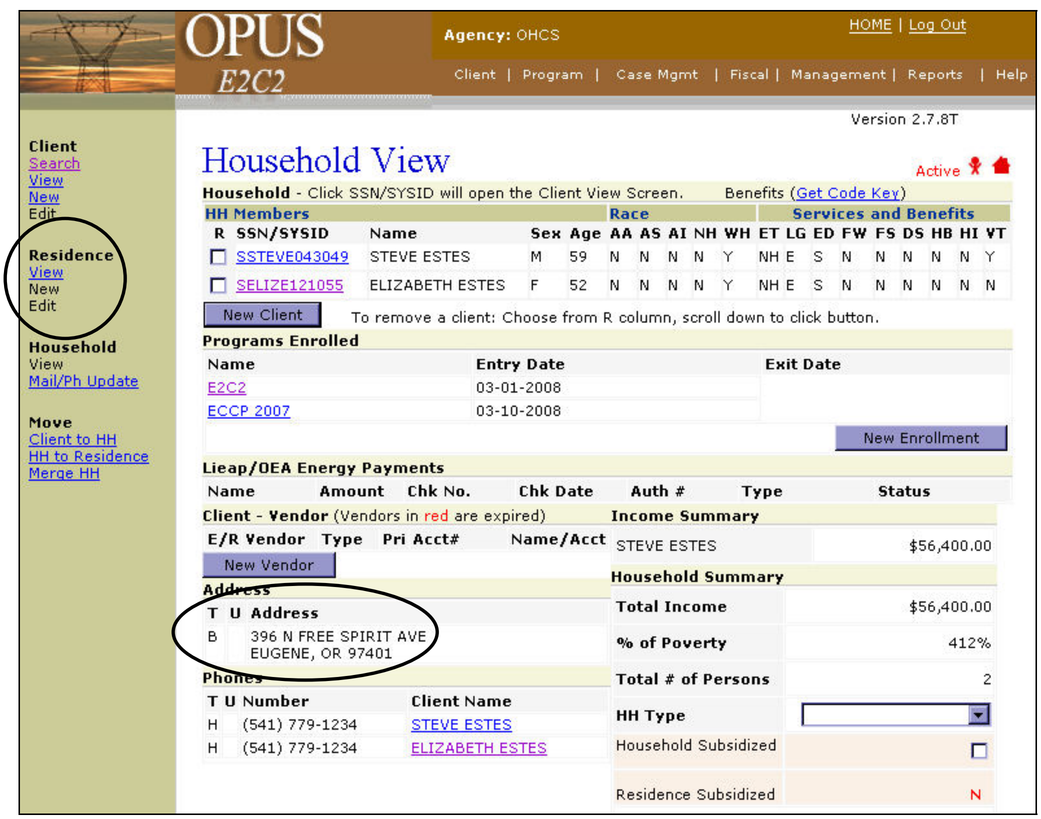


Figure 3-6: HH View with address

- If the residence address is found in the system: the address, city and zip code will be displayed in the results *(reference figure 3-6)*. If this address isn't correct, it can be updated by:
    - Clicking on the Residence 'View' link in the 'Left Nav Bar'. The 'Residence View' screen will appear. Click on the Residence 'Edit' link in the 'Left Nav Bar' and the 'Residence Edit' screen will appear.
    - Or while in 'Client Search' click on the Residence 'New' link and the 'Residence Edit' screen will appear.
    - Create a New Residence *or*
    - Move a Household to New Residence.

To complete the 'Move a Household to New Residence', follow the steps in the 'Moves' section titled **'Move household to a New Residence'**.

On the Left Nav Bar, click the Residence 'New' link. The 'Residence New' screen will appear *(reference figure 3-7)*. Reference **"Section Two; Client Intake, Residence New"** for additional information to create new residences.

Figure 3-7: Client Search for new residence

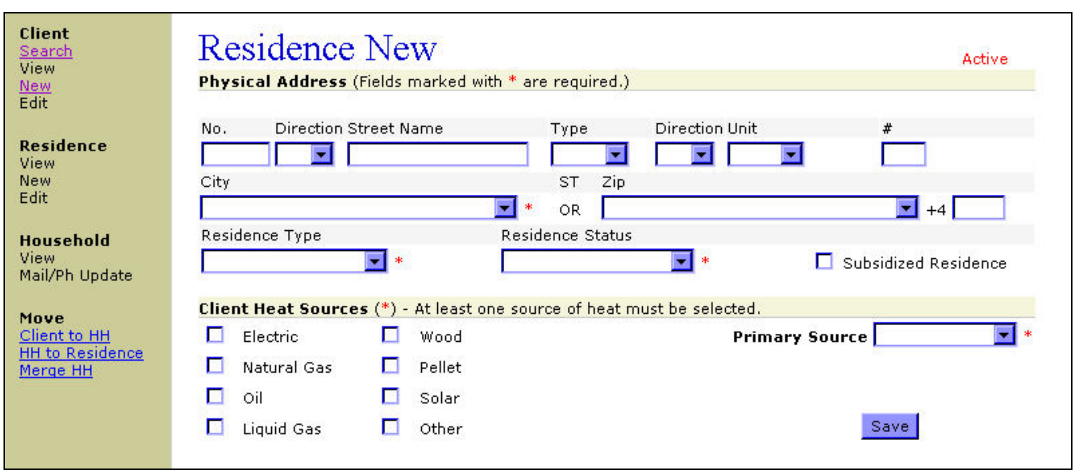


Figure 3-8: Residence New

Verifying Data on Views

In general, for all view screens, you should review to verify data entered. If information requires to be updated or revised, the 'Edit' link or button is available to update or correct information. Most "View Screens" are for viewing purposes, the *one exception* is the 'Household View' screen. Intake workers would use this screen to add new vendors.

Residence Edit

Setup:
On 'Client View' screen.

1. On the 'Left Nav Bar', click the 'Residence View' link and the 'Residence View' screen will appear next *(reference figure 3-9)*. On the Left Nav bar under 'Residence', click the 'Edit' link *(reference figure 3-9A)*. The 'Residence Edit' screen will open. Edit the required information then click 'Save' *(reference figure 3-9B)*. Everything else stays the same as detailed on the client's application.

Figure 3-9: in the Client View

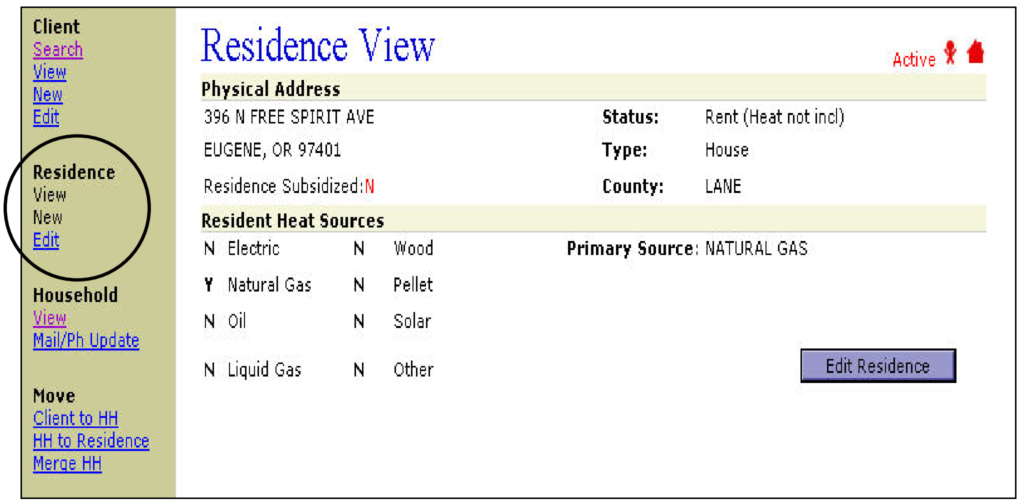


Figure 3-9A: Residence View, Edit

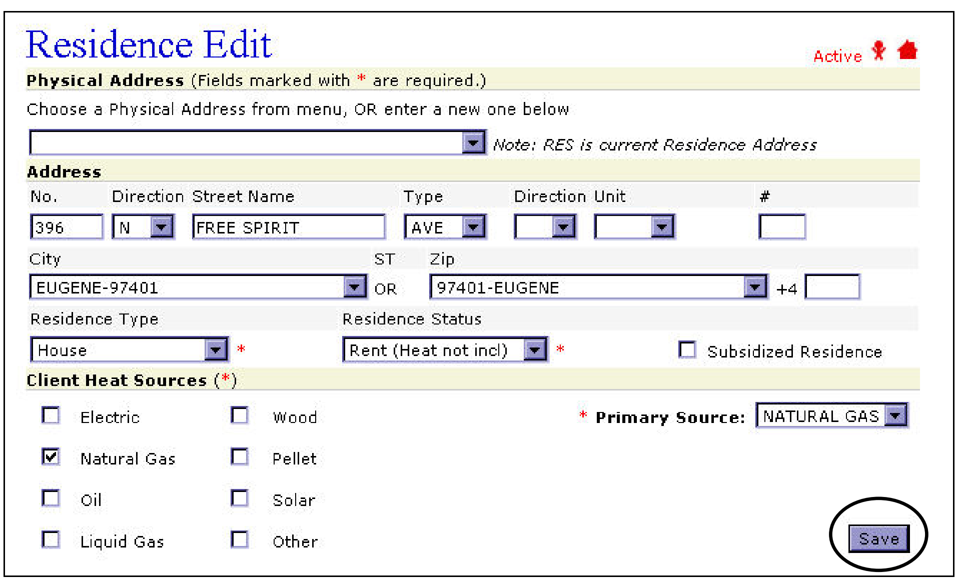


Figure 3-9B: Residence Edit screen

Add Client(s) to Existing Household

Adding clients to an existing household is easiest when at least one client and the residence have been initially created.

Setup:
On the ‘Search Client’ screen, as mentioned in the previous topics, searching for a client who needs to be added to an existing household prevents creating duplicate records. If a search locates clients living in a different household, follow steps in topic **Merge Household with another Household.**

Search Household to Add Client(s) to:

1. Search for the household member that needs to be added to the HH. On the ‘Search Client’ screen, type in the client’s name or SSN/SYSID. Click ‘Search’ button *(reference figure 3-10).*

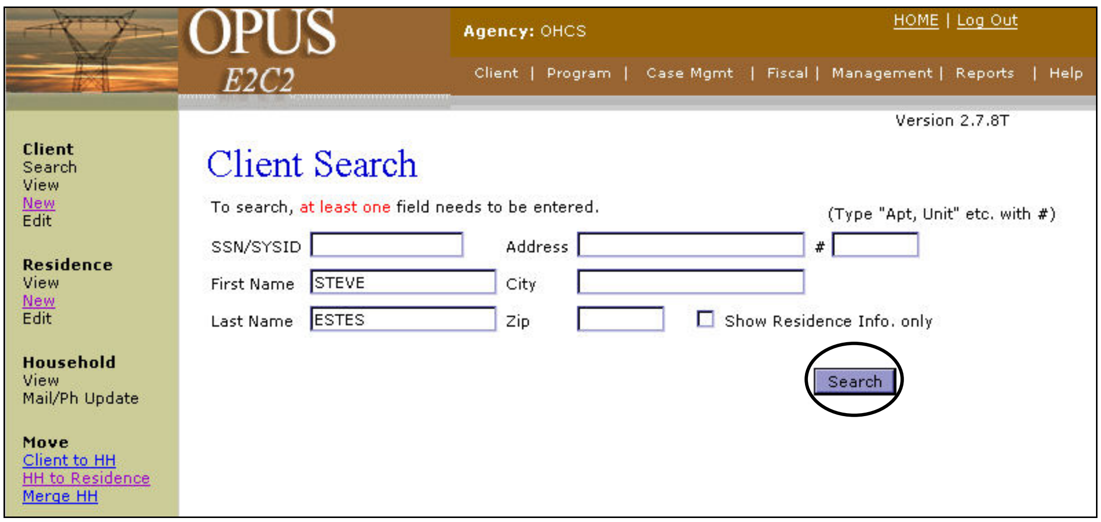


Figure 3-10: Client Search

2. In the results, click the client’s SSN number link to access ‘Household View’ screen *(reference figure 3-11).*

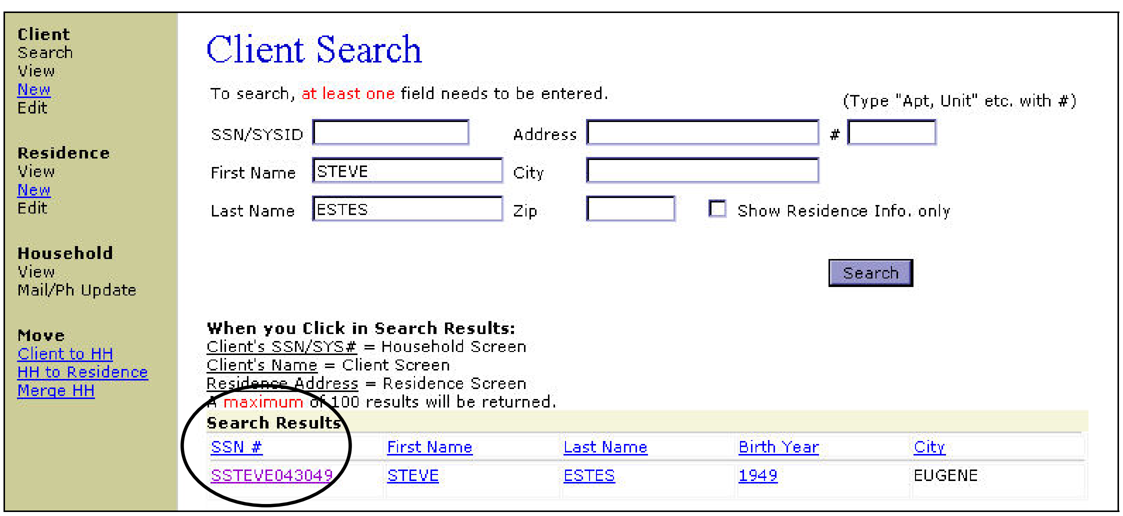


Figure 3-11: Client Search New with results

3. Under the ‘HH Members’ section, click the ‘New Client’ button *(reference figure 3-12)*. The ‘Client Search New’ screen will appear next *(reference figure 3-13)*.

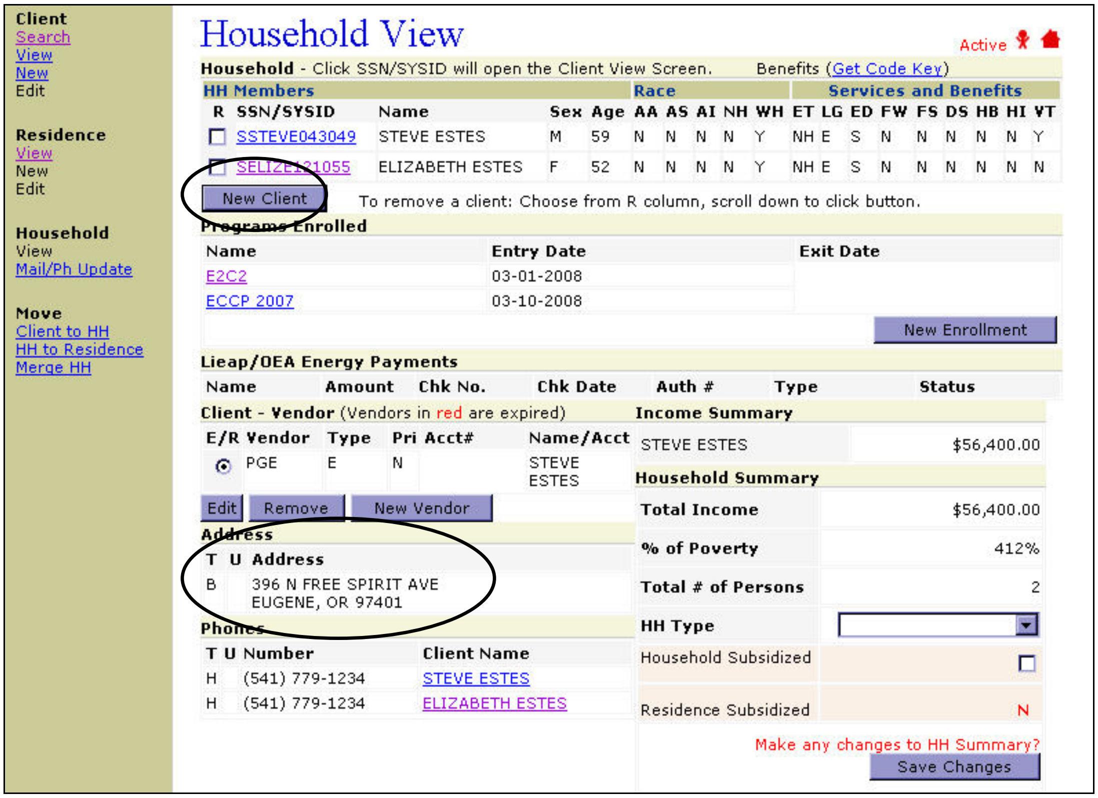


Figure 3-12: HH view, New Client button

Figure 3-13: Add new HH member Search

On the 'Client Search New' screen, under 'Possible Matches', clients will appear if the name and or SSN/SYSID number is close to the search criteria entered. If the 'Possible Matches' do not match the client in question, click on the 'Add New Member' button *(reference figure 3-13)*. The 'Client New' screen will appear. *Fields marked with * are required.*

4. Type or select the following:

- Salutation, as needed.
- First Name, Middle Name, (if required), Last Name.
- Date of Birth.
- SSN or choose SYSID instead.
- Phone number is the same as the others in HH, should not have to re-enter.
- Gender.
- Language.
- Ethnicity.
- Education.
- Mailing Address.

In the example above the mailing address will be the same as the others in the household. Address selections can be made from the drop-down menu previously entered for other clients in household and skip the steps below.

- Street Number, Street Name, Street Direction such as: S, N, NE, NW, etc.
- Street Type such as: Ave, Lane, etc.
- Unit Type such as: Apt, Unit, Bldg, PO Box, etc., # - for an apt number or PO Box #.
- Select City.
- E-mail address, not needed.
- Services and Benefits the client currently receives.
- Click the 'Save' Button to save the client information *(reference figure 3-14, next page).*

The 'Client New' screen is on the next page to capture all the details.

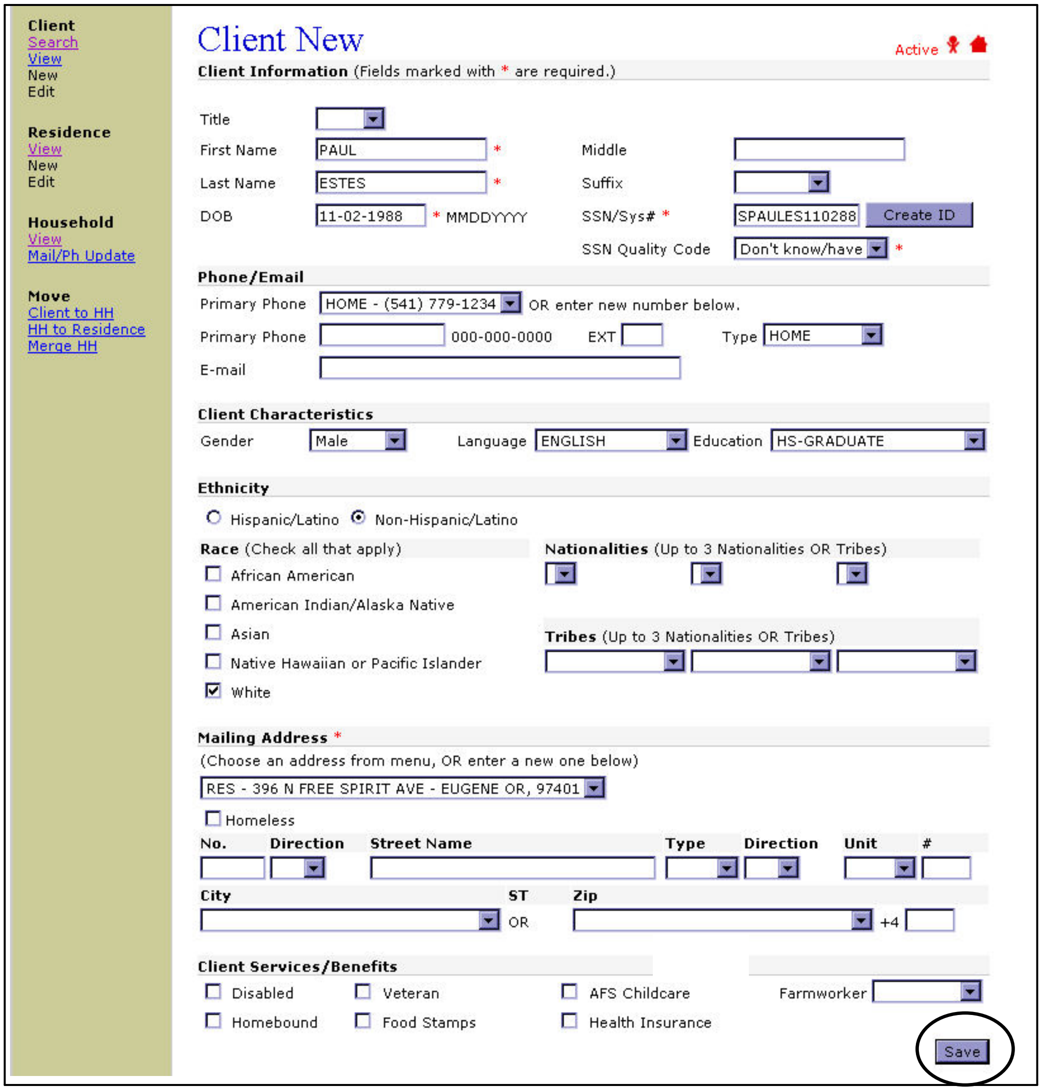


Figure 3-14: HH Client New

Click the ‘Save’ button and the ‘Client View’ screen will appear.

Figure 3-15: HH member view selection

Double-check the information to ensure it is correct. On the 'Client View' screen, a user can select another household member from the top right drop-down menu called 'Select Another Client in HH'. This is an easy way to get to another HH member 'Client View' screen if information requires to be updated, *(reference figure 3-15)*. The figure below shows in detail the HH selection *(reference figure 3-15A)*.

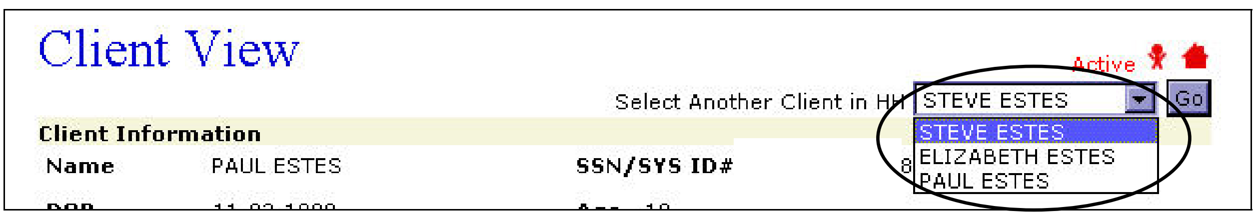


Figure 3-15A: HH member view selection

Client Edit

Setup:
On the ‘Client View’ screen, working with the dropdown box ‘Select Another Client in HH’.

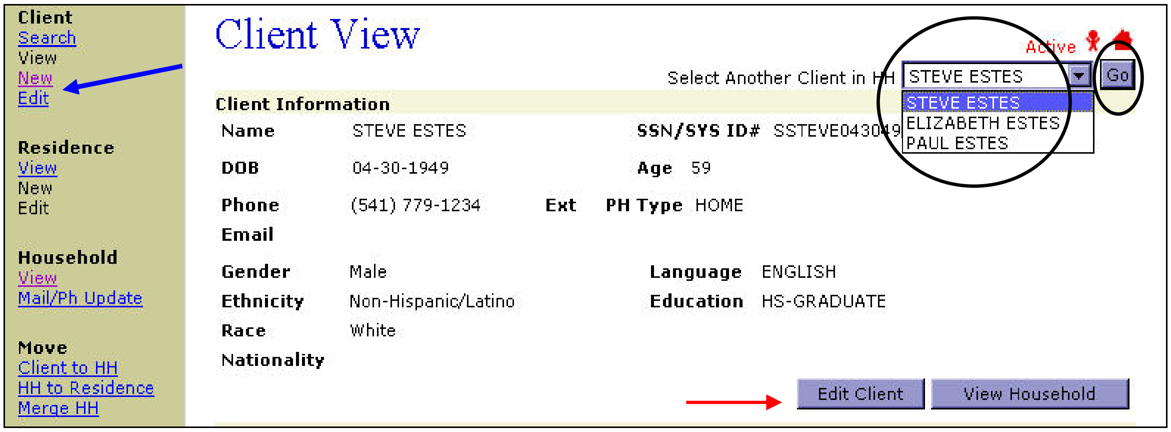


Figure 3-16: Client view to edit information

1. Once the correct name is selected, click the ‘Go’ button *(reference figure 3-16)*. The ‘Client View’ screen will appear next. On the Left Nav Bar, click the ‘Client Edit’ link, ***or*** click the ‘Edit Client’ button under the ‘Client Information’ section. The ‘Client Edit’ screen will appear next *(reference figure 3-16A)*.

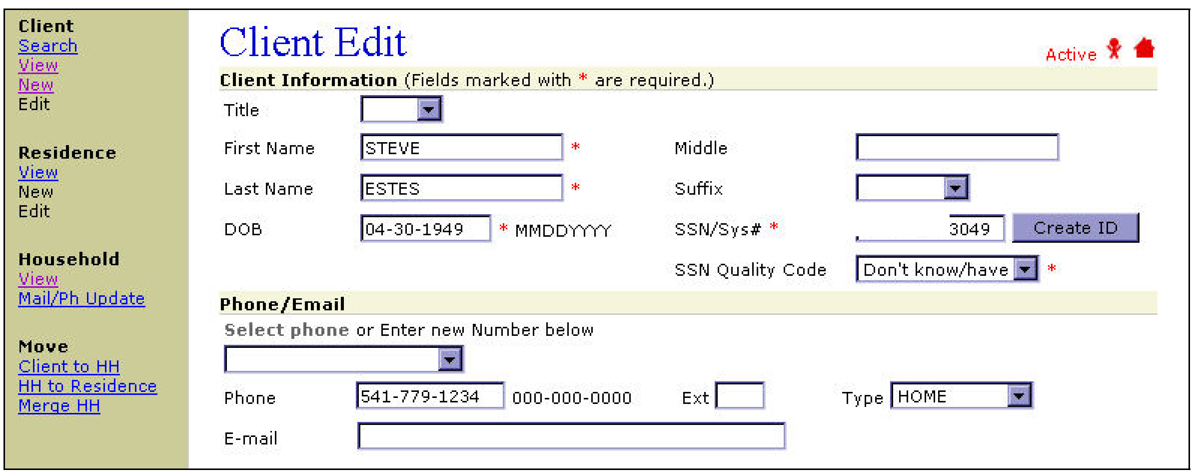


Figure 3-16A: Client Edit screen

2. On the ‘Client Edit’ screen, all fields will be in **edit mode** for information to be corrected or changed. Certain drop-down boxes contain information that was entered for the other HH members. If this information is correct, it can be chosen or the information can be manually added.

   If the phone number needs to be updated, dashes <u>*do not*</u> need to be typed in. As the tab button is used to exit a cell, OPUS will automatically insert the dashes.

When the information has been verified and correct, click the ‘Save Changes’ button at the bottom of the screen *(reference figure 3-16B)*. The ‘Client View’ screen will appear with the most current changes.

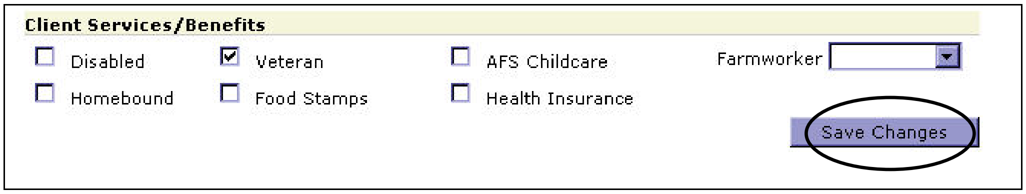


Figure 3-16B: Client edit ‘Save Changes’

Income Edit/Employer or Delete Income/Employer

Setup:

1. On the ‘Client View’ screen, use "Select Another Client in HH" to select the required HH member whose information requires to be updated, *(reference figure 3-17)*. The ‘Client View’ screen will appear next.

Figure 3-17: Client View Edit income/employer

2. To edit income or an employer, click the ‘Edit’ button on the ‘Client View’ screen *(reference figure 3-17)*. The ‘Income & Employer Edit’ screen will appear. Some cells require manual input and some cells have drop-down boxes to choose information from.

3. Make appropriate changes or updates as needed. Click ‘Save’ *(reference figure 3-18)*. The ‘Client View’ screen will re-appear. *Fields marked with * are required for an income source to be saved.*

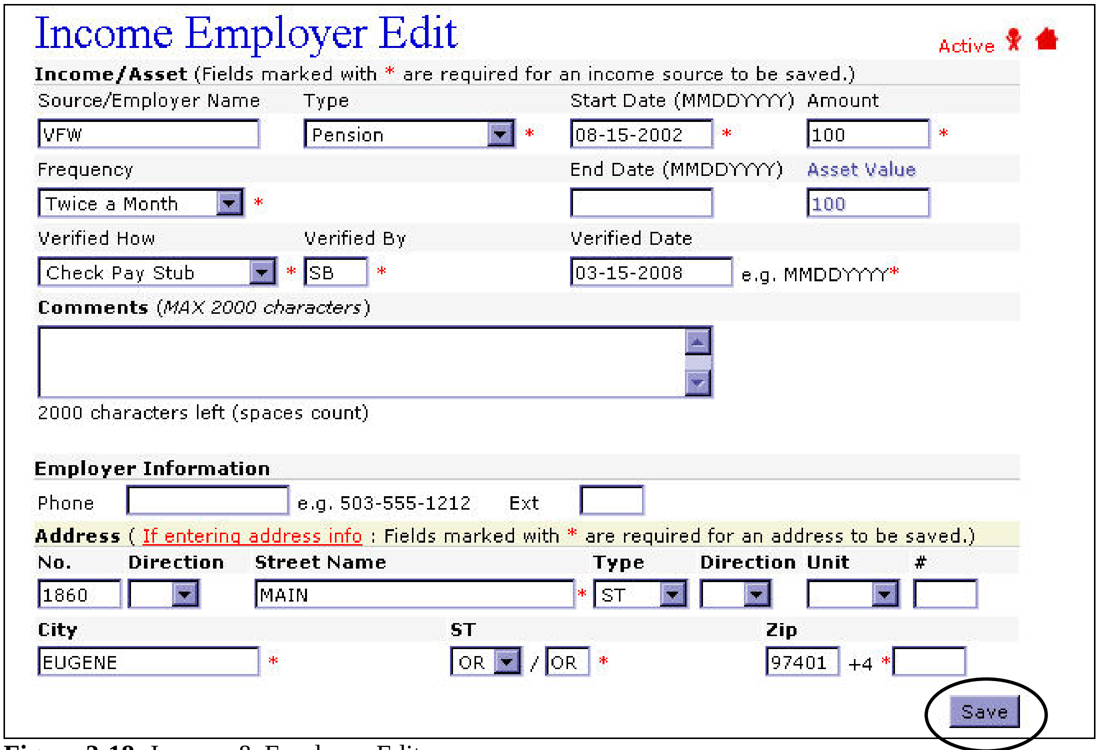


Figure 3-18: Income & Employer Edit screen

3. To delete an income, click on the ‘Delete’ button. A “Windows Internet Explorer” confirmation will appear with the question **“Are you sure you want to delete the selected income?”** If the income is to be deleted, click the ‘OK’ button. If the income *is not* to be deleted, click ‘Cancel’ *(reference figure 3-19)*.

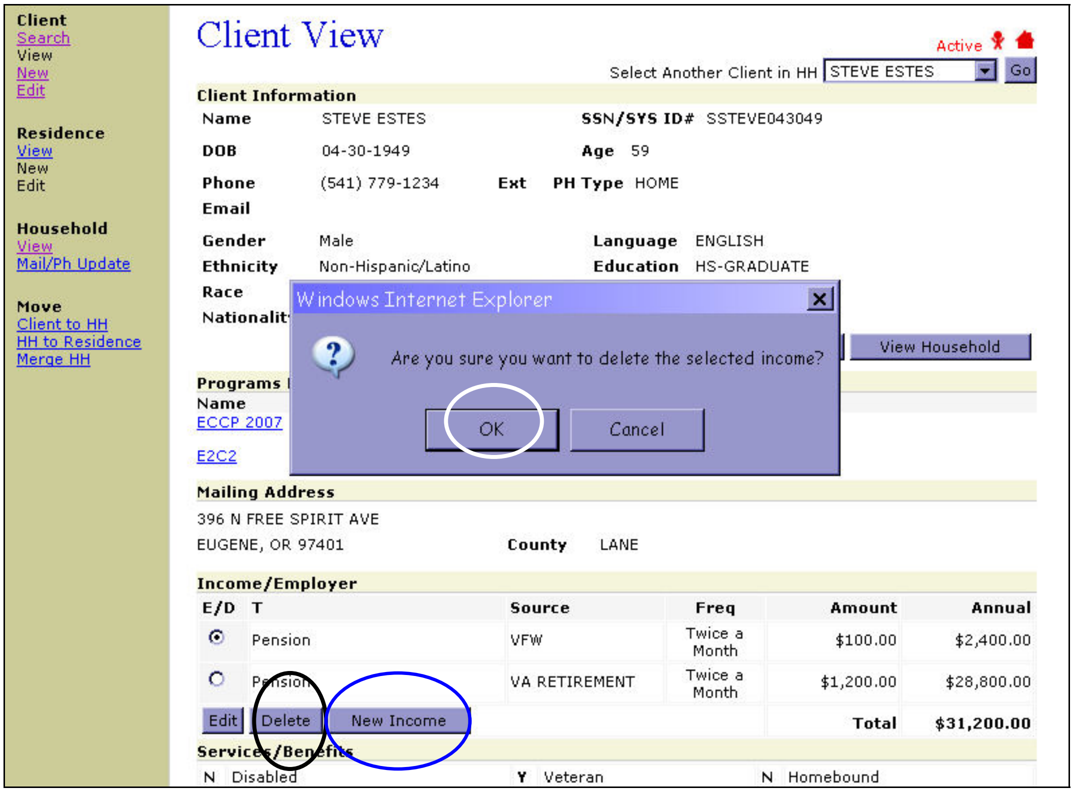


Figure 3-19: Income & Employer delete

4. If a new income needs to be added, click the ‘New Income’ button. Note: Complete all required information using the same steps used to edit client information. Click the ‘Save’ button when complete.

Moves

There are six different ways to process moves in OPUS:

1. Move Client(s)/Household to Unknown
2. Move Client (s) to Household
3. Move/Adding Client(s) to Existing Residence
4. Move/Merge Household to New Residence
5. Move/Merge Household to Existing Residence
6. Merge Household with another Household

The following examples demonstrate move scenarios.

Move Client(s)/Household to Unknown

Paul Morgan submitted his application for assistance. Searching the database using the client's SSN, Paul Morgan was not in the database. A search for the client's current address: 7114 SE Terrace Trails Dr., Portland OR 97266 was completed and found the address in the database with a different client identified as Lisa and Steven Adams.

1. On the 'Client Search' screen, enter Paul Morgan's address and click the 'Search' button. The 'Search Results' indicates Lisa and Steven Adams affiliated with the address. Click on Lisa's SSN to get to the 'Household View' screen *(reference figure 3-20).*

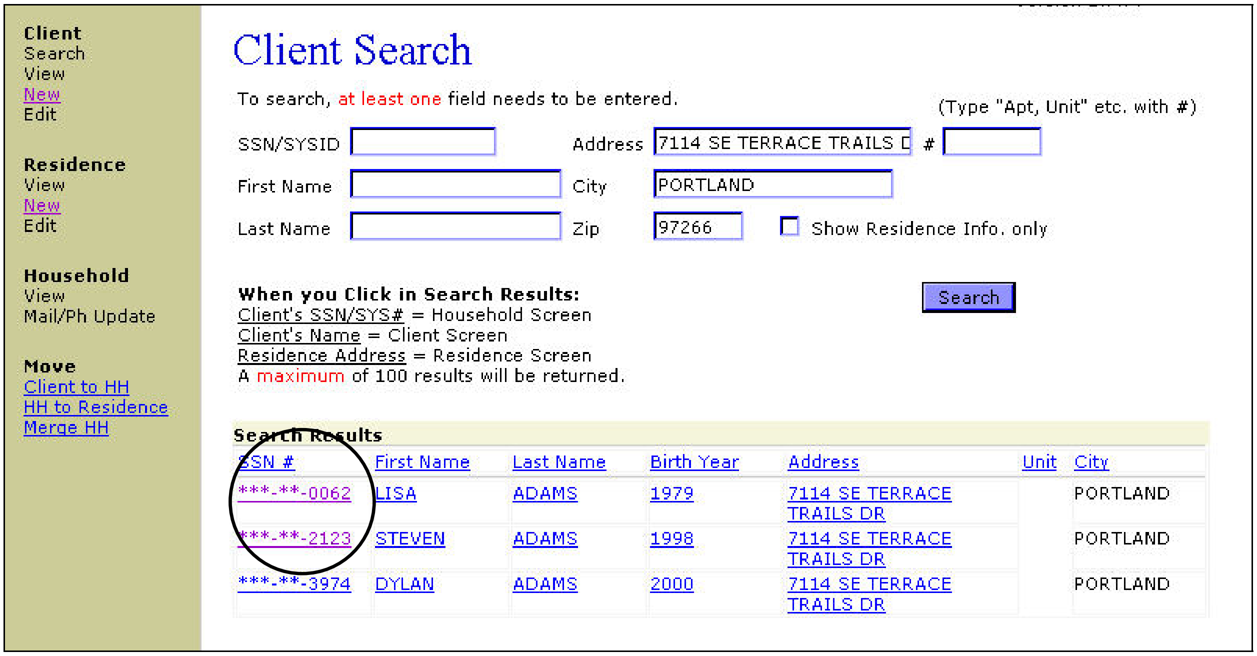


Figure 3-20: Client Search by address

2. This HH needs to be moved from the existing address which is being occupied by Paul Morgan. To move the family from the residence, click on ‘Move Entire Household to Unknown’ *(reference figure 3-21)*.

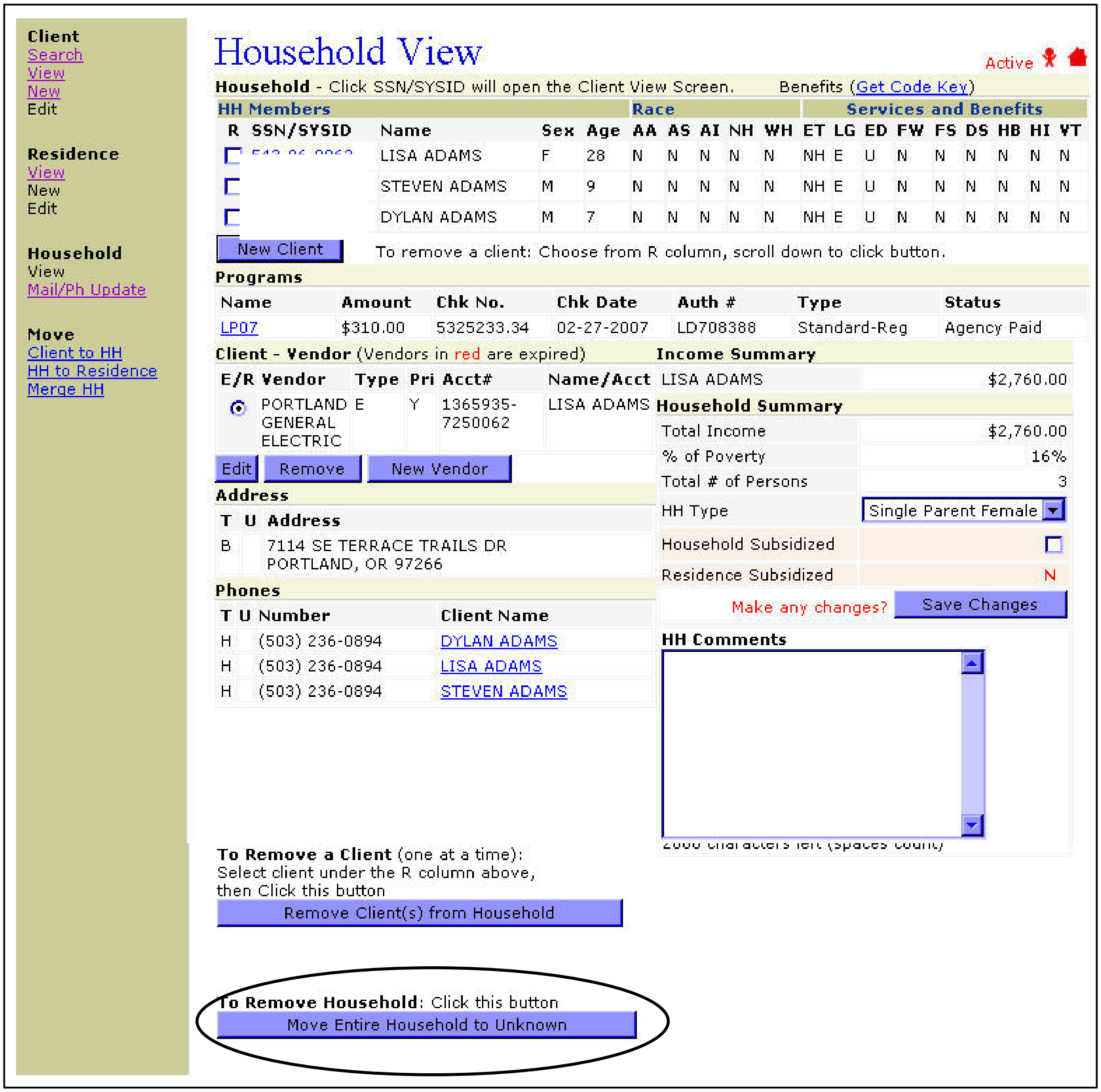


Figure 3-21: HH view. Move Entire Household to Unknown.

3. The database will require the user to confirm they want to move the HH to unknown. Click the 'OK' button to complete the move to unknown. When the HH has been moved out of the residence, the HH address will appear as 'unknown' *(reference figure 3-22)*.

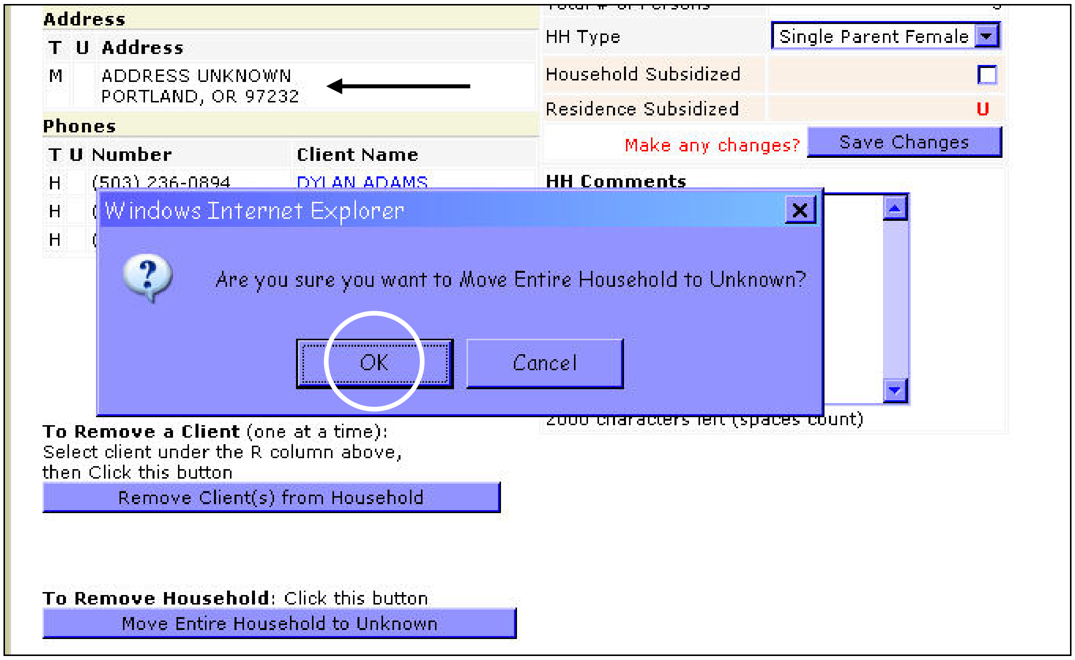


Figure 3-22: HH View. Move HH to unknown. Address shows 'unknown'.

Move Household to New Residence

1. To move a new client to a household, use 'Client Search New. If the client does not appear in 'Possible Matches', click on 'Add New Member' *(reference figure 3-23)*.

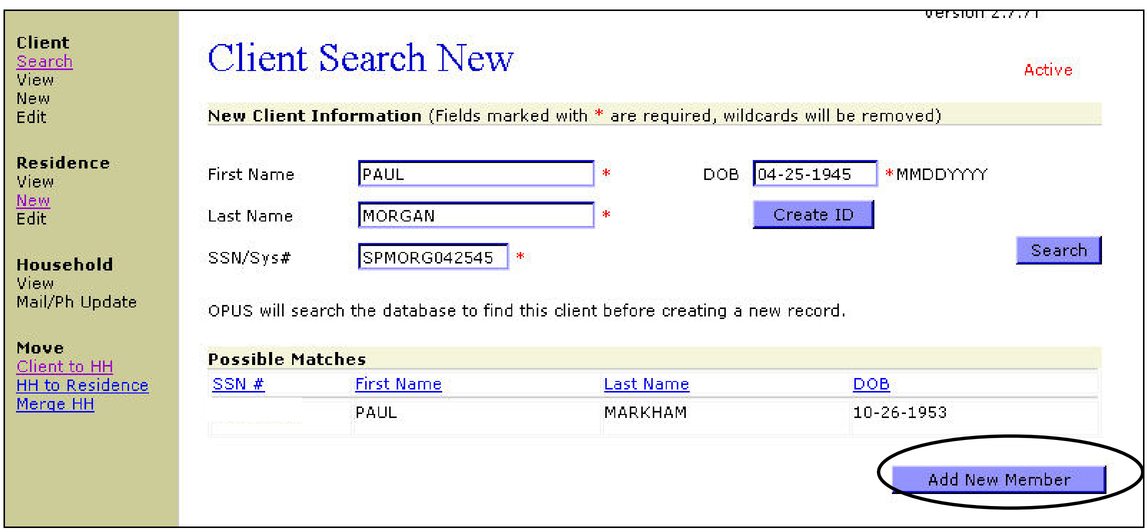


Figure 3-23: Client Search New, Add New Member

2. The ‘Client New’ screen will appear. Some information will already be filled in *(reference figure 3-24)*. Complete the balance of the client information, then click ‘Save’.

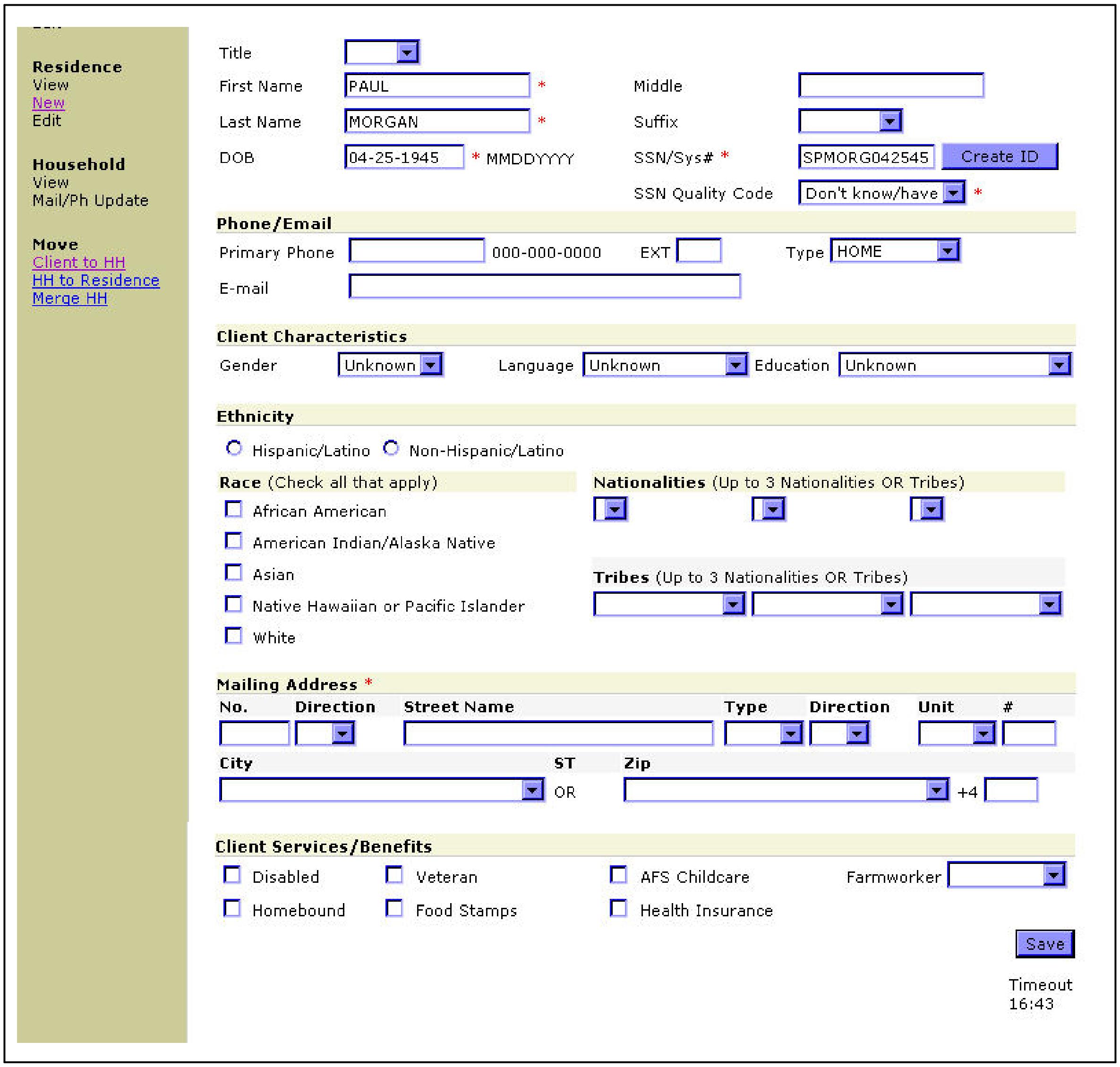


Figure 3-24: Client New screen.

Moving-Adding Existing Client(s) to Existing Residence

1. To move an existing client to an existing residence, locate the designated client who is being moved. Click on SSN to open up 'Client View' *(reference figure 3-25).* Click on 'Client to HH' link in the 'Left Nav Bar'. The 'Move Client' screen will appear *(reference figure 3-25A).*

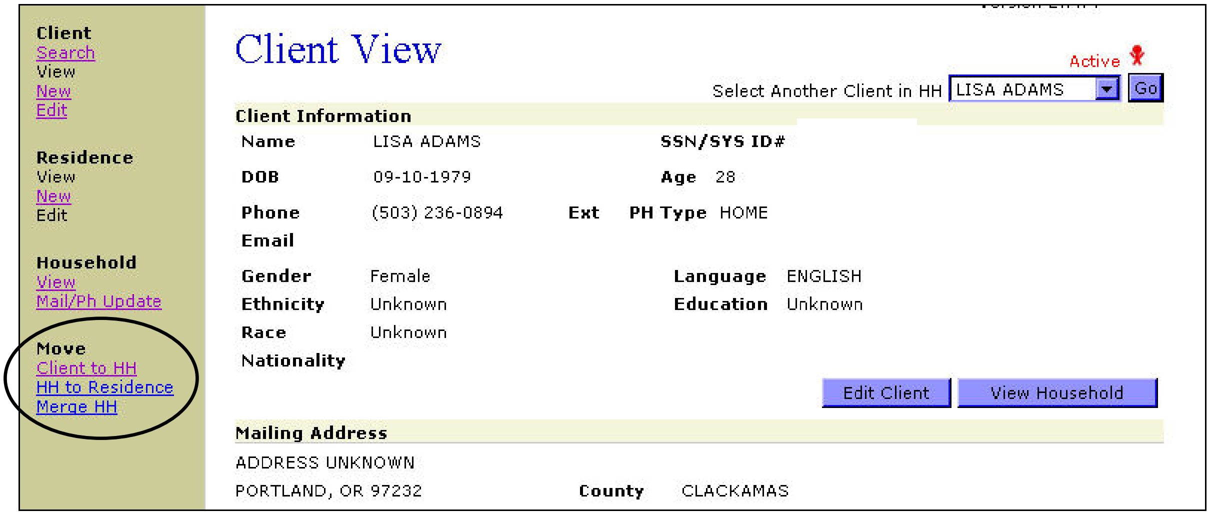


Figure 3-25: Move existing client to existing residence

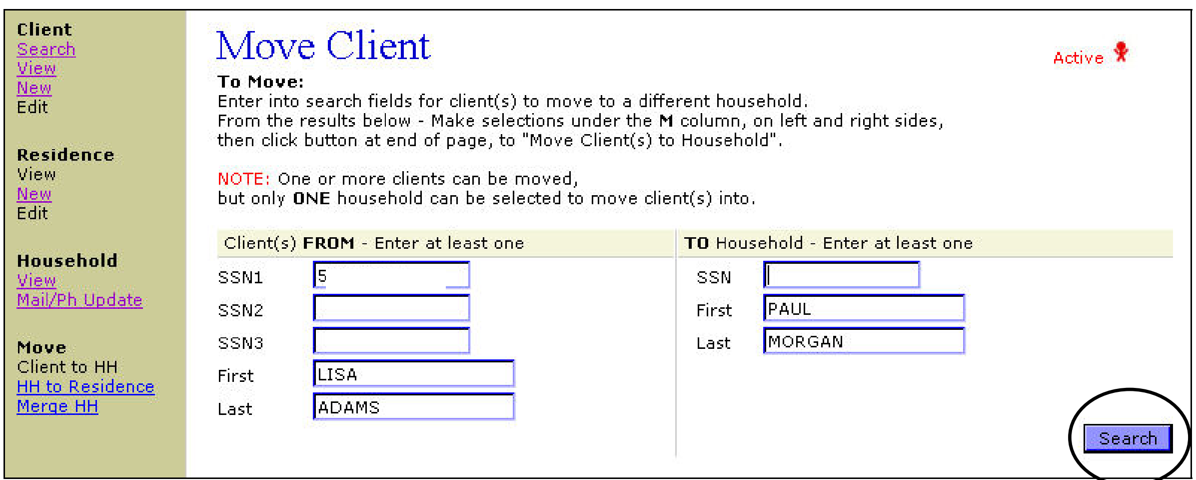


Figure 3-25A: Move Client

Enter the 'Client(s) FROM' - SSN and/or name and enter 'TO Household' SSN and/or name, click 'Search' *(reference figure 3-25A).*

2. The client(s) to be moved 'FROM' and the 'TO Household' information will appear. Check the appropriate box(es) or radio button to complete the move. Click on 'Move Client(s) to Household' button *(reference figure 3-26)*. Windows Internet Explorer comment will appear asking for a confirmation of the move 'Are you sure you want to move the selected clients?

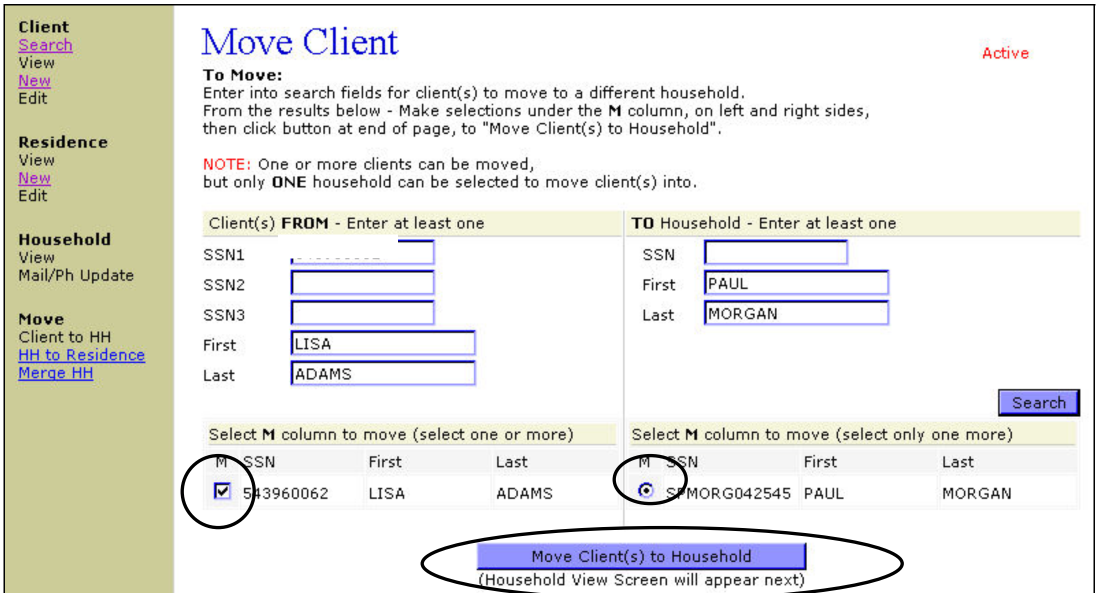


Figure 3-26: Move Client(s) to Household

3. Click 'OK' if the client(s) are correct to complete the merge *(reference figure 3-26A)*.

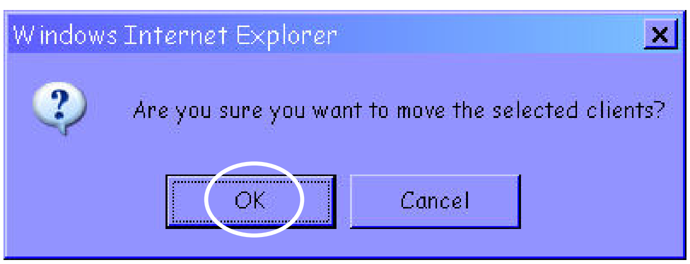


Figure 3-26A: Confirmation to move client(s) to HH

4. The ‘Household View’ screen will appear with the clients merged *(reference figure 3-26B)*.

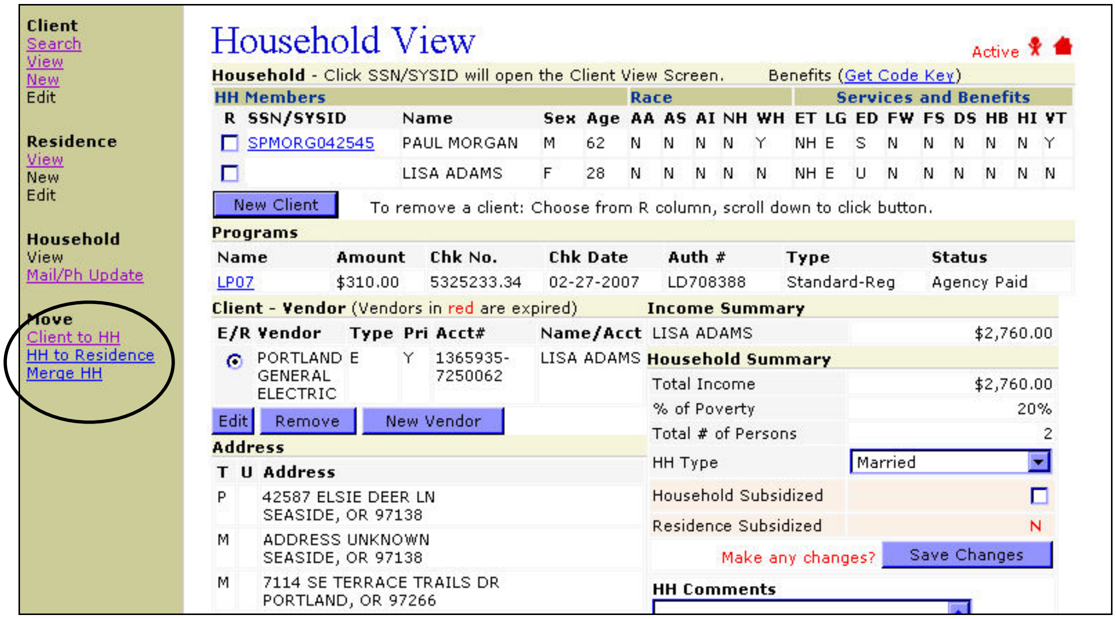


Figure 3-26B: Household view, clients merged.

Move/Merge Household to Existing Residence

In ‘Household View’, in the Left Nav Bar, ***#1,*** click ‘Mail/Ph Update’ link. Check the appropriate information to be updated in ‘Household Info Update’ screen then ***#2,*** click ‘Update Changes’. “Windows Internet Explorer” will request confirmation ‘Are you sure you want to Update Household information? Click ***#3,*** ‘OK’. The clients in the HH will be updated at the same time with the same address and phone number *(reference figure 3-27)*.

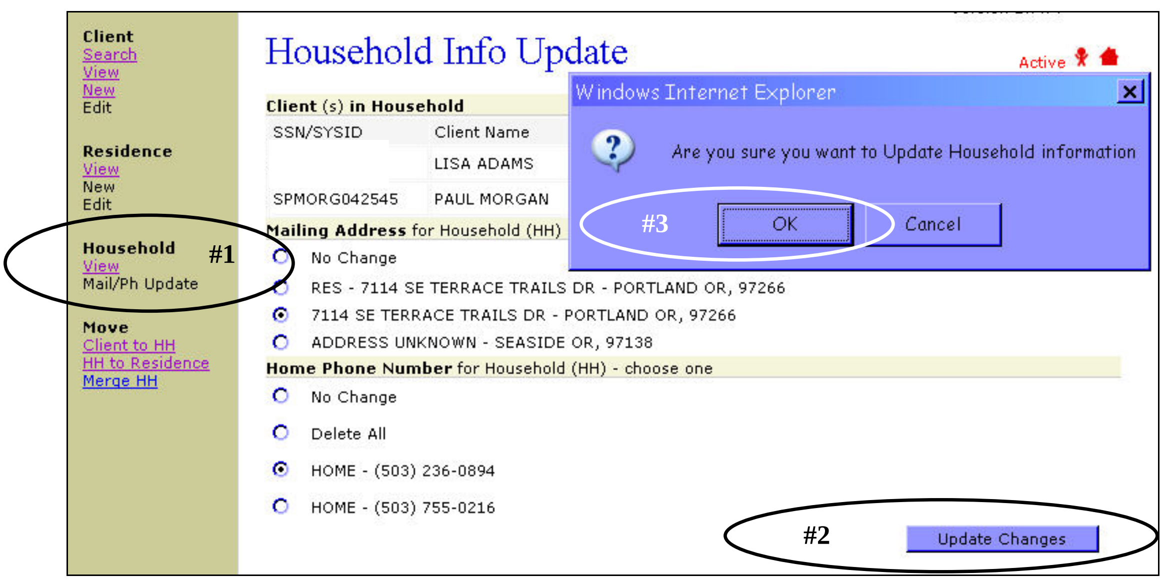


Figure 3-27: Merge HH to Residence

Merge Household with Another Household

1. In 'Household View' locate the household you want to merge with another household. On the Left Nav Bar, click 'Merge HH' link *(reference figure 3-28).*

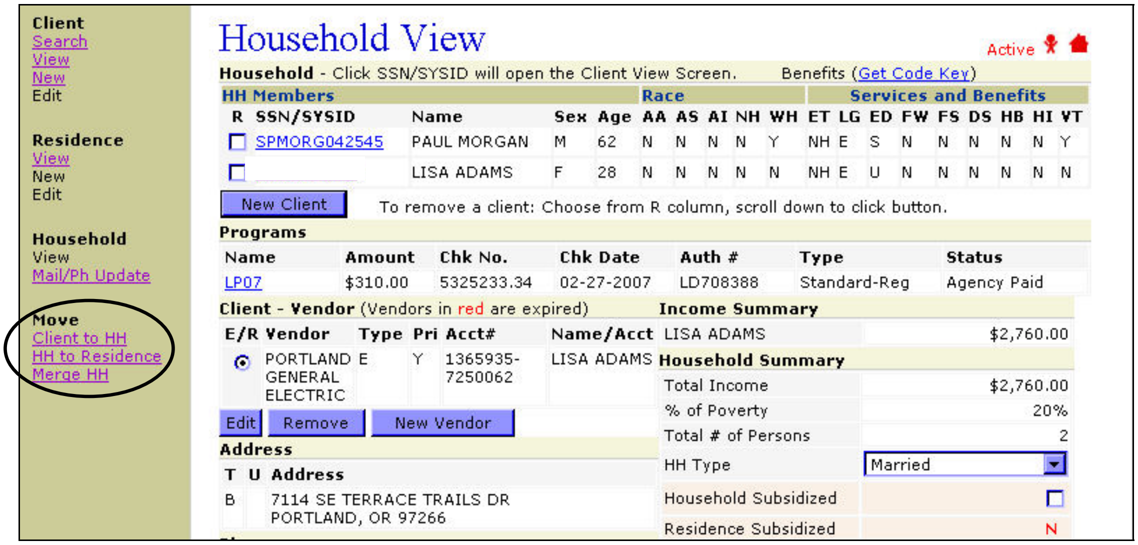


Figure 3-28: HH View after merge.

2. ***#1***, fill in the 'Move FROM' 'Merge TO' then: ***#2***, click "Search'. Check the appropriate radio buttons to be updated, ***#3,*** click 'Merge Households'. "Windows Internet Explorer" will request confirmation 'Are you sure you want to Update Household information? ***#4,*** click 'OK'. The clients in the HH will be updated at the same time with the same address and phone number *(reference figure 3-28A).*

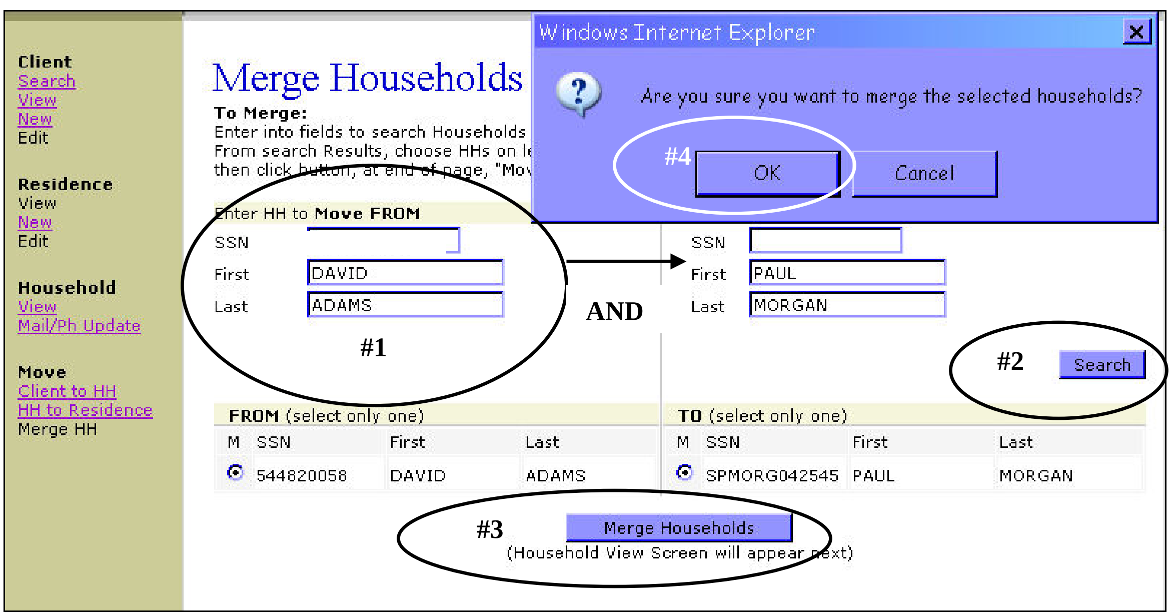


Figure 3-28A: HH View processing merge.

3. The Household View screen appears. The move is completed *(reference figure 3-28B).*

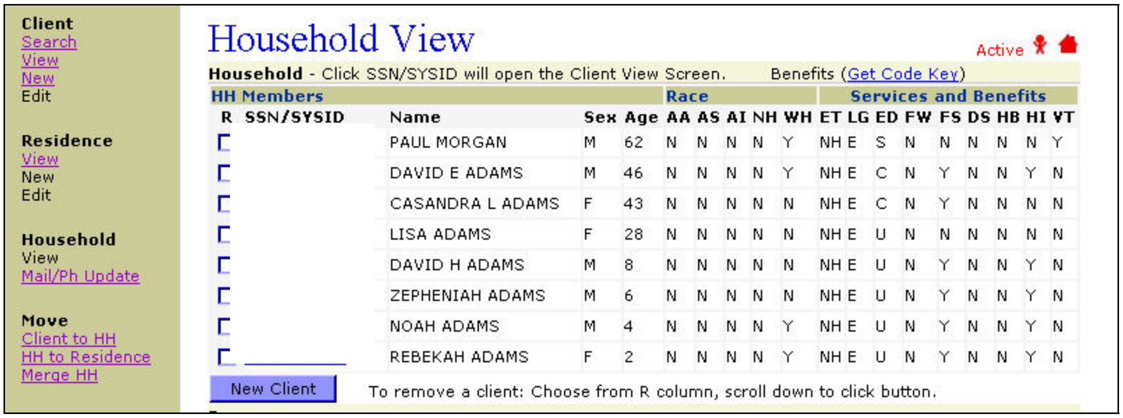


Figure 3-28B: HH merge completed.

Client Vendor Edit, Remove, New Vendor

Periodically, client vendor records need to be updated with new account numbers, or a household may be serviced through a different vendor.

Setup:
On the 'Household View' screen, find the 'Client-Vendor' section, under the 'Programs' section. To edit, remove or add a new vendor, click the appropriate button and the desired screen will appear *(reference figure 3-29).*

Figure 3-29: Vendor Edit/Remove/New Vendor screen.

The ‘Client Vendor Edit’ screen allows household information to be updated. The ‘Client’ drop-down box will allow different names to be chosen within the specific household *(reference figure 3-29A).*

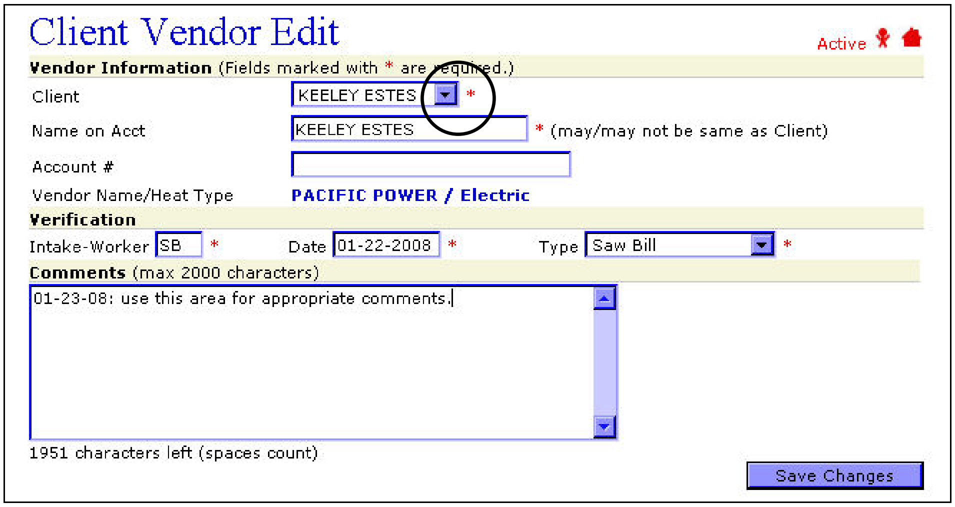


Figure 3-29A: Client Vendor Edit screen.

The ‘Client Vendor New’ screen allows a new vendor to be used for a specific client *(reference figure 3-30).*

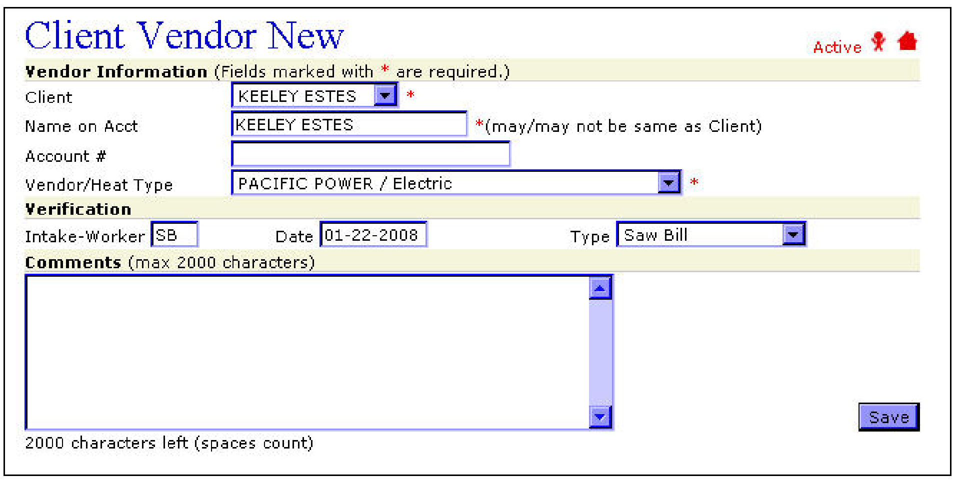


Figure 3-30: Client Vendor New screen

The ‘New Vendor’ button will allow the vendor to be removed from the client’s records.
Notice: This button initiates a double check asking ‘Are you sure you want to Remove Vendor’ *(reference figure 3-30A)*. Check the appropriate button to continue.

Figure 3-30A: Client Vendor Remove screen.

Section Four

E2C2 Program Enrollments

The E2C2 module of OPUS allows an intake worker to enroll clients into agency level programs that provide energy education and case management services. Specific services can be allotted to a household to measure energy efficiencies and case plans; goals and expectations can be recorded, tracked and used for measurements and federal reporting requirements.

Program Enrollment

Once a household has been entered into the OPUS database, the HH is ready to receive services in the E2C2 module.

The E2C2 module is customized with various services consisting of but not limited to: energy kit components, case management, education depending on an agency's level of services and funding opportunities.

Note: The household must have a 'Residence' address in the database before I & R Transactions kit components can be designated.

In the 'Household View' under 'Address' *(reference figure 4-1)*, if the address is designated a **'B'** the address is mailing and physical address. If the address is designated as **'M'**, it's a mailing address only and components can not be assigned to the HH.

Setup: Using the 'Household View' screen

1. To ensure a household has an active physical residence, once the household is enrolled into OPUS, click on the 'Residence – View' in the Left Nav Bar. **If** the household is not in a physical residence, under 'Residence' the 'New' link in the Left Nav Bar will be an active link (in blue) *(reference figure 4-1).*

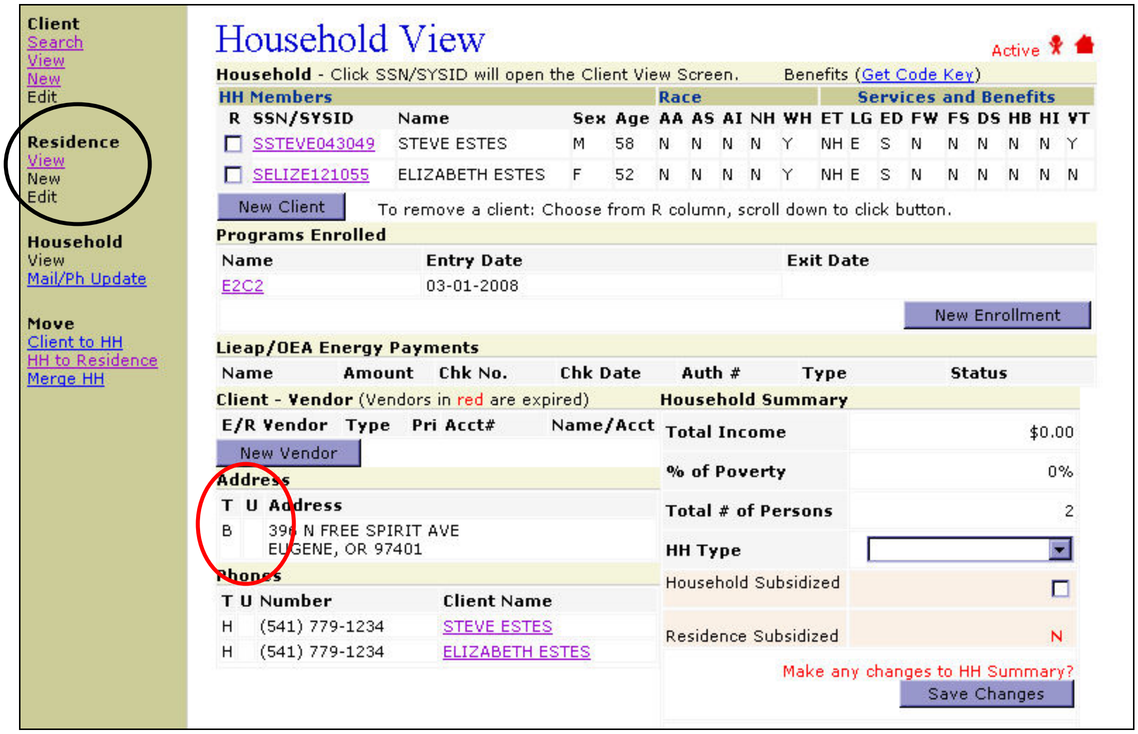


Figure 4-1: Household View. Left Nav Bar with 'Residence' links.

2. Click on the ‘New’ link and the ‘Residence New’ screen will appear. Complete all required and pertinent information then click the ‘Save’ button *(reference figure 4-1B).*

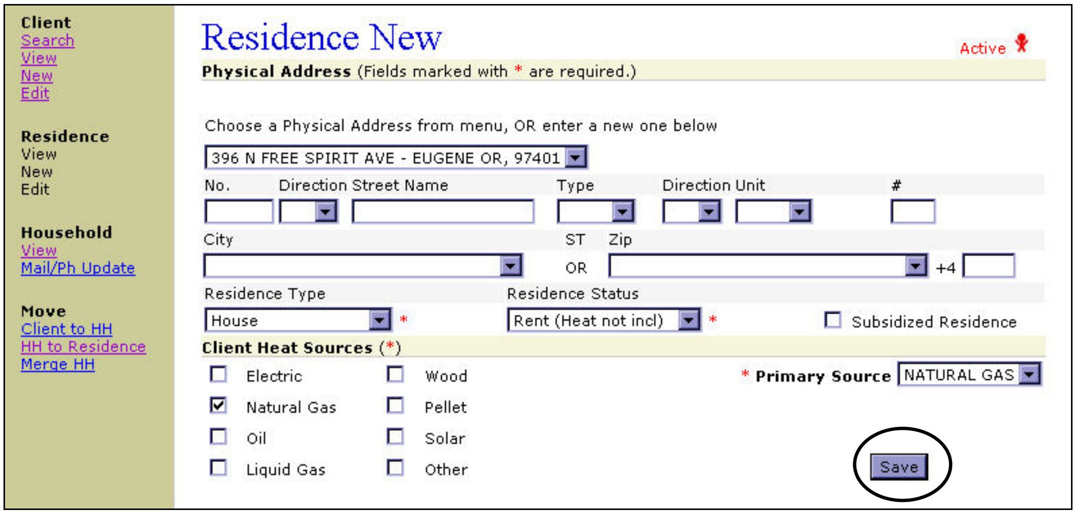


Figure 4-1B: Residence New screen

Program Enrollment New

Setup: Using the ‘Household View’ screen.

1. In the section titled, ‘Programs Enrolled’, click the ‘New Enrollment’ button. In this example, the E2C2 program is already completed to indicate where it would be located *(reference figure 4-2).*

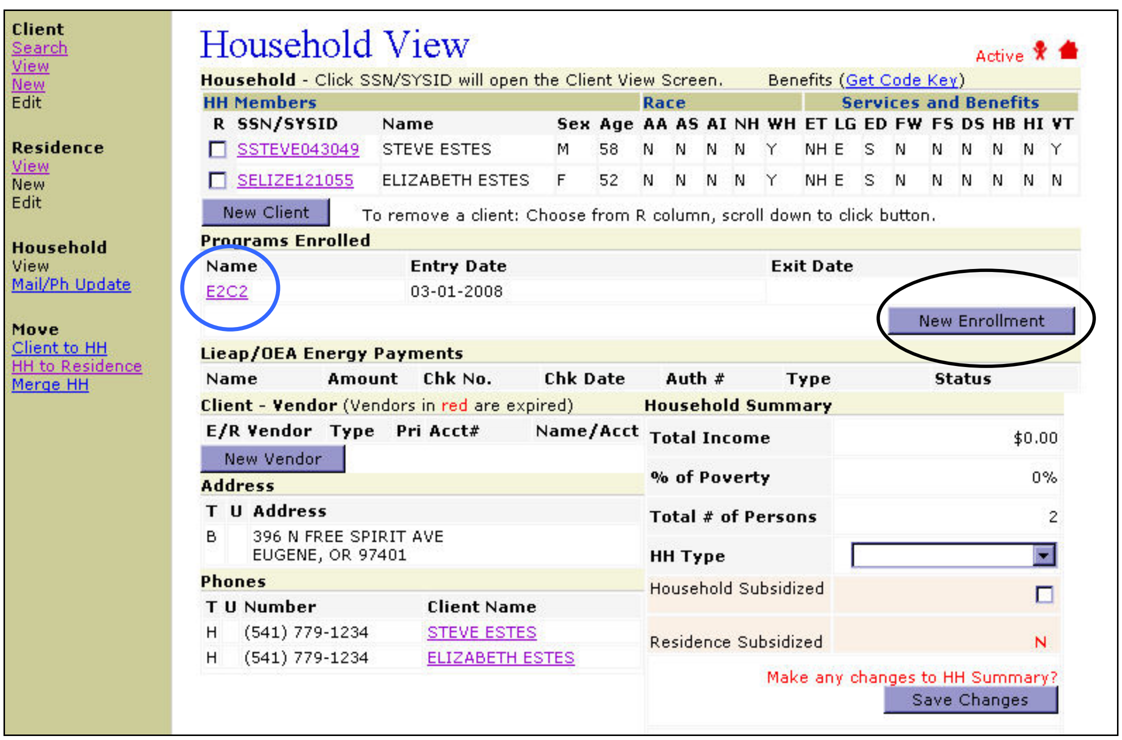


Figure 4-2: Household View

2. In the ‘Household View’ screen, under ‘Program Enrolled’, click on ‘Program Enrollment New’ screen. Using the drop-down arrow, select the appropriate ‘Program’ and ‘Client’ name then click ‘Load’ *(reference figure 4-2A)*.

Figure 4-2A: Program Enrollment New ‘Load’ screen

3. The window will flash and the ‘Enrollment Date’ will appear. Fill in the ‘Enrollment Date’ and click the ‘Enroll All’ button. Then click the ‘Save’ button *(reference figure 4-2B)*.

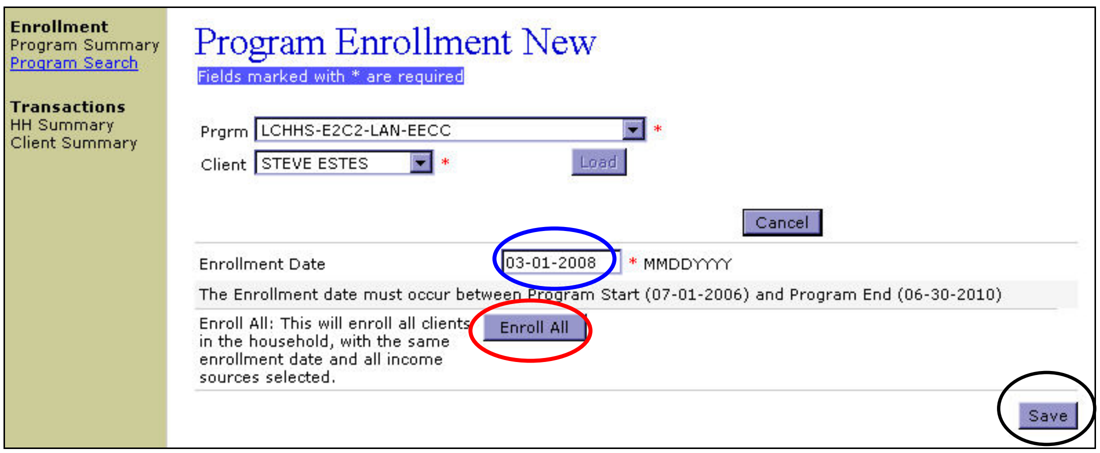


Figure 4-2B: Program Enrollment New ‘Save’ screen

The 'Household Transactions Summary' screen will appear with a complete enrollment of the household members *(reference figure 4-3C).*

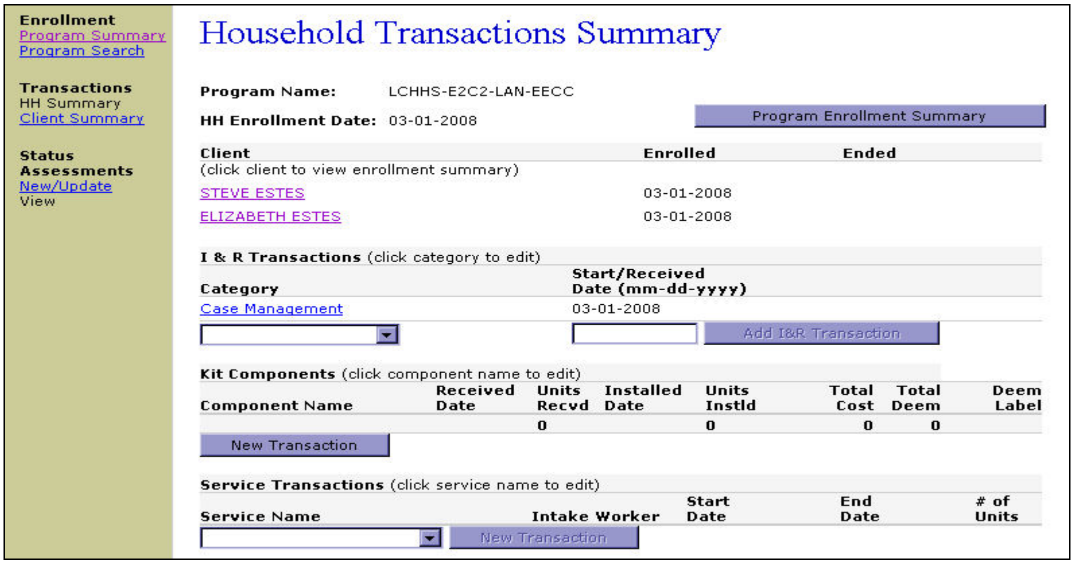


Figure 4-3C: Household Transactions Summary

4. If the household members are enrolled one at a time the 'Program Enrollment New' will appear again. Use the 'Client' dropdown arrow and select the household applicant name Enter the 'Enrollment Date' and click on 'Load' *(reference figure 4-4).* **Note:** A new 'Program' can be selected from the 'Prgrm' field.

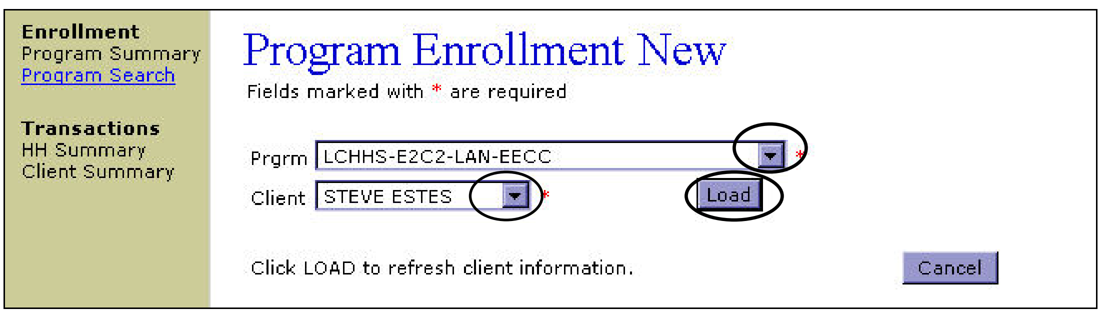


Figure 4-4: Program Enrollment New, individual client

As each client is enrolled, the client's name will appear to the right under 'Client Enrolled' *(reference figure 4-4A).*

Figure 4-4A: Program Enrollment New – Clients Enrolled screen.

Note: To complete the enrollment for each individual client, the intake worker must click the 'Save' button after selecting each client individually. After the enrollments are done, click the 'Cancel' button which will end the selection *(reference figure 4-4A)*.

Figure 4-4B: Program Enrollment New. Save after each client screen.

Household Transactions Summary

The 'Household Transactions Summary' screen will appear. The intake worker should review the HH information to ensure accuracy for the program(s) and reconfirm accuracy in the 'Household View' screen *(reference figure 4-5).*

The 'Household Transaction Summary' screen provides an overview of 'Information and Referral' (I & R Transactions) consisting of, but not limited to: kit components, energy education, and weatherization services the household may be enrolled in. New enrollments begin by enrolling the household or clients into services and transactions that they qualify for.

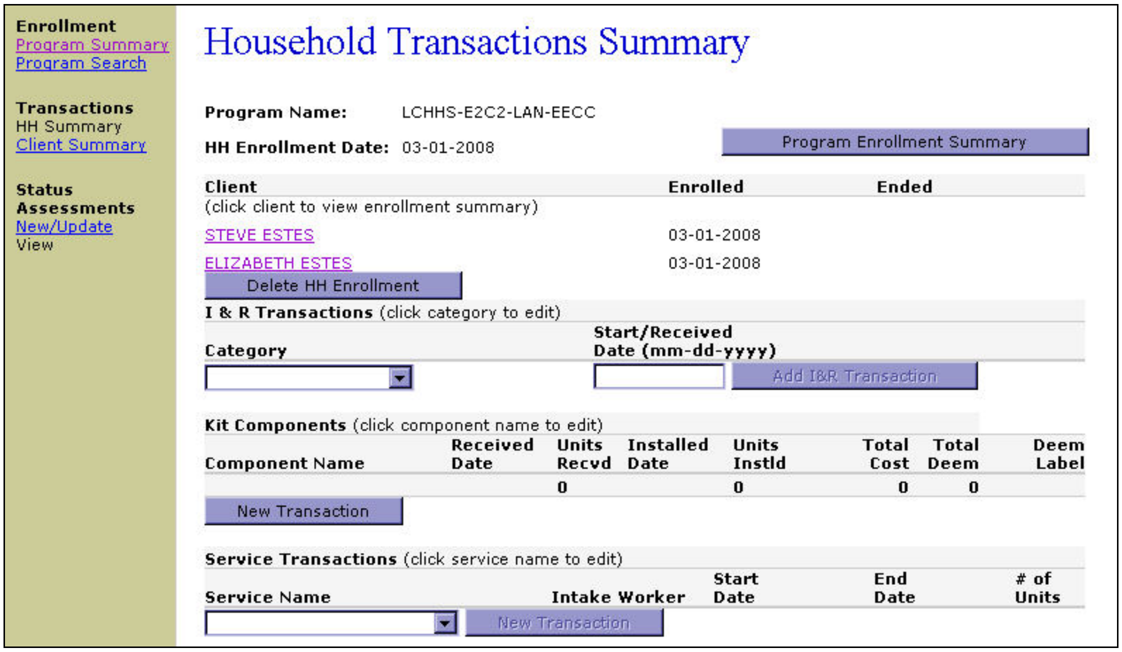


Figure 4-5: Program Enrollment New, additional HH client.

Program Enrollment Search

Case managers/intake workers can locate a list of clients enrolled in a specific program.

1. Using the 'Main Menu', scroll the mouse over 'Program', to 'Enrollment', to 'Search' and click on 'Search' *(reference figure 4-6)*. The 'Program Enrollment Search' screen will appear.

Figure 4-6: Program Enrollment Search screen

2. Using the 'Program' drop-down menu, select the appropriate Program *(reference figure 4-6A)*. At least one field needs to be completed.

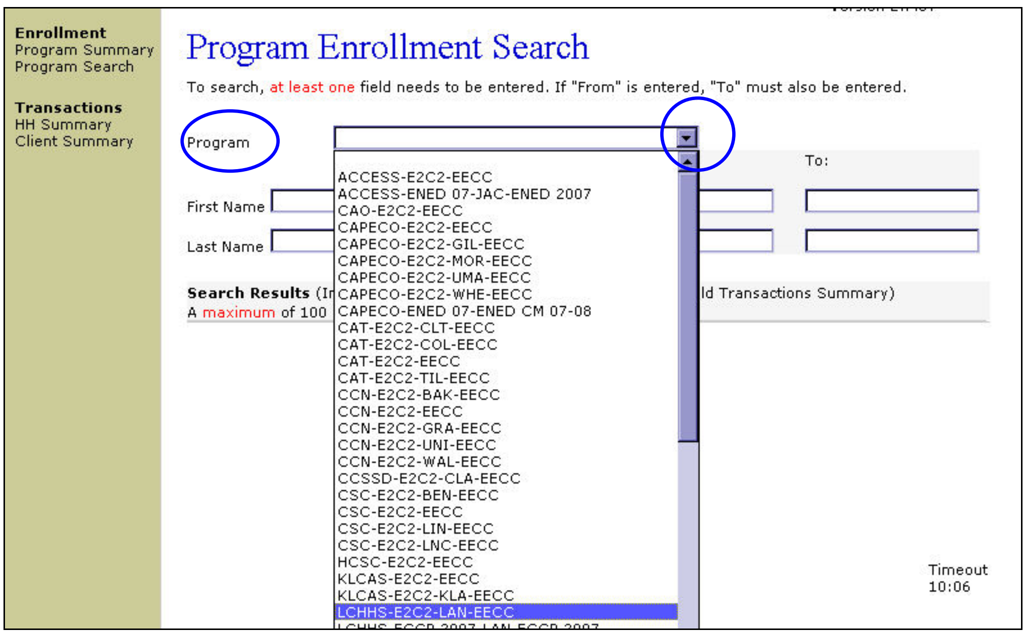


Figure 4-6A: Program Enrollment Search with APC chosen screen.

3. Click in an empty cell, the 'Search' button will become active (figure 4-6B). **Note:** A maximum of 100 results will be returned. This is not recommended to be used for reporting purposes.

Figure 4-6B: Program Enrollment Search with APC selected screen.

I & R Transactions

1. Using the 'Household Transaction Summary' screen; under 'I & R Transactions, use the drop-down menu to select the appropriate category for the HH. Enter the 'Start/Received' date. Click on 'Add I & R Transaction' button *(reference figure 4-7)*.

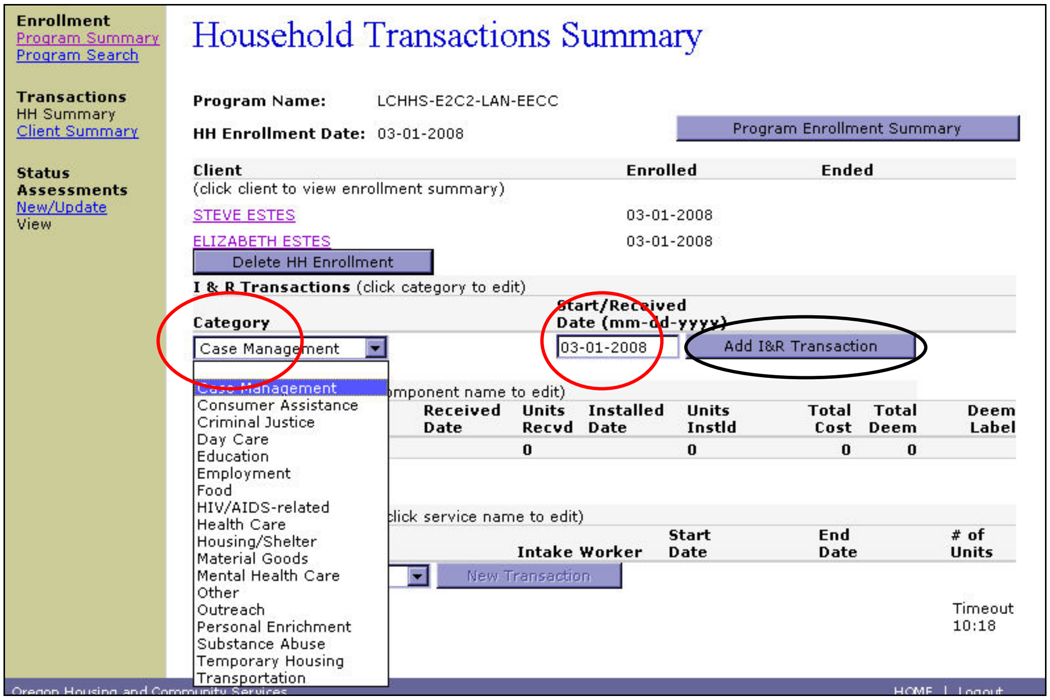


Figure 4-7: I & R Transactions category/date menu

2. The 'Household Transaction Summary' screen will appear. The intake worker should verify the information is correct with this screen. If the I & R Transaction requires correction or editing, click on the 'Category' title *(reference figure 4-8)* .

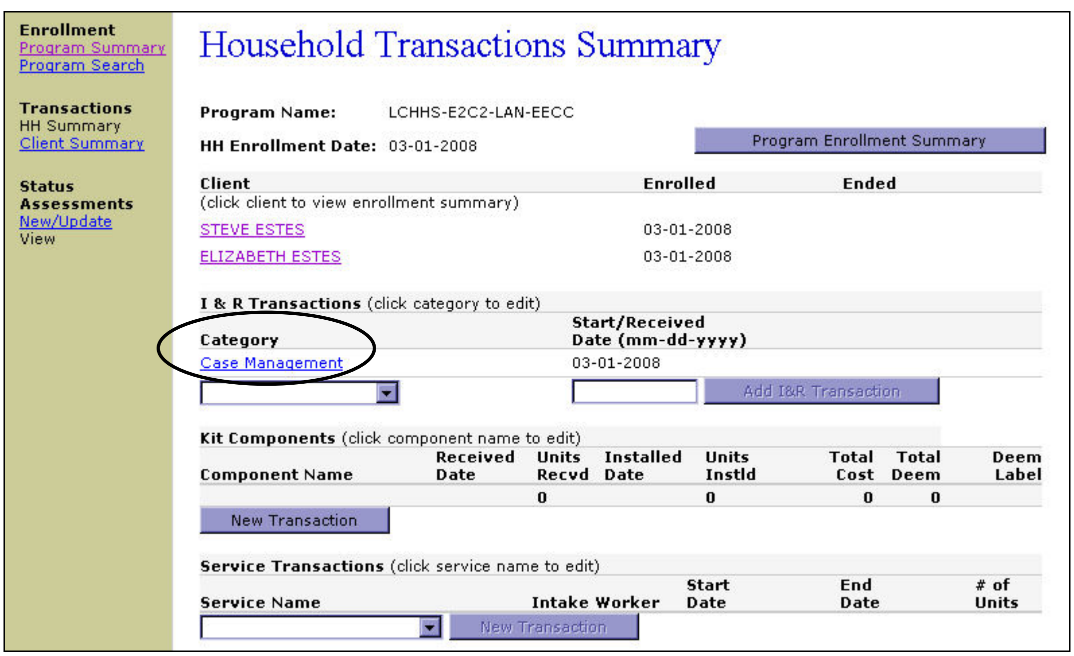


Figure 4-8: Household Transactions Summary with I & R Category/Date menu.

3. The 'Edit' screen allows the intake worker to make the appropriate changes. Changes can include the type of services by using the drop-down menu and the date can be manually changed. Click the 'Save' button. If needed, the program can be deleted from the HH information by clicking on the 'Delete' button *(reference figure 4-9)*.

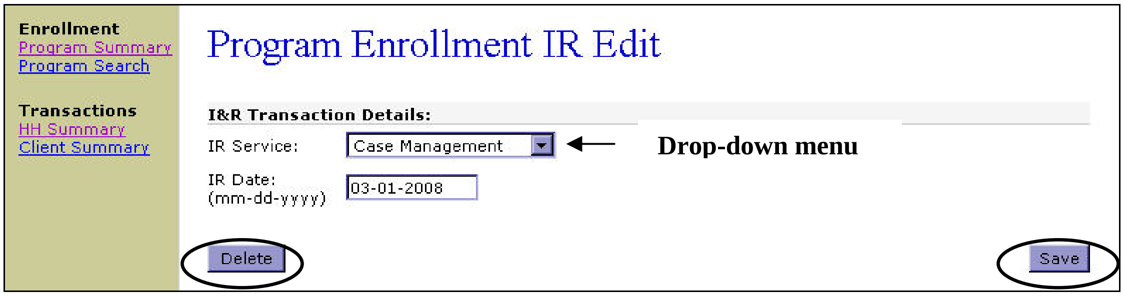


Figure 4-9: Program Enrollment IR Edit screen

4. Use the 'Household View' screen to add other transactions to an open enrollment. Click on the 'Programs Enrolled' link to access 'Household Transactions Summary'. Click on the 'Category' drop-down menu *(reference figure 4-9A)*.

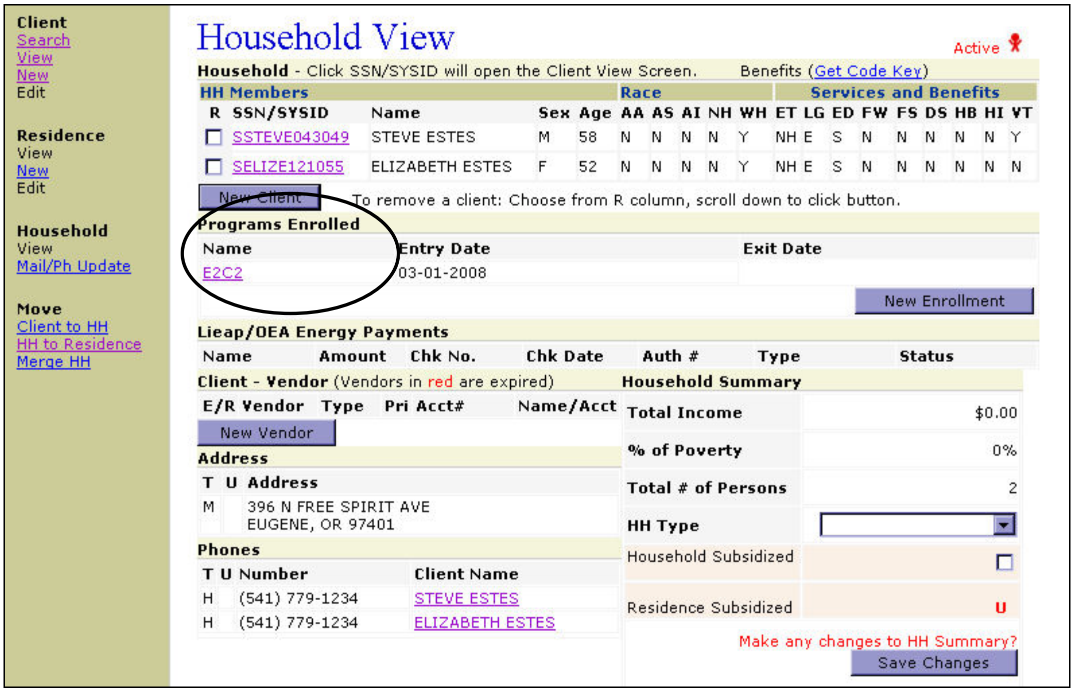


Figure 4-9A: Household View, Programs Enrolled to add I & R Transactions Categories.

5. Using the 'Household Transaction Summary' screen; under 'I & R Transactions, use the drop-down menu to select the appropriate category for the HH. Enter the 'Start/Received' date. Click on 'Add I & R Transaction' button (reference section 'New Enrollment; Steps 1 and 2). Ensure all household members are enrolled in each category *(Reference figure 4-9B)*. **Note:** When the category and start/received date is filled in, the Add I&R Transaction button will become active.

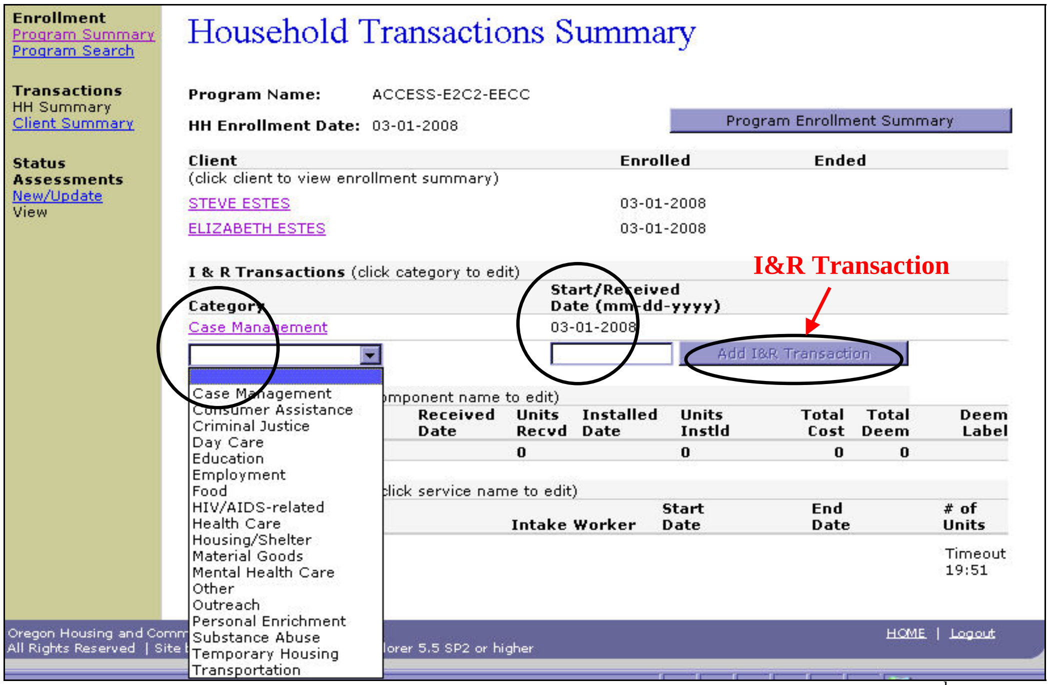


Figure 4-9B: Household Transactions Summary, I & R Transactions/Category – add 2nd enrollment.

Note: I & R Transactions can be deleted if needed. Click on the specific I & R category to be deleted, the 'Program Enrollment IR Edit' screen will appear *(reference figure 4-9C)*.

Figure 4-9C: Program Enrollment IR Edit screen

To enroll a HH in another program, return to 'Program Enrollment New' and repeat the required steps. The 'Household Transaction Summary' screen displays multiple 'Programs Enrolled' *(reference figure 4-10)*.

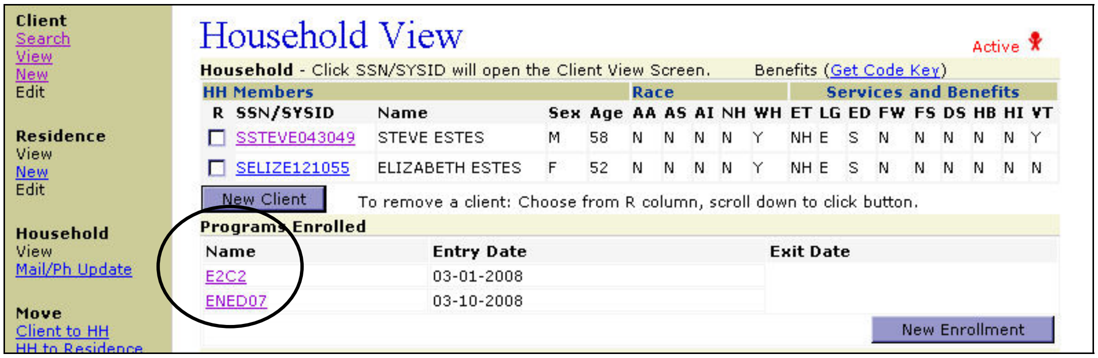


Figure 4-10: Household View with two Programs.

Kit Components

1. Select the appropriate 'Program Enrolled' from the 'Household View' screen *(reference figure 4-11).*

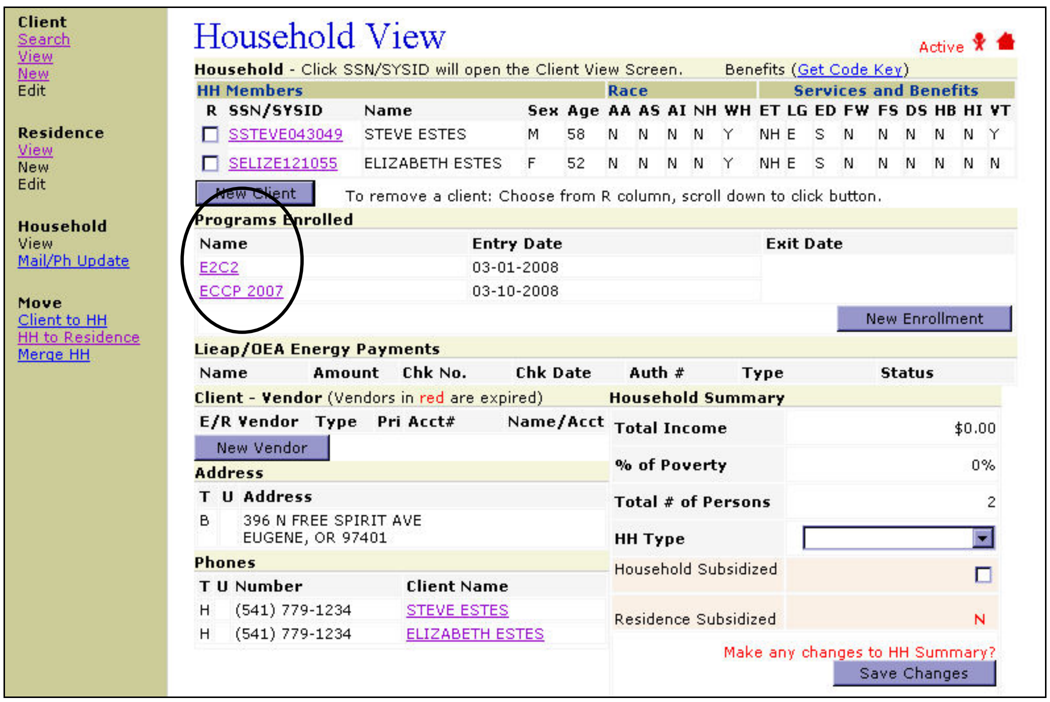


Figure 4-11: Household View – Programs Enrolled screen.

2. Using the ‘Household Transactions Summary’ screen, click on the ‘New Transaction’ button *(figure 4-11A).* The ‘WX Kit New’ screen will appear.

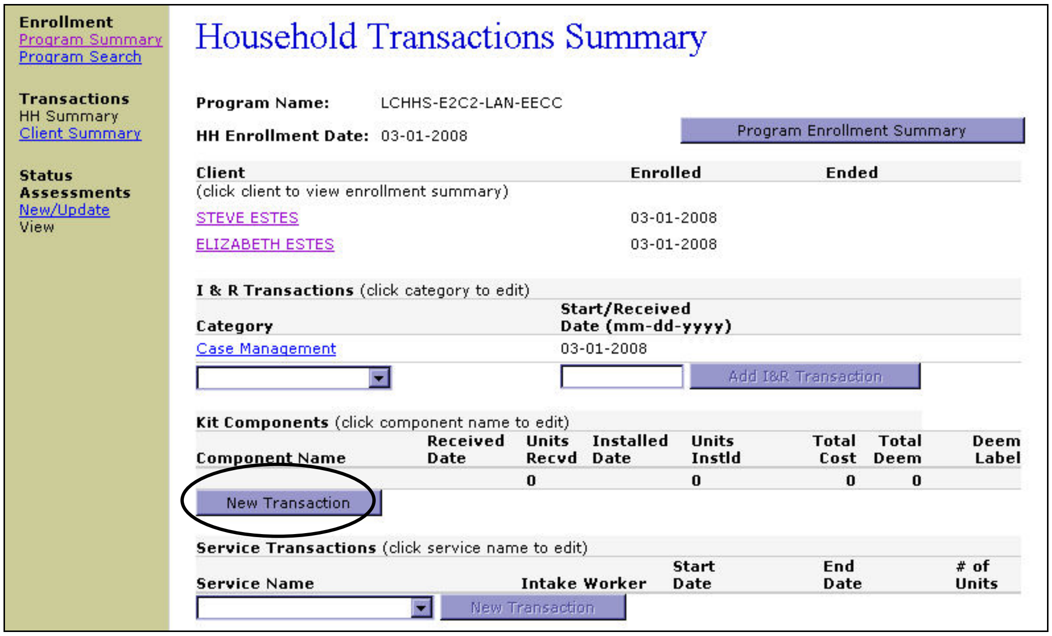
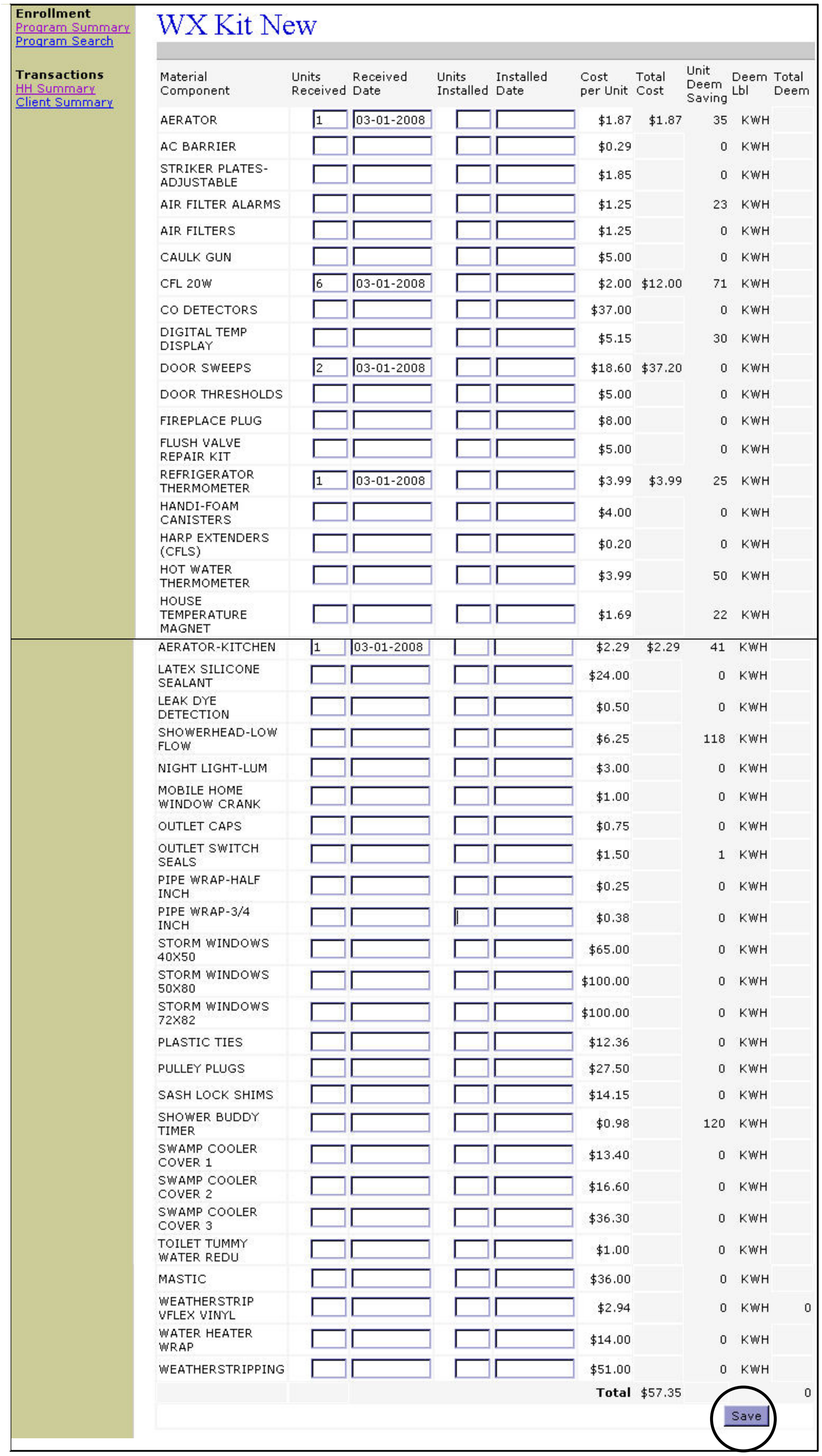


Figure 4-11A: Household Transactions Summary – New Transaction screen.

3. The “WX Kit New” screen allows the intake worker/user to enter the number of units of each kit component, number of units installed and date received by the client. When complete issuing the kit components, click the ‘Save’ button. The Household Transaction Summary screen will re-appear *(reference figure 4-11B).*

Note: Every ‘New Transaction’ WX Kit provided to a household should be entered into the database for tracking purposes.

Do to the size of the ‘WX Kit New’ screen; it is on the following page by itself to demonstrate all the components and the ‘Save’ button.



Enrollment
Program Summary
Program Search

Transactions
HH Summary
Client Summary

WX Kit New

Material Component	Units Received	Received Date	Units Installed	Installed Date	Cost per Unit	Total Cost	Unit Deem Saving	Deem Lbl	Total Deem
AERATOR	1	03-01-2008			$1.87	$1.87	35	KWH	
AC BARRIER					$0.29		0	KWH	
STRIKER PLATES-ADJUSTABLE					$1.85		0	KWH	
AIR FILTER ALARMS					$1.25		23	KWH	
AIR FILTERS					$1.25		0	KWH	
CAULK GUN					$5.00		0	KWH	
CFL 20W	6	03-01-2008			$2.00	$12.00	71	KWH	
CO DETECTORS					$37.00		0	KWH	
DIGITAL TEMP DISPLAY					$5.15		30	KWH	
DOOR SWEEPS	2	03-01-2008			$18.60	$37.20	0	KWH	
DOOR THRESHOLDS					$5.00		0	KWH	
FIREPLACE PLUG					$8.00		0	KWH	
FLUSH VALVE REPAIR KIT					$5.00		0	KWH	
REFRIGERATOR THERMOMETER	1	03-01-2008			$3.99	$3.99	25	KWH	
HANDI-FOAM CANISTERS					$4.00		0	KWH	
HARP EXTENDERS (CFLS)					$0.20		0	KWH	
HOT WATER THERMOMETER					$3.99		50	KWH	
HOUSE TEMPERATURE MAGNET					$1.69		22	KWH	
AERATOR-KITCHEN	1	03-01-2008			$2.29	$2.29	41	KWH	
LATEX SILICONE SEALANT					$24.00		0	KWH	
LEAK DYE DETECTION					$0.50		0	KWH	
SHOWERHEAD-LOW FLOW					$6.25		118	KWH	
NIGHT LIGHT-LUM					$3.00		0	KWH	
MOBILE HOME WINDOW CRANK					$1.00		0	KWH	
OUTLET CAPS					$0.75		0	KWH	
OUTLET SWITCH SEALS					$1.50		1	KWH	
PIPE WRAP-HALF INCH					$0.25		0	KWH	
PIPE WRAP-3/4 INCH					$0.38		0	KWH	
STORM WINDOWS 40X50					$65.00		0	KWH	
STORM WINDOWS 50X80					$100.00		0	KWH	
STORM WINDOWS 72X82					$100.00		0	KWH	
PLASTIC TIES					$12.36		0	KWH	
PULLEY PLUGS					$27.50		0	KWH	
SASH LOCK SHIMS					$14.15		0	KWH	
SHOWER BUDDY TIMER					$0.98		120	KWH	
SWAMP COOLER COVER 1					$13.40		0	KWH	
SWAMP COOLER COVER 2					$16.60		0	KWH	
SWAMP COOLER COVER 3					$36.30		0	KWH	
TOILET TUMMY WATER REDU					$1.00		0	KWH	
MASTIC					$36.00		0	KWH	
WEATHERSTRIP VFLEX VINYL					$2.94		0	KWH	0
WATER HEATER WRAP					$14.00		0	KWH	
WEATHERSTRIPPING					$51.00		0	KWH	
					Total	$57.35			0

Save

Figure 4-11B: WX Kit New

3. The ‘Household Transactions Summary’ screen will re-appear with the WX Kit Components displayed. Using this screen, the intake worker/user should confirm the information prior to proceeding *(reference figure 4-11C).*

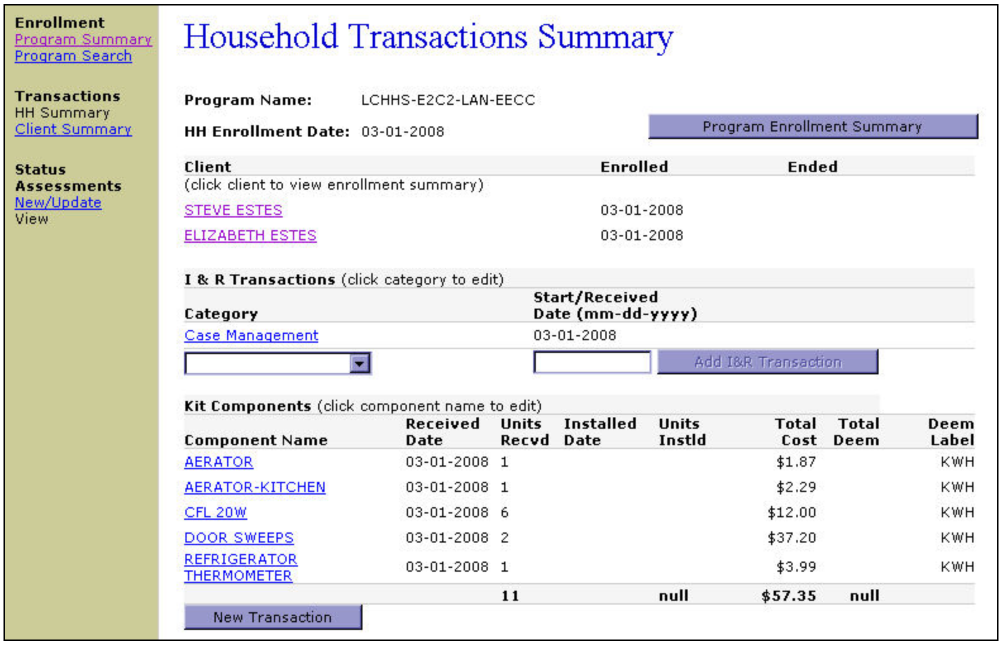
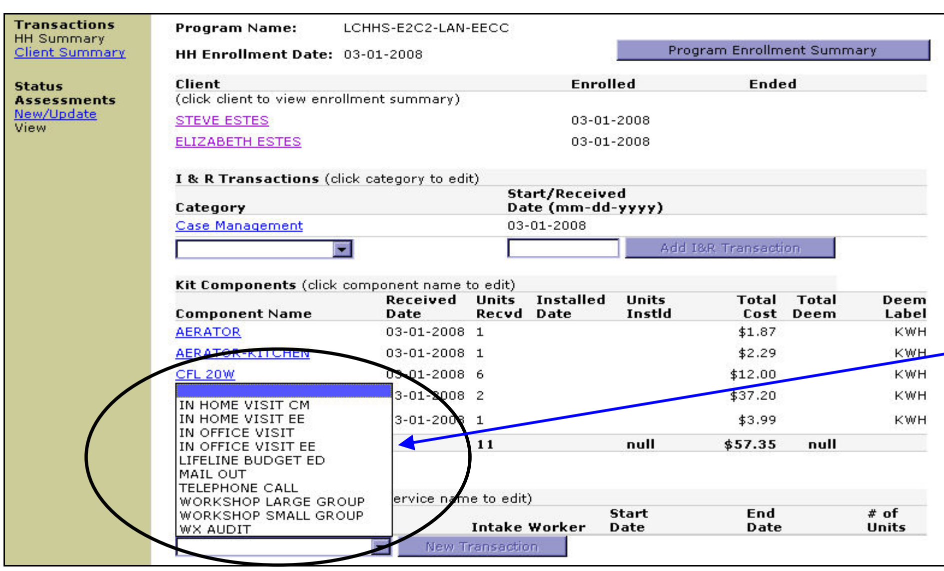


Figure 4-11C: Household Transaction Summary w/Kit Components screen.

Service Transactions

Service transactions are used to document how services were provided, whether the service was in home visit by the case manager, office visit, via telephone, etc.

1. Using the ‘Housing Transactions Summary’ screen, under the ‘Service Transactions’ section, using the drop-down menu, select the ‘Service Name’ and click the ‘New Transaction’ button. *(reference figure 4-12A).*



Level 3 Case Management is not always identified in the ‘Service Name’ which is connected to the APC. If this is not available, contact your OPUS Administrator who works with the specific program and module. Reference figure 4-12 drop-down menu.

Figure 4-12: Service Transaction section – services selection drop-down menu

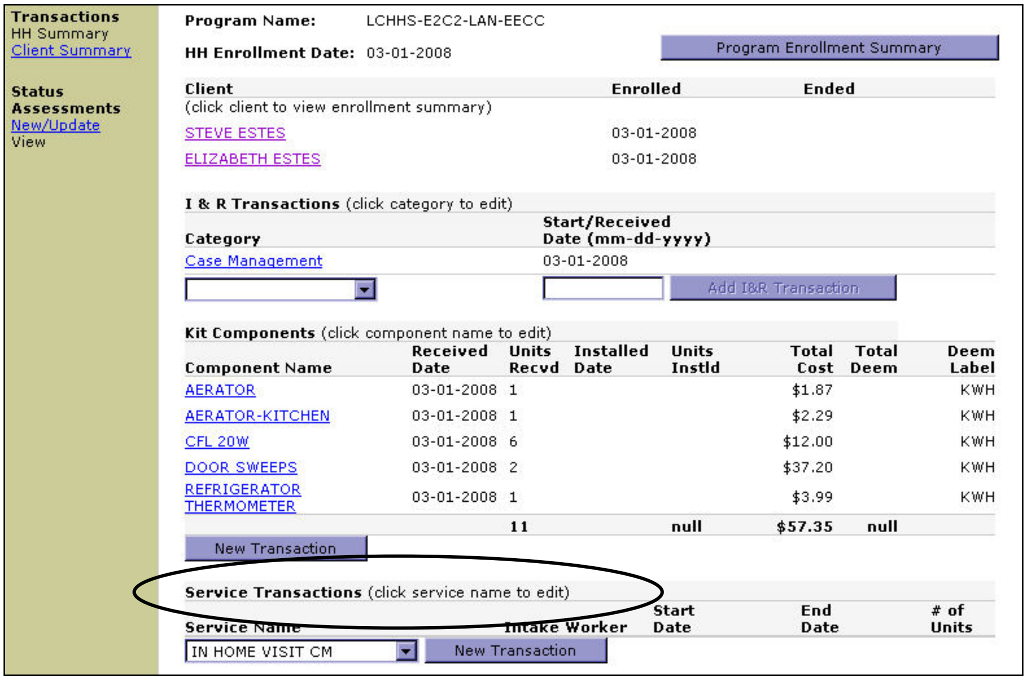


Figure 4-12A: Services Transactions – services selected, New Transaction screen.

2. The ‘Services Transaction New’ screen will appear.

Service Transaction New

1. Using the ‘Service Transaction New’ screen, select the clients that will be participating in the service provided. The ‘Applicant” is identified with the round radio button ‘App’ and other household members/clients who participate in the service are identified with the box checked in the ‘C’ column *(reference figure 4-12B).*

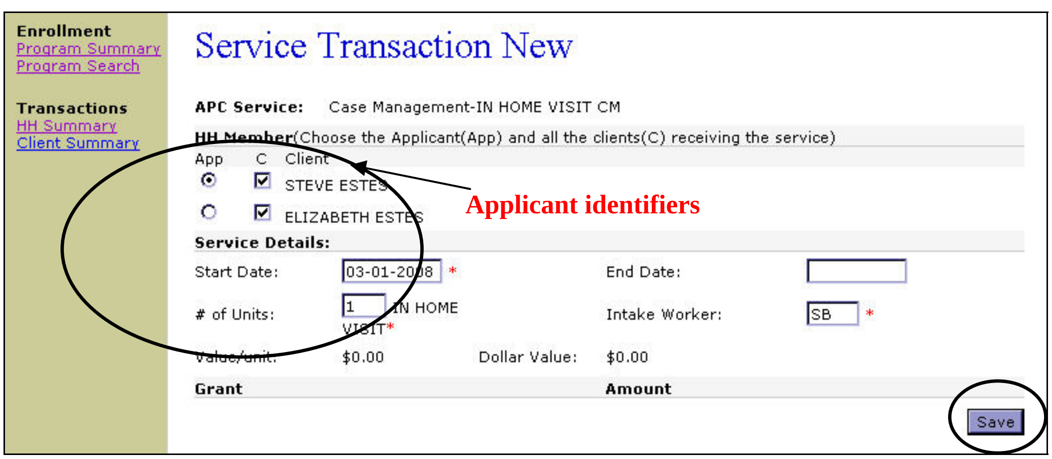


Figure 4-12B: Services Transaction New screen.

2. Enter the start date, end date, and number of units provided. The ‘# of Units’ should normally be ‘1’ to represent one activity. In this case, the HH received on unit of service with WX Kit components. Click the ‘Save’ button *(reference figure 4-12B).*

3. The 'Household Transactions Summary' screen will re-appear showing 'Kit Components' and 'Service Transactions' information *(reference figure 4-12C)*.

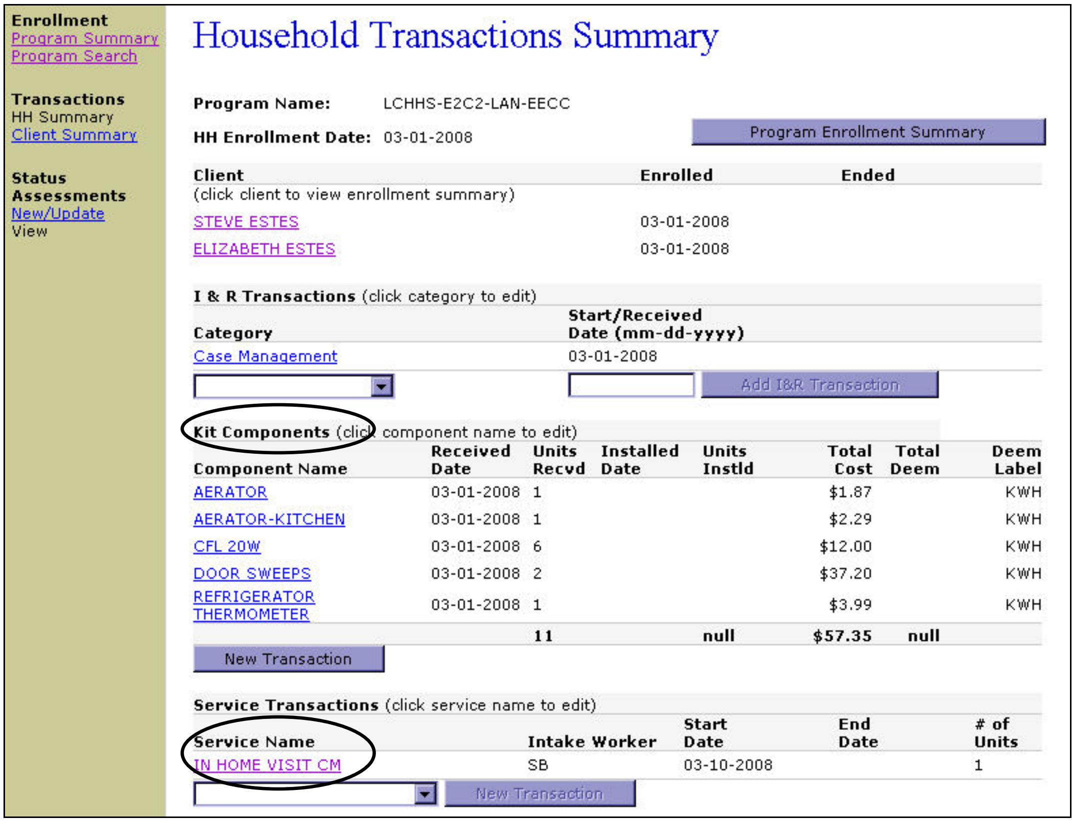


Figure 4-12C: Household Transactions Summary with services screen.

4. If a 'Service Transaction' has been previously activated, enter the amount to be allocated to any of the grant(s) that are associated with the service at the bottom of the screen. The dollar value needs to be allocated to the grants available and a zero balance needs to be displayed before the information can be saved. **(This function has not been activated at time of rollout of this module.)**

Service Transaction Edit

1. Using the 'Household Transactions Summary', click on the desired 'Service Name' that needs to be edited *(reference figure 5-12C, above)*. The 'Service Transaction Edit' screen will open. This screen allows dates, number of units and the intake worker initials to be edited. 'Service Transactions' can also be 'Deleted' in this screen *(reference figure 4-12D)*.

Figure 4-12D: Service Transaction Edit screen.

2. Click on the 'Save' button when done making changes. The 'Household Transactions Summary' screen will reappear.

Case Plan

The following steps will cover case management features of a program enrollment which include a case plan, action plans, action steps, case notes, and a tickler alert reminder system for assisting an agency to manage their client's progress through the case management process.

IMPORTANT NOTICE: During the construction of this module, there was a very clear aspect on the design which is the case management component holds a different security classification than other modules.

Case workers who create 'Case Plans' are the owners of each 'Case Plan'. These intake workers have control of who can access and to what level of access for each case plan implemented. Case workers can create co-owners and they can pass the ownership to another person. The agency management, directors or OPUS administrators do not have access unless they are designated to be co-owners. OHCS staff can not view 'Case Plans' at any level unless the case worker grants such access.

Therefore, hotlinks can not be created to 'Case Plans' from the 'Household Transaction Summary'.

A case plan can have several components within it's self and is the main source of holding a client's program information, known as the "gate keeper". A case plan can consist of but not limited to: action plans, action steps, case notes and tickler alerts. Each agency can decide how much of a case plan should be included and it could depend on the goals set forth for each household an agency works with.

Case Plan New

Setup:

1. Using the 'Household Transaction Summary' screen, click the 'Program Enrollment Summary' button *(reference figure 4-13)*.

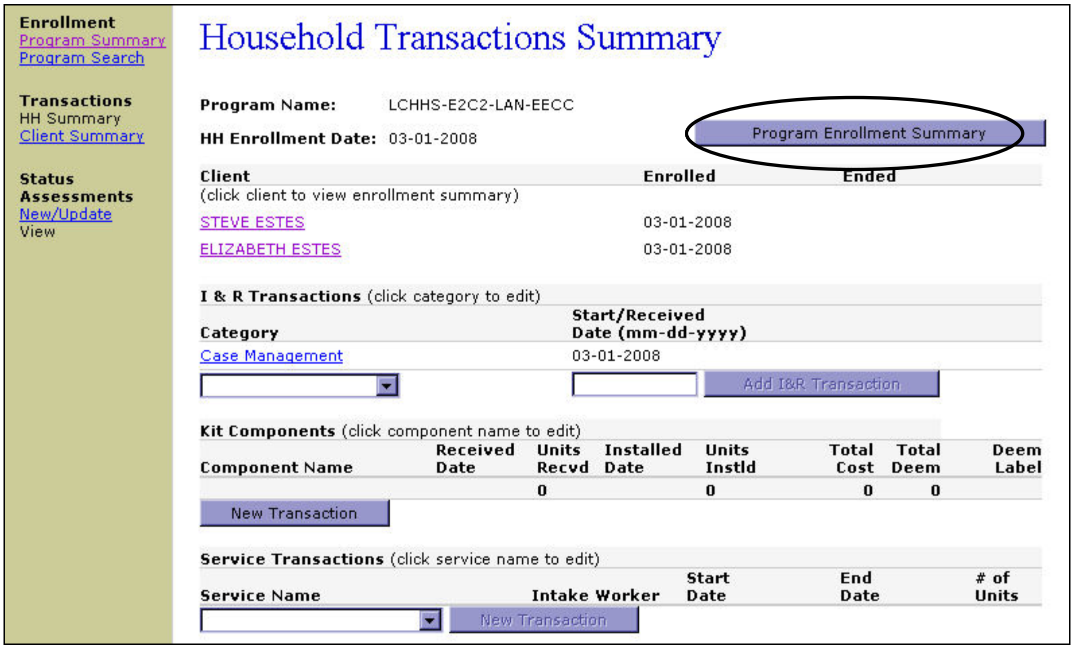


Figure 4-13: Household Transactions Summary – Program Enrollment Summary screen

2. The 'Program Enrollment Summary' screen will appear. To initiate a case plan, click on the 'New Case Plan' button *(reference figure 4-13A)*.

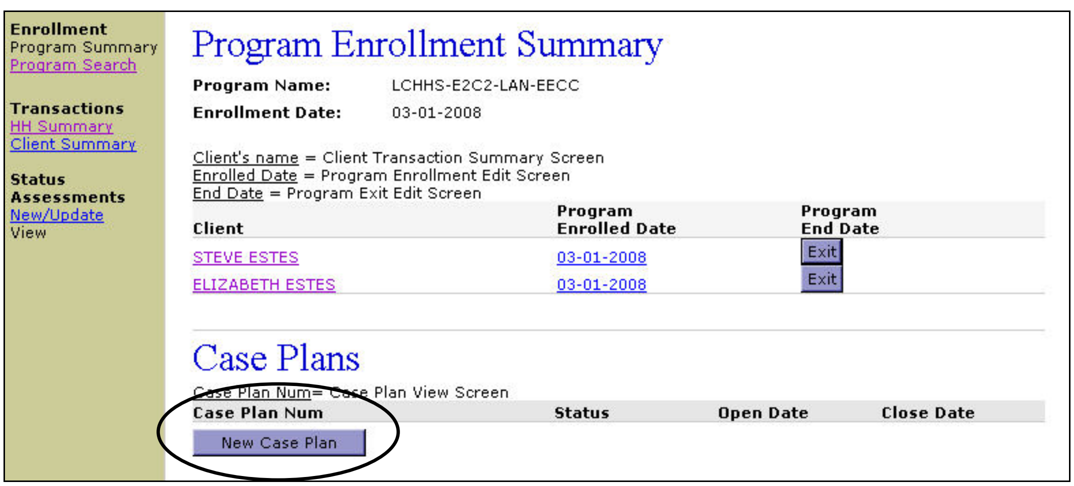


Figure 4-13A: Program Enrollment Summary – Case Plans screen

3. The ‘Case Plan New’ screen will appear. Complete all required information. Select the appropriate client(s) to be enrolled in the case plan and enter the entry date. Leaving the ‘Case Plan #’ blank will allow the database to create an auto-generated case plan number *(reference figure 4-14)*. *Items with a red asterisk ‘*’ are required fields.*

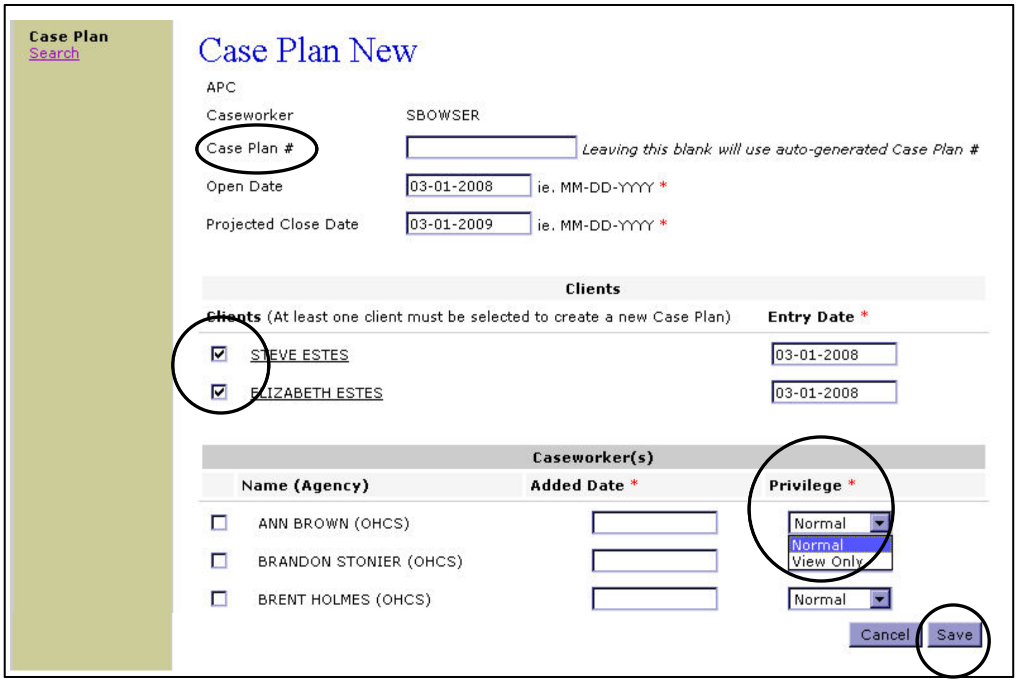


Figure 4-14: Case Plan New screen.

4. Additional agency case workers that are involved with the client can be added to a client’s case plan by choosing the appropriate name(s) in the ‘Caseworker(s)’. Case workers can be issued ‘Normal’ or ‘View only’ permissions to the file by selecting the appropriate privilege *(reference figure 4-14)*.

Case Plan View

The ‘Case Plan View’ screen provides an overview of all the clients enrolled in the case plan, the case workers assigned to work on it and their privilege level such as owner, normal or view only access.

Case plans can be edited, closed or items added. To edit a case plan, click on ‘Edit Case Plan’ button *(reference figure 4-14A).*

Figure 4-14A: Case Plan View screen.

The ‘Case Plan Edit’ screen will appear. Change or correct the appropriate information and click ‘Save Changes’ button (reference figure 4-14B).

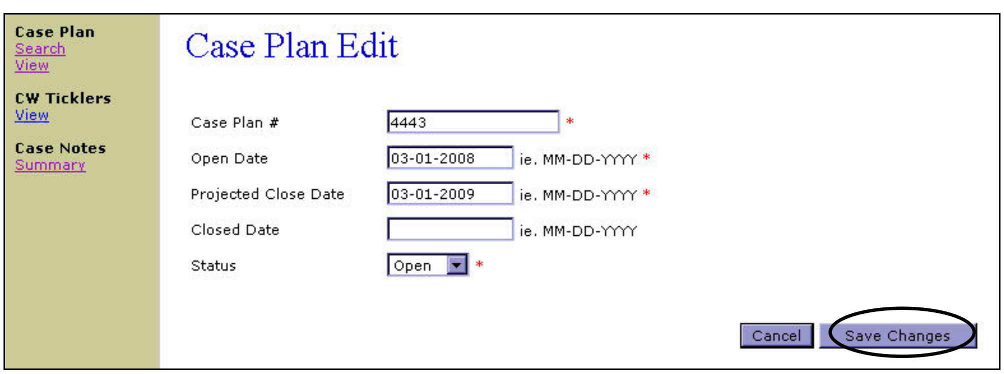


Figure 4-14B: Case Plan Edit screen.

Action plans are a part of case plans. Action plans are steps in developing a plan that works towards a specific goal for a household such as assisting the client(s) with classes, finding employment, transportation, etc. Before an 'Action Plan' is developed it is important to know where or what the household status is. A status assessment is needed and is an important part of analyzing where to start with a client and where the goal completion would end, giving a client or household a goal to work towards.

Action Plan(s) are located at the bottom of the 'Case Plan View'. Using the drop-down menu, an intake worker would choose the category appropriate for the client and/or household composition. When the category is chosen, the case plan notes would build off the specific category. The intake worker would document the plan and steps desired for a client and/or household to complete their goal *(reference figure 4-14C).*

Developing an 'Action Plan' will be discussed later in this chapter.

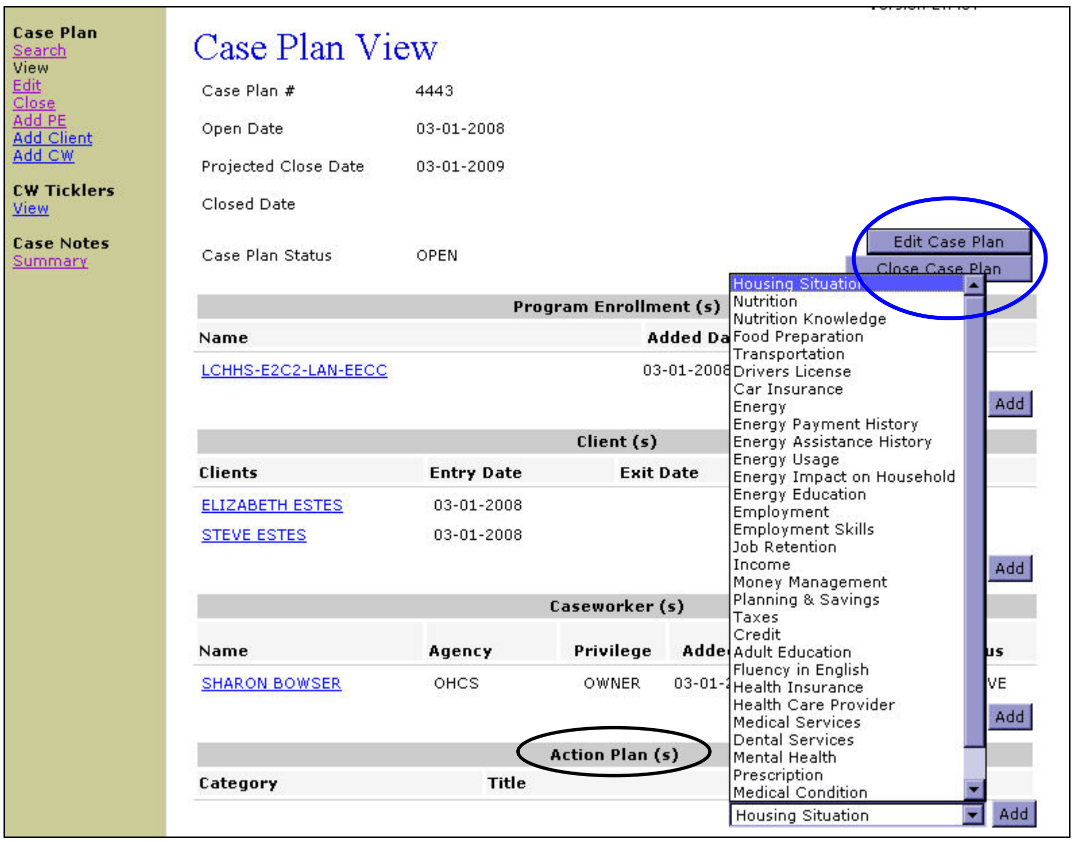


Figure 4-14C: Case Plan View – Action Plan screen.

To close a case plan, click on the 'Close Case Plan' button *(reference figure 4-14C)*. The 'Case Plan Close' screen will appear. Complete the close date and click the 'Close' button *(reference figure 4-14D)*.

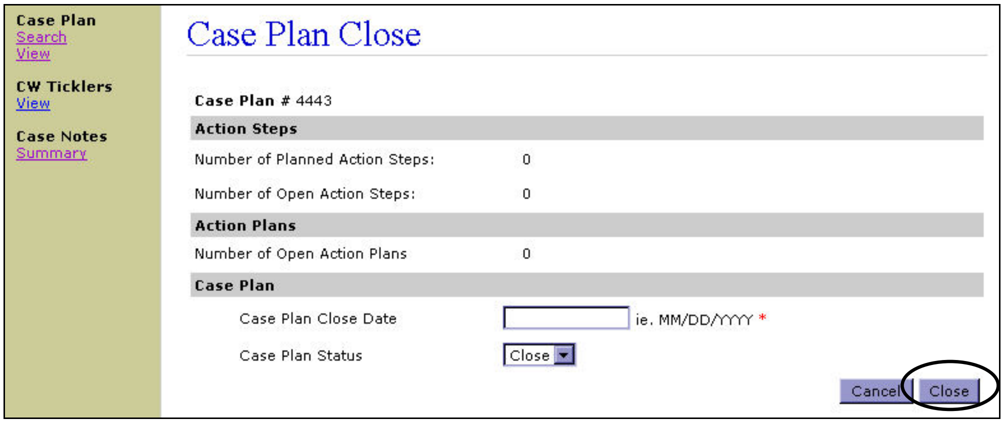


Figure 4-14D: Case Plan Close screen.

Using the 'Case Plan View' screen, to add case notes (reference figure 4-14E), click the 'View/Add Case Notes' button. The 'Case Notes New' screen will appear. Enter the date and appropriate comments pertaining to the client(s) and what progress, if any, towards the goal set.

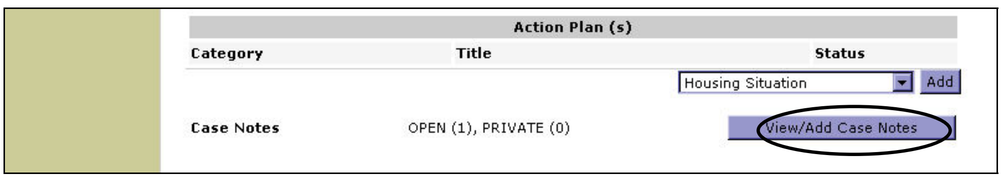


Figure 4-14E: Case Plan View 'View/Add Case Notes' partial screen

NOTE: It is recommended to add the intake workers initials at the end of each comment(s) annotated. This would help another case worker by knowing who created the comments for current intake workers or previous intake workers having contact with the client(s) *(reference figure 4-14F)*.

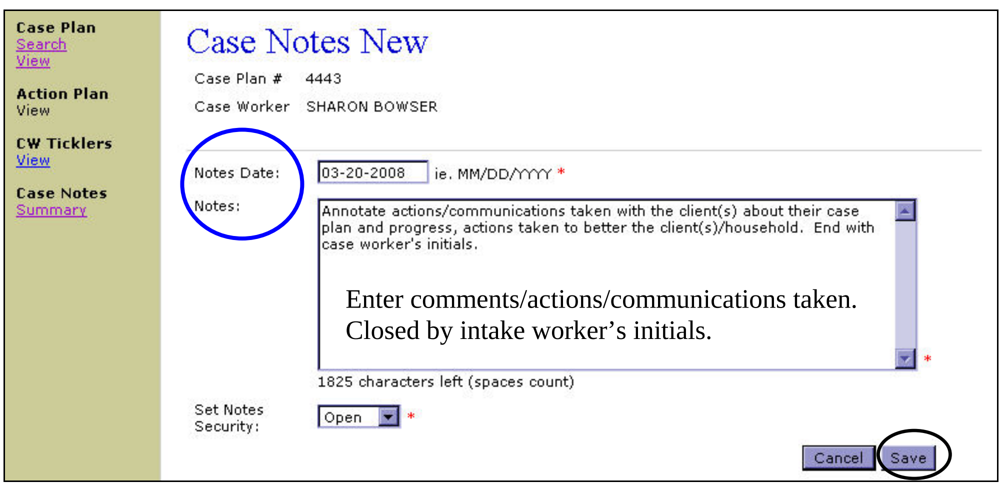


Figure 4-14F: Case Notes New screen.

The ‘Case Plan View’ screen will re-appear. It is recommended the intake worker would confirm the accuracy of the client’s information: active clients, programs enrolled, caseworker, action plan, and the number of case notes *(reference figure 4-14G)*.

Figure 4-14G: Case Plan View screen

Note: ‘Case Plans’, ‘Assessments’ and ‘Action Plans’ can not be deleted, only edited or closed.

Status Assessment

Clients are given an initial assessment as a part of a case plan to indicate their needs and to develop a case plan. Clients are assessed by using a number of indicators from housing and food access, energy, etc.

1. Using the 'Household Transactions Summary' or 'Program Enrollment Summary' screen, go to the 'Top Nav Bar' and scroll the mouse over 'Program' then go to 'Enrollment' then scroll down to and click on 'Summary'. Another route to get to the assessments is using the 'Left Nav Bar, under 'Enrollment', click on 'Program Summary'. The 'Program Enrollment Summary' screen will appear. In the 'Left Nav Bar', under 'Status Assessments', click on 'New/Update' *(reference figure 4-15).*

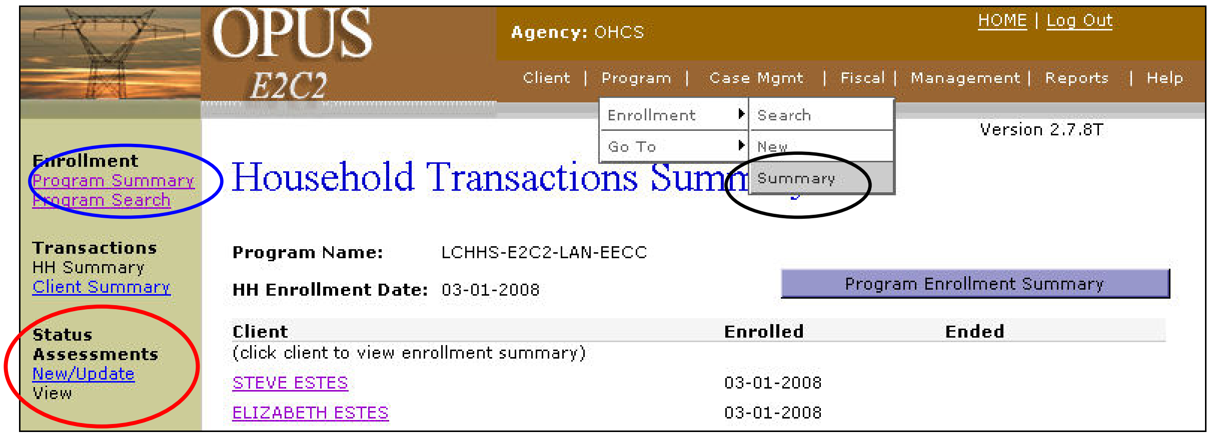


Figure 4-15: Navigation Menus. Main Menu or Left Nav Bar screen.

The 'Quick' assessment is a condensed version of the 'Comprehensive' assessment and is good to use as a screening tool to help decide whether a client's needs can be served by either 'Level 2' or 'Level 3' case management services.

To decide which level a client(s) belongs to refer to the "E2C2 Stability Services and Data Entry Standards" (reference figure 4-15A, next page).

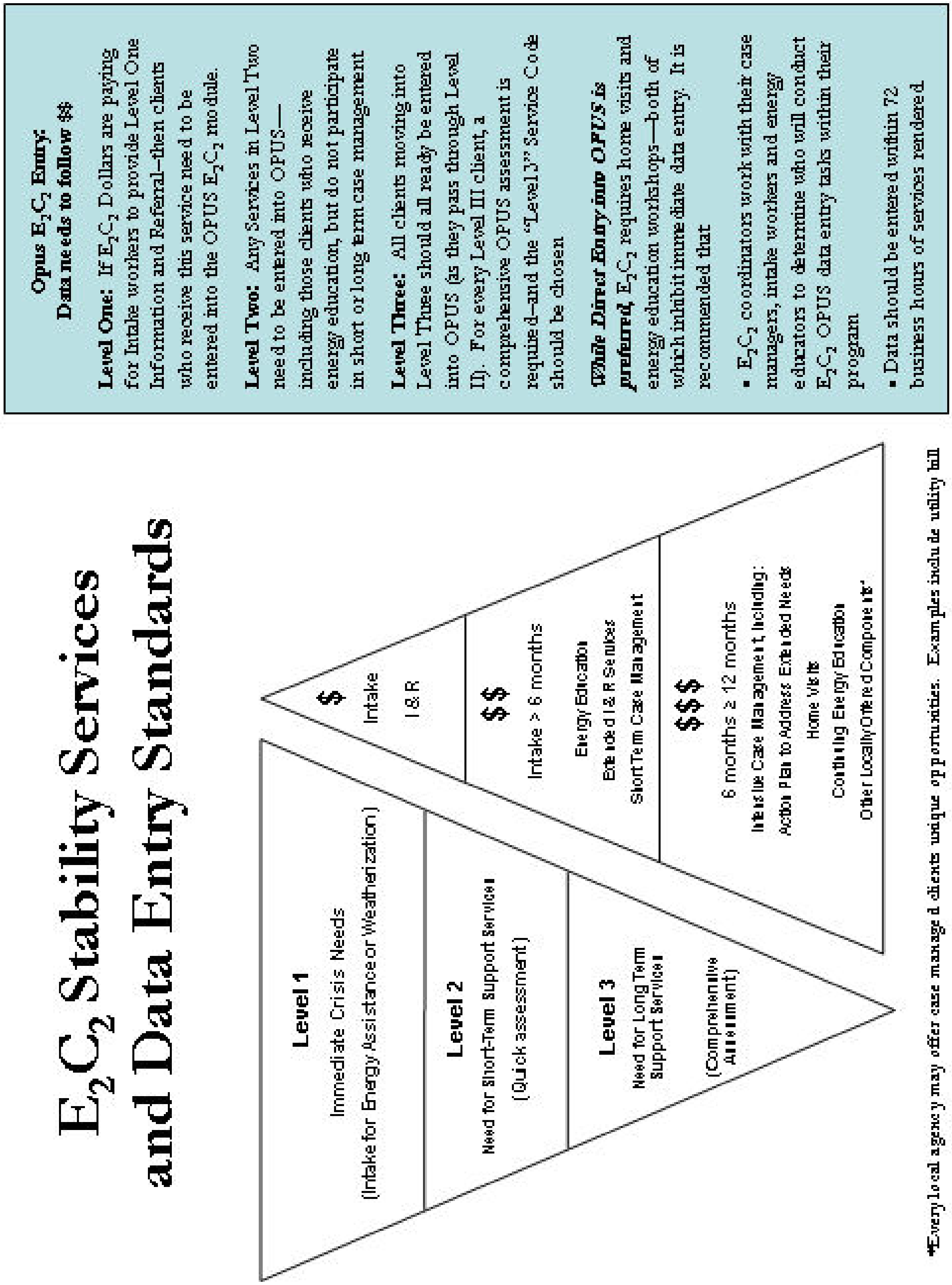


Figure 4-15A: E2C2 Stability Services and Data Entry Standards.

Status Assessment New/Edit

2. The household is analyzed for an initial assessment that can be reviewed later for a comparison of when the clients came into the program versus the assessment when clients exit the program. The 'Status Assessment New/Edit' screen will appear. Complete all the pertinent information either by manual entry or by using the drop-down menus.
   Figure 4-15B is a 'Quick' assessment which is a condensed version of the 'Comprehensive' assessment. Click the 'Save' button when completed *(reference figure 4-15B).*

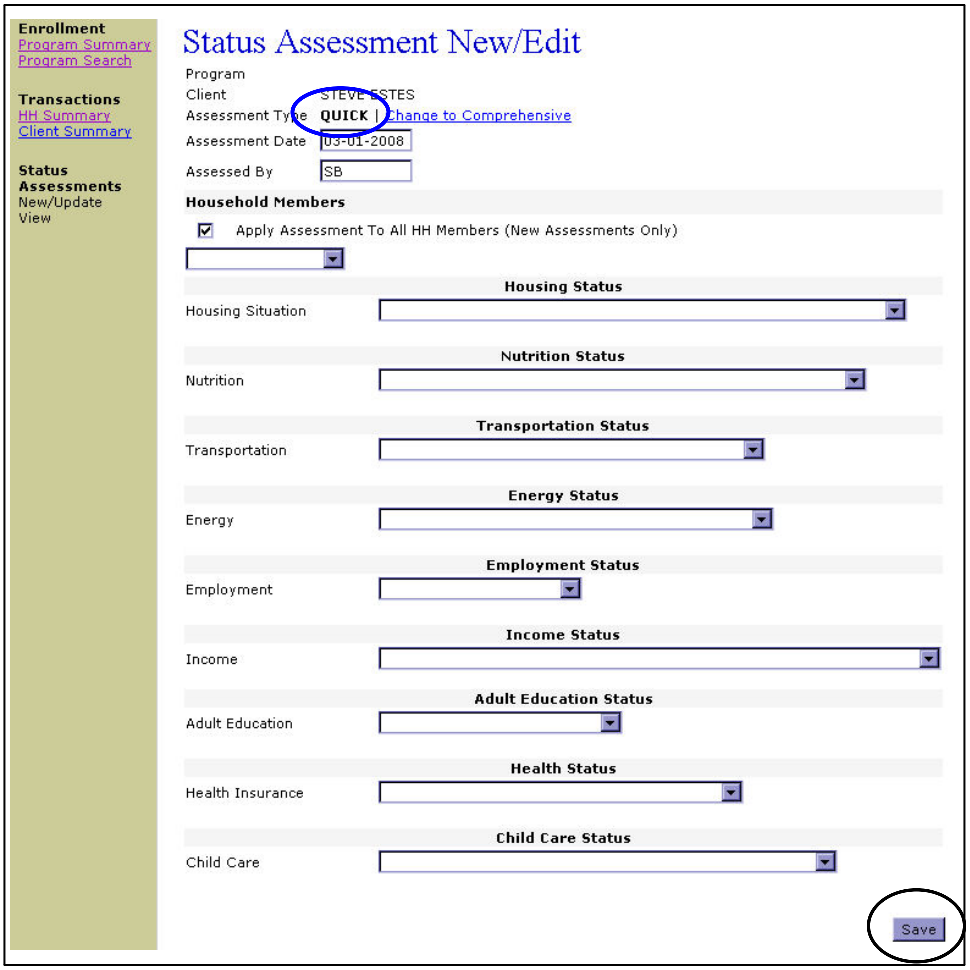


Figure 4-15B: Status Assessment New/Edit screen.

By clicking on 'Change to Comprehensive' link, there is a 'Status Assessment New/Edit' long version which captures more information.

3. The second assessment is a 'Comprehensive' assessment. Either assessment is good to use as a screening tool to help decide whether a household's needs can be served by either level two or level three case management services *(reference figure 4-15B).* Click the 'Save' button when completed *(reference figure 4-15C, next page).*

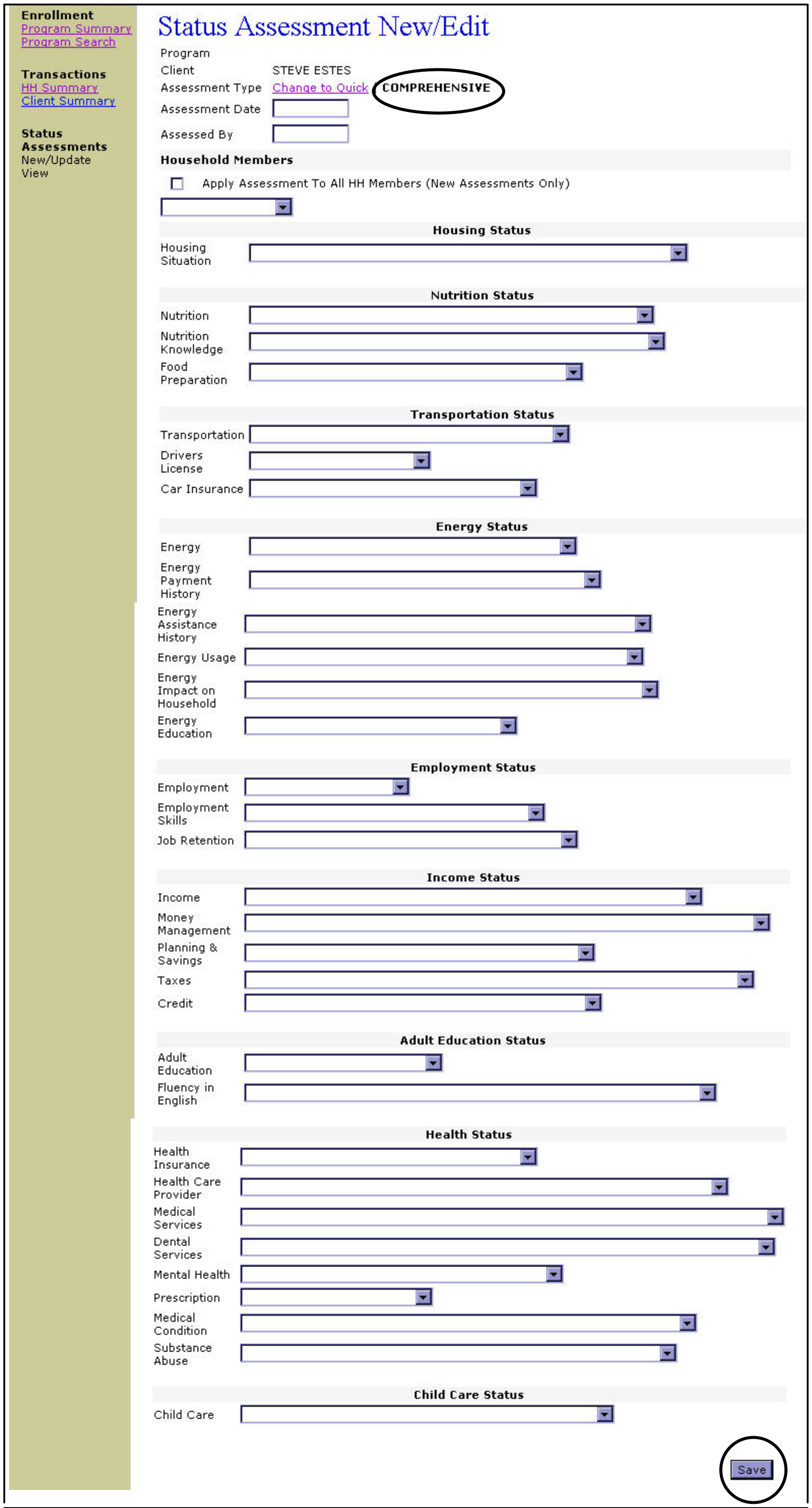


Figure 4-15C: Status Assessment New/Edit Comprehensive screen.

This screen shot indicates every thing included on a comprehensive assessment. All screen shots were captured to show the 'save' button at the bottom as well.

Status Assessment View

5. The ‘Status Assessment View’ screen will appear after completion of each assessment (reference figure 4-15D).

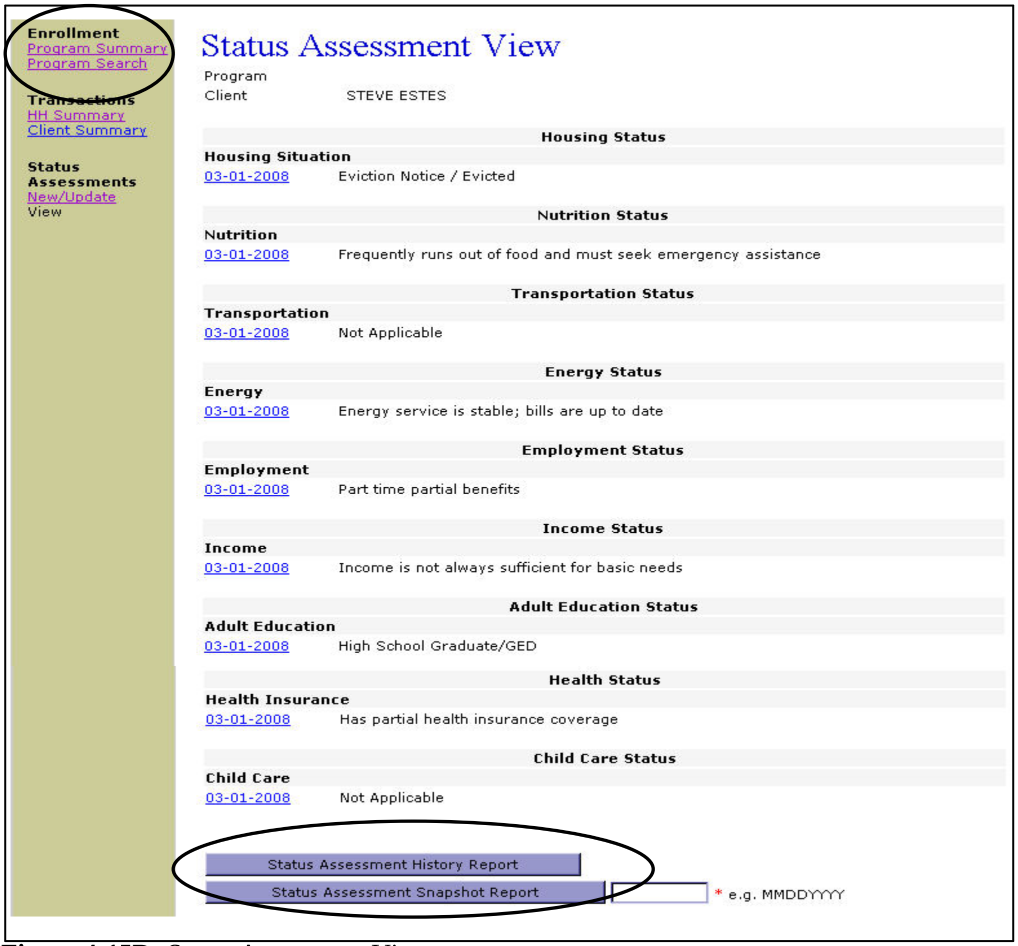


Figure 4-15D: Status Assessment View screen

6. At the bottom of the ‘Status Assessment View’ screen are two buttons.
   1: ‘Status Assessment History Report’ which will provide a printable report that shows the selected assessment indicators including any changes made since the initial assessment.
   2: ‘Status Assessment Snapshot Report’, which allows the intake worker to enter a specific date. The report will show the status of the client’s assessment as of the specific selected date *(reference figure 4-15D).*

7. Before exiting a client from case management, the ‘Comprehensive Assessment’ must be updated to reflect the status in each sub-category at the point of exiting.

8. Using the ‘Left Nav Bar’, under ‘Enrollment’, click the ‘Program Summary’ link to return to ‘Program Enrollment Summary’, ‘Case Plan’ *(reference figure 5-15D, previous page)*. Under Case Plans, the intake worker can select a previously created case plan or select a new case plan (reference figure 4-16).

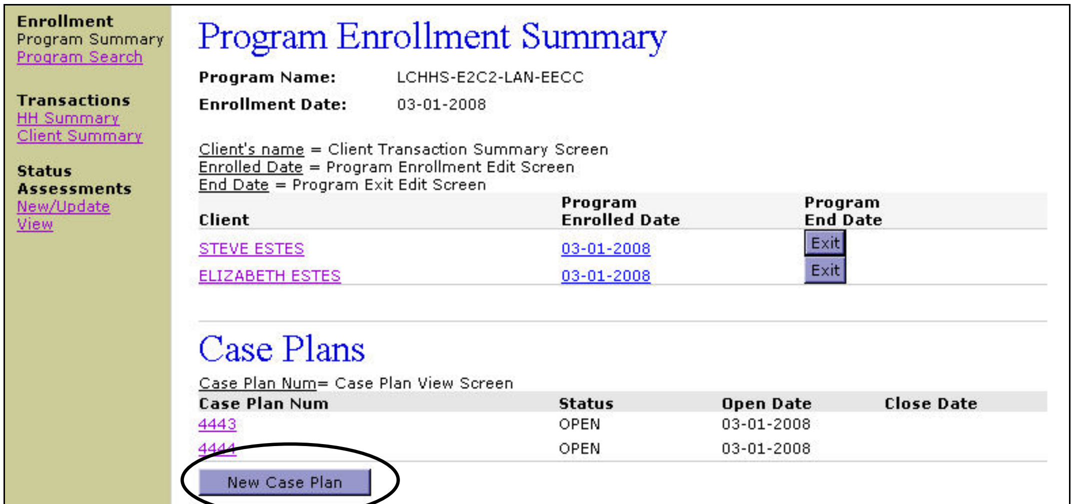


Figure 4-16: Program Enrollment Summary – Case Plan screen.

Action Plan

Once the Case plan has been started, an action plan is created. An 'Action Plan' may include action steps that outline the expectations that a client and case manager would set to help a client or household achieve their goal(s) in the respective categories. Multiple action plans may be created.

1. Using the 'Case Plan View' screen, at the bottom, is the 'Action Plan' section. Select the appropriate category then click the 'Add' button to begin a new action plan (reference figure 4-16A).

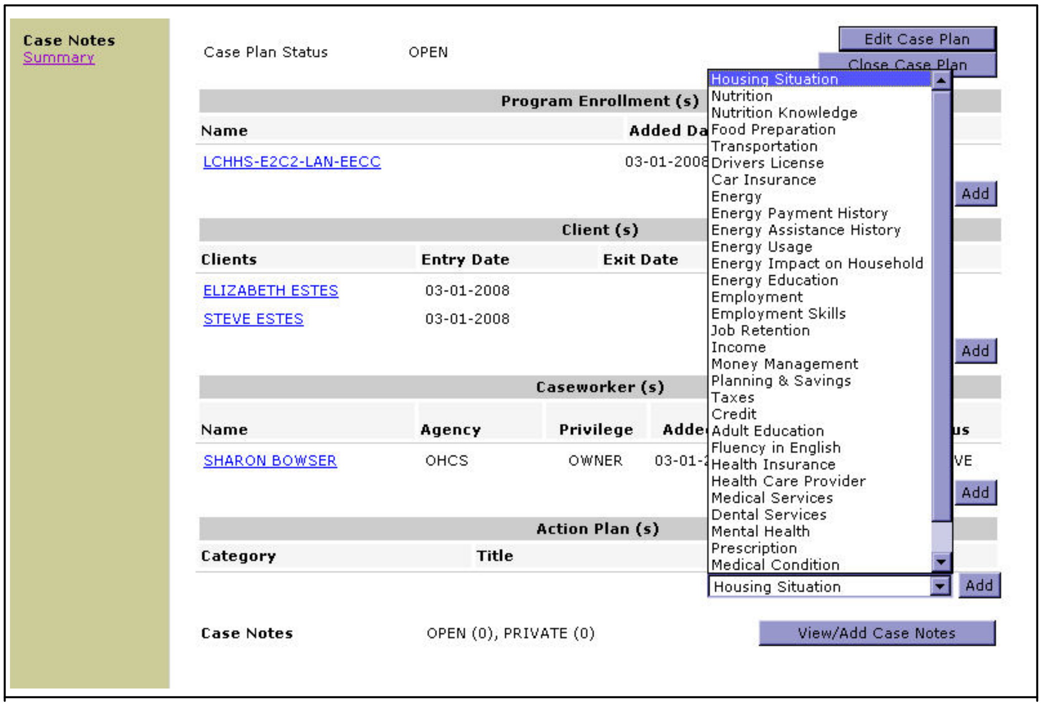


Figure 4-16A: Case Plan View screen

Note: 'Action Plan Category' items can be used more than once.

Action Plan New

1. *Reference figure 4-16B*, using the 'Action Plan New' screen, the 'Entry Level' is the assessment indicator selected at the point of entry into case management. The 'Target Goal' must be higher than the 'Entry Level' and represents the target for achievement for this action plan.

2. The 'Open Date' is when the action plan was started. The 'Projected Close Date' is the target date the intake worker and client sets to achieve the target goal. A 'Date Tickler' is selected if the intake worker would like to be reminded by OPUS when the 'Projected Close Date' is approaching.

3. Select the client(s) who will be associated with the action plan then click the 'Save' button. *All fields marked with a red asterisk '*' are required.*

4. The intake worker would enter all the pertinent information. If the intake worker wants to create a reminder, click on the box 'Create Projected Completion Date Tickler'. Click on the 'Save' button when the information is completed.

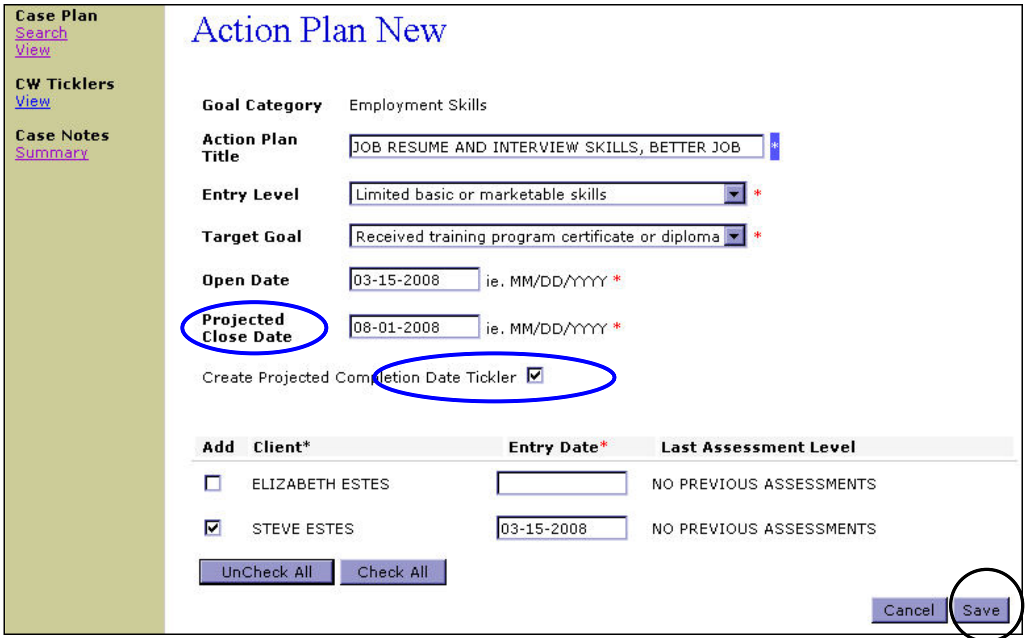


Figure 4-16B: Action Plan New screen.

Note: Case workers can set an alert tickler for 'Action Plans'. The 'Action Plan New' screen has a check box to select if the case worker wants to be reminded about the 'Projected Close Date'.

Action Plan View

The ‘Action Plan View’ screen will appear next. The ‘Action Plan View’ screen provides several areas to work from. In this screen, the plan can be edited, built upon with action steps, case notes viewed or created and then eventually closed upon completion. The next section will provide procedures to create action steps to support an action plan *(reference figure 4-16C)*.

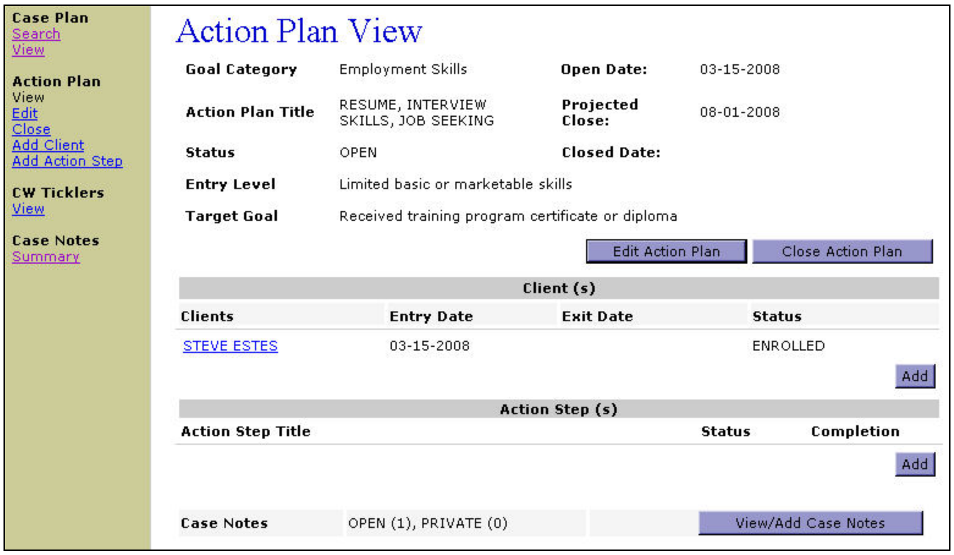


Figure 4-16C: Action Plan View screen.

Action Steps

1. ‘Action Steps’ support case plans. Using the ‘Case Plan View, click on the selected ‘Category’ link under the ‘Action Plan’ *(reference figure 4-17)*.

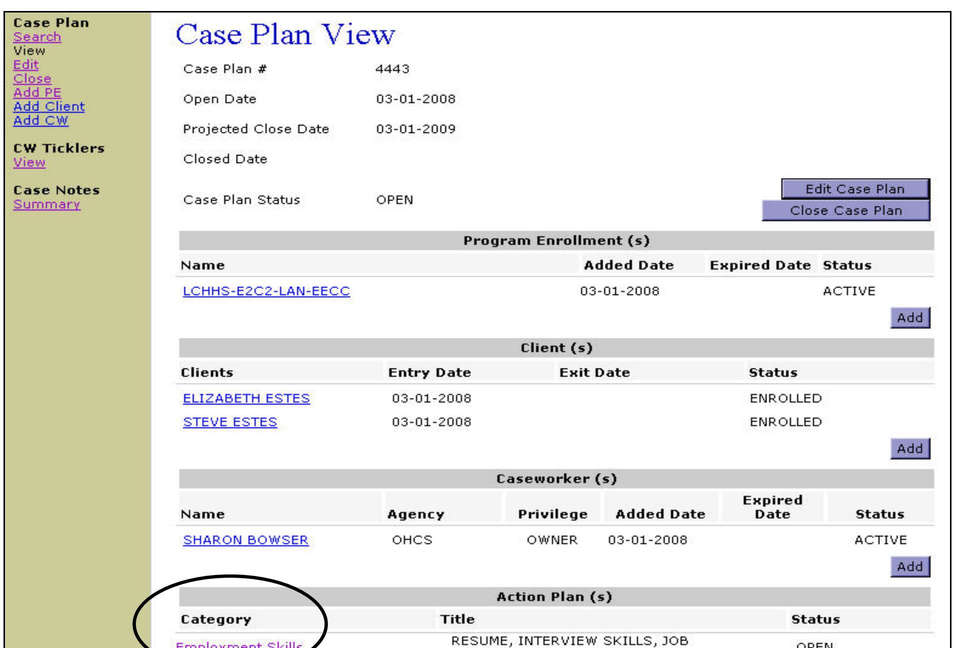


Figure 4-17: Case Plan View – Action Plan – Action Category screen.

Action Step New

2. The ‘Action Plan View’ screen will appear. In the ‘Action Step(s)’ category, click the ‘Add’ button (reference figure 4-17A).

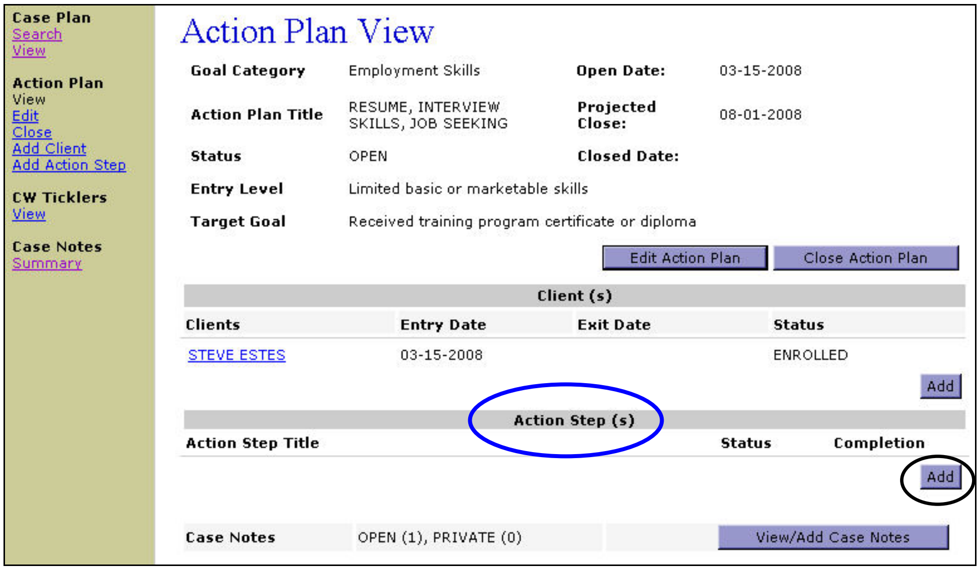


Figure 4-17: Action Plan View screen.

3. The ‘Action Step New’ screen will appear. On the ‘Action Step New’ screen, fill in all pertinent fields *(reference figure 4-17A)*. *All fields marked with a red ‘*’ are required.*

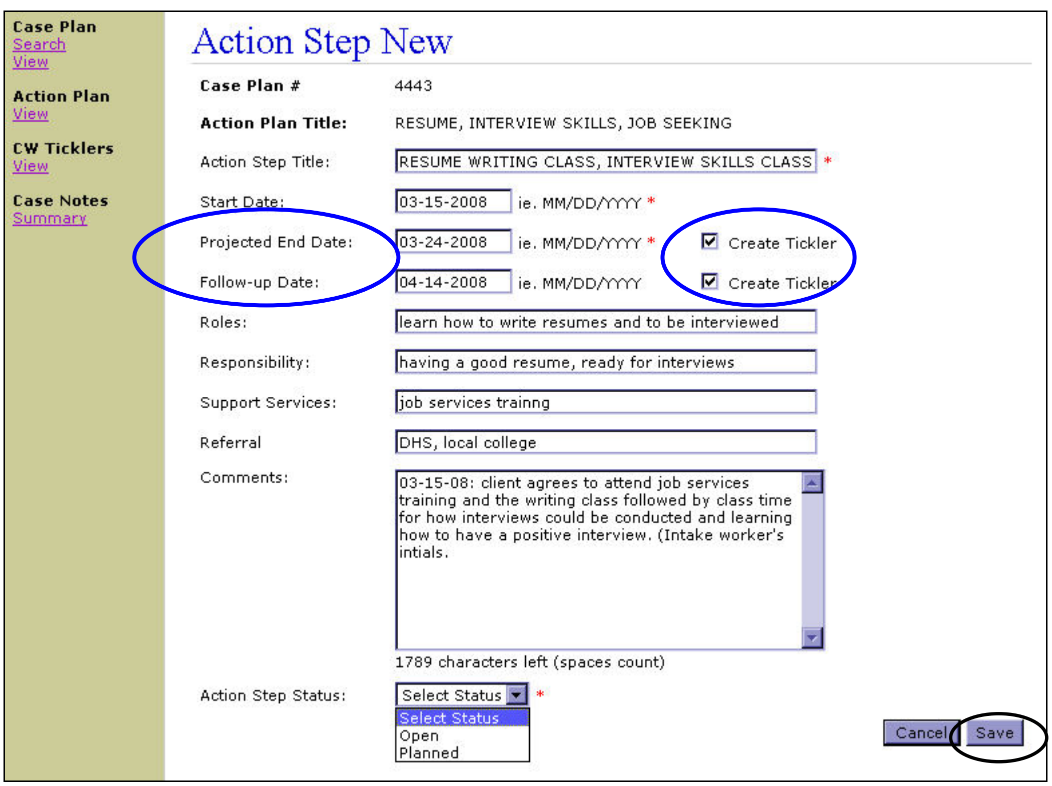


Figure 4-17A: Action Step New screen.

4. In the ‘Action Step New’ screen, the following explains the purpose of each field.
   a) **Roles** further define what the action step is.
   b) **Responsibility** defines what the client has agreed to do to complete the action step.
   c) **Support Services** lists any services the agency may provide to assist the client in achieving this action step.
   d) **Referral** lists any referrals made to assist the client related to this action step.
   e) **Comments** can be used to further explain the above information or to record information that may be important to help the client be successful in this action.
   f) The **Action Step Status** is used to identify this step as ‘Open’, meaning the client is actively working on this step, or ‘Planned’, which means the step is planned for the future.

Case workers can set an alert tickler for ‘Action Steps’. The ‘Action Step New’ screen has two check boxes to select so that a case worker can be reminded to follow up on the ‘Projected End Date’ and/or ‘Follow-up Date’.

Action View

These steps are helpful if/when there are a series of steps that need to be completed sequentially. Click the ‘Save’ button and the ‘Action Step View’ screen will appear (reference figure 4-17B).


Case Plan
Search
View
Action Plan
View
Action Step
View
Edit
Close
CW Ticklers
View
Case Notes
Summary

Action Step View

Case Plan #	4443
Action Plan Title:	RESUME, INTERVIEW SKILLS, JOB SEEKING
Action Step Title:	RESUME WRITING CLASS, INTERVIEW SKILLS CLASS
Start Date:	03-15-2008
Projected Close Date:	03-24-2008
Follow-up Date:	04-14-2008
Roles:	learn how to write resumes and to be interviewed
Responsibility:	having a good resume, ready for interviews
Support Services:	job services trainng
Referral	DHS, local college
Comments:	03-15-08: client agrees to attend job services training and the writing class followed by class time for how interviews could be conducted and learning how to have a positive interview. (Intake worker's intials.
Action Step Status:	PLANNED
Action Step Completion:	Edit Action Step / Close Action Step

Case Notes OPEN (1), PRIVATE (0) View/Add Case Notes

Figure 4-17B: Action Step View screen.

If more than one step is needed for the action plan, click the ‘Add’ button again on the ‘Action Plan View’ screen and repeat the steps listed above. **Note:** Each step should have its own unique title.

5. The ‘Action Step New’ screen will appear. Enter all the pertinent information. *All fields with the red asterisk ‘*’ are required.* There is a check box for “Projected End Date” and ‘Follow-up Date’. There is a check box to ‘Create Projected Completion Date Tickler’ for a case worker to select if a reminder is desired *(reference figure 4-17A, page 92).*

6. At the bottom of the screen, ‘Case Notes’ can be added explaining specific instructions/agreement to the action step by clicking the “View/Add Case Notes” button *(reference figure 4-17B)*. The ‘Case Notes Summary View’ will appear.

Case Worker Tickler System

Case worker ticklers can be created and reviewed, unchecked to be deactivated or deleted. To create ticklers reference the sections: Action Plans’ and ‘Step Plans’ previously covered *(reference figure 4-18).*

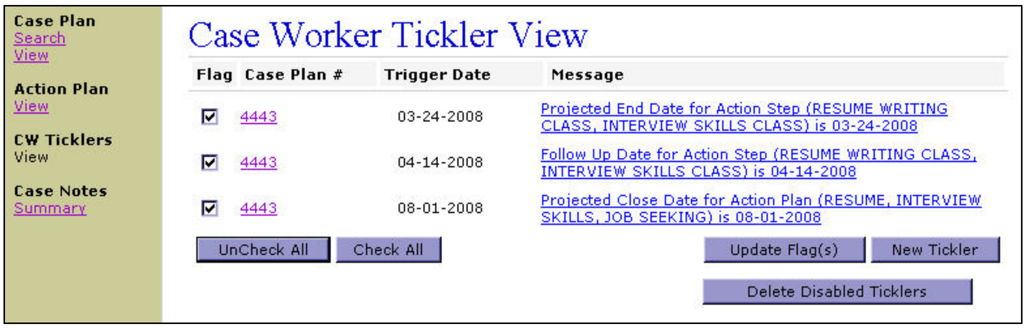


Figure 4-18: Action Step New screen – Create Tickler screen.

When the tickler has been implemented and a case worker logs into the OPUS System, a message alert box will popup on the ‘Message of the Day’ screen to remind them of items in the tickler list that need to be reviewed *(reference figure 4-19).*

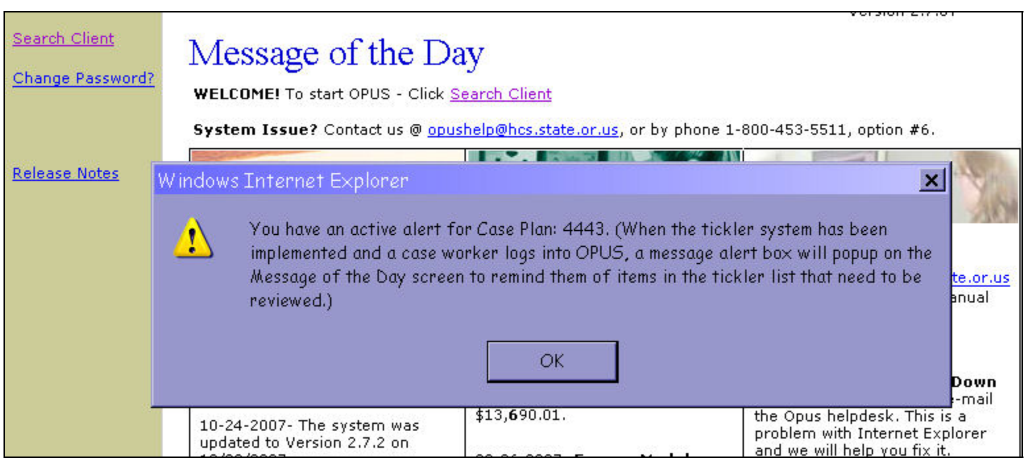


Figure 4-19: Message of the day with message alert - Case worker tickler alert screen

1. The intake worker/case worker would click the 'OK' button to close the screen and proceed to the 'Case Worker Tickler View' screen for review. On the 'Main Menu', scroll the mouse over the 'Case Mgmt', over 'Case Worker', down to and click on 'View Ticklers'. The 'Case Worker Tickler View' screen will appear *(reference figure 4-19A).*

Figure 4-19A: Main Menu – View Tickler screen.

2. The '**Case Worker Tickler View**' screen will appear. Click on the Case Plan # that you want to review *(reference figure 4-19B).*

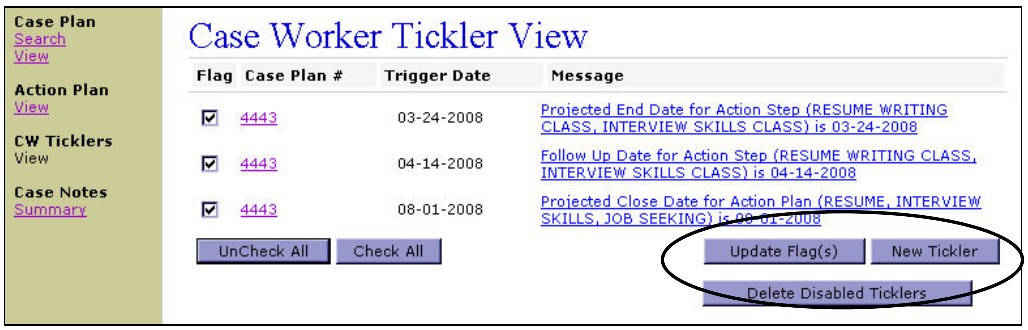


Figure 4-19B: Case Worker Tickler View – Case plan number screen.

3. Each "tickler" is a 'Flag' column followed by 'Case Plan #'. The case worker would select the 'Case Plan #' link (highlighted in a different color and underlined) to view the specific plan. If the boxes are un-checked the reminders are deactivated.

4. Case Plans may deactivated individually or click the 'UnCheck All' button. To "Save" the changes the intake worker would need to click on the 'Update Flag(s)' button. To remove a tickler permanently, make sure the tickler is not checked and click on the 'Delete Disabled Ticklers'. An intake worker could start a new tickler using this screen by clicking the "New Tickler" button *(reference figure 4-19B).*

Case Notes Summary View

If a case plan is new, not active or there may not be current case notes displayed. When there are case notes, they will be listed by owner and date with links to them so the case worker can read them based on their access privilege. Click the “Add” button, and the ‘Case Notes New’ screen will appear *(reference figure 4-20).*

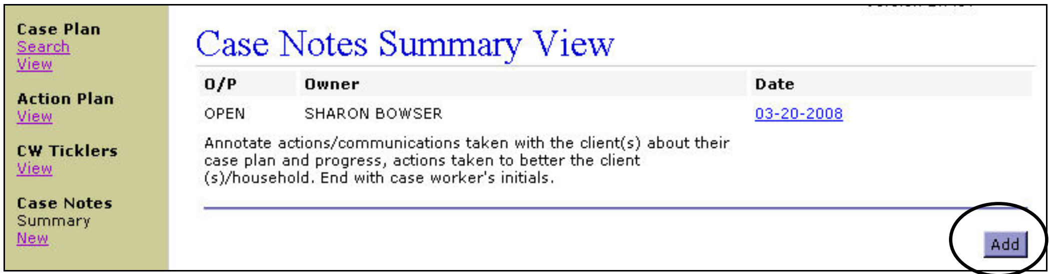


Figure 4-20: Case Notes Summary View screen.

Case Notes New

1. On the ‘Case Notes New’ screen, complete all pertinent fields. The field ‘Set Notes Security’ is for ‘Open’ or ‘Closed’ security as determined. If case notes are marked “closed”, only the intake worker who created the case notes will be able to view that record. If ‘Case Notes’ are marked ‘Open’, all users with privilege access to the client’s case plan will have access to read the case notes.

   Note: consider the sensitivity of the client’s case information when determining to select ‘Open’ or ‘Closed’ *(reference figure 4-20A).*

2. Click the ‘Save’ button.

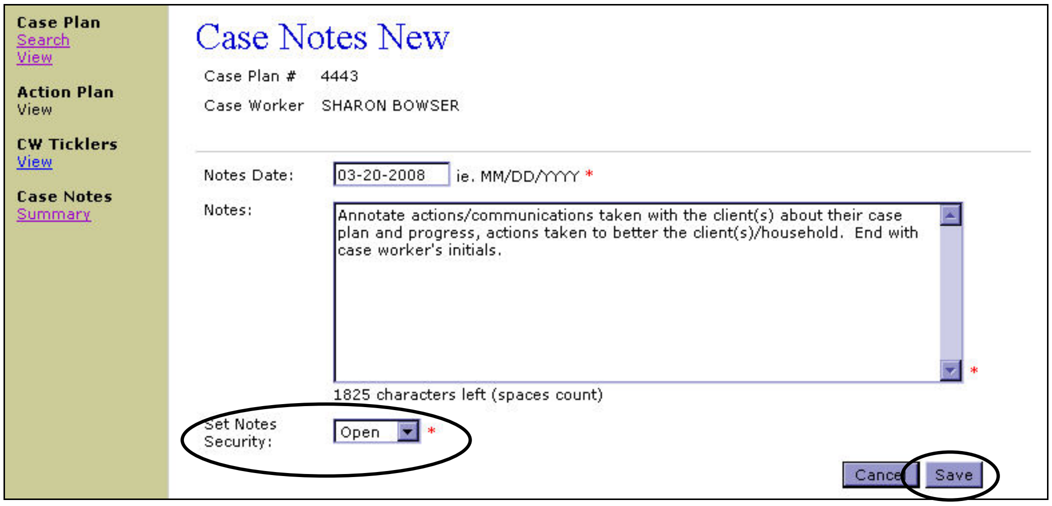


Figure 4-20A: Case Notes New screen.

Case Notes Summary View

3. The ‘Case Notes Summary View’ screen will appear (reference figure 4-20B). To add another note, click the “Add” button and repeat the above steps.

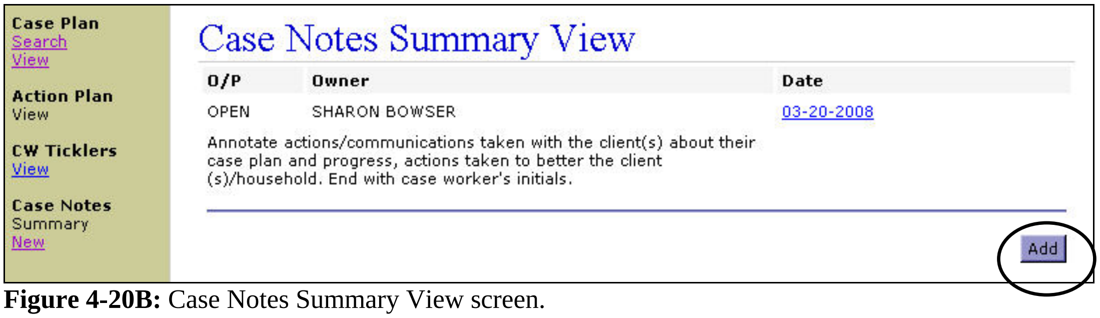


Figure 4-20B: Case Notes Summary View screen.

M1 Section Five

Agency Management Functions

Program coordinators and managers will learn how to use the management screens: Agency, Program, Grant, APC, User and Vendor. Most screens are processes that involve setting up programs funded thru OHCS, local programs which are temporary or agency match funds that are used to assist low income families to pay energy bills.

Topics marked with an * above are fully explained in detail in the "**How to Setup a Local Program**" section of the manager's manual.

Agency Screens

All SSNs throughout this manual have be covered for confidentiality purposes even though the test database was used.

The ‘Agency’ screen allows information to be updated or to add new records for an agency such as address, phone, etc. There are four Agency screen types: Search, Edit, View and New.

Agency Search

The ‘Agency Search’ screen has fields to search by agency name, address, abbreviation, city and phone.

Setup:
On the ‘Message of the Day’ screen.

1. Using the ‘Main Menu’, scroll the mouse over ‘Management’. The drop-down menu will appear, click on ‘Agency’ *(reference figure 5-1)*. The ‘Agency Search’ screen will appear next.
2. Enter the required agency abbreviation or name. Example: ABBR: ‘OHCS’, click the ‘Search’ button *(see Figure 5-1A)*.
3. The agency entered will be displayed in the results. Click on the ‘Agency Name’ to open the ‘Agency View’ screen.

Figure 5-1: Main Menu, Management – Agency screen.

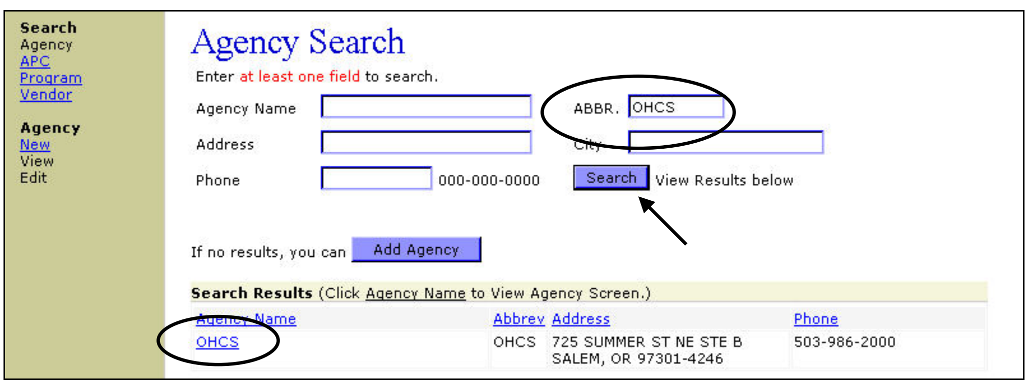


Figure 5-1A: Agency Search screen

Note: If the agency name doesn’t appear in the ‘Search Results’, a new agency can be created by following steps in section titled **Agency New** *(reference figure 5-2)*.

Agency View

The ‘Agency View’ screen *(reference figure 5-2)* provides a view only screen with the agency information. To edit an agency’s information, click the ‘Edit Agency’ button on right-side of screen, or on the ‘Left Nav Bar’. The ‘Agency Edit’ screen will appear next.

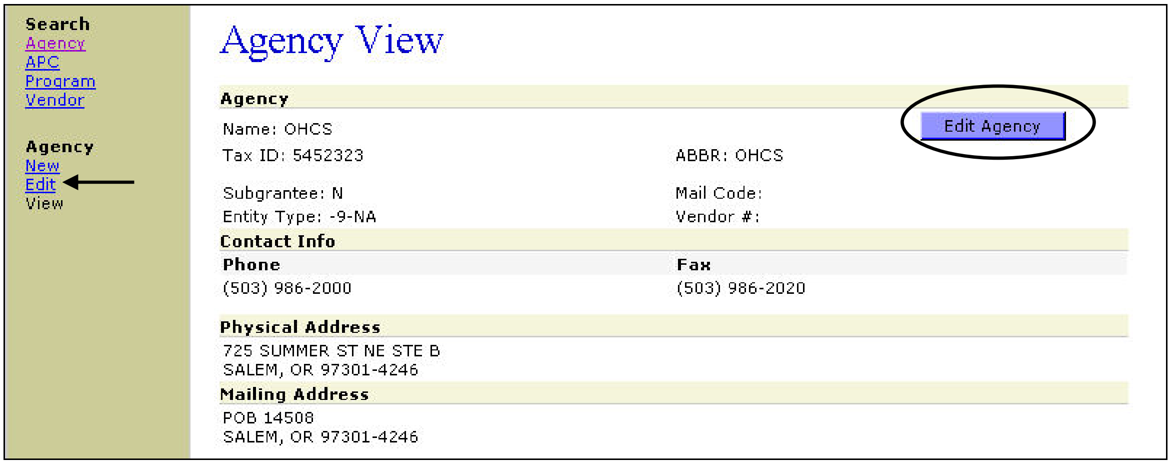


Figure 5-2: Agency View

Agency Edit

The ‘Agency Edit’ screen provides editing capability to enter or update information.

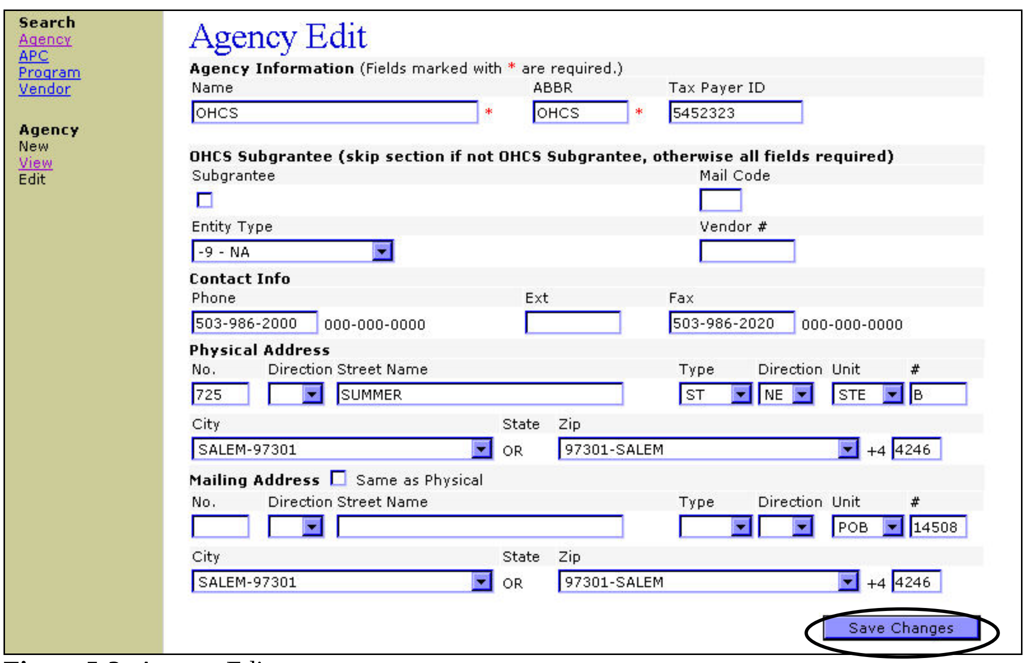


Figure 5-3: Agency Edit screen.

Setup:
On the 'Agency Edit' screen *(reference figure 5-3)*. The following fields can be updated. **Note:** *All fields marked * are required* before saving.

- Agency Name
- Agency Abbreviation
- Agency tax payer ID
- Contact Phone and Fax numbers
- Physical address
- Mailing address

Click the 'Save Changes' button. The 'Agency View' screen will appear next with the updated information.

Agency New

Setup:
Using the 'Agency Search' screen, the agency in question did not appear. The 'Search Results' displays 'No matches'. To create a new agency follow the steps listed:

1. On the 'Left Nav Bar', under 'Agency, click the 'New' link or click on 'Add Agency' *(reference figure 5-4).*

Figure 5-4: Agency Search, No match – New screen.

The ‘Agency New’ screen will appear next *(reference figure 5-5)*.

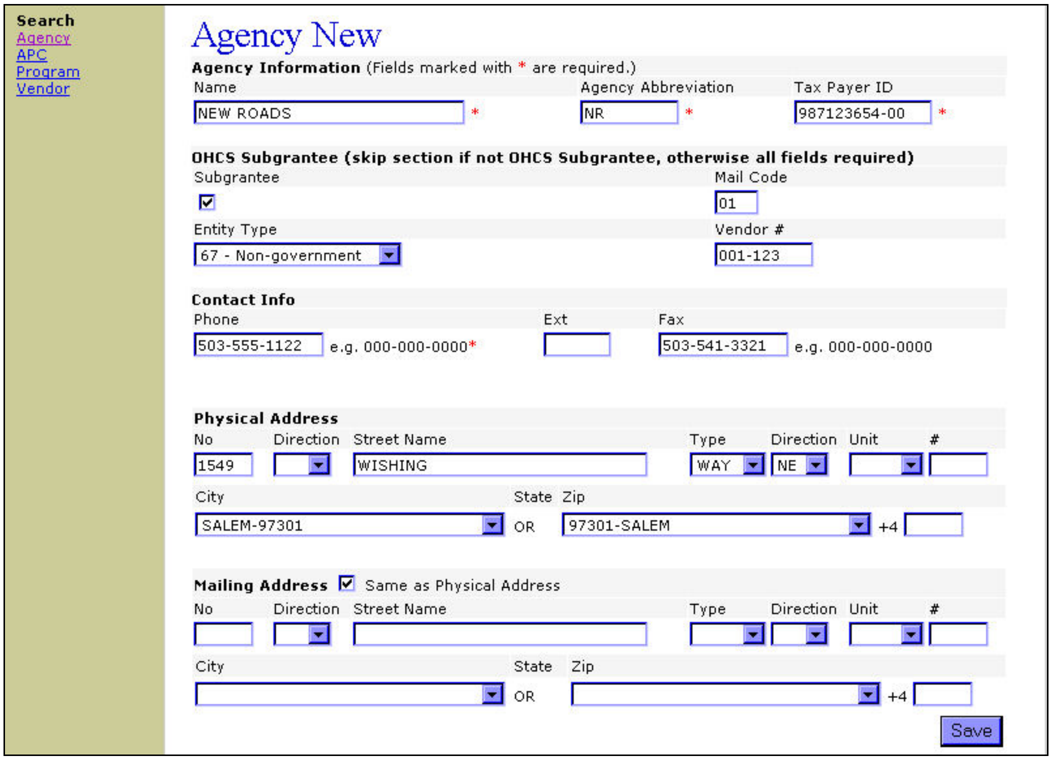


Figure 5-5: Agency New screen.

2. Enter or Select *(all fields marked * are required)*.

- Agency Name
- Agency Abbreviation
- Tax Payer ID
- Contact Phone and Fax numbers
- Physical address
- Mailing address

3. Click ‘Save’ button.

Program Screens

Program screens allow an agency to update or create local programs in OPUS. There are four program screen types: ‘Search’, ‘View’, ‘Edit’ and ‘New’.

In most cases, programs have already been created in OPUS for agencies by OHCS so that an agency can utilize it in the system. OPUS has been developed specifically for OHCS managed programs.

At the agency level, if additional third party grant funds become available, the OPUS system can be utilized for local grant programs. Agencies must use the LIEAP-OEA module business rules and reports.

To learn more on how to setup a local program in OPUS, reference the section titled '**Setting up a Local Program**' of this management manual.

Program Search View

Setup:

On the 'Message of the Day' screen.

1. Using the 'Main Menu', scroll the mouse over 'Management' and click 'Program' from the drop down menu *(reference figure 5-6)*. The 'Program Search View' screen will appear *(reference figure 5-6A)*.

2. Enter a program name, in the *example*, "LIEAP 2008 was entered and located in the database. The 'Program Search' works as *both* a search and a view screen.

Note: A program is created with basic components: Program Code, Program/Name, Start Date and End Date.

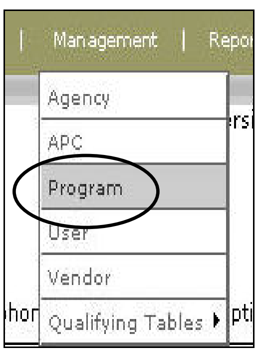


Figure 5-6: Program

Figure 5-6A: Program Search View screen.

Program Edit

An example of why a program would need to be edited might be if program dates need to be extended due to an agency receiving additional funds after the original creation date. An OPUS user with ‘Manager’ permissions can revise a program end date so that the program can be extended in order to be used for additional client assistance payments. To edit a program, click the ‘Program Code’ link under ‘Search Results’ *(reference figure 5-6A)* and the ‘Program Edit’ screen will appear next *(reference figure 5-7).*

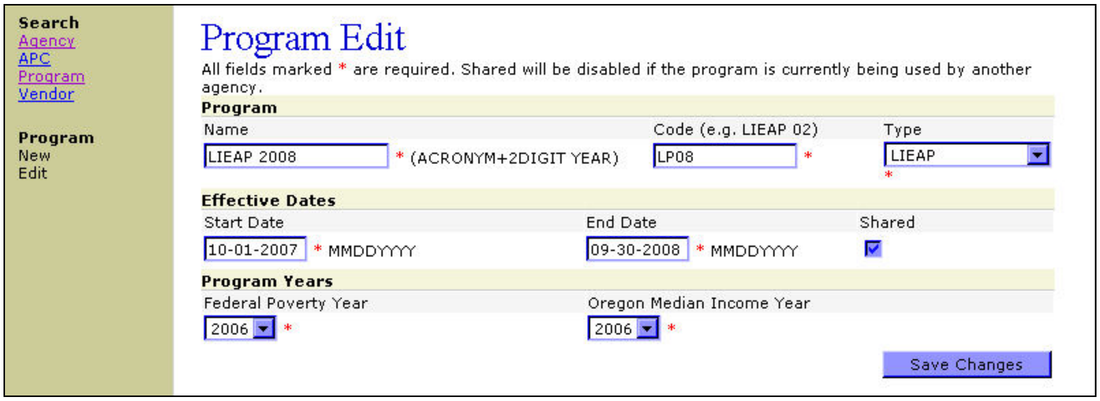


Figure 5-7: Program Edit screen.

Follow the steps below to edit a program *all fields marked * are required*.

1. Enter or Select:
- Program Name
- Program Code
- Effective Program Start Date
- Effective Program End Date
- Program Federal Poverty Year
- Program Oregon Median Income Year

2. Click ‘Save Changes’ button to save The ‘Program View’ screen will appear next with the changes completed.

Program New

An OPUS user with manager permissions can create new programs. Always search for the program prior to creating new programs to prevent creating duplicate programs. The following steps are instruction to create a new program in OPUS.

Setup:

On the 'Message of the Day' screen. Use the same steps in section **"Program Search View"** ***(reference figure 5-6 and 5-6A)***, **Page 96.**

1. **1.** Using the 'Main Menu', scroll the mouse over 'Management' and click 'Program' from the dropdown menu. The 'Program Search View' screen will appear *(reference figure 5-8).*
2. **2.** Search for the desired program name to see if it exists in the OPUS database.

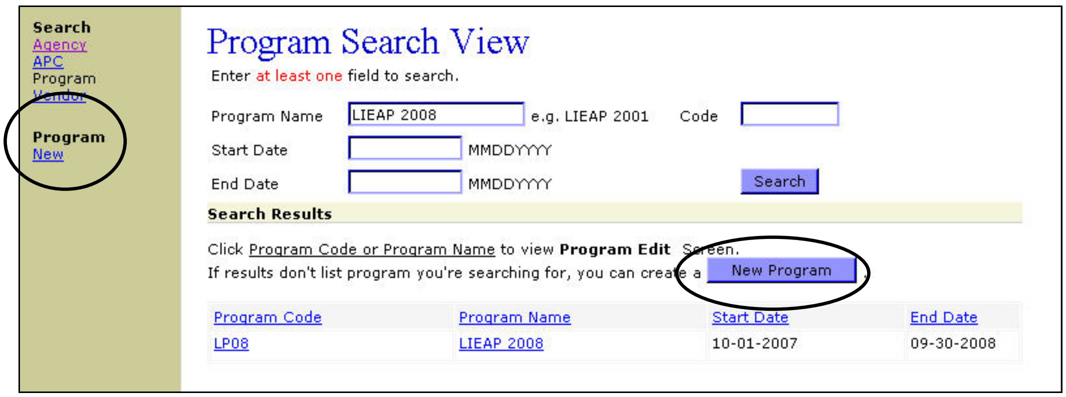


Figure 5-8: Program Search View – New screen.

3. **3.** If 'No Results' was determined under the 'Program Code', click the 'New Program' button or click the "New" link under 'Program' on the 'Left Nav Bar'. The 'Program New' screen will appear next *(reference figure 5-9).*

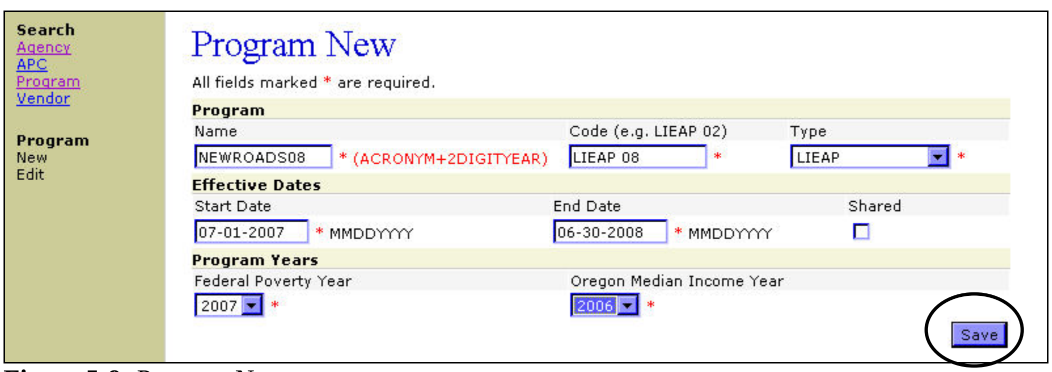


Figure 5-9: Program New screen.

4. **4.** Enter or Select the following: *all fields marked * are required.*
   - Program Name
   - Program Code
   - Program Type
   - Start Date and End Date
   - Program Year for calculations
   - Oregon Median Income Year

5. Click the ‘Save’ button. The ‘Program Search View’ screen will appear next. Search for the new program created. **Note:** Enter at least one field to search. *Example:* enter the ‘Code’ “LIEAP” and “Start and End date”. Click the ‘Search’ button. The ‘Program Edit’ screen will appear with ‘Search Results’ listed *(reference figure 5-10).*

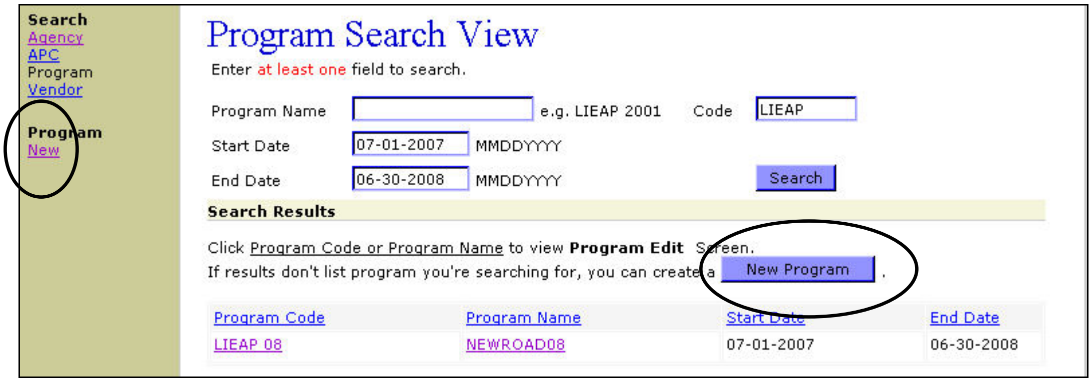


Figure 5-10: Program Search View with results screen.

6. Click on the Program “New” link or click on ‘New Program’ button *(reference figure 5-10)* and the ‘Program New’ screen will open. Complete the required fields, then click ‘Save’ *(reference figure 5-10A).*

Figure 5-10A: Program New screen

After clicking on the ‘Save’ button, the ‘Program View’ screen will appear. Use this screen to verify the program information. If the program information requires editing, click on ‘Edit Program’ button. *(reference figure 5-10B).*

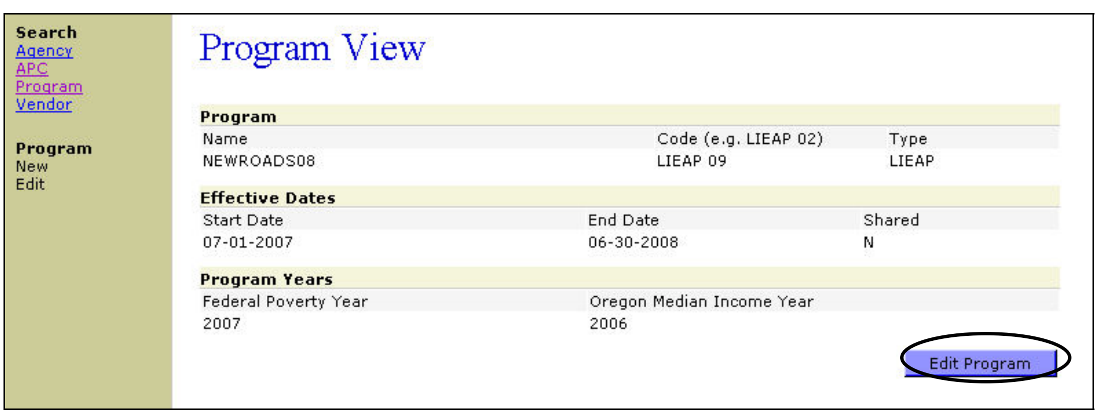


Figure 5:10B: Program View New completed screen

The ‘Program Edit’ screen will open. Make corrections and click ‘Save Changes’ *(reference figure 5-11).*

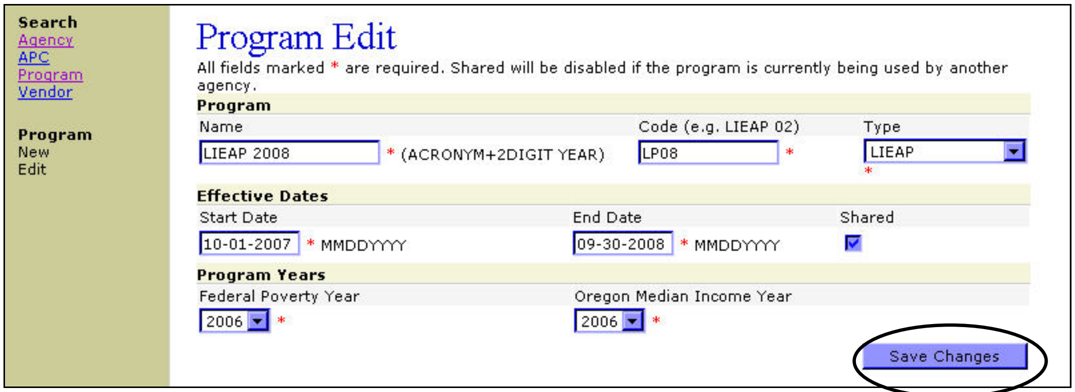


Figure 5-11: Program Edit screen.

APC Screens

The acronym APC stands for ‘Agency, Program, County’. The ‘APC’ screens allow a manager to update information about an agency’s program details such as: which grant a program is affiliated with, which agencies utilize a specific program, and whether to change the start and end dates of an APC in order to be used for specific time periods, such as a program operation year. There are four APC screen types: ‘Search’, ‘Edit’, ‘View’ and ‘New’. The APC tree structure is best explained in the section ‘**Setting up a Local Program in OPUS**’ in the user manual, Management Section.

APC Search

The ‘APC Search’ screen searches by the following criteria: ‘Agency’, ‘County’, ‘Program’, ‘Grant’, ‘Start date and End date’.

Setup:

On the Message of the Day screen.

1. Using the ‘Main Menu’, scroll the mouse over ‘Management’ and click on the APC item *(reference figure 5-12)*. The ‘APC Search’ screen will appear.

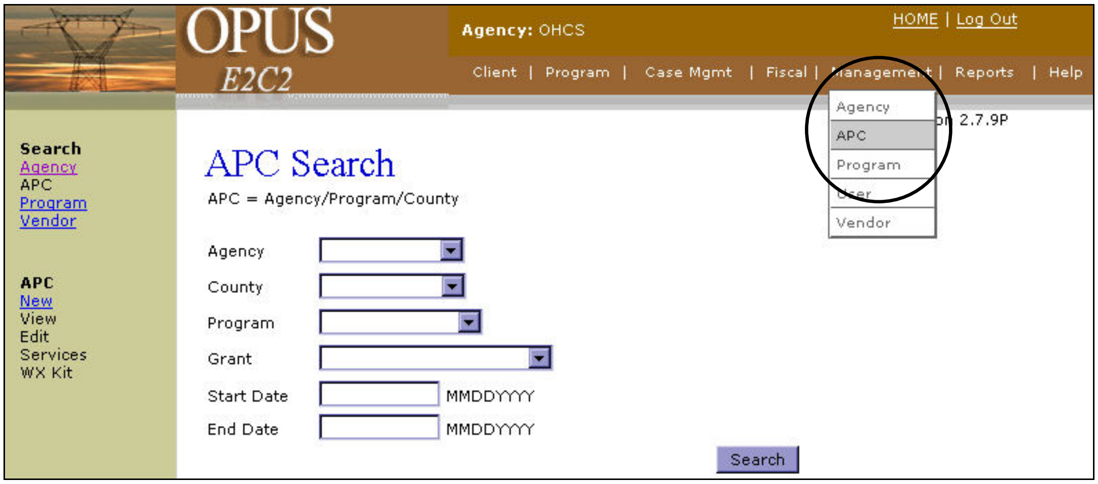


Figure 5-12: APC Search screen.

2. Enter specified information in one of the cells to initiate a search. Example: the program 'E2C2 was entered then clicked on 'Search' with a positive search results *(reference figure 5-13).*

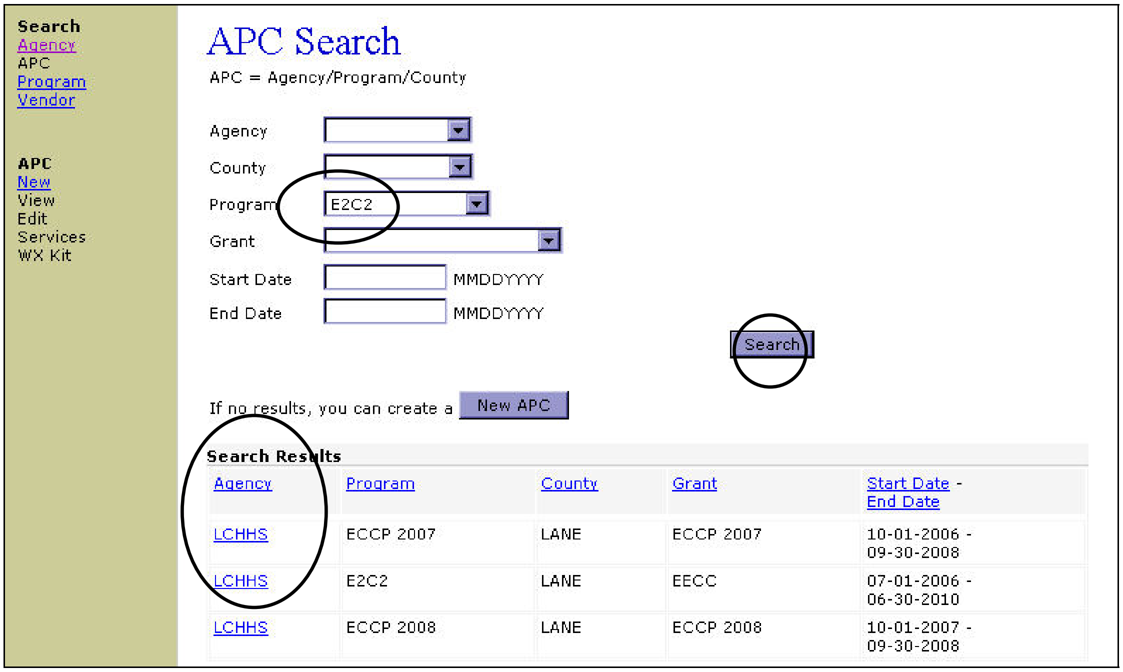


Figure 5-13: APC Search with Results screen. Agencies with and without Counties.

At this time, an APC can be viewed, edited or deleted (reference figure 5-14).

An APC *<u>without</u>* a county denotes a 'Parent level' APC. An APC *<u>with</u>* a county denotes the APC is a 'Child level' APC. Both are displayed with a start date and end date for the program. To edit an APC, click the 'Agency' name and the 'APC View' screen will display.

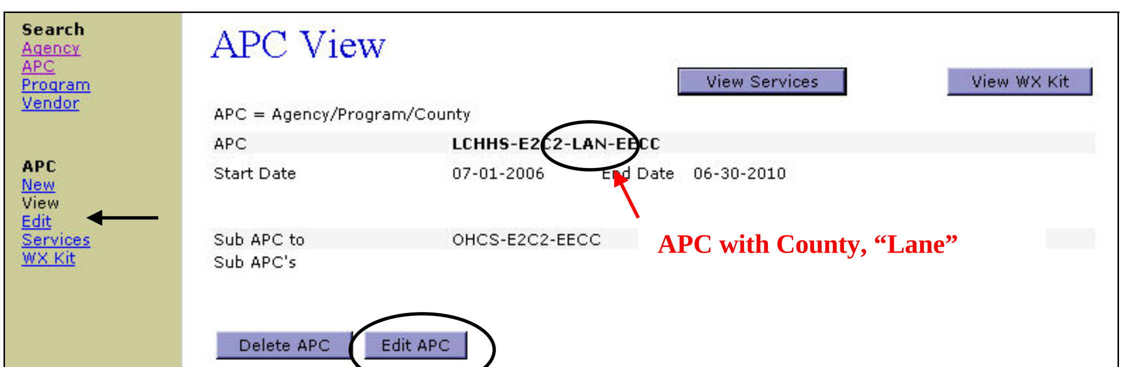


Figure 5-14: APC View with County screen.

APC View

The ‘APC View’ screen provides a brief overview of a ‘Parent APC’ selected from the search screen *(reference figure 5-15)*. To “View an ‘APC’, *follow the step listed in* **‘APC Search’**.

APC Edit

An ‘APC’ can be edited if an ‘APC’ start or end date requires revised or extended. To edit an ‘APC’, follow the steps below:

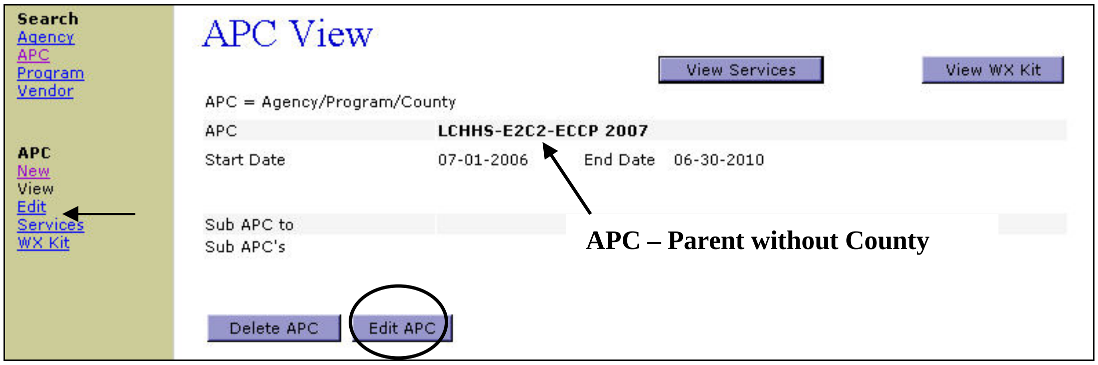


Figure 5-15: APC View to Edit screen.

Setup:

1. Using the ‘APC View’ screen, click the ‘Edit APC’ button or click the ‘Edit’ link on the ‘Left Nav Bar’, under APC *(reference figure 5-15)*. The ‘APC Edit’ screen will display *(reference figure 5-15A)*. In most cases, program end dates are extended so an ‘APC’ is functional and allows clients to receive future program assistance.

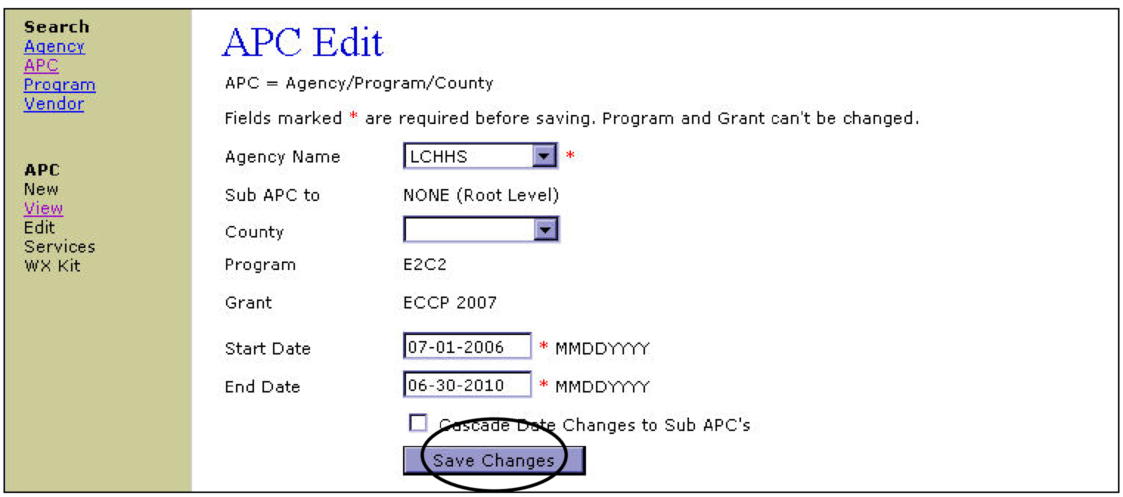


Figure 5-15A: APC Edit in process screen.

2. Click the ‘Save Changes’ button. The ‘APC View’ screen will return with the changes.

APC New

In most cases, OHCS will have set up most agencies 'APC' tree structures in OPUS. The OPUS system can be used by agency managers to set up local programs using the built-in LIEAP-OEA business rules and reports. For local program guidelines, use the specific instructions in the manual's section titled, "**Setting Up a Local Program in OPUS**".

Setup:

On the 'APC Search' screen.

1. Using the 'Left Nav Bar', click the 'New' link under APC *(referenced figure 5-16)*. The "APC New' screen will appear *(reference figure 5-16)*.

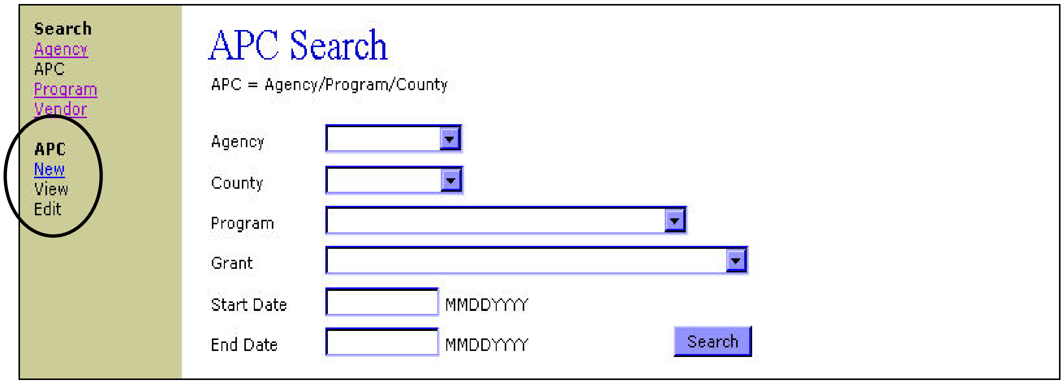


Figure 5-16: APC Search – New screen.

2. Select the following:

- Agency name.
- Sub Agency to. Note: If a "Child Level APC" is being created, select "Sub Agency to" and select the "Parent APC" which is the main agency receiving the funds to hand down to a sub-agency.
- County. **Note:** If a "Parent Level APC" is being created, leave the 'County' option blank.
- Program.
- Grant.
- Start and end date.

3. Click the 'Save' button. The 'APC View' screen will appear *(reference figure 5-16A)*.

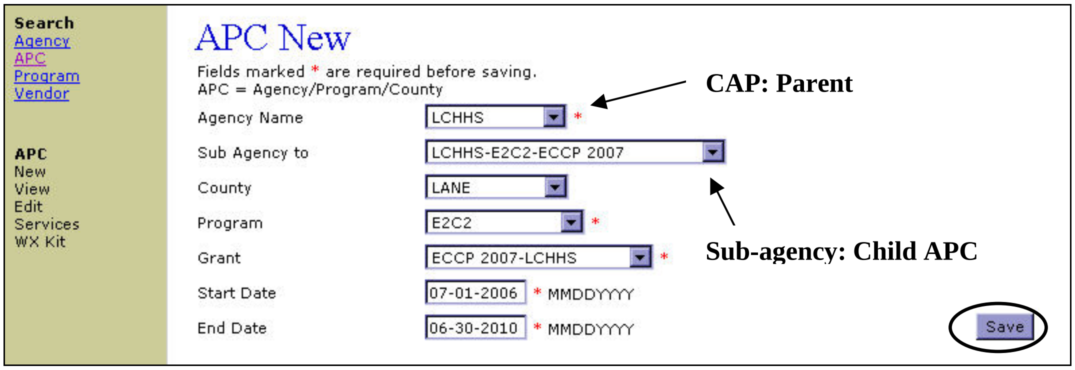


Figure 5-16A: APC New (filled in) screen.

User Screens

A manager sets up user accounts and roles (permissions) in the OPUS system for the agency staff. Staff roles and actions depend on what job functions are to be performed by an individual working in OPUS. Some users will have minimum; view only access. Some users will need additional roles to process client intakes and/or reports. Some users will have additional roles for management functions. There are six types of 'User' screens: 'Search', 'New', 'View', 'Edit', 'User Role Edit' and 'User Action Edit'.

User Search

The 'User Search' screen allows a manager and/or another user to search for a person who is registered in OPUS.

Setup:

On the 'Message of the Day' screen.

1. Using the 'Main Menu', scroll the mouse over 'Management', down to and click 'User' *(reference figure 5-17)*. The 'User Search' screen will appear next *(reference figure 5-217A)*.

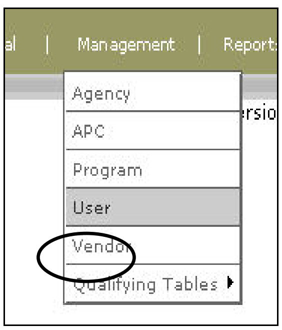


Figure 5-17: User Menu

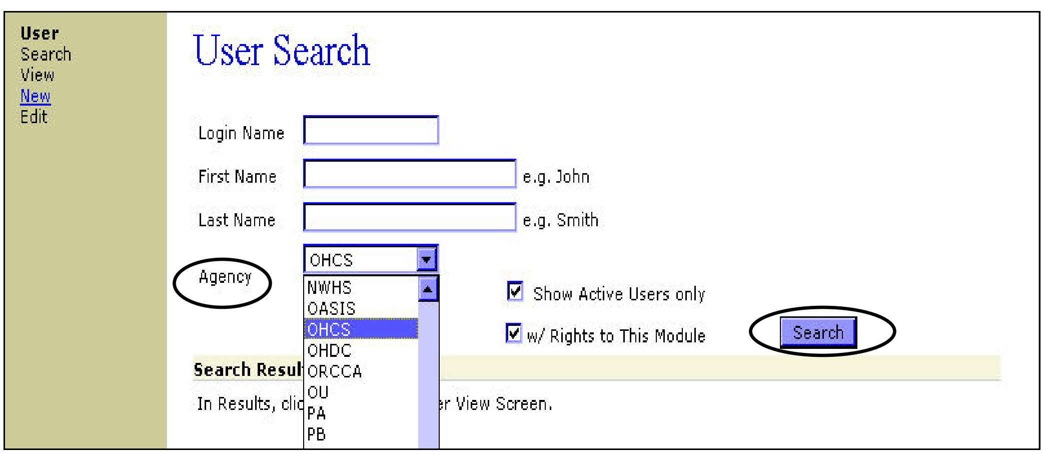


Figure 5-17A: User Search by agency screen.

2. Enter a users name or search by ‘Agency’. **Note:** Parent agencies have access to sub-agency staff within their structure. To search by ‘Agency’, use the drop-down arrow and select the appropriate agency and click ‘Search’. To search by user name, type in the first and/or last name then click ‘Search’.
A list of staff members will appear in the ‘Search Results’. In the ‘Search Results’, user names can be placed in alphabetical order by first name, last name or login name by clicking on the link(s). Then click the ‘Search’ button *(reference figure 5-17B).*

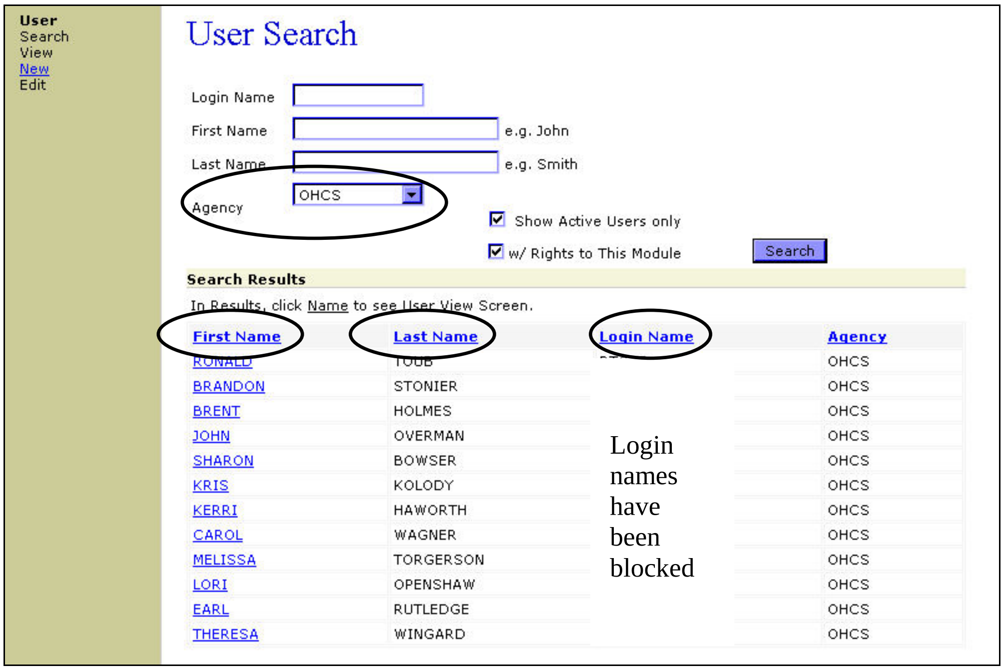


Figure 5-17B: User Search with Search Results screen.

3. Click on a name to see ‘User View’ screen. The ‘User View’ screen allows a manger to view an individual user’s roles *(reference figure 5-17C).*

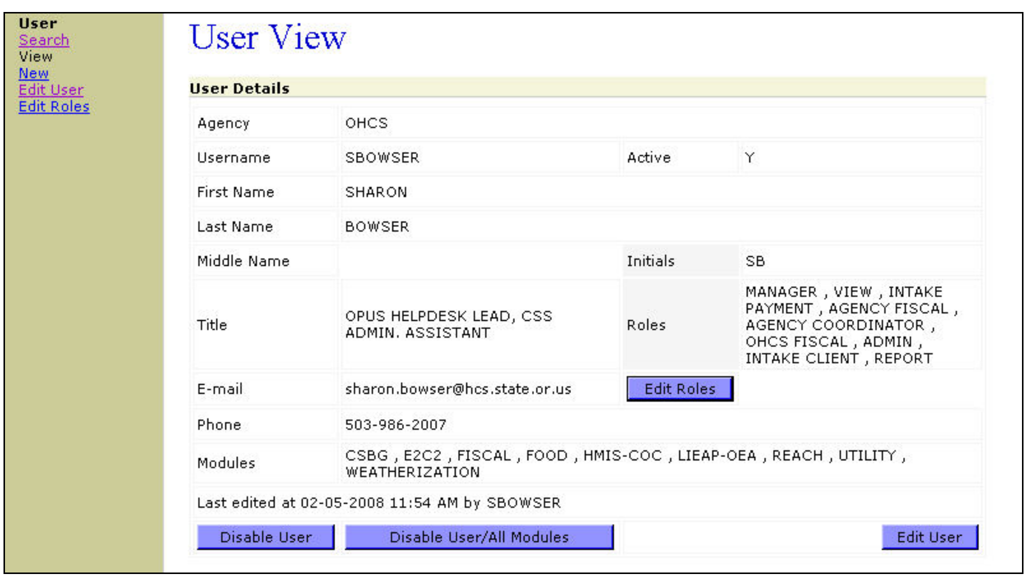


Figure 5-17C: User View screen.

Possible Disabled User

IMPORTANT NOTE: If there is a possibility that a user might have been enrolled before in OPUS but a search results indicates no match, follow these steps:

1. Reference the procedure 'User Search'. In 'Search Results', if a specific user's name does not appear, click the boxes "Show Active Users Only" and "w/Rights to This Module", removing the 'Checkmark' then click 'Search *(reference figure 5-17)*.

   These steps will allow an agency's users to appear regardless what module the user has permission to work in and it will show all users who have been disabled. To reactivate a disabled user, reference the 'Reactivate a User' section listed below.

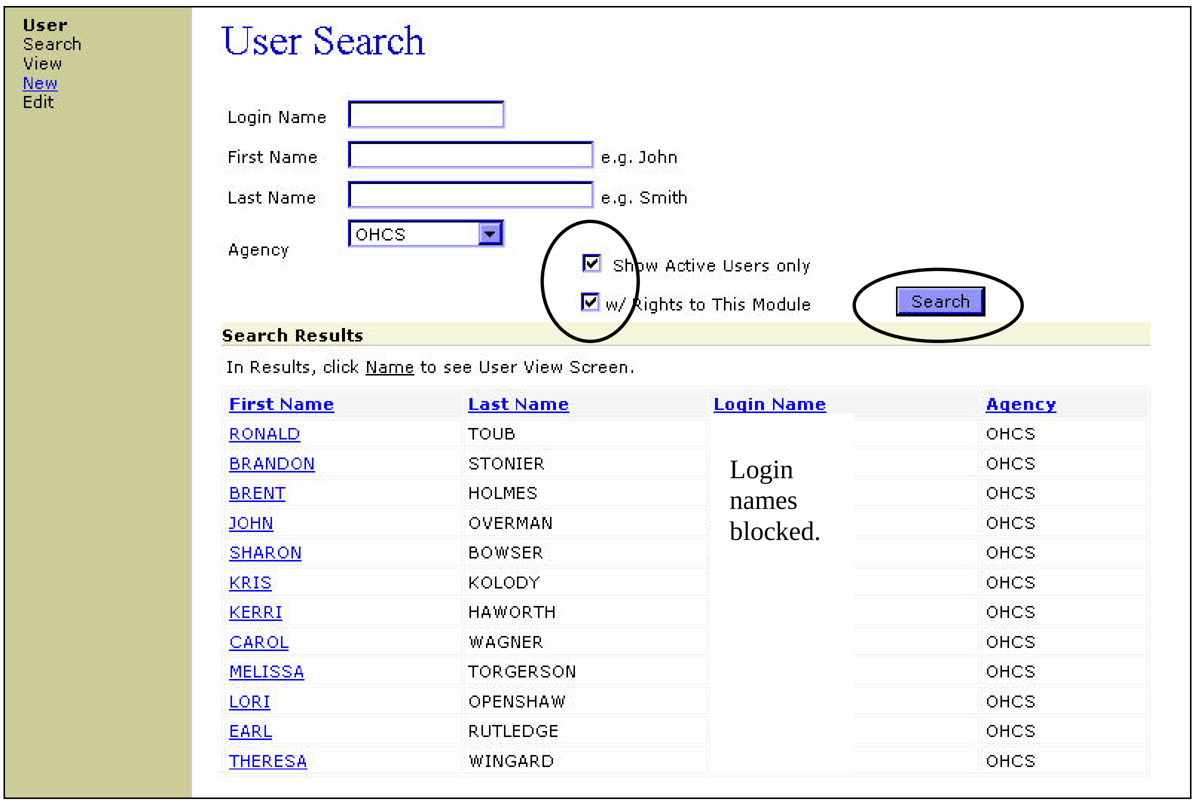


Figure 5-17: Searching for users, Active users and rights to the module screen.

2. If there are no matches found in the database, a manager can create a new user.

User New

The User New Screen allows a manager to create a new user in the OPUS System.

Setup:

On the 'User Search' screen.

1. Using the left Nav Bar, under 'User', click 'New' *(reference figure 5-18)*. The 'User New' screen will appear next *(reference figure 5-18B)*.

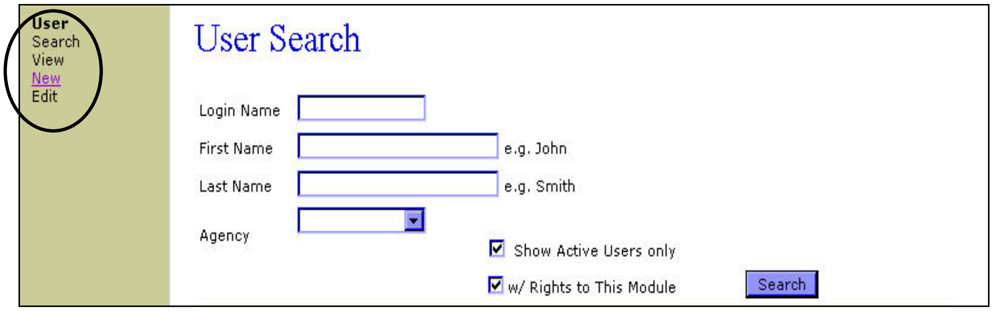


Figure 5-18: User Search – New User screen.

Type or select *(all fields marked * are required)*.

- User name. **Note:** Refer to the User name and password requirements link.
- First name.
- Last name.
- Middle name or initial (optional).
- Initials.
- Title.
- Role - includes the "Permission Levels" by screen.
- E-mail. This is optional **<u>but</u> Note:** OHCS communicates regularly via e-mail. OPUS Broadcasts are via e-mail along with announcements. Make sure the e-mail address is correct. ****OPUS Broadcasts are announcements from OHCS stating something is wrong or something is being worked on, updated or fixed. OPUS Broadcasts are done on 'URGENT' basis only. Read all OPUS Broadcast.
- Phone and Extension if applicable.
- Agency.

Click the 'Save' button. The User View screen will appear next.

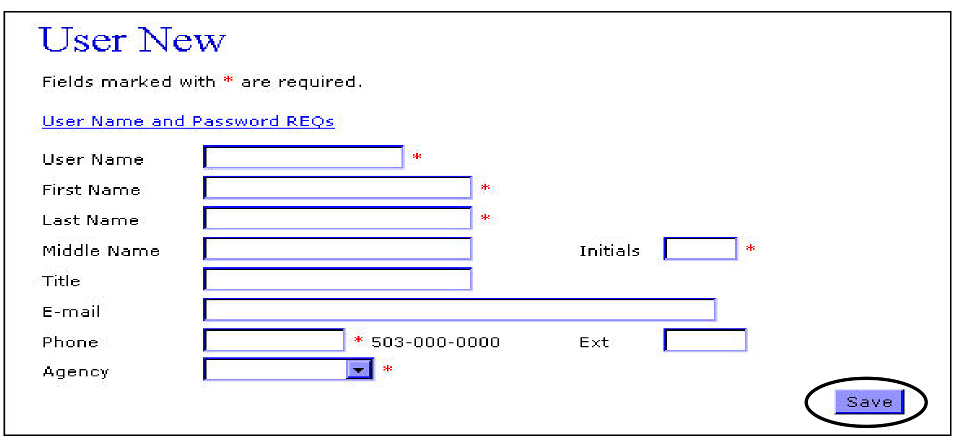


Figure 5-18B: User New screen.

User View

The 'User View' screen allows a manager to view or edit information on an individual user and to view 'Roles' (permission level) a user has been assigned *(reference figure 5-19)*. To edit roles, follow the instructions listed below.

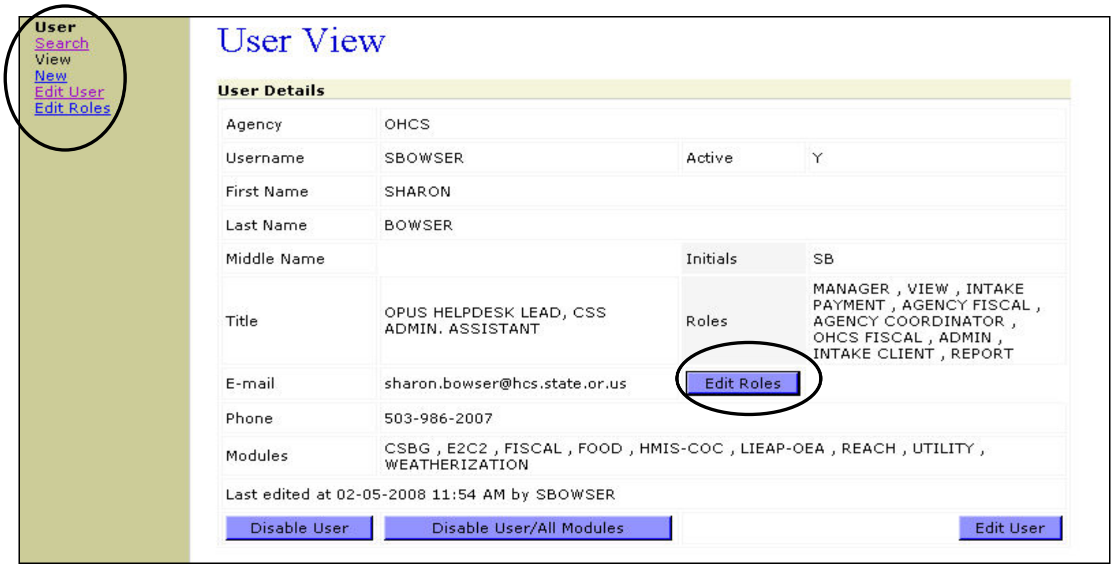


Figure 5-19: User View – to Edit screen.

User Role Edit

The 'User Role Edit' screen allows a manager to grant or adjust the roles and actions a user has access to on a as needed basis, per screen or assigned task. To edit user roles and actions, follow the steps below.

Note: There are two steps issuing roles. The first step is establishing permissions for a user. For each role there is a default set of actions, which initially allows permissions to ***all*** the actions associated within the specific role.

Setup:

1. On the 'User View' screen, click the 'Edit Roles' button or click on the 'Edit Roles' link in the Left Nav Bar *(reference figure 5-19, above)*. The 'User Role Edit' screen will appear *(reference figure 5-19A)*.

2. On the 'User Role Edit' screen, select the role(s) the user will have access to then click the 'Update' button to apply the roles. The 'User View' screen will appear again. The 'Roles' are now listed in the 'User View' screen.

If the user needs all the default permissions associated with a given role, there is no need to do any further steps. There may be times when a user *needs* additional permissions within a role so they can do specific actions within a specific role.

At the same time, there might be permissions within a specific role that a user *does not* need access to perform. To customize permissions within a role, follow the instructions below.

User Action Edit

Setup:

On the 'User Role Edit' screen.

1. Click on 'Edit Actions'. The 'User Role Action Edit' screen will appear *(reference figure 5-19B).*

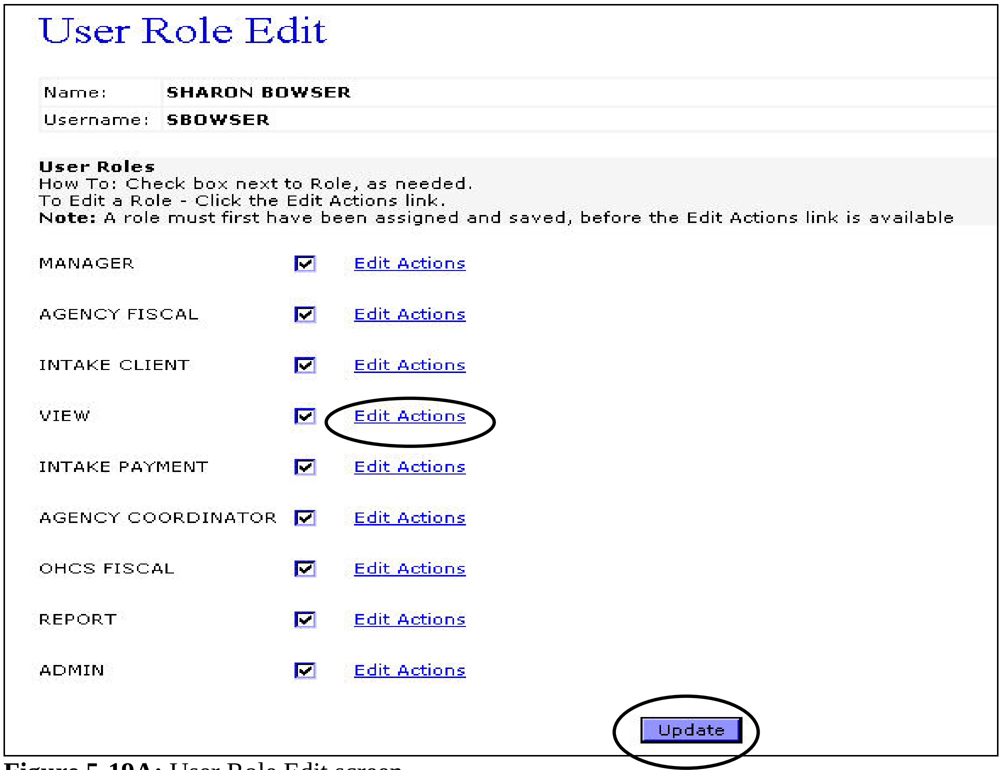


Figure 5-19A: User Role Edit screen.

2. On the ‘User Role Action Edit’ screen, a manager can ‘Allow’ or ‘Deny’ permissions within any specific role. The permissions are decided by the OPUS Administrator and Manager(s) of the agencies. Once permissions have been assigned, click the ‘Save’ button. The ‘User View’ screen will appear. This step needs to be repeated for each specific role that requires permission within it to be edited *(reference figure 5-19B)*.

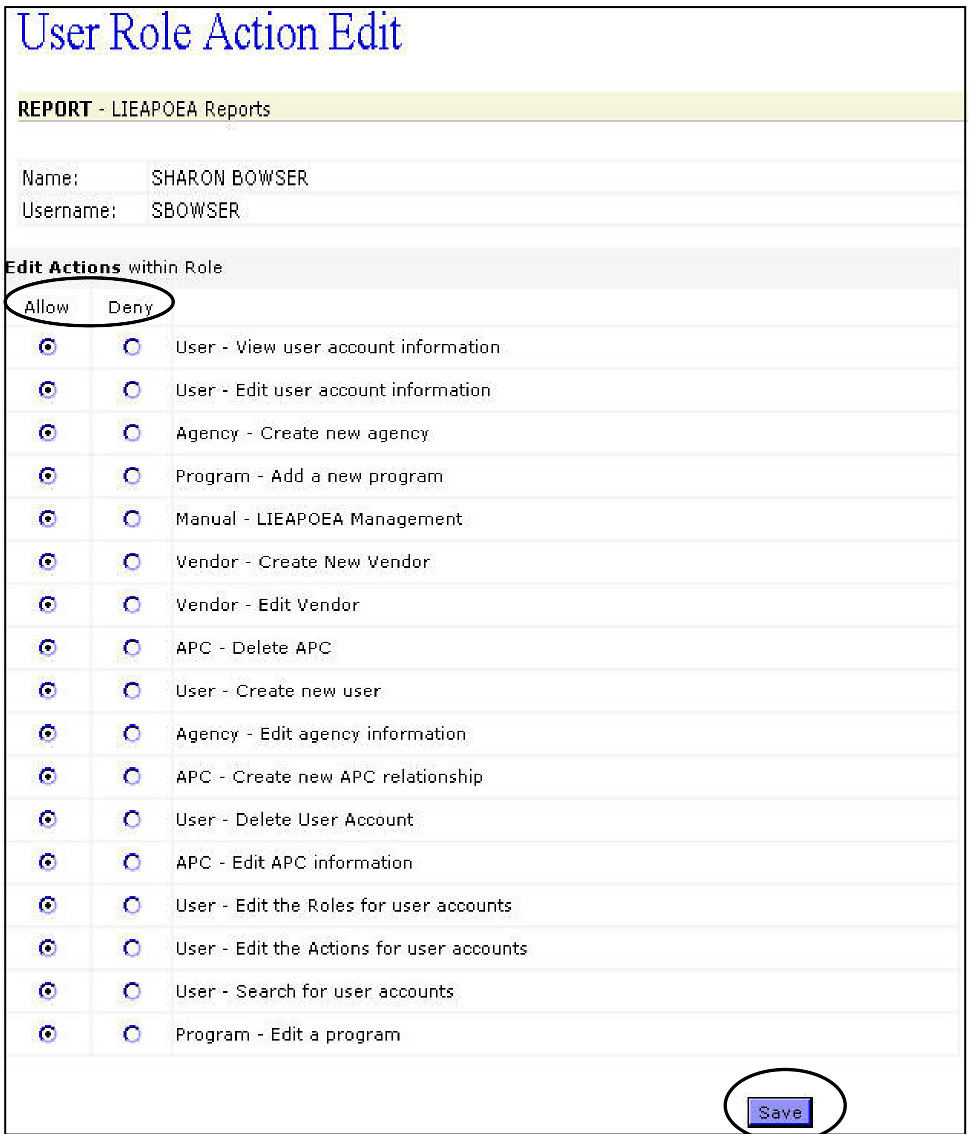


Figure 5-19B: User Role Edit screen.

Delete User

When users are deleted, the user's name is basically cancelled. The user's name stays in the database in an inactive list and is never really deleted. To locate a user that could have been deleted, refer to 'Possible Deleted User' previously discussed.

To cancel a user account, a manager will click the 'Disable User' or 'Disable User/All Modules' button *(reference figure 5-19C)*. For user(s) who have access to multiple modules, it's best to use 'Disable User/All Modules'.

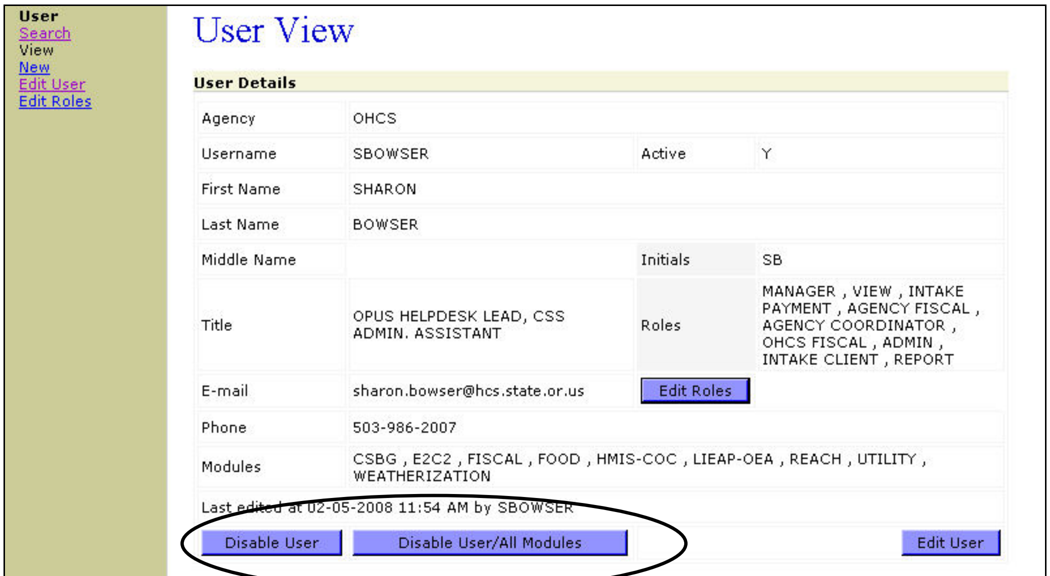


Figure 5-19C: User View Delete User screen.

Reset User Password

Setup:

1. Using the 'User View', click the 'Edit User' button or the 'Edit User' link in the Left Nav Bar *(reference figure 5-20)*. The 'User Edit' screen will appear *(reference figure 5-21)*.

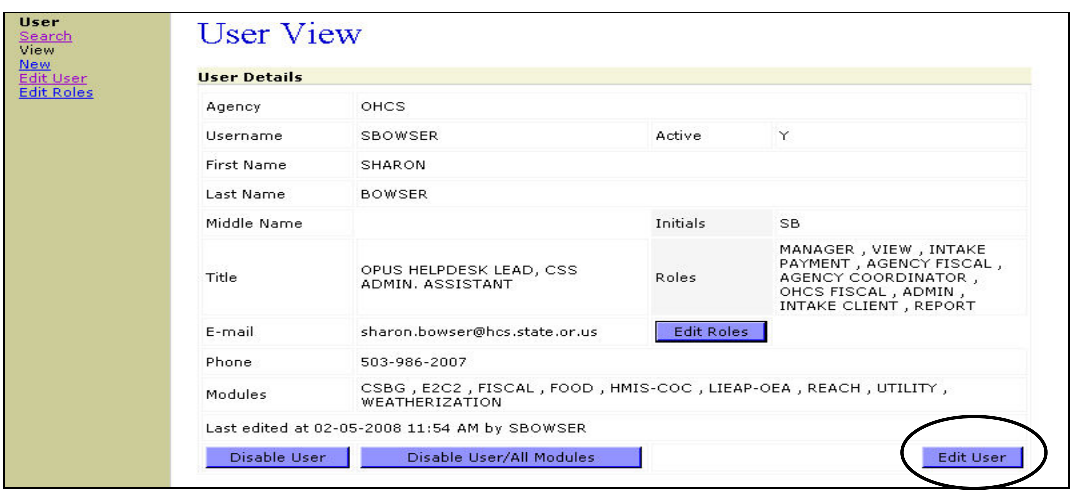


Figure 5-20: User View screen.

2. On the ‘User Edit’ screen, check box "Reset password". A manager would use this feature if a current user forgot the password or if an agency has a policy to reset passwords for routine reasons *(reference figure 5-21)*.

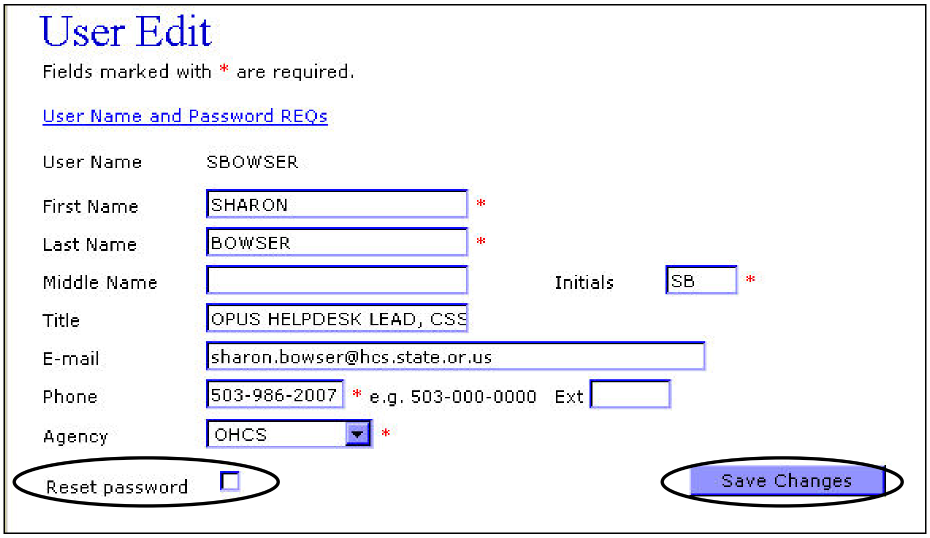


Figure 5-21: User Edit – Reset Password screen.

3. Click the ‘Save Changes’ button. The User View screen will display. The user will need to log in the next time with a temporary password (reference **Section One - Basic Operations**).

Vendor Screens

The vendor screens allow a manager to setup and/or update information for program vendors; such as address, phone, etc. There are four vendor screen types: 'Search', 'Edit', 'View' and 'New'.

Vendor Search

The LIEAP-OEA module has many vendor records in the database. *Always* search for a vendor to see if it exists before creating a new one.

Setup:
One the 'Message of the Day' screen.

1. Using the 'Main Menu', scroll the mouse over 'Management' down and click on 'Vendor' *(reference figure 5-22)*. The 'Vendor Search' screen will appear *(reference figure 5-22A)*.

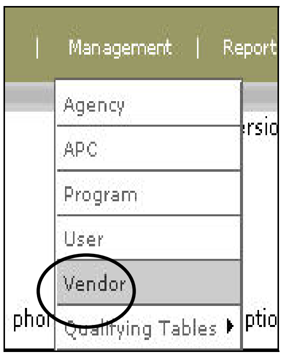


Figure 5-22: Vendor Search

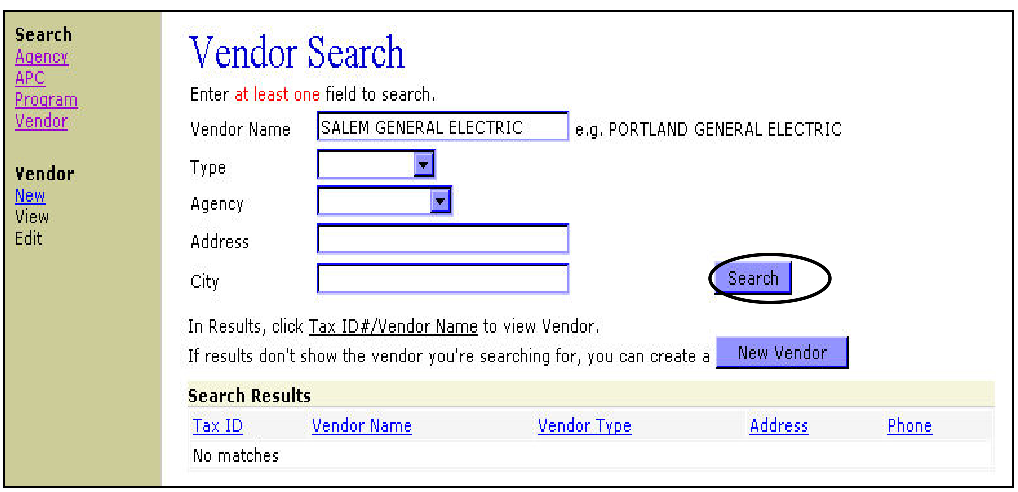


Figure 5-22A: Vendor Search screen.

2. Enter at least one of the following:
- Vendor Name
- Type of service

3. If the vendor exists, it will display in the ‘Search Results’. Click on the required ‘Vendor Name’ in the ‘Search Results’ *(reference figure 5-23)*, the ‘Vendor View’ screen will appear *(reference figure 5-25)*.

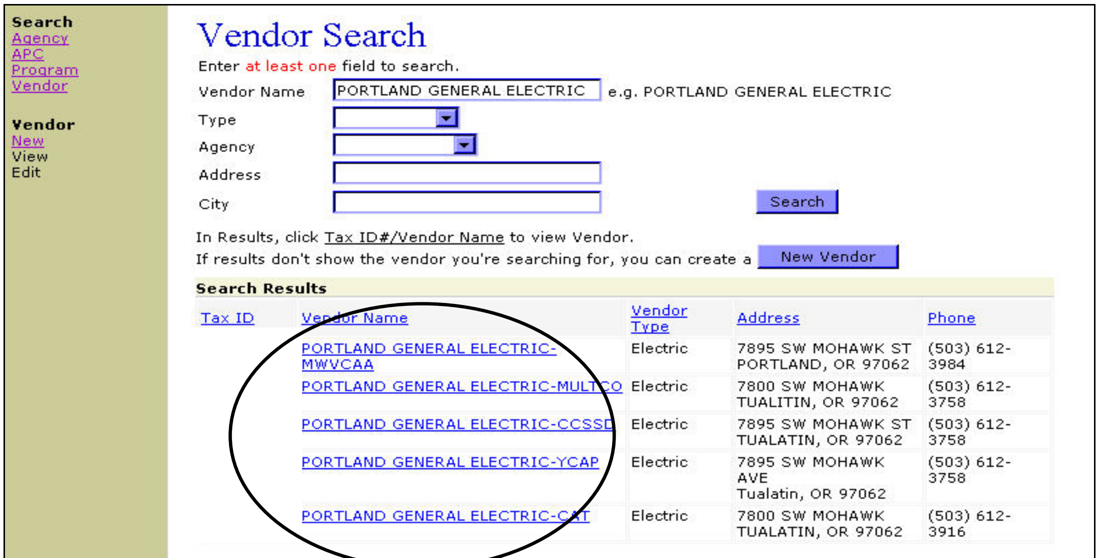


Figure 5-23: Vendor View screen.

If the vendor *does not* exist in the system, ‘Search Results’ will appear with ‘No matches’. A new vendor can be created *(reference figure 5-24)*. At that time a ‘New’ vendor can be created.

Figure 5-24: Vendor View – No Match screen.

Vendor View

The 'Vendor View' screen provides an overview of a vendor and contact information. From this screen, a vendor can be 'Edited' or a 'New' vendor created. If vendor information needs to be updated or corrected, click the 'Edit Vendor' button or the 'Edit' link located in the Left Nav Bar. The 'Vendor Edit' screen will appear *(reference figure 5-26)*.

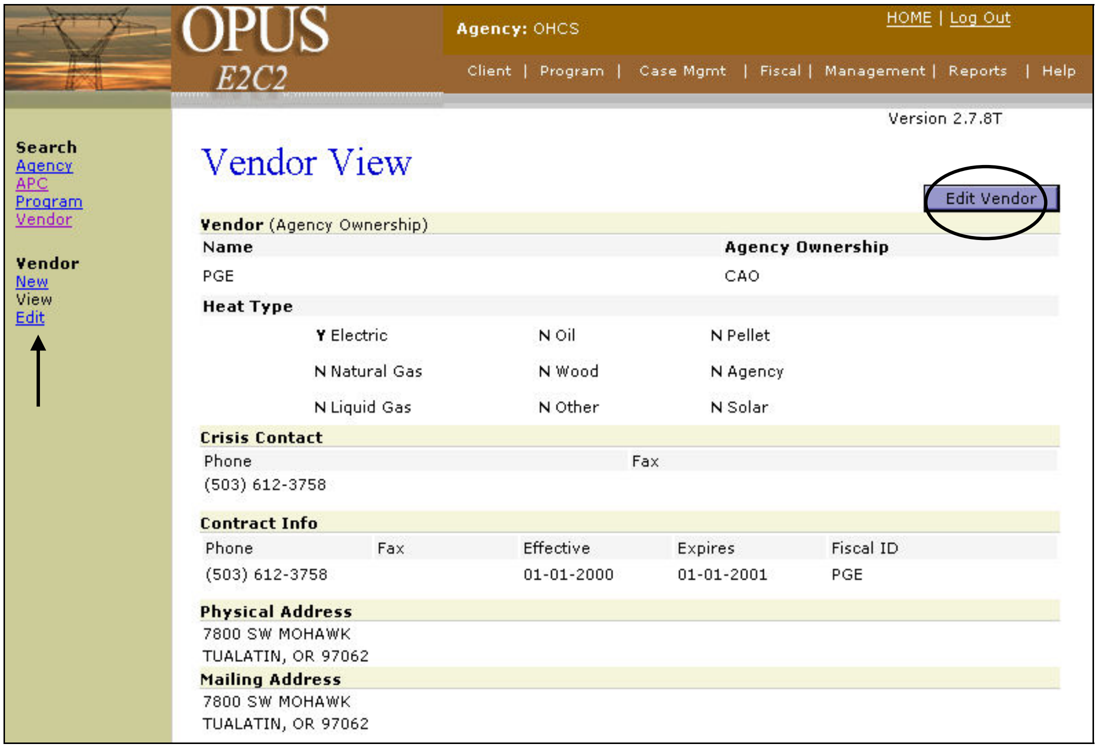


Figure 5-25: Vendor View

Vendor Edit

The 'Vendor Edit' screen allows information to be updated on a vendor. Updates could involve any of the vendor sections, which are 'Vendor Info', 'Crisis Info', 'Physical Address' and 'Mailing Address'. All fields marked with "*" are required *(reference figure 5-26)*.

IMPORTANT NOTE: Each agency has their specific set of vendors. Each vendor in the LIEAP-OEA business rules need to have an operating contract, which has effective start and end dates that are renewed on a yearly basis.

Once changes are made, click 'Save Changes'.

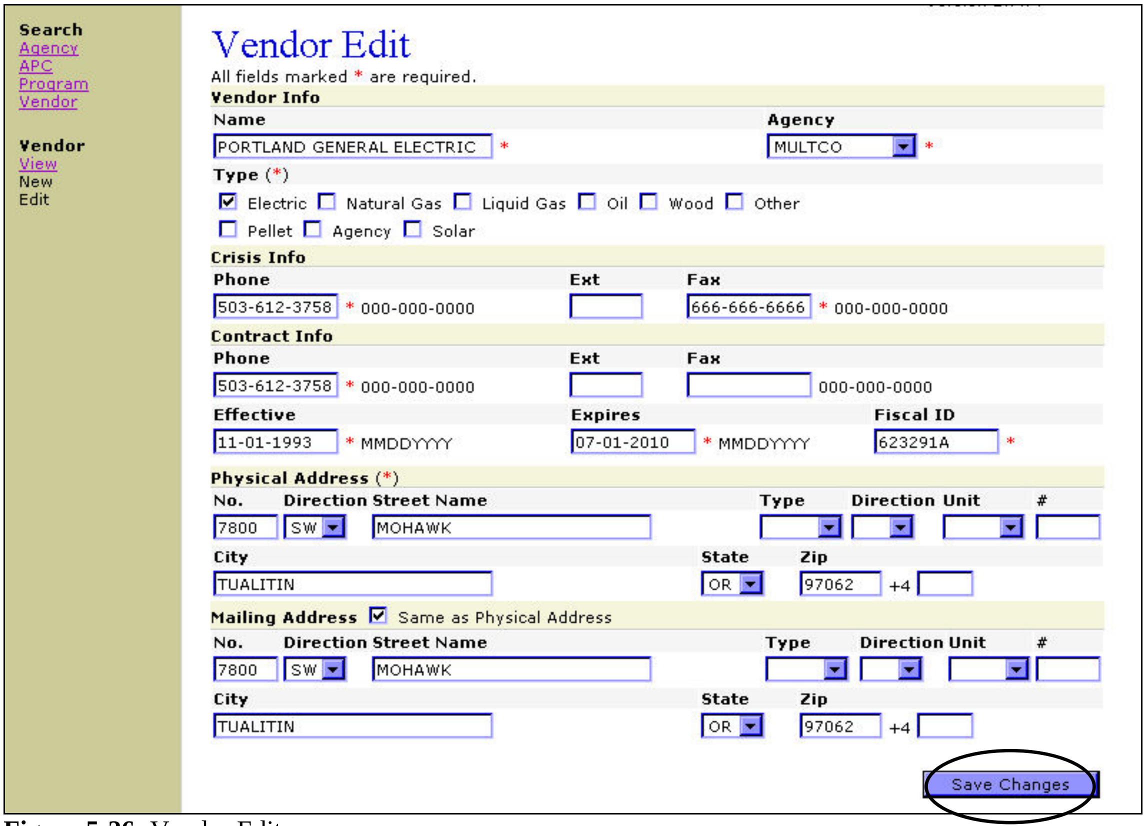


Figure 5-26: Vendor Edit screen.

Vendor New

When a Vendor has been searched and not found in the database, you will need to create a new Vendor in OPUS. The following steps will instruct you on how to create a new Vendor.

Setup:

On the 'Message of the Day' screen.

1. Using the 'Main Menu', scroll the mouse over 'Management' down and click on 'Vendor' *(reference figure 5-27)*. The 'Vendor Search' screen will appear *(reference figure 5-27A)*.

Figure 5-27: Vendor Search

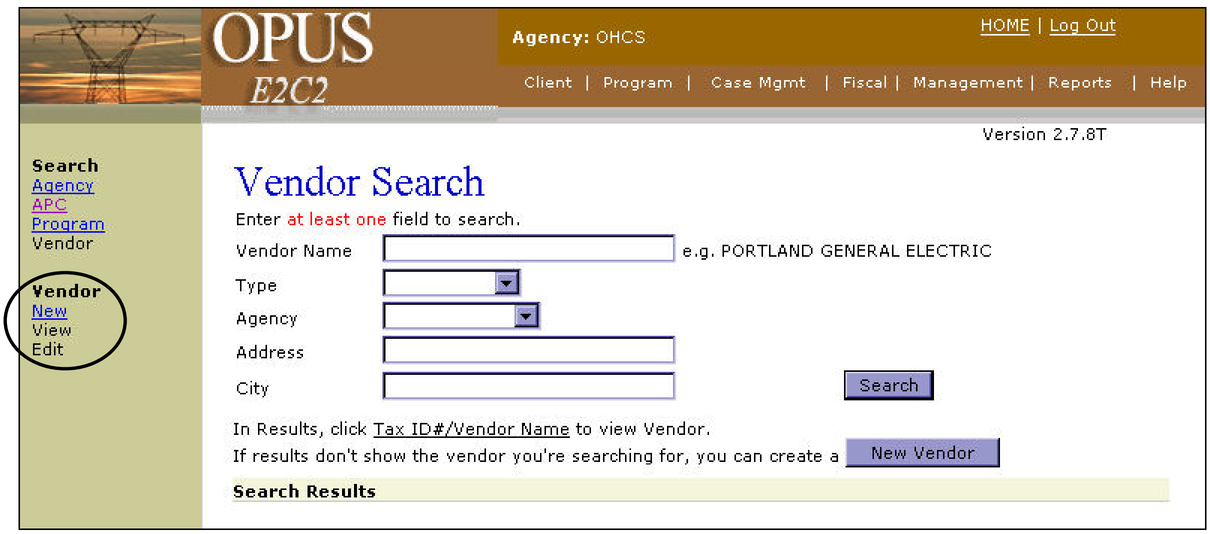


Figure 5-27A: Vendor Search – No Match – New Vendor screen

2. Using the Left Nav bar under Vendor, click the 'New' link. The 'Vendor New' screen will appear *(reference figure 5-28)*.

3. On the 'Vendor New' screen, enter or select the following: (fields marked * are required).

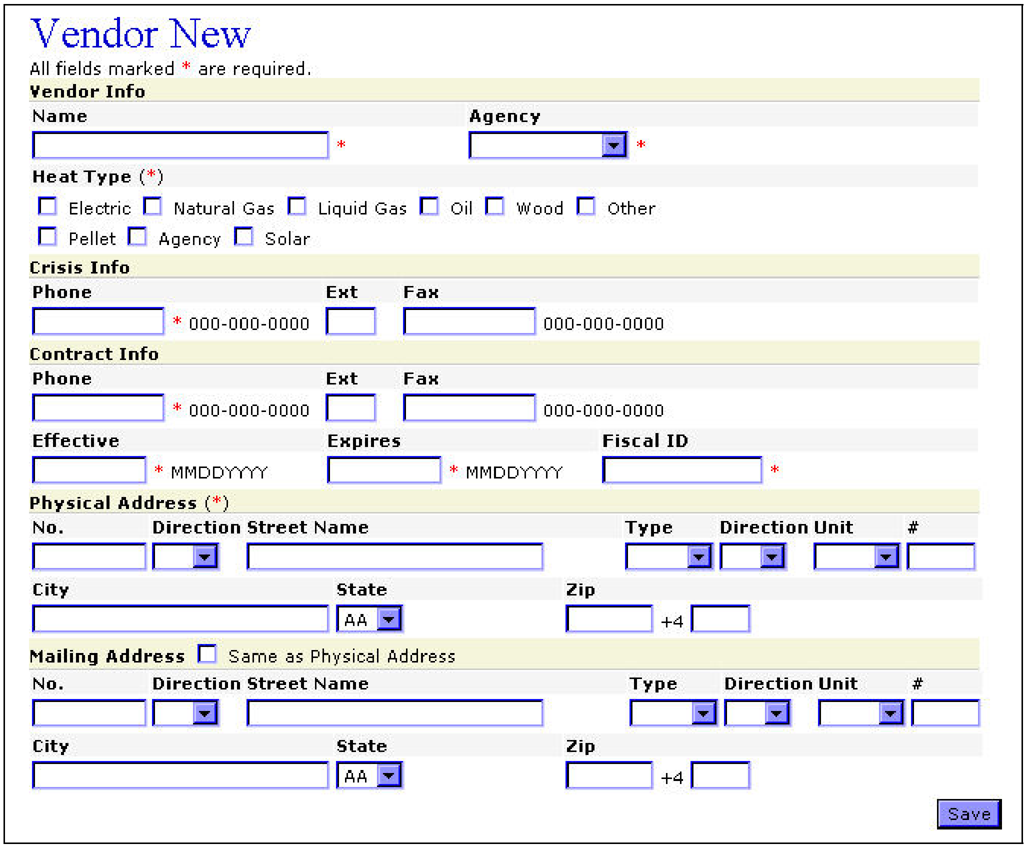


Figure 5-28: Vendor New screen.

- Vendor Name
- Using the drop-down menu, select the Agency affiliated with this Vendor
- Select the Heat Type provided by the Vendor clients
- Crisis Phone and Fax numbers
- Contract Phone and Fax
- Effective Start and End dates of the vendor contract
- Vendor’s Physical address
- Vendor’s Mailing address. If the vendor’s mailing address is the same as the physical address, check the ‘Same as Physical Address’ box.

Click the ‘Save’ button. The Vendor View screen will appear next.

M2 Section Six

Local Program Tree Structure – Creating the APC

Setting Up a Local Program

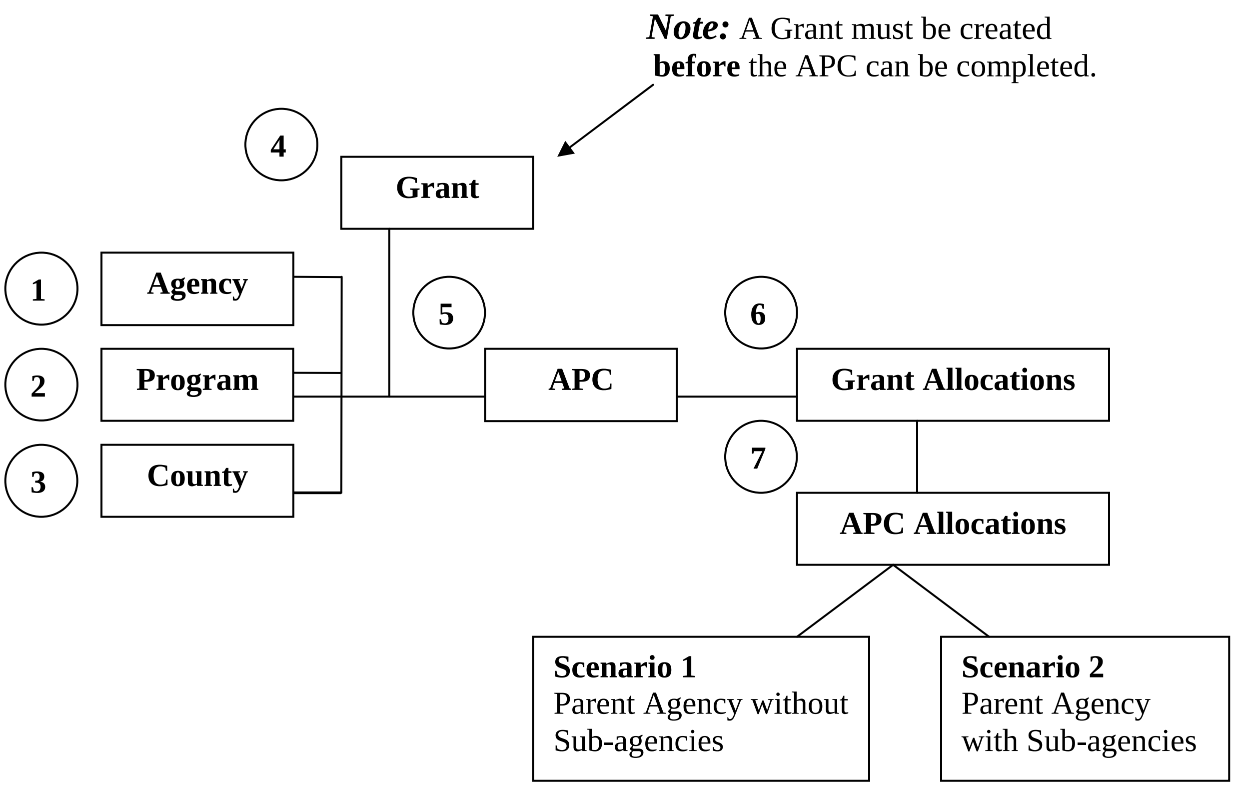
The Local Program tree structure is created with an 'Agency', 'Program', 'County', and the 'Grant' developing the "APC". After the 'tree structure' is created, then the manager can create a grant and allocate the grant funds to the APC branches which include the 'Parent-Level' agency and the 'Child-Level' agencies (or sub-agencies).
Note: For all agencies and/or programs created; LIEAP-OEA 'Energy' programs can be viewed by all agencies delivering LIEAP-OEA 'Energy' services.

The remaining chapter is "Under Construction". Agency users will be notified when this section is completed. The remaining chapter was left intact to be used or edited in the future.

Creating a Local Program

A Local Program tree structure is created with **1**-Agency, **2**-Program, **3**-County, and **4**-Grant. The tree structure includes the necessary components to be able to allocate funds from the grant level to the agency level and to make funds available for client assistance. The structure produces objects called an APC. After the tree structure is created, a manager can allocate grant funds from a 'Parent-Level' APC to a 'Child-Level' agency or sub-agencies to be used for energy assistance payments.

Local Program Tree Structure

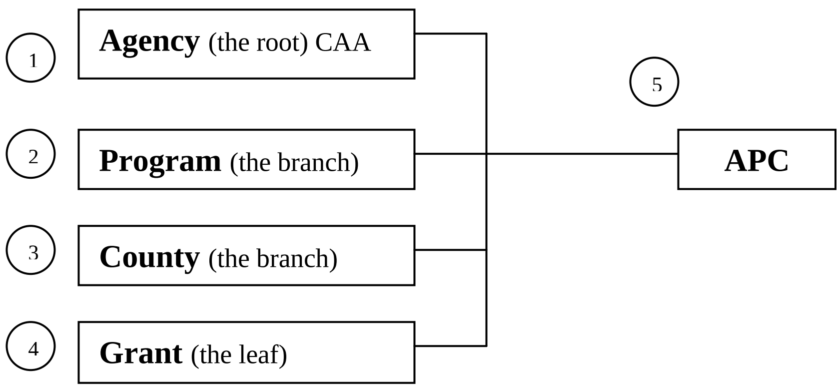


The first step to "Creating a Local Program" is to create the '***Agency'*** branch of the tree. Reference "Create an Agency."

Create an Agency

Agencies using OPUS will most likely have their agency initially built by OHCS. The agency "Manager" role has the ability to edit and update agency information, i.e.; address and phone numbers, as needed. If an agency needs to create another agency (sub-agency) it can be built by the main agency (CAP) who receives the initial funding. When an agency creates a sub-agency in OPUS, it is viewed by other Community Action Agencies (CAA) *within the same module(s)*. Before creating a new agency or sub-agency; standard operating procedure (SOP) is to conduct a search for a specific 'APC'. A search for an agency is done by using the **'Main Menu'** > **'Management'** > **'Agency'** *(reference figure 6-1)*.

Using the 'Agency Search' screen, enter the acronym of the agency or the agency name and click the 'Search' button *(reference figure 6-1A)*.



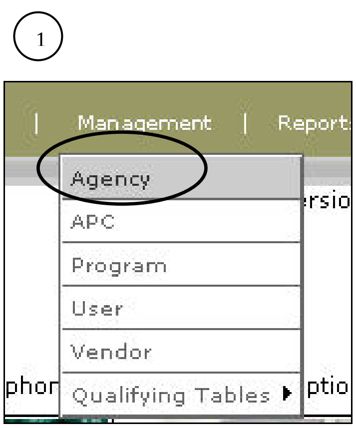


Figure 6-1: Agency Search

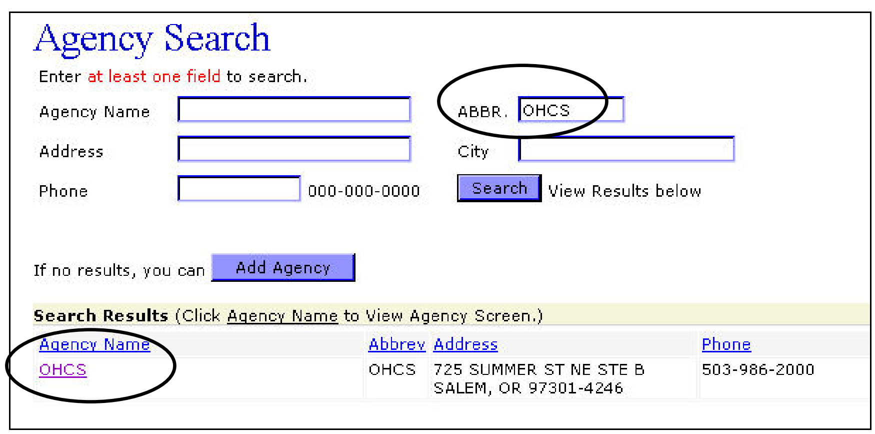


Figure 6-1A: Agency Search with Results

If the agency is active, the agency name will appear in 'Search Results'. Click on the Agency Name under the link.

The ‘Agency View’ screen will appear *(reference figure 6-1B)*.

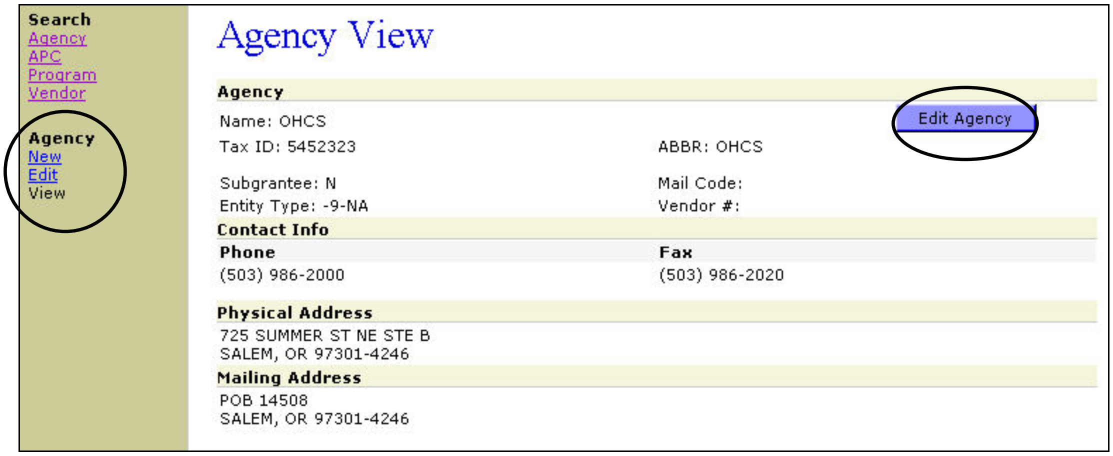


Figure 6-1B: Agency View screen.

To edit an agency’s information use the ‘Edit Agency’ button or go to the ‘Left Nav Bar’ and click on the Agency ‘Edit’ link. To create a new agency, use the ‘Left Nav Bar’, under ‘Agency’ and click on the ‘New’ link *(reference figure 6-1B)*.

Create a Program

Once an agency has been created, the ‘Program’ branch of the tree is ready to be completed. From the ‘Main Menu’, scroll the mouse over ‘Management’ and click ‘Program’ *(reference figure 6-2)*. The 'Program Search View' screen appears *(referenced figure 6-2A)*.

Note: Search for the program name before creating a new program to ensure the program is not duplicated.

As shown below, there was a search for the program ‘First Steps’, which ‘Search Results’ indicates ‘No Matches’.

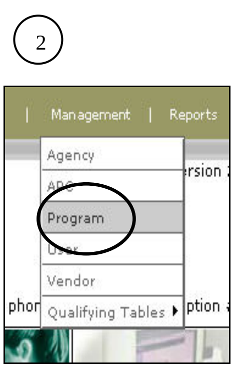


Figure 6-2: Program **Figure 6-2A:** Program Search View screen with “No Match”.

Using the ‘Left Nav Bar’ under ‘Program’ click the ‘New’ link. The 'Program Search New' screen appears *(reference figure 6-4)*. Enter the program name, program code, start date and end date. Click the ‘Save ‘button. The ‘Program Search View’ screen appears. You can verify that the program you entered is in the database by searching for it again and seeing it displayed in the search results section of the screen. If a program is not in the database, click on the ‘New program’ button (also reference figure 6-4). The ‘Program New’ screen will appear *(reference figure 6-4A)*.

Figure 6-4: Program New Link and New Program button screen

Enter the program name, program code, start date and end date. Click the Save button. The Program Search/View screen will appear.

Figure 6-4A: Program New screen.

Verify that the program you entered is in the database by searching for it again and seeing it displayed in the search results section of the screen.

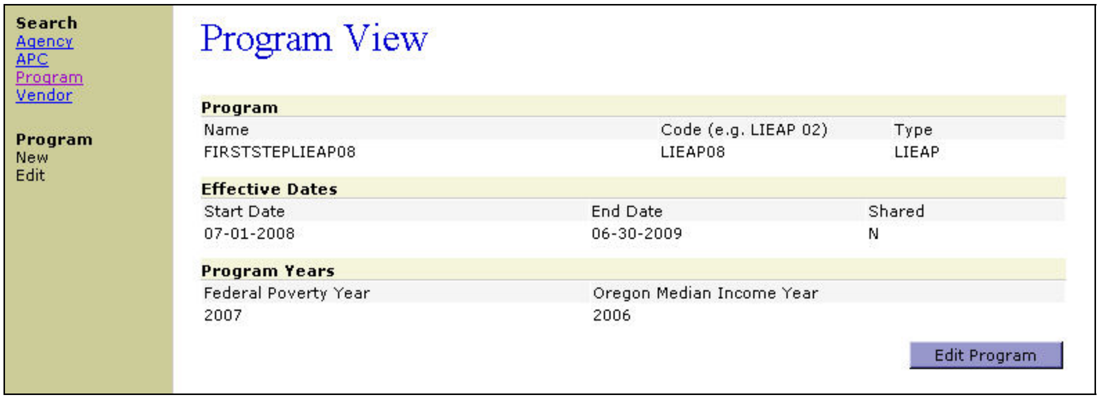
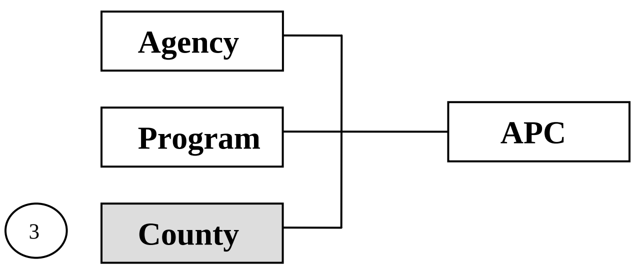


Figure 6-4B: Program View screen

Working with the 'County' branch of the APC is next.

Counties in the OPUS System

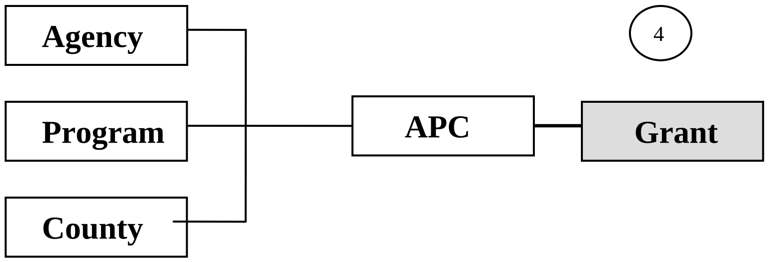
Since all counties have been initially created in the OPUS database, agencies don't need to complete this step. A County drop-down list is provided on all screens as you need to access them.



The next step is to create the Grant that the APC(s) will use for the program assistance funds.

Create a Grant

A grant (funding source) must be created in OPUS in order to draw down funds for a 'Parent' agency level or for the 'Child' agency level to complete client assistance payments.



1. Using the 'Main Menu', scroll the mouse over 'Fiscal' down to 'Search', and in the menu, click Grant. The 'Grant Search' screen will appear *(reference figure 6-5)*.

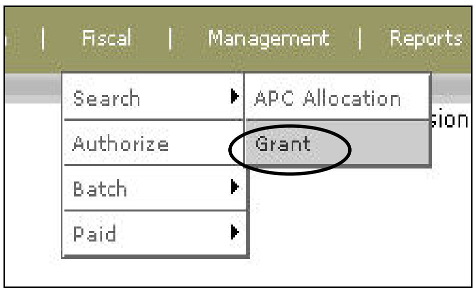


Figure 6-5: Grant Search

Note: Complete a search for the grant name prior to creating a new grant to ensure the grant is not duplicated.

2. Enter the 'Grant Name' and click 'Search'. Once it has been determined the grant does not exist in the database *(reference figure 6-5A)*, click the 'New Grant' button or in the Left Nav Bar, under 'Grant', click the "New" link. The "Grant New" screen will appear *(reference figure 6-5B)*.

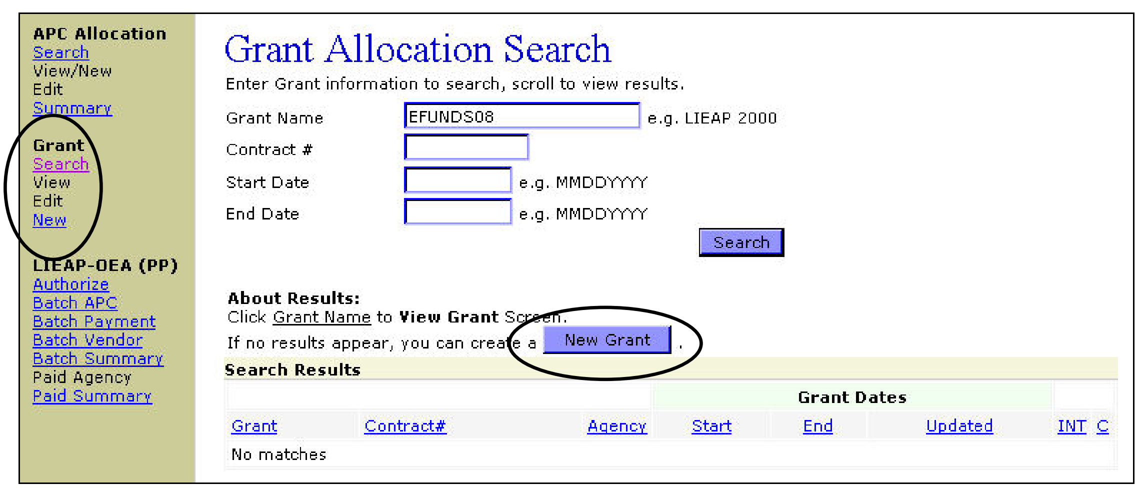


Figure 6-5A: Grant Allocation Search New screen.

3. Enter all the information. Fields with a red * Asterisk are required *(reference figure 6-5C)*. Click the 'Save' button and the 'Grant View' screen will appear.

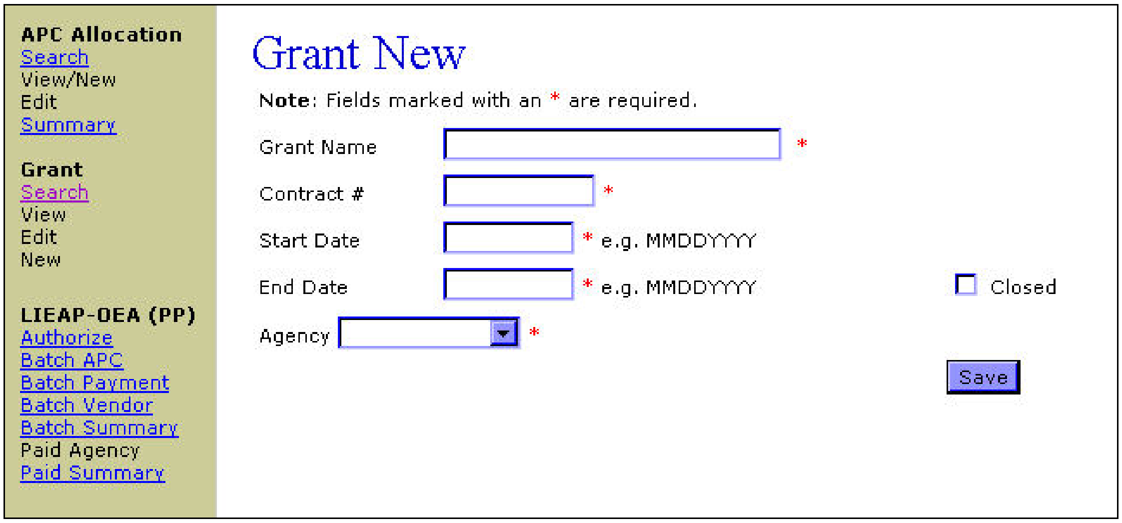


Figure 6-5B: Grant New screen.

Creating an APC

Notice: Before a grant can be **used**, the APC tree structure needs to be completed by bringing the branches together for the overall tree structure.

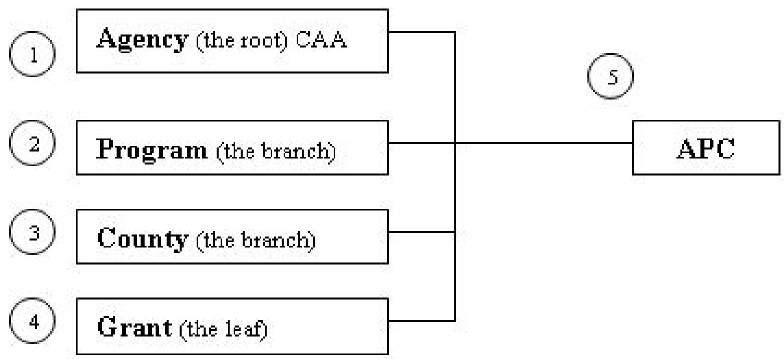
******Complete a search for any APC combination with the agency and/or program name created to ensure the grant is not duplicated.

Agencies can **or** will have 'Local Programs'. 'Local Programs' are programs ***not*** funded through OHCS. A 'Parent' APC is required to be created first to be the starting point to draw grant funds. Every Community Action Agency (CAA) is the 'Parent' agency. The subgrantee(s) or known as sub-agency. Sub-agencies are the 'Child' agency or agencies. A 'Parent' agency can have one sub-agency or multiple sub-agencies. Agencies can, within itself, be the only agency who can be the 'Parent' and 'Child' with a county.

Note: Agencies who receive funding from OHCS *will not* build an APC. The APC will be created by OHCS Staff.

To better understand a 'Parent' APC versus a 'Child' agency, see the diagram next page.

APC Tree Structure



Building the Agency, Program, County (if applicable) and the Grant together, the APC is completed. The rest of this chapter will show how the structure is completed.

The **Agency** is considered the "Parent' (root) of the tree and must exist to receive a '**Program**' and can be the only agency to receive the 'Program'; in turn the agency can be the 'Child' branch from the 'Parent' agency. The Parent agency delivering a program with a specific county will list the appropriate '**County**' in the tree structure. The '**Grant**', a funding stream is created (received) in order to draw down funds to the 'Parent' and/or 'Child' agency for client assistance.

Creating an APC, Parent and Child

1. Using the 'Main Menu', scroll the mouse over 'Management' and click the item 'APC' *(reference figure 6-6)*. The APC Search screen will appear *(reference figure 6-6A)*.

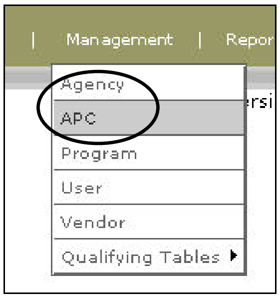


Figure 6-6: APC Search

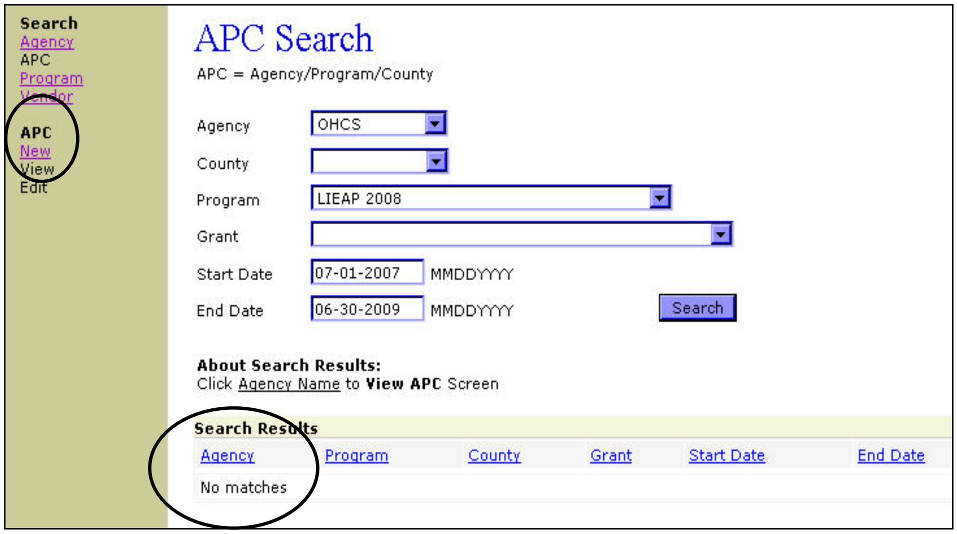


Figure 6-6A: APC Search, No Match screen.

If the 'Search Results' indicates 'No Matches', a new APC can be created.

2. Using the Left Nav Bar, under 'APC', click the 'New' link. The 'APC New' screen will appear *(reference figure 6-6B)*.

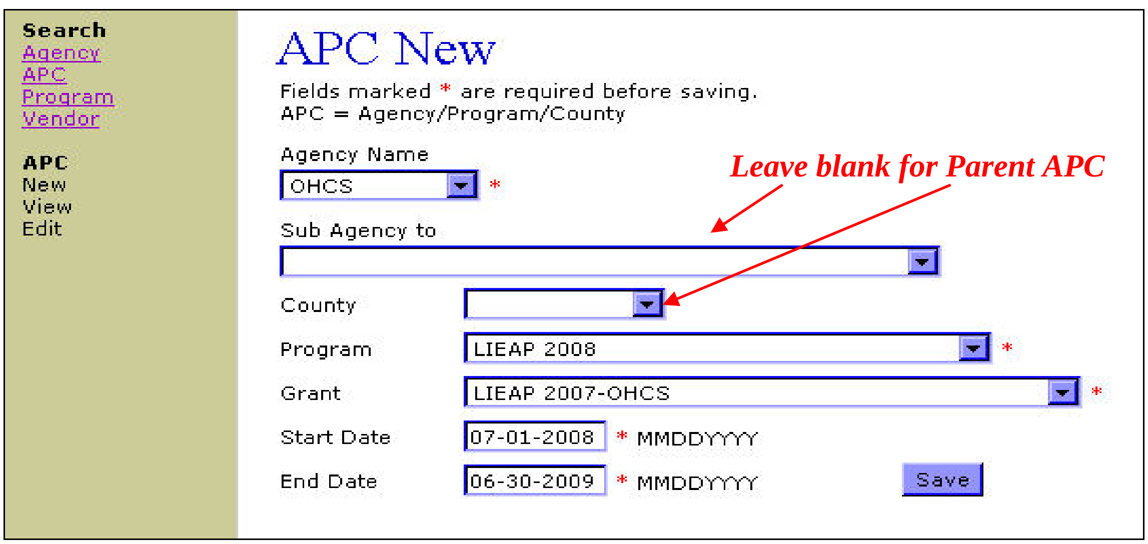


Figure 6-6B: APC New 'Parent' screen.

3. Complete all required information:

- Agency Name
- Program
- Grant
- Start and End Date

Click the ‘Save’ button. The APC View screen will appear *(reference figure 6-6C)*. Verify that the information in the APC is correct. *Figure 6-6C* is the ‘Parent’ APC.

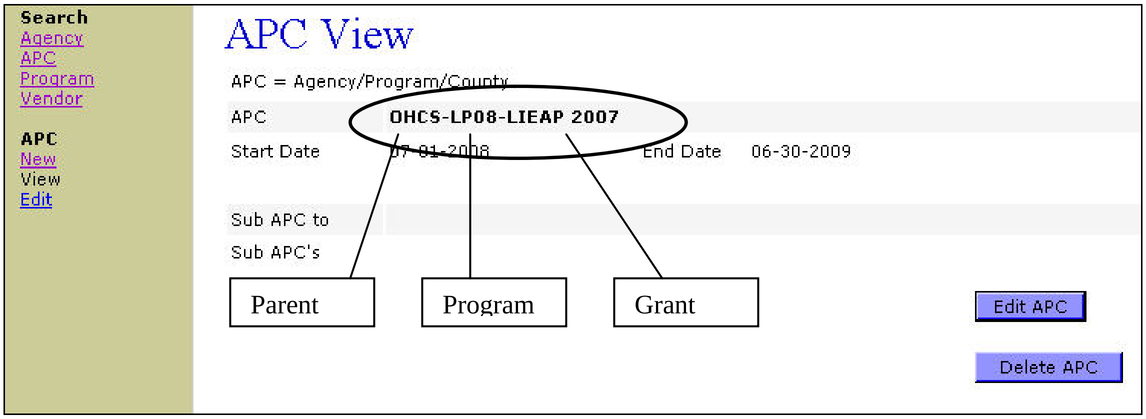


Figure 6-6C: “Parent” APC View screen.

To create a ‘Child’ APC, follow the same steps as used for building a ‘Parent’ APC listed above. The ‘Child’ APC created after the ‘Parent’ APC, is in fact, the ‘Parent’ agency recreated but with a designated county. Enter all appropriate information and click ‘Save’ *(reference figure 6-6D)*. The APC View screen will appear *(reference figure 6-6E)*.

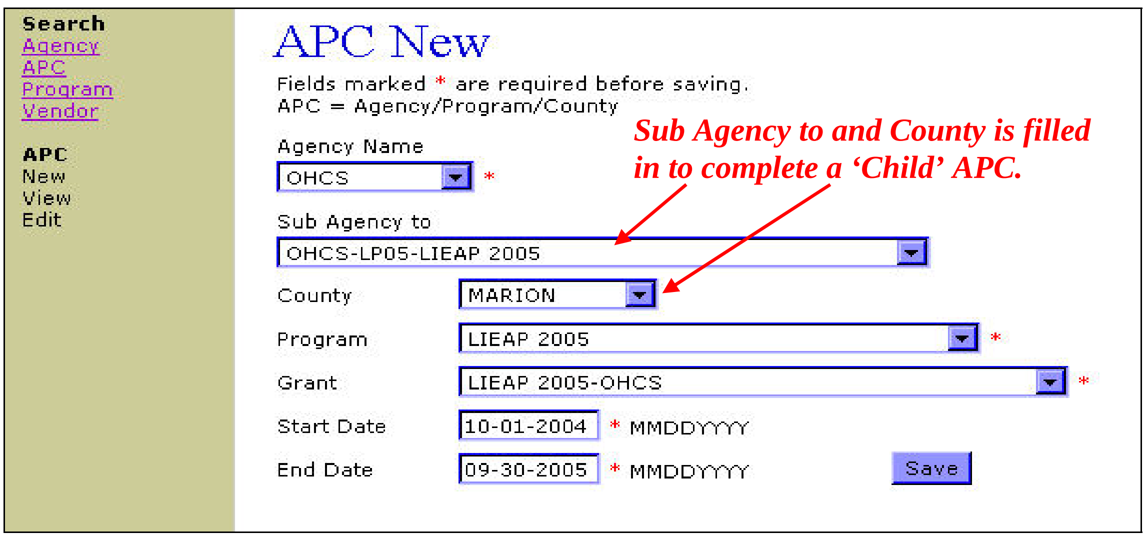


Figure 3-6D: APC New – ‘Child’ Search screen.

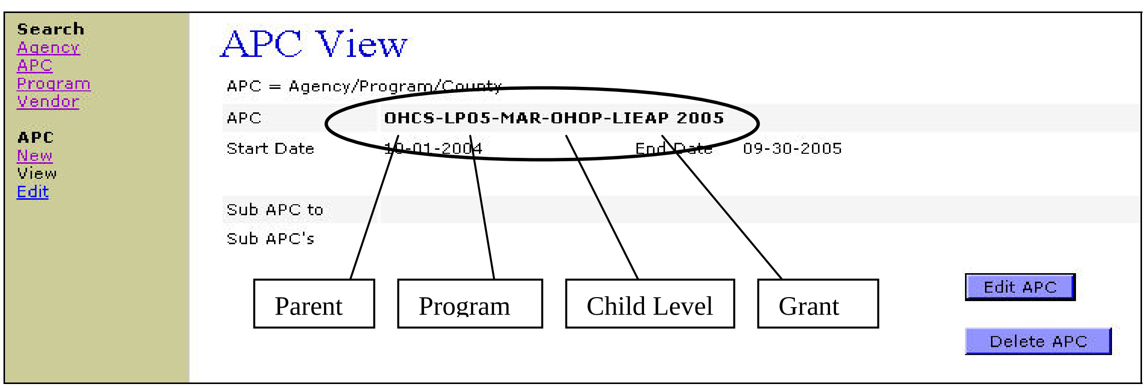


Figure 3-6E: APC View –‘Child’ APC screen.

Verifying the APC Tree Structure

Verifying an APC tree structure can be done by using the 'APC Search' screen.

1. On the 'Main Menu', scroll the mouse over 'Management' and click 'APC' *(reference figure 6-7)*. The APC Search screen will appear *(reference figure 6-7A)*.

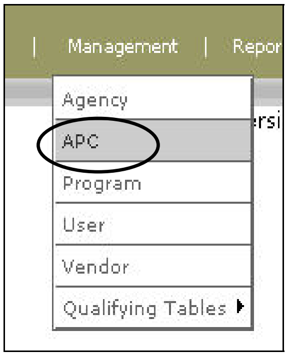


Figure 6-7: APC Search

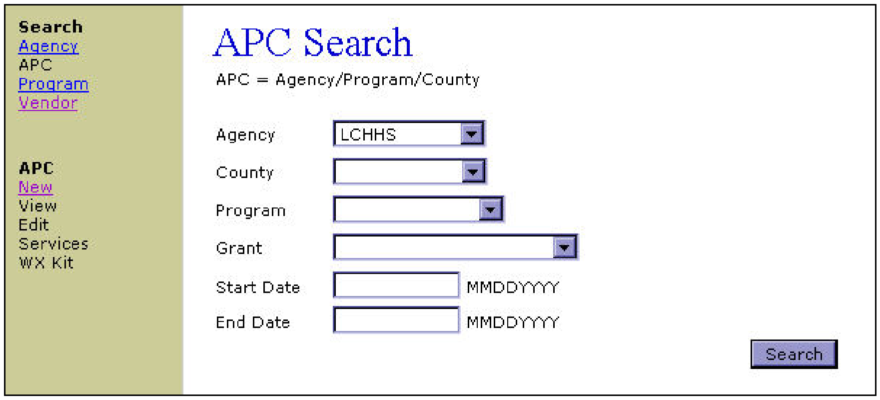


Figure 6-7A: APC Agency Search screen

2. Using ***only*** the drop-down menus, select the 'Agency' and 'Program'. These options will display an APC or multiple APCs using the specifications chosen *(reference figure 6-7B).*

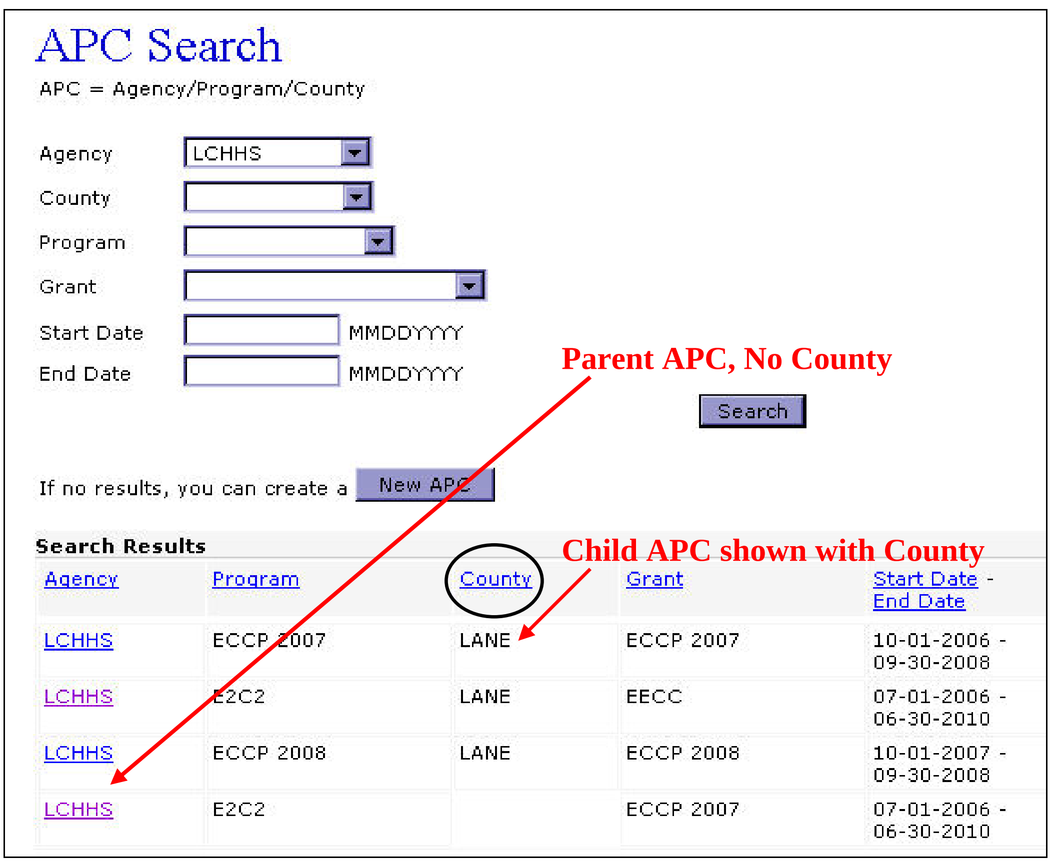


Figure 6-7B: APC Search with Search Results screen

The agency ‘LCHHS’ and the Programs ‘E2C2 and ECCP’ were selected for a search. In the ‘Search Results’ section, the ‘Parent’ APC with no county, and two ‘Child’ APCs are displayed. ***Note:*** “Child APCs” display a ‘County’.

This process distinguishes the difference from a ‘Parent’ and ‘Child APC. Grant allocations are ready for this program and issued to the ‘Child Level’ APC(s).

Agency users will be notified when this section is completed. The remaining chapter was left intact to be used or edited in the future.

Grant Allocation

Grant Allocations to agencies are funds assigned to a ‘Parent APC’ and then are allocated the ‘Child APC(s)’ or County level agencies.

1. From the ‘Main Menu’ to ‘Fiscal’ to ‘Search’, click on ‘Grant’. The 'Grant Search' screen will appear *(reference figure 6-8).* Enter the ‘Grant’ name and click ‘Search’ *(reference figure 6-8A).* The grant should appear in ‘Search Results’.

Figure 6-8: Grant Search screen

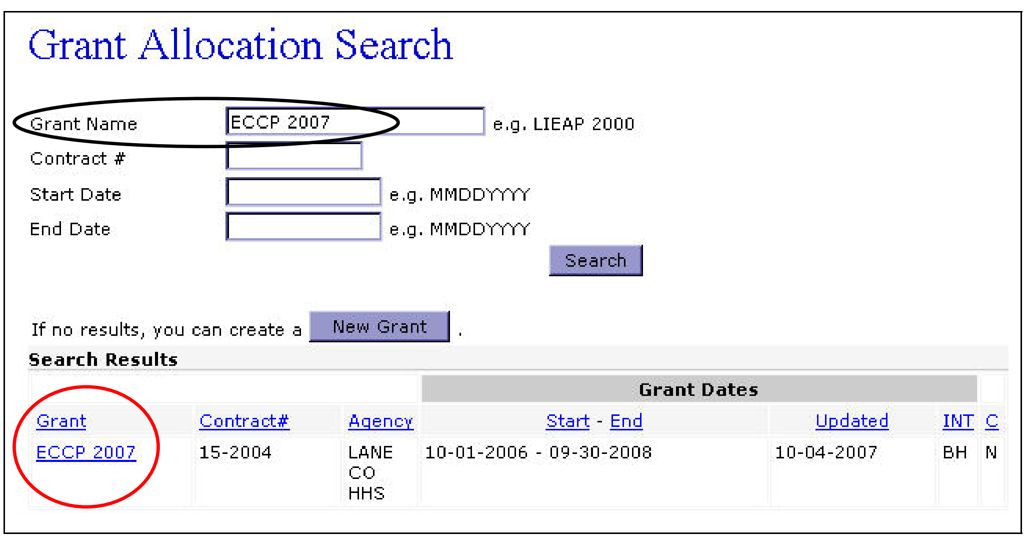


Figure 6-8A: Grant Allocation Search screen

2. The ‘Grant Allocation Search’ screen will display with ‘Search Results’. There are times when agencies can have more than one grant. The desired grant will need to be selected. To view the appropriate grant, click on the ‘Grant’ link under ‘Search Results’ *(reference figure 6-8A).*

The ‘Grant Allocation View’ screen will display. The view screen allows verification of the designated amount of a grant allocated funds down to the associated APC agencies. The ‘Total Grant’, ‘Transferred Total’, ‘Total Remaining’ and dates are displayed *(reference figure 6-8B)*.

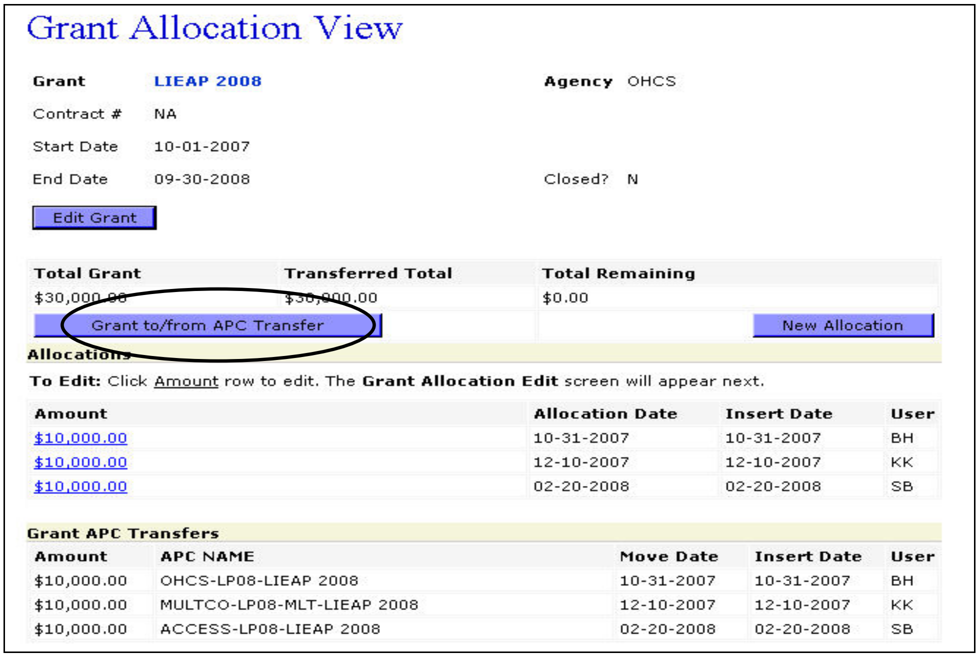


Figure 6-8B: Grant Allocation View screen

The button labeled ‘**Grant to/from APC Transfer**’ allows funds to be transferred down to ‘Parent’ and ‘Child’ APC levels. In some cases, the ‘Grant to/from APC Transfer’, allows transferring funds back up to the grant-level. The button labeled ‘**New Allocation**’ allows a deposit to the top grant level, aka the ‘Parent’ *(Reference figure 6-8B)*.

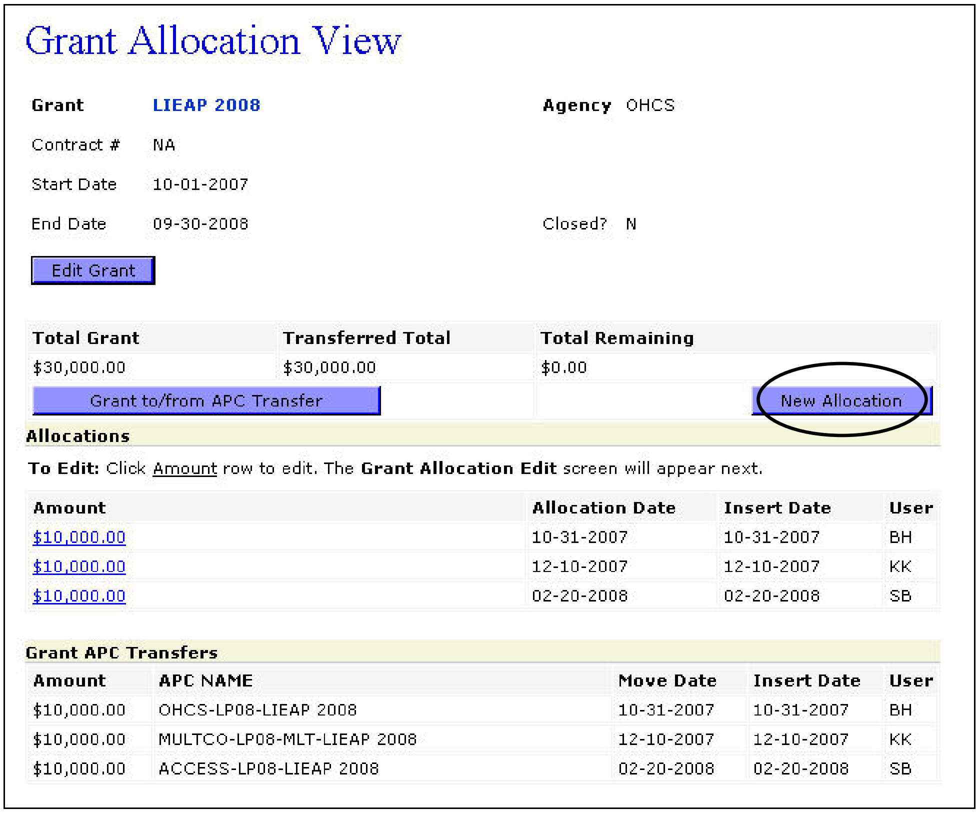
As funds are transferred down to the ‘Parent’ and ‘Child’ APC levels, the section labeled ‘**Grant APC Transfers**’ will display a history of transfers as they occur.

New Grant Allocation

The purpose of the 'New Grant Allocation is to set-up grant funds to be distributed to sub-agencies 'Child APCs'.

On the 'Grant Allocation View' screen, under the 'Allocations' section the funding amount is displayed. The 'Allocations' section will display a list of current and future allocations given to, or subtracted from, a grant.

1. On the 'Grant View' screen, click the button 'New Allocation' *(reference figure 6-9)*.



Grant Allocation View

Grant LIEAP 2008 **Agency** OHCS

Contract # NA

Start Date 10-01-2007

End Date 09-30-2008 Closed? N

Edit Grant

Total Grant	Transferred Total	Total Remaining
$30,000.00	$30,000.00	$0.00

Grant to/from APC Transfer | New Allocation

Allocations

To Edit: Click Amount row to edit. The **Grant Allocation Edit** screen will appear next.

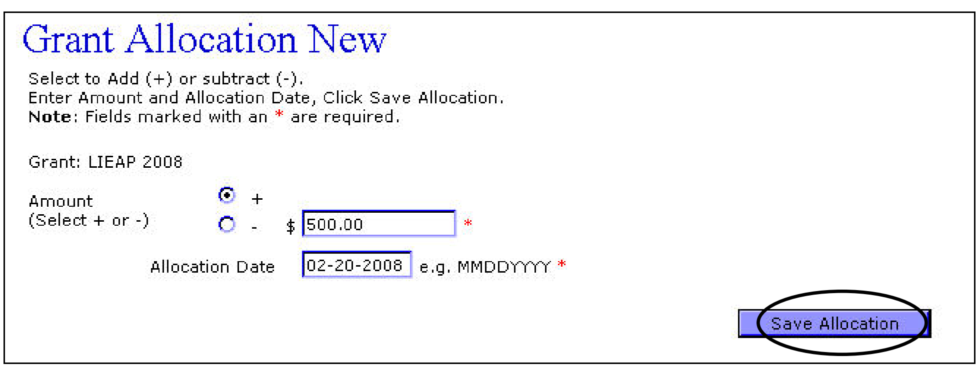
Amount	Allocation Date	Insert Date	User
$10,000.00	10-31-2007	10-31-2007	BH
$10,000.00	12-10-2007	12-10-2007	KK
$10,000.00	02-20-2008	02-20-2008	SB

Grant APC Transfers

Amount	APC NAME	Move Date	Insert Date	User
$10,000.00	OHCS-LP08-LIEAP 2008	10-31-2007	10-31-2007	BH
$10,000.00	MULTCO-LP08-MLT-LIEAP 2008	12-10-2007	12-10-2007	KK
$10,000.00	ACCESS-LP08-LIEAP 2008	02-20-2008	02-20-2008	SB

Figure 6-9: Grant Allocation View 'New Allocation' screen.

2. The 'Grant Allocation New' screen will appear *(reference figure 6-9A)*. The 'New Grant Allocation New' screen allows funds to be added (+) or subtracted (-) from a grant and the allocation date. When complete, click 'Save Allocation'.



Grant Allocation New

Select to Add (+) or subtract (-).
Enter Amount and Allocation Date, Click Save Allocation.
Note: Fields marked with an * are required.

Grant: LIEAP 2008

Amount (Select + or -) + - $ 500.00 *

Allocation Date 02-20-2008 e.g. MMDDYYYY *

Save Allocation

Figure 6-9A: Grant Allocation New screen.

The ‘Grant Allocation View New’ screen will appear *(reference figure 6-9B)*. Confirmation of the allocation will be displayed under ‘Allocations’ section.

APC Allocation View New

APC = Agency/Program/County/Grant

Name: **ACCESS-LP08-LIEAP 2008**

View Parent APC

Grant Name		**Allocation**	
LIEAP 2008		$10,000.00	
Allocations	$10,000.00		
Available	$0.00		
Allocated	$10,000.00		
Spent	$0.00	**Total Spent**	$0.00

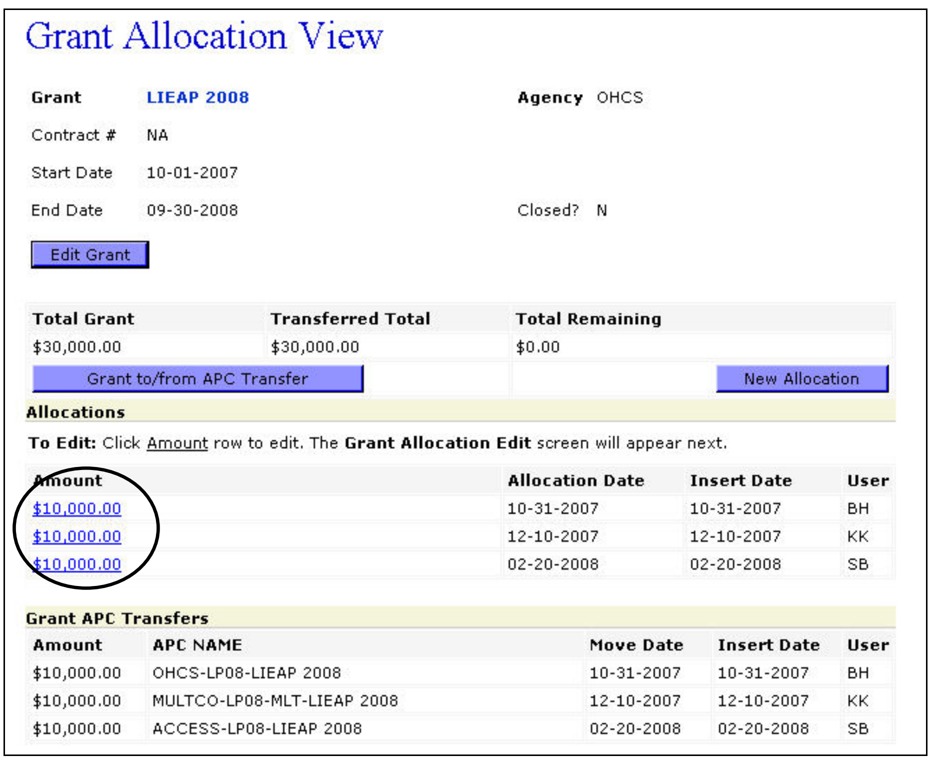
View History

Sub APC(s)(Click Agency name to View APC Allocation)

Agency	**Allocations**	**Available**	**Alloc Date**	**New Alloc**
ACCESS-LP08-JAC-LIEAP 2008	$10,000.00	$10,000.00		S

Figure 6-9B: Grant Allocation View with New Allocation added screen.

Note: the initials of the user completing the allocation adjustment will appear with the new entry *(reference figure 6-9C)*.



Grant Allocation View

Grant	**LIEAP 2008**	**Agency**	OHCS
Contract #	NA		
Start Date	10-01-2007		
End Date	09-30-2008	Closed?	N

Edit Grant

Total Grant	**Transferred Total**	**Total Remaining**
$30,000.00	$30,000.00	$0.00

Grant to/from APC Transfer | New Allocation

Allocations

To Edit: Click Amount row to edit. The **Grant Allocation Edit** screen will appear next.

Amount	**Allocation Date**	**Insert Date**	**User**
$10,000.00	10-31-2007	10-31-2007	BH
$10,000.00	12-10-2007	12-10-2007	KK
$10,000.00	02-20-2008	02-20-2008	SB

Grant APC Transfers

Amount	**APC NAME**	**Move Date**	**Insert Date**	**User**
$10,000.00	OHCS-LP08-LIEAP 2008	10-31-2007	10-31-2007	BH
$10,000.00	MULTCO-LP08-MLT-LIEAP 2008	12-10-2007	12-10-2007	KK
$10,000.00	ACCESS-LP08-LIEAP 2008	02-20-2008	02-20-2008	SB

Figure 6-9C: Grant Allocation View screen

The ‘Amount’ is a “link” indicated in blue and underlined *(reference figure 6-9C)*.

If the amount needs to be edited, click the actual dollar amount and the **‘Grant Allocation Edit**’ screen will appear (reference figure 3-10). The funding a can be edited to be added (+) or subtracted (-) from a grant and the allocation date can be edited. When complete, click ‘Save Changes’.

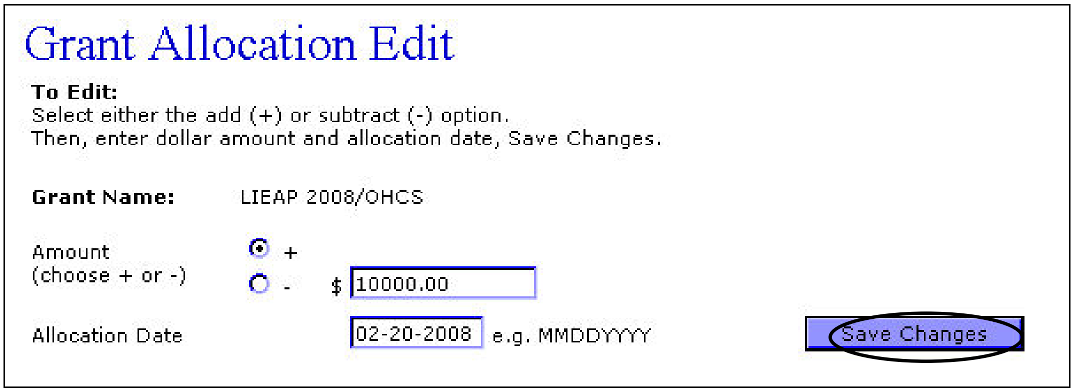


Figure 6-9C: Grant Allocation Edit screen.

If the grant information needs to be edited complete the following steps.

Click on the ‘Edit Grant’ button or use the Left Nav Bar, under ‘Grant’ and click on ‘Edit’ *(reference figure 6-10)*. The grant name, contract number, start and end date, and agency can be edited.

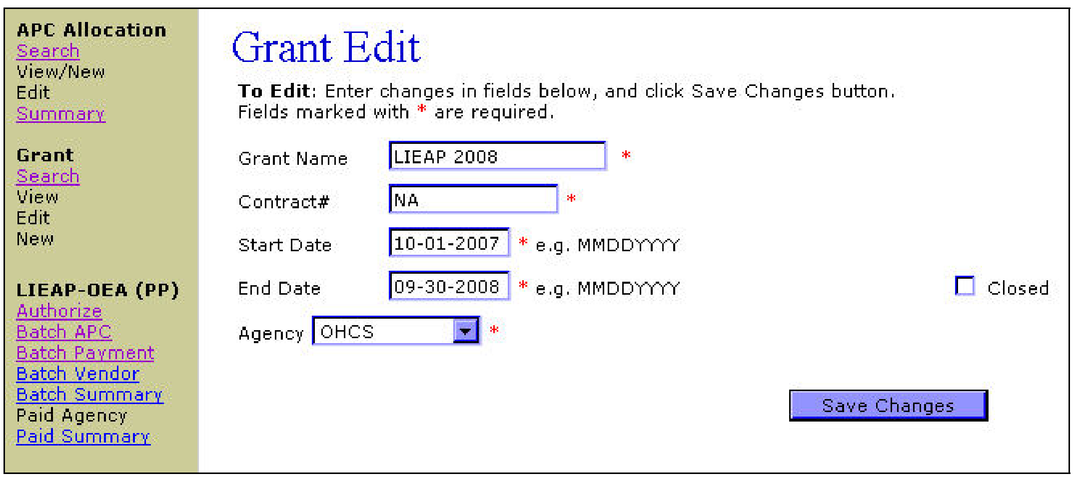
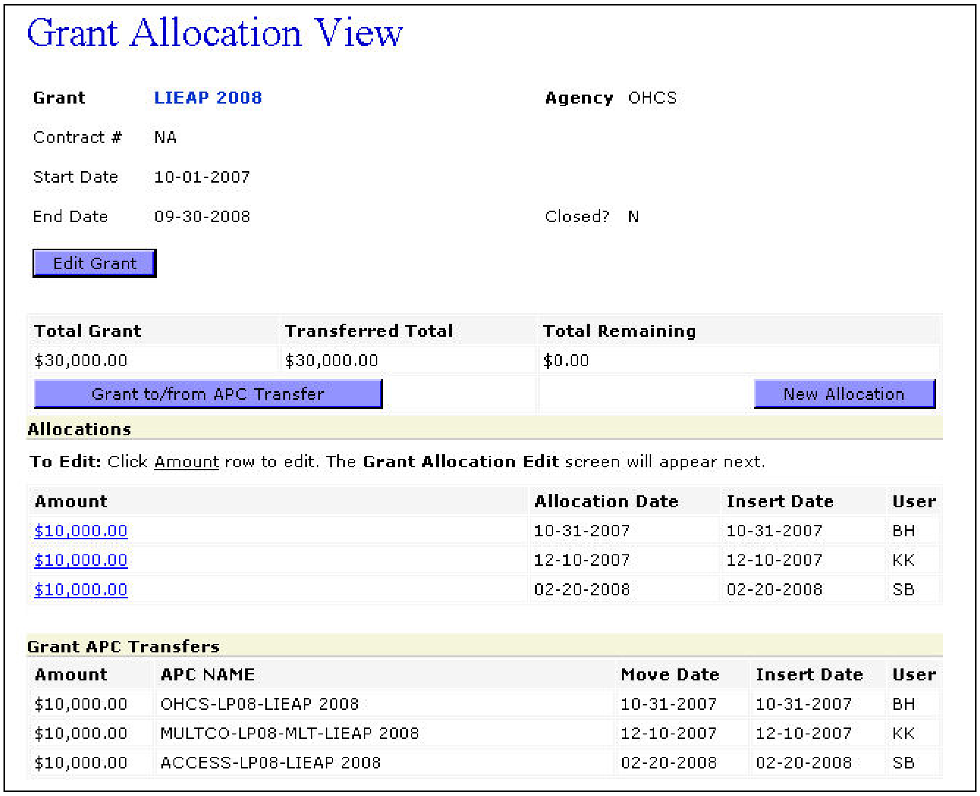


Figure 6-10: Grant Edit screen.

Click ‘Save Changes’, the ‘Grant Allocation View’ screen will appear *(reference figure 6-10A, next page)*.

Note: Funding amounts can not be edited in this field.



Grant Allocation View

Grant LIEAP 2008 **Agency** OHCS

Contract # NA

Start Date 10-01-2007

End Date 09-30-2008 Closed? N

Edit Grant

Total Grant	Transferred Total	Total Remaining
$30,000.00	$30,000.00	$0.00

Grant to/from APC Transfer New Allocation

Allocations

To Edit: Click Amount row to edit. The **Grant Allocation Edit** screen will appear next.

Amount	Allocation Date	Insert Date	User
$10,000.00	10-31-2007	10-31-2007	BH
$10,000.00	12-10-2007	12-10-2007	KK
$10,000.00	02-20-2008	02-20-2008	SB

Grant APC Transfers

Amount	APC NAME	Move Date	Insert Date	User
$10,000.00	OHCS-LP08-LIEAP 2008	10-31-2007	10-31-2007	BH
$10,000.00	MULTCO-LP08-MLT-LIEAP 2008	12-10-2007	12-10-2007	KK
$10,000.00	ACCESS-LP08-LIEAP 2008	02-20-2008	02-20-2008	SB

Figure 6-10A: Grant Allocation View screen.

Move Grant/APC

To allocate grant funds down to the ‘Parent’ APC level (no county), so specific amounts can be drawn down to the ‘Child’ APC(s) level for client assistance payments, funds must be moved.

Using the ‘Grant Allocation View’, click on ‘Grant to/from APC Transfer’ button *(reference figure 6-11).*

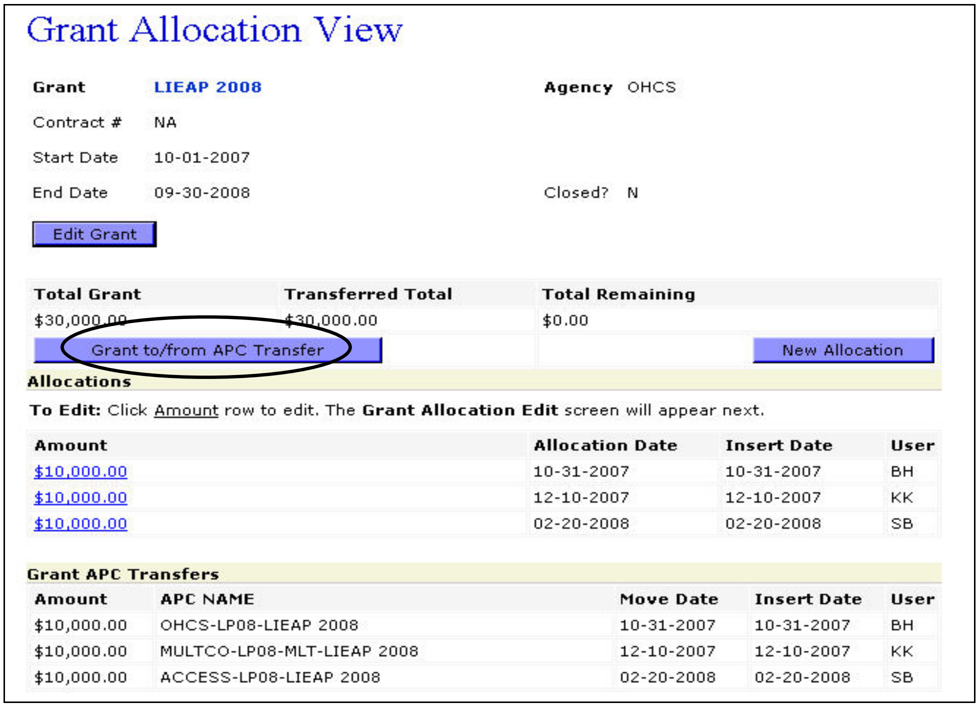


Figure 6-11: Grant Allocation View – Grant to/from APC Transfer screen.

To allocate to the ‘Parent’ APC, click the button labeled ‘Grant to/from APC Transfer’. The ‘Move Grant/APC’ screen will appear. Select the appropriate APC from the drop-down menu, then click ‘Load’ *(reference figure 6-11).*

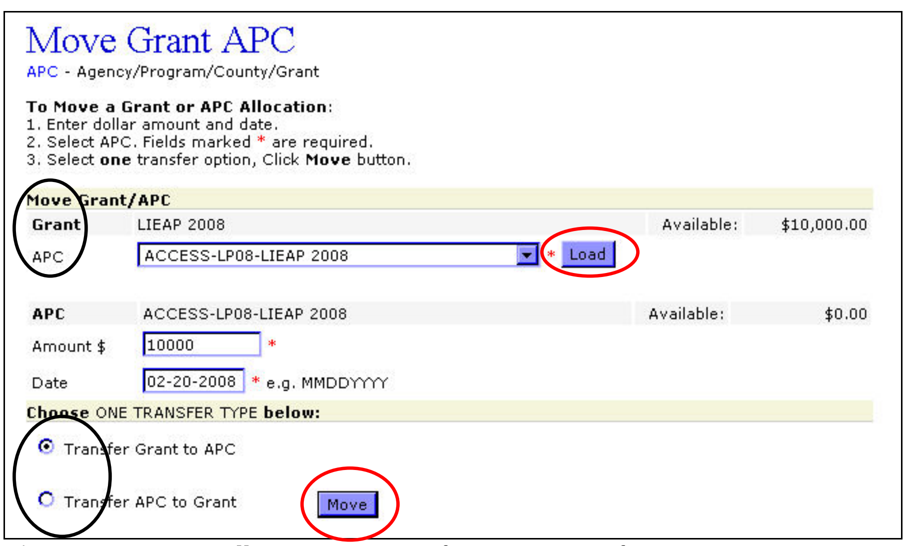


Figure 6-11: Grant Allocation. Grant to/from APC Transfer screen.

The ‘Move Grant APC’ screen will appear. In the ‘Move Grant/APC’ section, enter the following:

- Select the appropriate APC, using the drop-down menu
- Enter the funding amount that will be moved
- Enter the date
- Select the appropriate ‘Transfer Type’

Click on ‘Move’ to complete the transfer.

The ‘APC Allocation View’ screen will appear. Transfers should be reviewed and verified and can be done using the APC Allocation View screen.

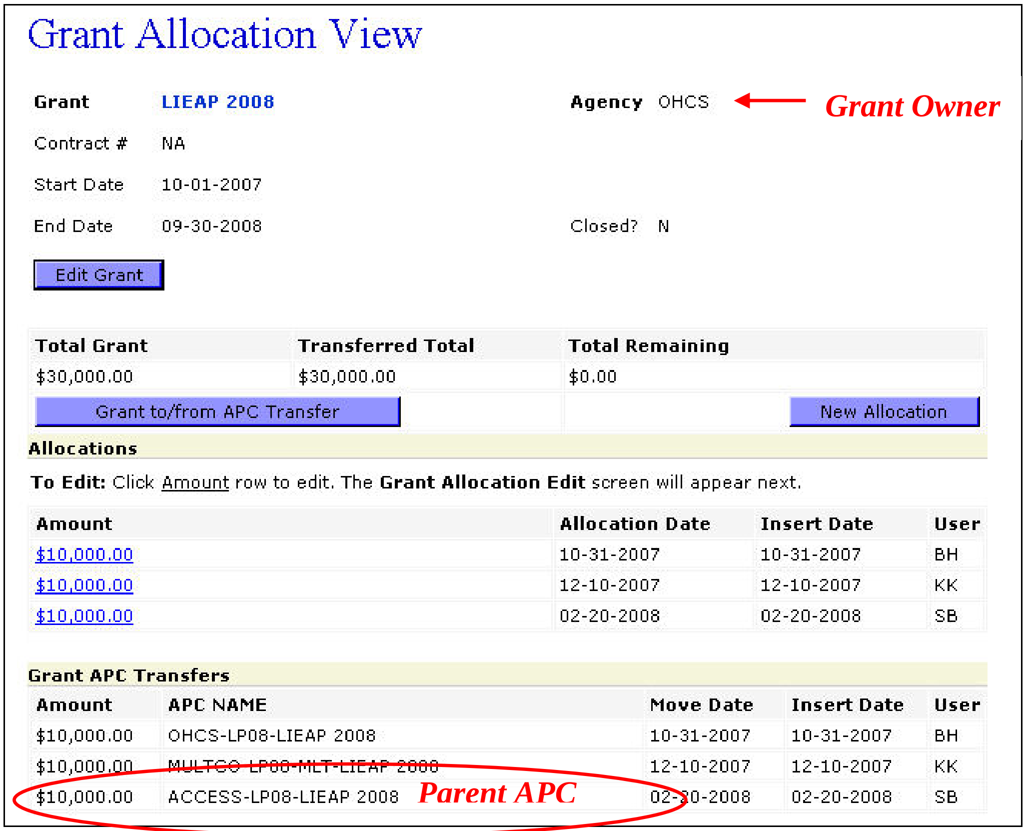


Figure 6-11C: APC Allocation View ‘Parent’

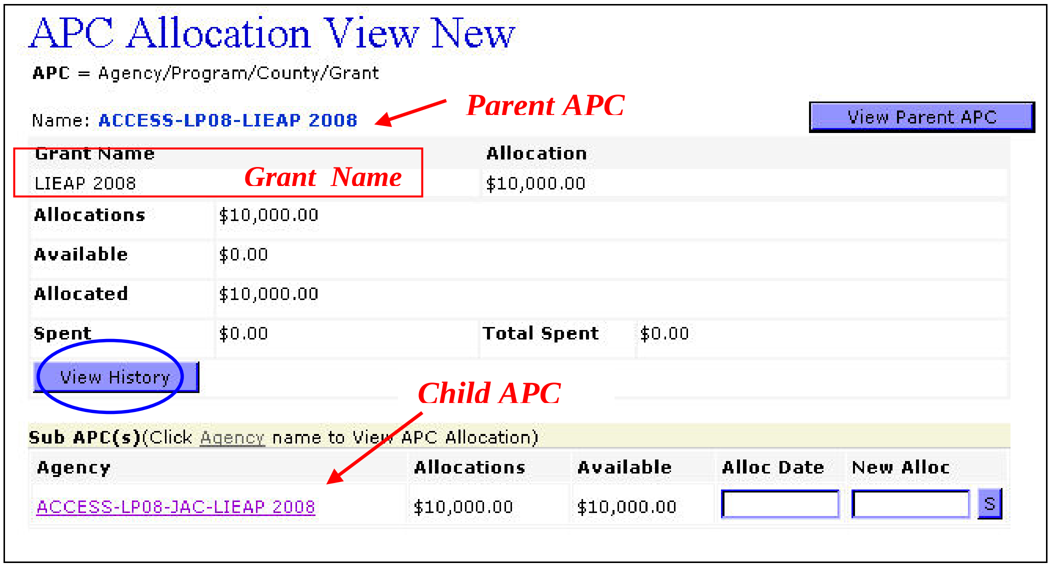


Figure 6-11D: APC Allocation View New ‘Child’ screen.

On the ‘APC Allocation View New’ screen, above the “Grant Name” the ‘Parent’ APC is displayed showing the allocation that was just completed. If the initial APC family was built correctly, the following information: the Parent APC listed at top: ACCESS-LP08-LIEAP 2008 (no county), and it’s associated ‘Child’ APC: ACCESS-LP08-JAC-LIEAP 2008 is listed.
To complete an APC move, enter the ‘Allocation Date’, the ‘New Allocation Amount’, and click the ‘S’ (Save) button.

Click on ‘View History’ and the ‘APC Allocation History View’ screen will appear. The history view screen is used for historical purposes *(reference figure 6-12).*

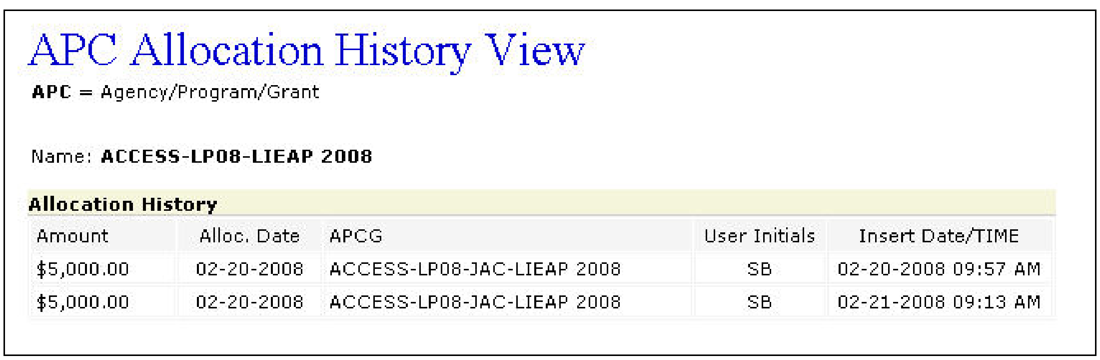


Figure 6-12: APC Allocation History View

After allocating from the Parent APC-level (no county) to the Child (with County), notice that the total available in the Parent ‘APC’ is $0.00, because the Parent’s available funds have been allocated down to the Child-County level, and the ‘Total Allocated’ is $10,000.

Click on 'View Parent APC' and the 'APC Allocation View New' screen will appear. Select the appropriate 'Parent APC' by clicking on the Sub APC Agency link *(reference figure 6-13).*

Figure 6-13: APC Allocation View New – View History

The 'APC Allocation View New' screen will appear. In the upper portion of the screen is the information on the 'Parent APC. This view screen is used for historical purposes *(reference figure 6-14).*

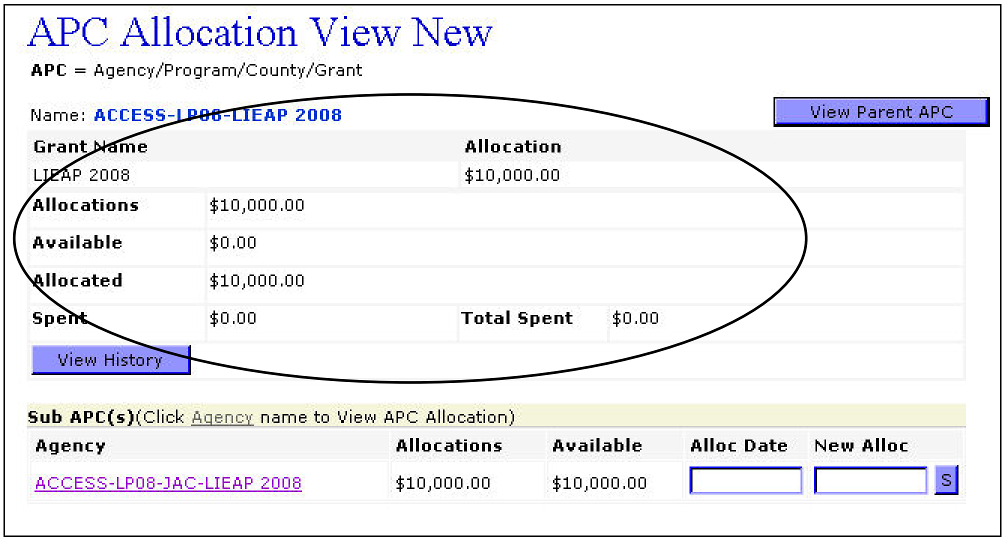


Figure 6-14: APC Allocation View New – View Parent APC

Program Funds Available for Payment Assistance

Once the Grant and APC tree structure is completed and grant funds allocated down to the Child APC level, the funds will be able to be used on the 'OPUS New Payment' screen for client payment assistance.

After an intake worker has processed a household through the OPUS system, the intake worker will be able to select the Child-APC from a drop down menu on the 'New Payment' screen as shown in the example below. Reference Section 2; Client Intake New.

Steps have been completed for creating a Local Program.