

OPUS Agency Grant Status

Preparers (Roles needed-AGS Preparer, Fiscal View)

1. <https://opusprod.hcs.state.or.us>
2. Login to OPUS.
3. Enter user name and password and click on Login.
4. Select OPUS Module FISCAL and click on Submit. (skip this step if Fiscal is the only module available).
5. Run cursor over FSR.
6. Select AGS (Agency Grant Status) from drop-down menu.
7. To open an existing AGS, type grant code or selection to narrow search, then Click on Search.
8. Select existing AGS to view, edit or delete (editing or deleting are only allowed in PREP status).
9. To create a new report, click on AGS New.
10. Select grant from drop-down menu and click on Load (the system will bring up the earliest quarter for which there is no report for the chosen grant – the system will not allow a report for the current quarter if there is a previous quarter with no report which must be completed first).

*NOTE: Pay close attention to the quarter that is displayed. Even if funds were not allocated yet for the first quarter or two of the grant expenditure period, the system will not allow you to enter the current quarter until all previous quarters are entered. Just enter the period ending date and zero expenditures will be reported once saved. Also, remember that grants which end in “p” are for the prior biennium of 07-09 and ended 6/30/09.

11. Enter total expenditures to date, which are reimbursable by OHCS.

*NOTE: Categories may not be in the same order as they appeared on the old Excel FSR forms, so please be careful to enter the amounts for the correct category.

12. Enter matching funds, if required (spaces are available for Third Party Contributions, Other OHCS Awards and Rebates for grants *not* requiring matching funds and spaces are available for Local, State & Federal matching funds for grants requiring matching funds).
13. Enter source of matching funds, if required (spaces are available below amounts).
14. Enter program category totals, if required (DOE program is the only one with this requirement and spaces are provided on DOE AGS).
15. Select type of AGS- quarterly, final, or final-last quarter. When a final is submitted instead of a quarterly, just check "final". When a quarterly FSR is submitted and the final submitted at a later time (for the same period ending date), check "final-last quarter" (in fact it won't give you a choice at that point).

For example on a one year grant with the grant expenditure period of 7/1/09-6/30/10:

7/1/09-9/30/09 quarterly

10/1/09-12/31/09 quarterly

1/1/10-3/31/10 quarterly

4/1/10-6/30/10 quarterly *or* final

4/1/10-6/30/10 final-last quarter, if quarterly already submitted for same period

*NOTE: After a final AGS is certified, the system will not allow any additional AGSs for that grant. If a revised AGS/FSR is necessary, contact marcia.clark@hcs.state.or.us and request that the FSR be voided, so that a revised AGS/FSR can be entered.

16. Enter the period ending date for the quarter being reported.

*NOTE: Even if there were no expenditures for the quarter, enter the period ending date anyway or the category will not be saved (it would be as if there was no AGS/FSR submitted).

17. Enter a comment, if desired (such as a request to rollover funds).
18. Repeat steps 11 through 16 for each category.
19. Click on Save.

OPUS Financial Status Reports

Certifying Official (Roles needed- FSR Certifier, Fiscal View)

1. <https://opusprod.hcs.state.or.us>
2. Login to OPUS.
3. Enter user name and password and click on Login.
4. Select OPUS Module FISCAL and click on Submit. (skip this step if Fiscal is the only module available).
5. Run cursor over FSR.
6. Select FSR (Financial Status Reports) from drop-down menu.
7. To view an existing FSR, type grant code or selection to narrow search, then click on Search.
8. To create a new FSR, click on FSR New.
9. Select biennium from drop-down menu and click on Load.
10. Select individual AGSs to include in FSR, or click on Check All.
11. Click on Certify.
12. Click on Print to open the printable copy. Print copy and retain signed copy in your records.