OPUS
COMMON TASK
GUIDE

Oregon Housing and Community Services
OPUS HelpDesk
North Mall Office Building
725 Summer Street, NE, Suite B
Salem, Oregon 97301-1266
1-800-453-5511, Option 6
opushelp@oregon.gov

08/30/2018

Introduction

In order to meet the requirements of various Federal and State agencies, Oregon Housing and Community Services OPUS data collection system is a collaborative, statewide effort assisting agencies to document client-level needs and characteristics through a coordinated system that compiles common information at the agency, community, and state level.

OPUS is a software tool that can also assist agencies in focusing services and locating alternative resources to help low-income individuals. Subgrantee Agency staff may use the information in the system to target services to their client's and their community's needs.

OPUS is an entirely web-based system hosted on a central statewide server coordinated by Oregon Housing and Community Services Department. The system is accessed via the Internet by providers offering various supportive services to low-income Oregonians'.

DISCLAIMER: While Oregon Housing and Community Services takes great care to ensure the accuracy and quality of this guide, all materials are provided without any warranty whatsoever, including, but not limited to, the fitness for a particular purpose.

TRADEMARK NOTICES: OPUS system content, operations and corresponding logos are service marks of Oregon Housing and Community Services. All other product names and services used throughout this book are trademarks or registered trademarks of their respective companies. The product names and services are used throughout this book in editorial fashion only and for the benefit of such companies. No such use, or the use of any trade name, is intended to convey endorsement or other affiliation with the users' guide.

1. LOGGING IN

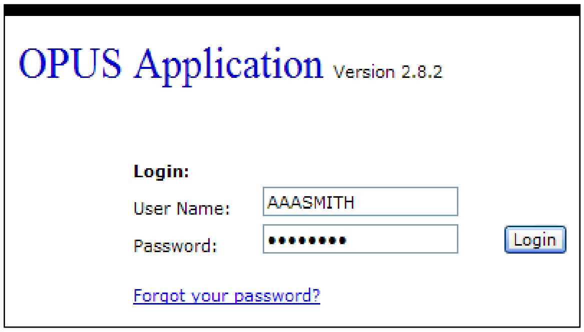
- Go to the OPUS website at:
  - ✓ OPUS Production: https://appsprod.hcs.oregon.gov/opus/
  - ✓ OPUS Test: https://appstest.hcs.oregon.gov/opustest/
- Make sure your Caps Lock key is *turned off*

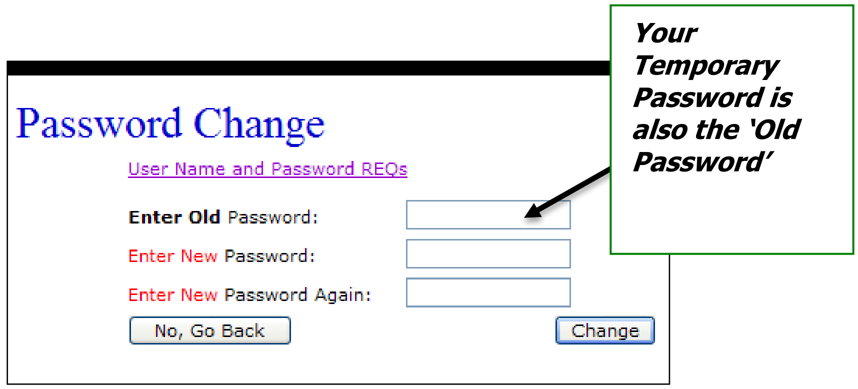
1-A. Username and Password Requirements

Username:	**Password:**
• Minimum of 5 characters • All Alphanumeric characters • Must not include symbols (e.g. @#$%^&' ") • Must not start with a number • Good examples of User Names include: - first initial of first name + last name - If your login name that you currently use to log into your work machine follows the rules above, then use the same one to avoid having to remember a different one.	• Minimum of 8 characters • Must contain at least one upper case letter • Must contain at least one lower case letter • Must contain at least one number or symbol(e.g. @#$%^&) • One number or symbol must not be at the beginning or end of the password • Don't use passwords that could be guessed like Program, Grant or Agency names such as "LIHEAP2004".

1-B. First-time Users

- When your account is setup or the password reset, a temporary password will automatically be sent to your e-mail address by the OPUS system. This is a temporary one time password. Passwords are time sensitive and will expire 48 hours from when they are sent. It is very important to login and change the password before it expires.
- No one has access to this temporary password except you.
- Temporary passwords are not interchangeable between the Test site (site used during training) and the Production site (actual site) because the two sites are actually two separate databases. Temporary passwords are specific to your account and specific to the database being used (i.e. Production or Test).
- The first time you log into the OPUS System, you will use the temporary password that was e-mailed to you at your work address. The system will prompt you to change your password to a new permanent one.
- On the '**Login**' screen, type '**Your User Name'** and the temporary password you received via email. The user will be prompted to change it on the next screen. The '**User Name'** is not case sensitive. The **'Password'** is case sensitive.

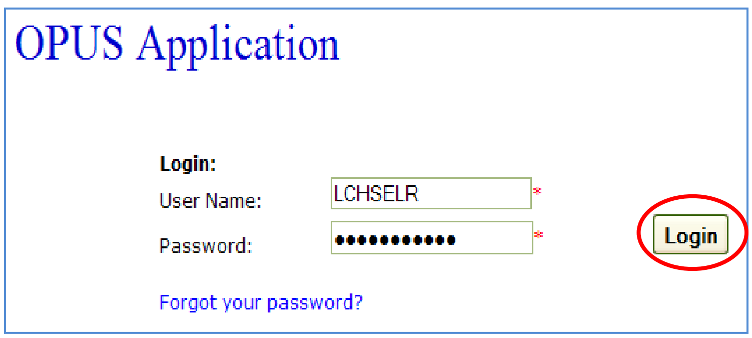




- ***Do not share your password*** with co-workers, clients, or others. ***OPUS HelpDesk will never ask for your password.***

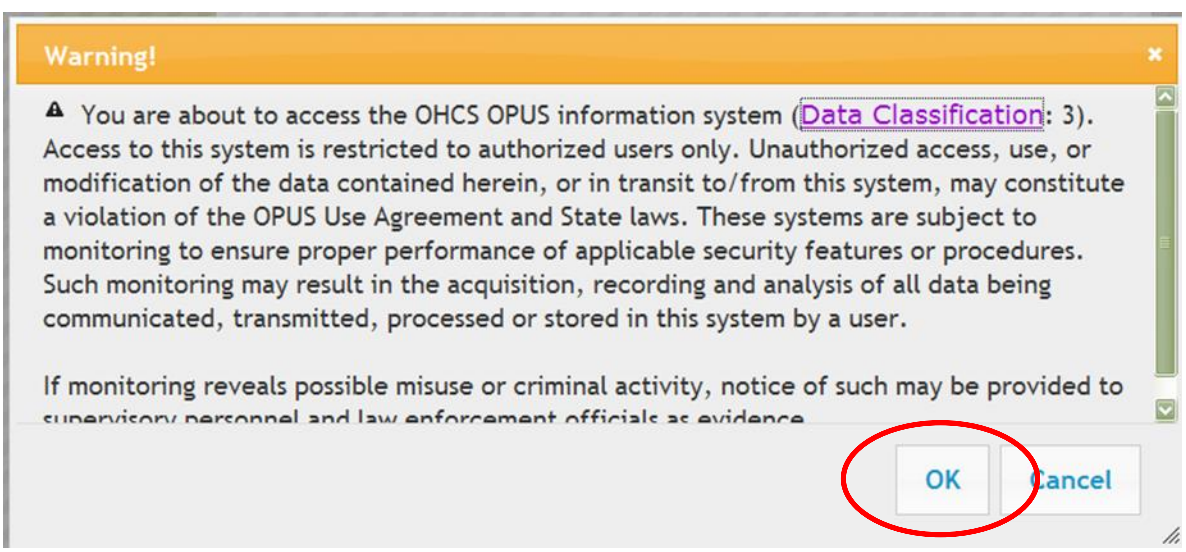
- Do not give this information to people on the phone or by e-mail. Your password is for only you to know. *Your account will be made inactive if you don't use it regularly*.

- Enter your individual **User Name** and **Password** and click '**Login**'.

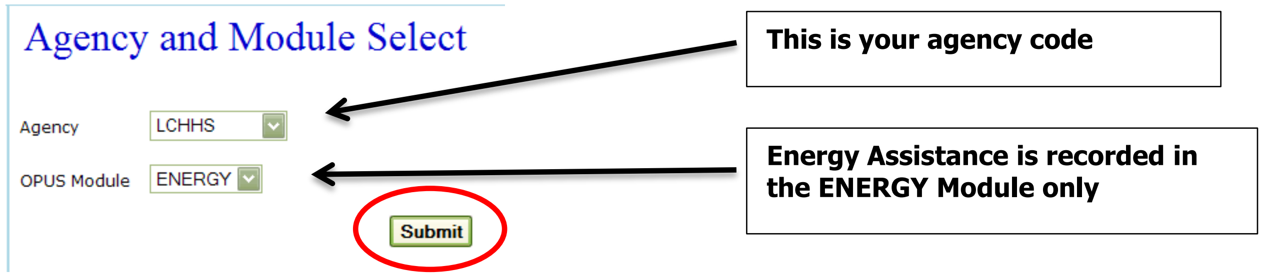


- The Warning window appears.

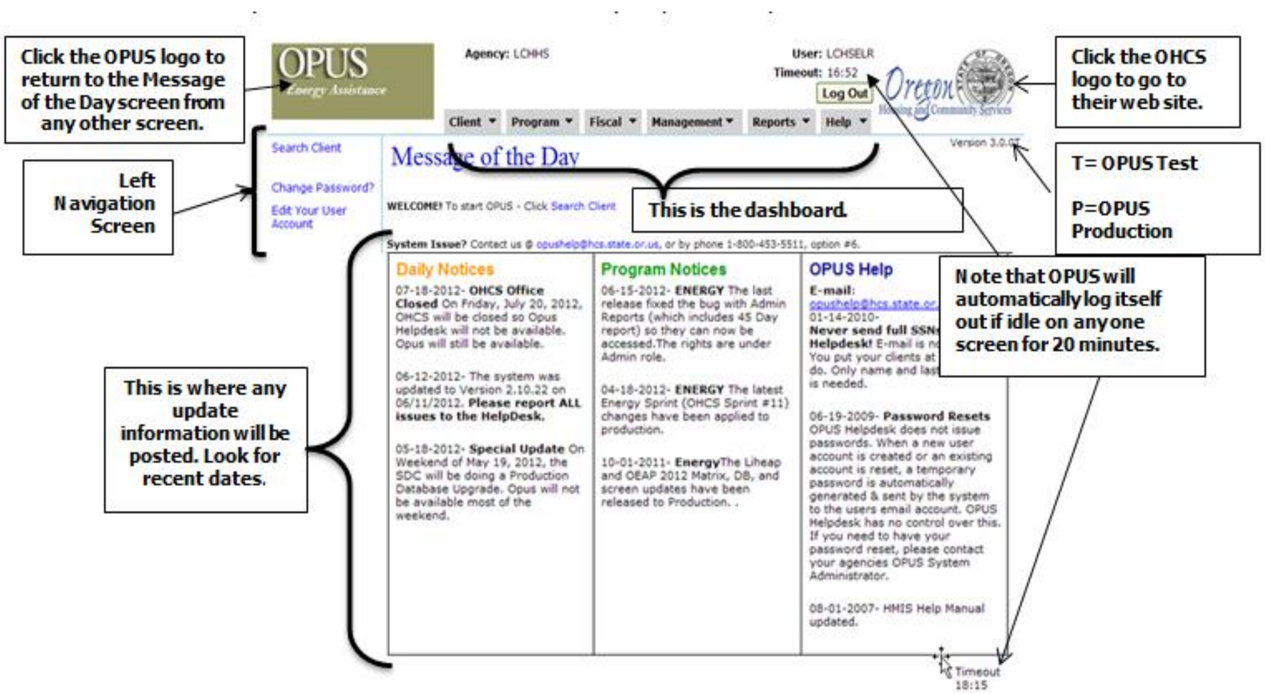
- Read the message and click '**OK**'.



- Make sure the correct '**Agency**' and '**OPUS**' module are selected; then click '**Submit**'.



- Check the **'Message of the Day'** screen to see if there are any important updates to OPUS.



1-C. Contact info for technical support

- Passwords (forgotten passwords or system not accepting your password or user name)
- Moving clients from a household or residence, entry errors, duplicate clients, duplicate residences, adding clients to a household, error messages, duplicate social security numbers

OPUS HelpDesk 1-800-453-5511, option 6; opushelp@oregon.gov

OPUS Information Website http://www.oregon.gov/OHCS/pages/OPUS_Main_Page.aspx

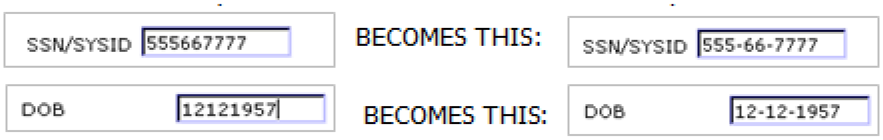
2. DATA ENTRY BASICS

2-A. Tab Order

- Press Tab key to move forward quickly through consecutive fields, or use Shift Tab to move through fields in reverse. *(This works well in most areas, but not all.)*

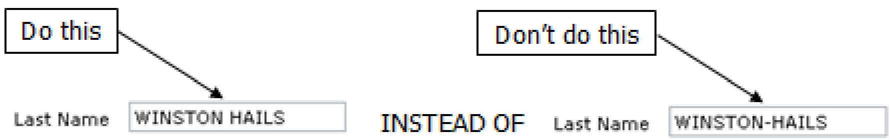
2-B. Number Formatting

- Do not type dashes, slashes, or spaces in dates or numbers
- OPUS automatically converts numbers to correct date and phone number format.



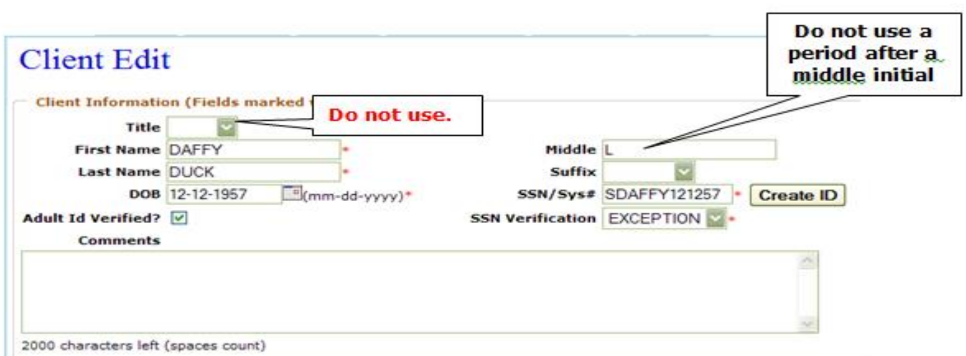
2-C. Client Names

- **Hyphenated Names**
  - Please don't use a hyphen, just a space



- **Shortened Names / Nicknames**
  - Do not use shortened names or nick names in the OPUS system. Use the full legal name as it appears on the SSN card or a current driver's license, or other legal documents.
  - Please note that sometimes the legal name on the SSN card will be 'Jim' or 'Bill' or some other shortened name. In these cases, just enter the name exactly as it appears on the SSN card or current driver's license, or other legal documents.

2-D. Be careful to enter information into the correct fields:

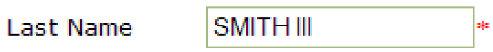


- Initials in Middle field, not First Name field

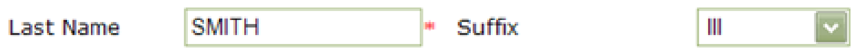
- "John L. Smith" should ***not*** show:

- Proper format ***should*** be:

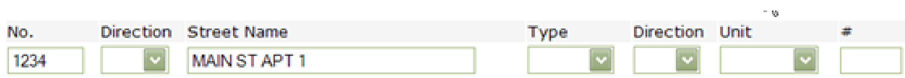
- <u>Suffix field instead of Last Name</u>
  - "John Smith III" should ***not*** show:



  - Proper format ***should*** be:

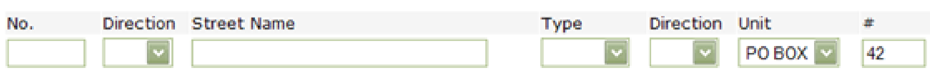


- <u>Unit type and number separate</u>
  - "1234 Main St. Apt. 1" should ***not*** show:



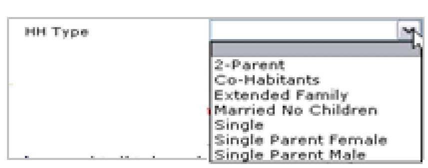
  - Proper format ***should*** be:

- <u>PO Box format:</u>



2-E. Fields with a downward arrow are dropdown menus

- With familiarity, it is possible to learn the dropdown selections.
- After clicking the drop arrow, type the *<u>first letter</u>* of the desired selection, such as 'M' for 'Married' in the Household Summary section, 'E' for 'Eugene' in the City list.
- Note that the first selection that begins with the chosen letter comes up first.

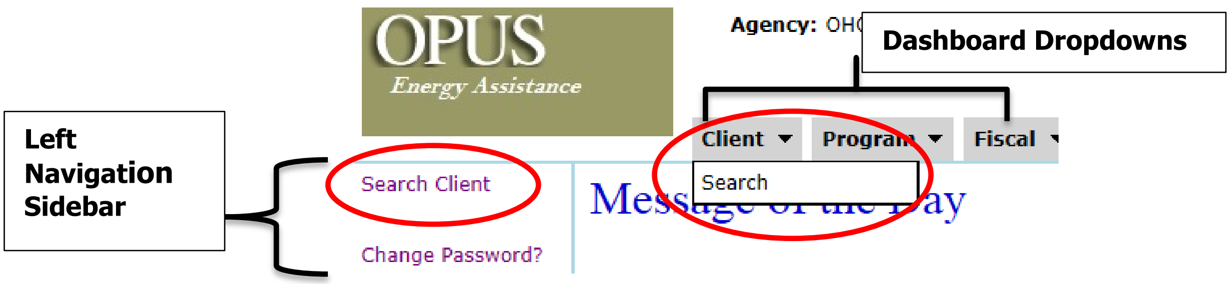


3. SEARCH FOR CLIENTS OR RESIDENCES

Many households and individuals from around the state have records in the OPUS system. The majority of the time you will be updating information for existing clients' records. It is imperative that a proper search be conducted to determine whether a client or a residence is already in OPUS. Avoid creating duplicate clients or residences by following the steps below. If in your search you think you've found a duplicate, please report it to the OPUS HelpDesk right away. These records need to be merged by OPUS-HelpDesk to keep the data integrity.

3-A. Order of search for records

Go to the Search Screen by clicking on the dashboard dropdown, or the left navigation screen



1) **SEARCH BY**: Social Security number of applicant – usually sufficient

If none found then:

2) **SEARCH BY:** SS#'s of remaining members of household if applicant not found

If none found then:

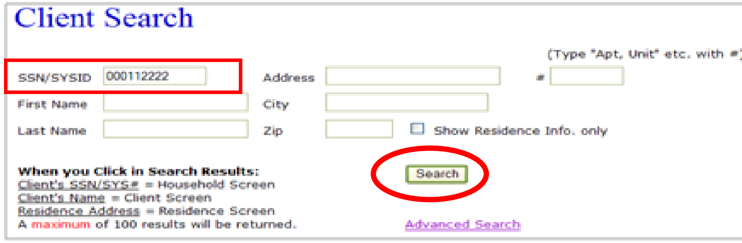
3) **SEARCH BY:** Name of applicant and/or other household members. Be sure to search by possible nick names like Bill for William, or Sue for Susan, etc.

If none found then:

4) **SEARCH BY:** Residence

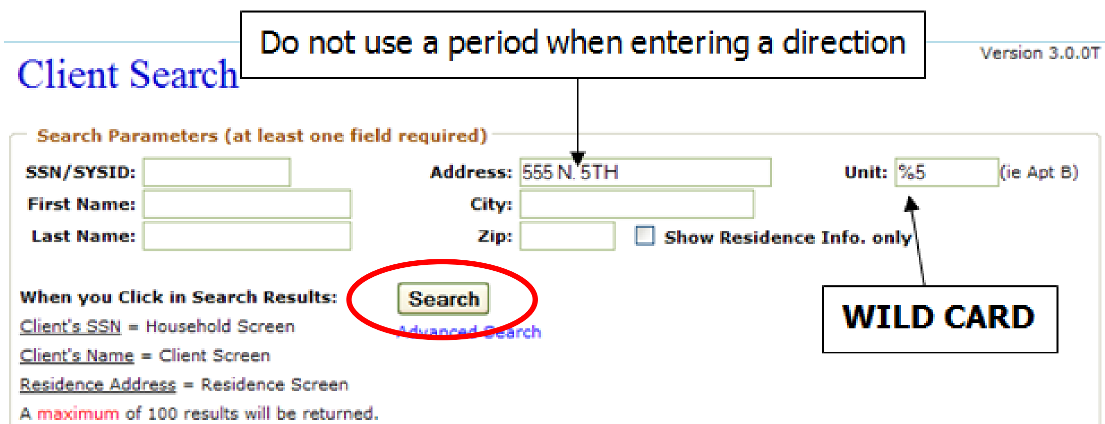
3-B. How to search

- Always search for clients or residences in OPUS **before trying to add them as new**.
- Best searches use only one or two fields at a time.
- Best searches are by Social Security Number ***or*** client name ***or*** partial address
    - ➢ **Social Security Number** search: Type all 9 digits of the number without any dashes or spaces. Click on '**Search**'



- **Name** search: Use 3 & 3 method – Type the <u>first three letters of the first name</u> and then type the <u>first three letters of the last name</u>. Click '**Search**.'

- **Residence Address** search:
  - Do not type in the entire address. The less you enter the more results you will get.
  - Do not type a period after a direction. They are not entered into the system using a period to abbreviate so you will not get any results when searching with a period

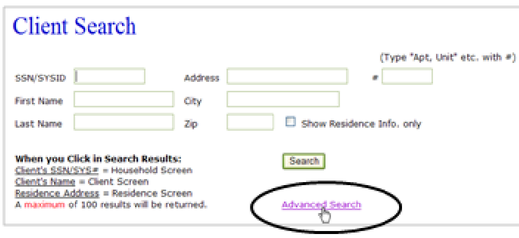


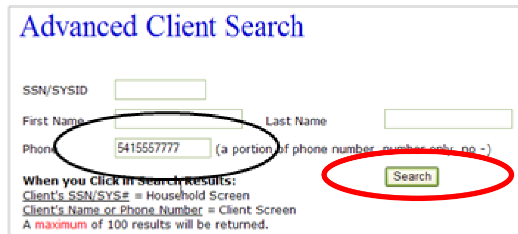
  - **WILD CARD**: ***%*** is the "wildcard" used in place of an unknown data in any field. The possible TYPE of unit could be the following and are not always entered consistently over an entire apartment complex or mobile home park.
    - **TYPE OF UNITS:**

#	DEPT	PMB	STE
APT	FL	RM	UNIT
BLDG	LOWR	SLIP	UPPR

BOX OFC SPC

- **Phone Number** search: Click '**Advanced Search'** on the '**Client Search'** screen.
    - Type the number without any dashes or spaces.
    - Click on '**Search'**.





3-C. Potential problems in searching

- Social Security numbers may have been entered into OPUS incorrectly during the original intake.
- Senior women often use the husband's Social Security number when he is deceased (because they are receiving benefits under his number).
- Names may have been misspelled when entered into OPUS during the original intake.
- Women often change their names when married or divorced. They may have used their maiden name when they were originally entered into OPUS, but they now go by their married name.
- Many people alternate between their first and middle names, or prefer a shortened version of their name, or use a nick name. Their nick name or shortened name may have been entered into OPUS during the original intake.
- An applicant may not be in OPUS (even if they've received some energy assistance before. Note: not all energy assistance is recorded using OPUS Energy module such as other local programs of agencies.)

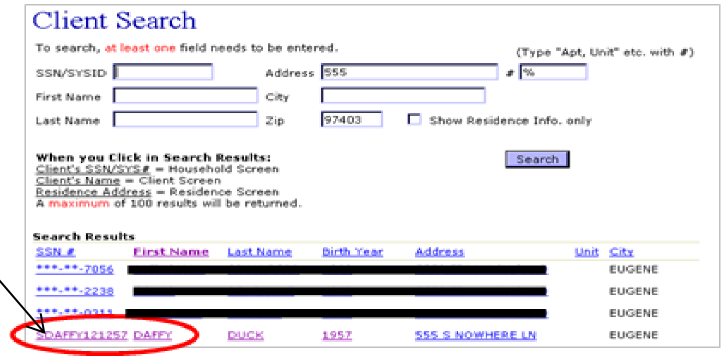
4. CLIENT DATA AND DEMOGRAPHICS

Client data and demographics are updated at each intake. When entering new clients, be sure to enter all data correctly.

4-A. Client Records - Updating / Editing existing records

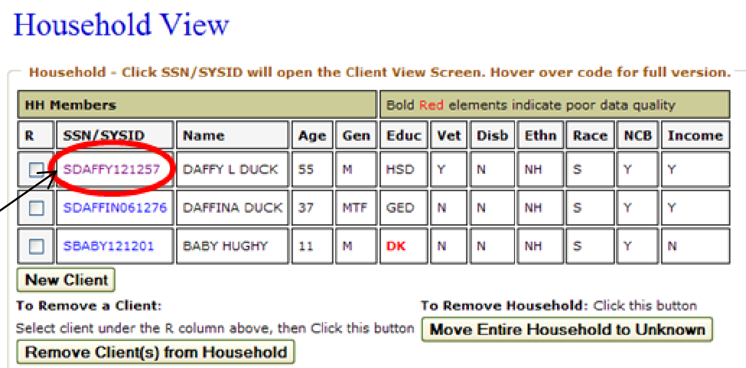
- Once you have completed a search and located the correct HH, select the client's SSN/SYSID on the '**Client Search'** screen to go to '**Household View'** screen.

Click on the SSN/SYSID to go to the 'HH View' Screen to update client information

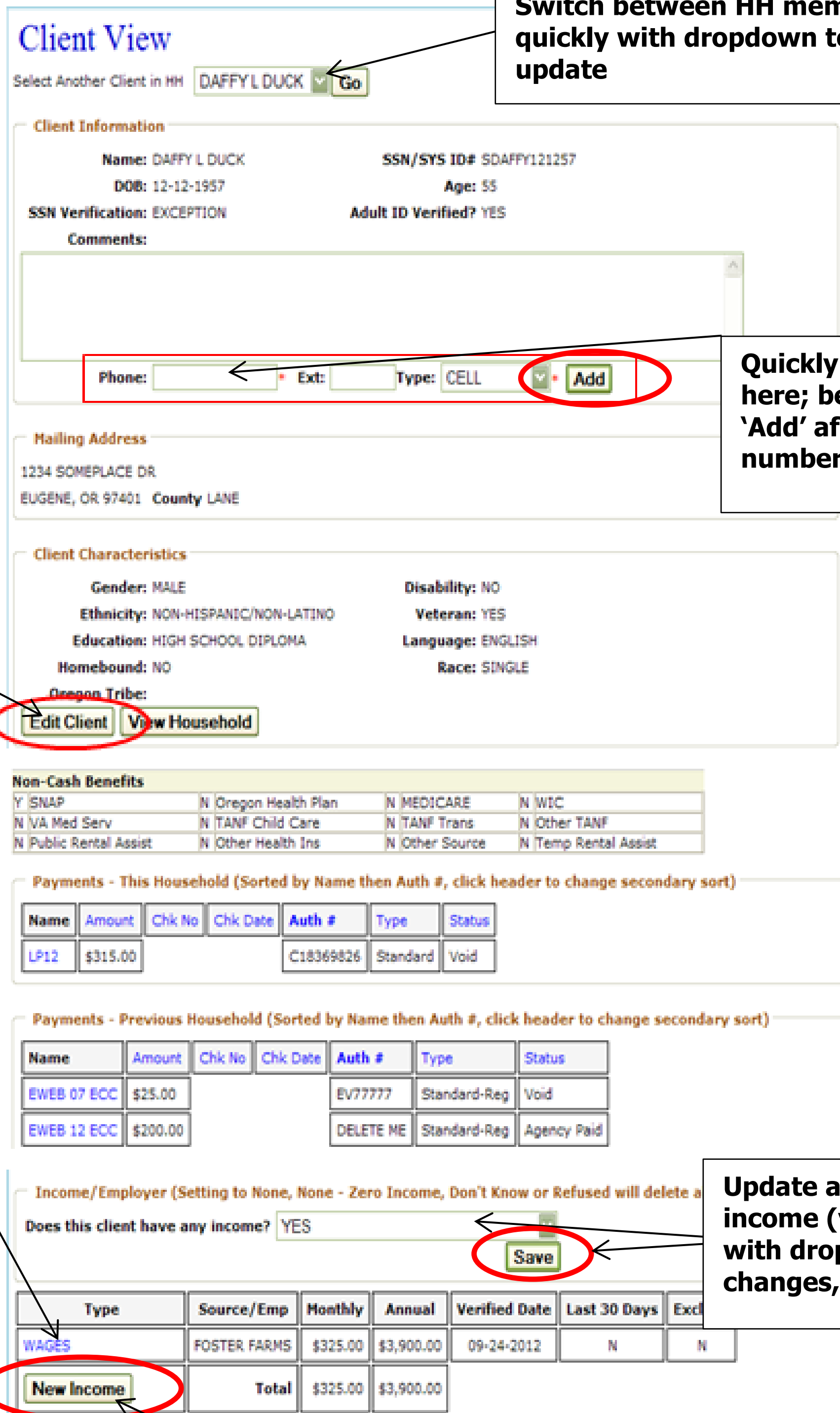


- Each HH member needs to be thoroughly checked using the steps below. Check each client individually, updating as you go, <u>including each client's income</u> (see Section 5, Income). From the '**Household View'** Screen, click on a member of the household to be directed to the '**Client Edit'** Screen.

Click on the SSN/SYSID to go to the 'Client View' Screen to update



Overview of 'Client View' Screen



Switch between HH members quickly with dropdown to update

Quickly Add a new number here; be sure to click on 'Add' after entering the number

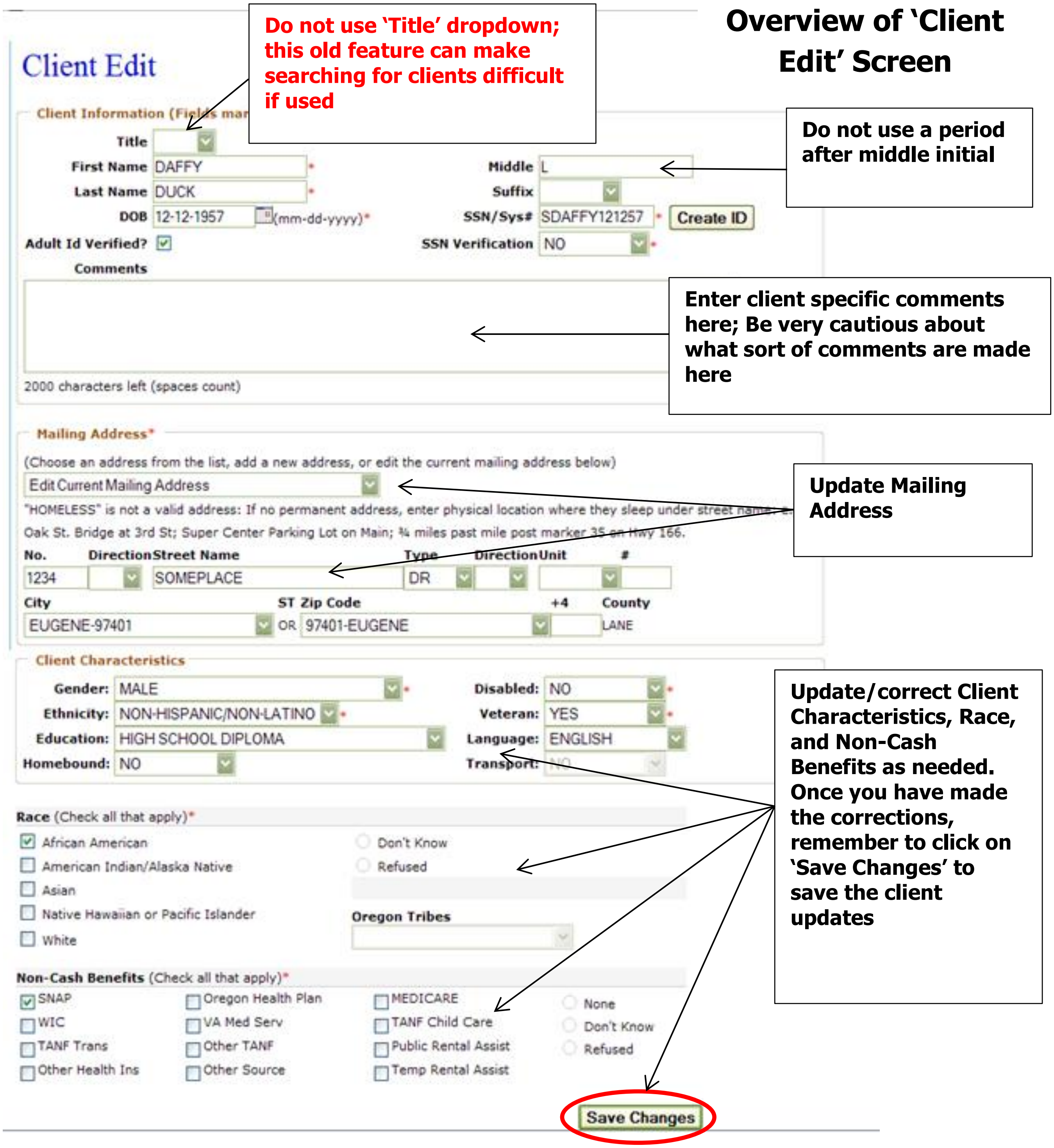
Click on 'Edit Client' to go to the 'Edit Client' Screen to update Information

Delete Income: Click on the link under 'Type', and then 'Delete' in the record. You will need to delete all income sources previously entered that are no longer accurate before proceeding with a payment as it will affect payment determination

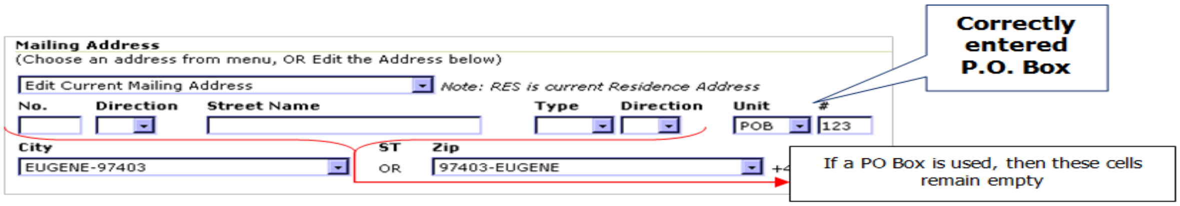
Update and change in client's income (yes, no, DHI, etc.) with dropdown. After making changes, click on 'Save'

New Income: Create a new income by clicking on the 'New Income' button at the bottom of the 'Client View' Screen

Overview of 'Client Edit' Screen



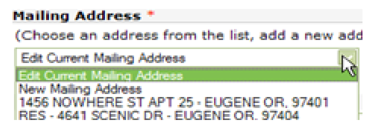
- **Review the 'Client Edit' Screen for each HH member**
- **Verify each field, make changes as necessary or add missing data**
- **Remember to always click on 'Save Changes' to ensure the data is saved**
- **Make sure mailing address is correct**
  - ✓ **Pay special attention to post office boxes with mailing addresses**



Mailing addresses are changed via the **Edit Client** screen OR the '**Mail/PH Update'** link on the left navigation.

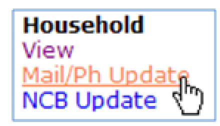
- **Changing/Editing Mailing Address: TWO WAYS TO UPDATE!**

1. On 'Edit Client' screen, use pull-down menu to update Mailing Address:

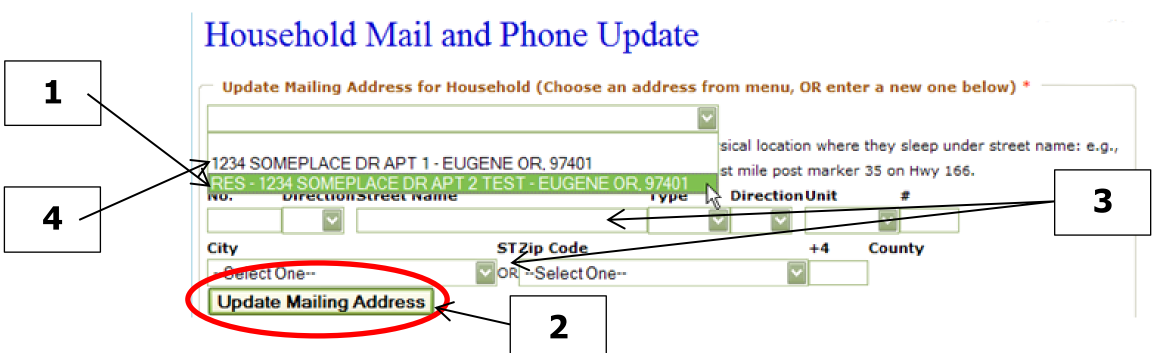


- "Edit Current Mailing Address" for errors
- "New Mailing Address" if new
- Add / Edit data
- Continue editing/reviewing all of the other info on the 'Client Edit' screen.
- Click on 'Save Changes' at the bottom of screen when finished

2. On any screen select the 'Mail/Ph Update' link on the left side navigation:



- If the Mailing Address matches the Residential address shown in the list, then select RES - <current correct mailing address> as shown below (1). Click on 'Update Mailing Address' (2) to save entered data.



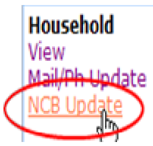
- If the Mailing Address and Residence address **are not the same**, then enter the correct mailing address information being sure to delineate the information into the correct cells (3). Click on 'Update Mailing Address' (2) to save entered data.

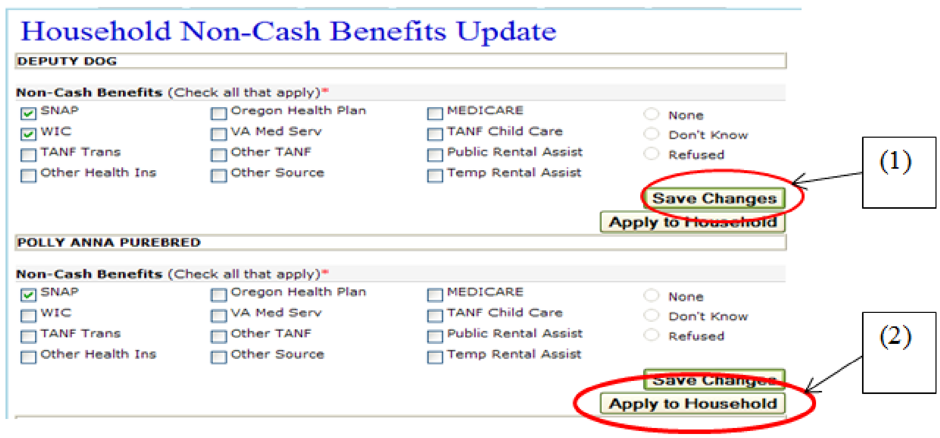
- If you select a different mailing address from the lists on this screen, that selection will now appear for all other HH members (4)

- **Changing/Editing Non-Cash Benefits – TWO WAYS TO UPDATE**

  1. On 'Edit Client' screen, scroll to bottom of screen and update benefits. This will need to be repeated for *each client* in the household. (See overview of 'Client Edit' Screen)

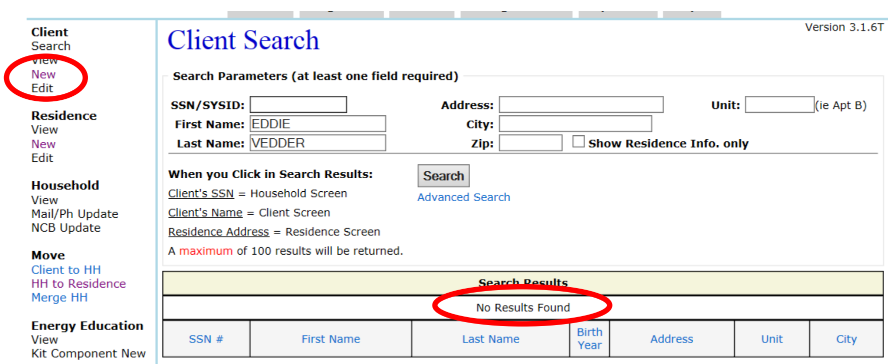
  2. On any screen, select the *NCB Update* from the left navigation from any view. Each household member is listed. You may edit each individually (1) from this screen and save the changes to only that member or apply those changes to all household members (2).



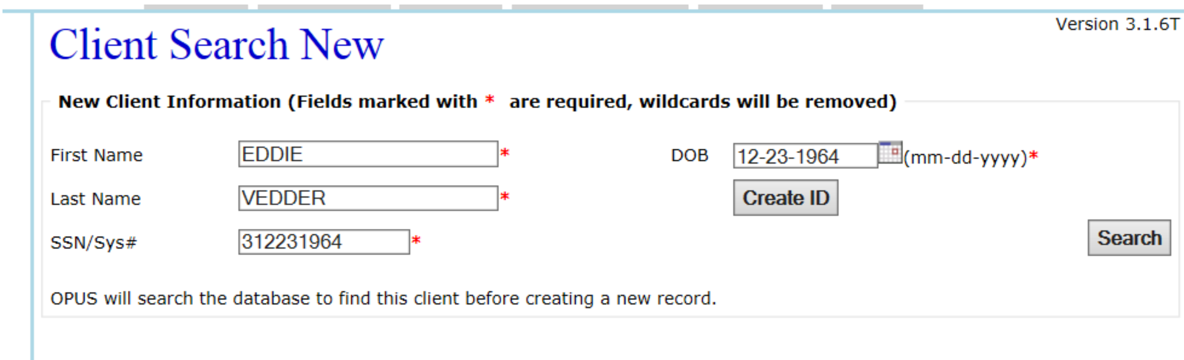


4-B. Creating New Client Records

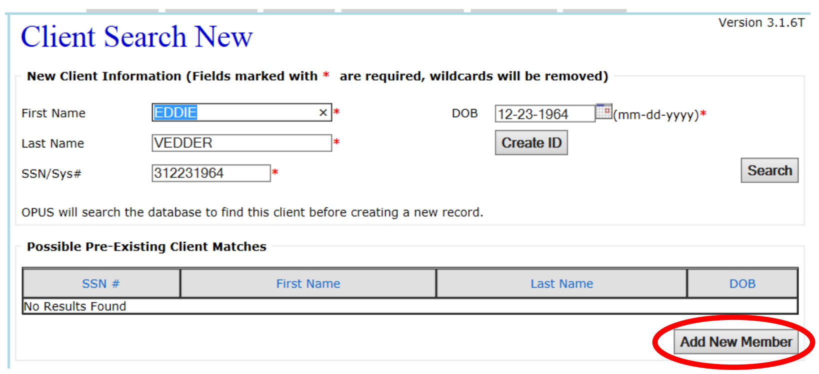
- After verifying that a client is truly not in OPUS (see Client Search), then select '***New***' link under '**Client**' on the left navigation.



- This will bring up the '**Client Search New**' screen. OPUS has a built in search so that duplicates will be avoided.



- Enter the required data, then click **'Search'**.
- After searching, a list will be shown with possible matches.
  - Select the correct match if it is there.
  - If there are no matches, then select the '**Add New Member**' button at the bottom of the screen and proceed to enter the new client's data.



Fill in appropriate and required fields. OPUS will ***not*** save a record unless all **required (*)** fields are completed.

- **Client Name (1)**

  (Title, First Name*, Middle, Last Name*, and Suffix)

  - **Hyphenated Names-**
    - Please don't use a hyphen, just a space
  - **Shortened Names / Nicknames-**
    - Do not use shortened or nick names in the OPUS system. Use the legal name as it appears on the SSN card or a current driver's license, or other legal documents.
    - Please note that sometimes the legal name on the SSN card will be Jim or Bill or some other shortened name. In these cases, just enter the name exactly as it appears on the SSN card or current driver's license, or other legal documents.

- **DOB (2) -**enter without dashes the system will automatically change
- **SSN * (3) & Verification (5) * -**Clients are ***not*** required to provide an SSN, but OPUS does *require* a unique ID to distinguish from other clients. **Only clients with verified SSN will be used in the LIHEAP payment calculation (their income will be included, but they will not).**
    - If a client has a VERIFIABLE SSN (card with them, or legal documents), then enter **YES**
    - If a client has a VERIFIABLE SSN, but they don't want it used in OPUS, then enter **NO** (and click **Create ID** if they are brand new in OPUS)
    - If a client does not have a SSN card or legal documents with them to verify, or it cannot be verified, or if the client just doesn't have a SSN, then enter **NO** (and click **Create ID** if they are brand new in OPUS)
    - **EXCEPTION** – only use Exception for the following reasons as per LIHEAP Manual
        - ✓ Unavailable to custodial guardian/parent (foster parents/child adoption in process)
        - ✓ Domestic Violence (DO NOT NOTE THIS IN COMMENTS ANYWHERE)
        - ✓ Safety Concerns
        - ✓ Newborn (one year old or less)
        - ✓ Adult applying for SSN with letter of SSN application
- **Adult ID Verified (4)** – **All adults ID must be verified.** For LIHEAP - if an adult ID has ***not*** been verified the household member will not be counted for the purposes of benefit, however their income will be counted.
- **Comments (6) -**Enter client specific comments here; **Be very cautious about what sort of comments are made here**
- **Phone (7)** -if available (if no phone, leave blank)
- **Mailing Address*(8) -**(Remember Mailing Address hints and suggestions)
- **Gender*(9)** *(Dropdown Field)* -This can prevent embarrassment when contacting a client with an androgynous name!
- **Ethnicity*(10)** *(Dropdown Field)* – allows REFUSED option (client can refuse, but intake worker must ask.)
- **Education (11)** *(Dropdown Field)*
- **Homebound (12)** *(Dropdown Field)* **–** if checked yes, then **Transportation** option becomes available.
- **Disabled*(13)** *(Dropdown Field)* - Disability MUST BE DOCUMENTED before entering this demographic into OPUS: SSD payments, disability statement from doctor, etc.

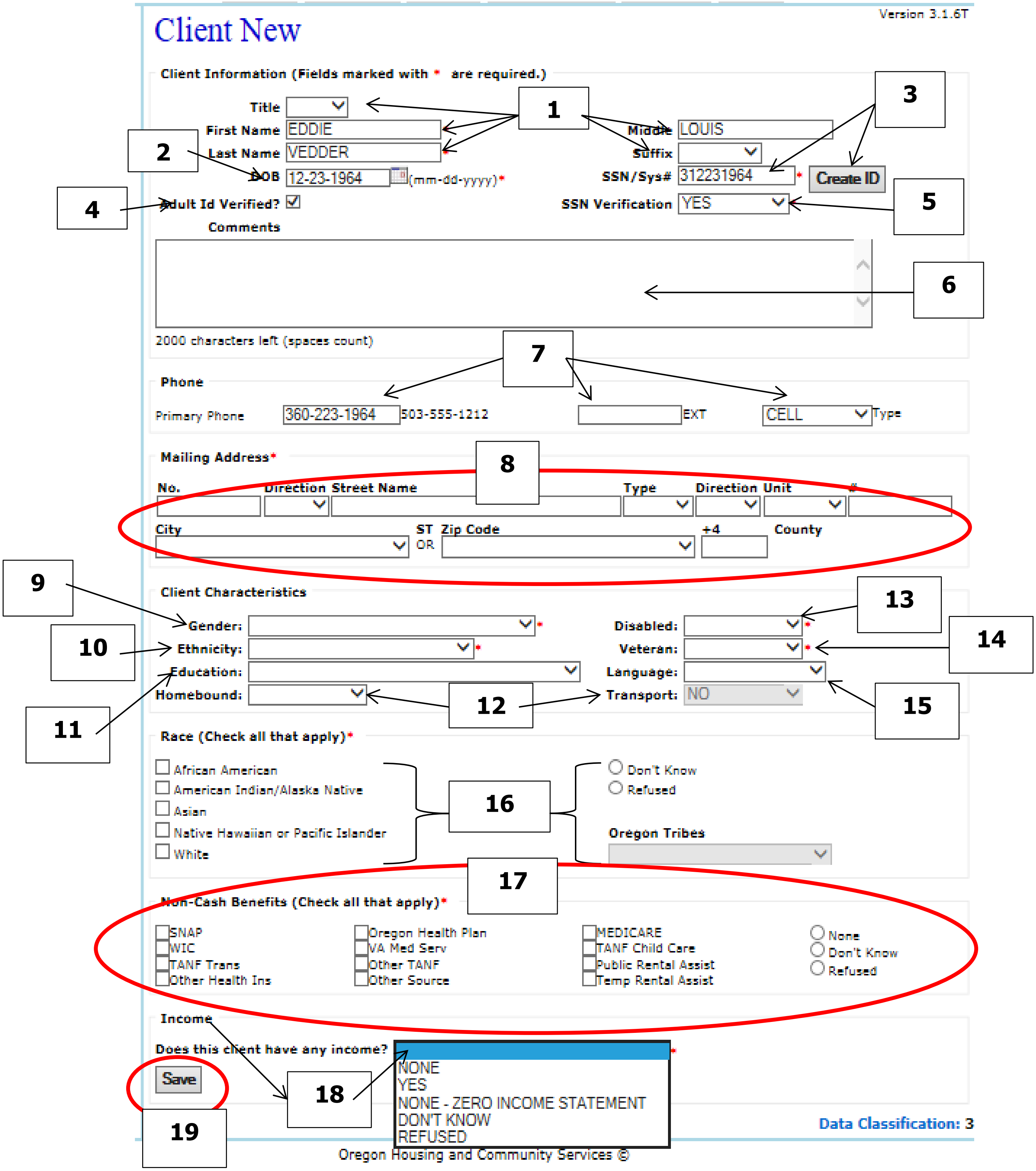
- **Veteran*(14)** *(Dropdown Field)*
- **Language (15)** *(Dropdown Field)* **-** It is important to know whether the client will require a translator in order to receive services.
- **Race* (16)**– Select all that apply (client can refuse, but intake worker must ask.)
- **Non-Cash Benefits*(17)-** select all that apply. Use the Optional Questionnaire to help gather this data.

SNAP	Oregon Health Plan	Medicare	None
WIC	VA Med Serv	TANF Child Care	Don't Know
TANF Trans	Other TANF	Public Rental Assist	Refused
Other Health Ins	Other Source	Temp Rental Assist	

- **Income (18) -Does this client have any income?** (Dropdown field with None, Yes, None-Zero Income Statement, Don't Know, and/or Refused)
- **Save (19) -**Remember to click '**Save**' to save entered data after completing fields

*****Tip: Duplicate Entries*****

When attempting to enter a **new record** for a client who **already exists** in OPUS, an **error message** will appear once a duplicate SSN or SYSID is entered in the Client Edit/New screen.


Client New
Version 3.1.6T
Client Information (Fields marked with * are required.)
Title
First Name EDDIE
Last Name VEDDER
DOB 12-23-1964 (mm-dd-yyyy)*
Adult Id Verified?
Comments
2000 characters left (spaces count)
Middle LOUIS
Suffix
SSN/Sys# 312231964 *
Create ID
SSN Verification YES
Phone
Primary Phone 360-223-1964 503-555-1212
EXT
CELL Type
Mailing Address*
No. Direction Street Name Type Direction Unit #
City ST Zip Code +4 County
OR
Client Characteristics
Gender:*
Ethnicity:*
Education:
Homebound:
Disabled:*
Veteran:*
Language:
Transport: NO
Race (Check all that apply)*
African American
American Indian/Alaska Native
Asian
Native Hawaiian or Pacific Islander
White
Don't Know
Refused
Oregon Tribes
Non-Cash Benefits (Check all that apply)*
SNAP
WIC
TANF Trans
Other Health Ins
Oregon Health Plan
VA Med Serv
Other TANF
Other Source
MEDICARE
TANF Child Care
Public Rental Assist
Temp Rental Assist
None
Don't Know
Refused
Income
Does this client have any income?*
NONE
YES
NONE - ZERO INCOME STATEMENT
DON'T KNOW
REFUSED
Save
Data Classification: 3
Oregon Housing and Community Services ©
1
2
3
4
5
6
7
8
9
10
11
12
13
14
15
16
17
18
19

5. INCOME

- Enter the total gross income from the previous 30 days or entire previous month.
- All adult members of a household must provide verification of income.
  - ➢ Adult is defined as 18 years or older.
  - ➢ A Child's SS, SSI, SSD, SSB and Child Support is counted under one of the adult members of the household.
  - ➢ Even if income sources match that of the previous year, '**Income'** must be updated.
- If an adult client is claiming "**Zero Income**", select "**NONE – ZERO INCOME STATEMENT**" This indicates that a Declaration of Household Income is attached to the application.
  - ❖ **Do not use** 'Don't Know' or 'Refused'
    - ▪ **If a HH refuses, the HH does not qualify.**
  - ❖ Only use **NONE** for children 17 years or younger.

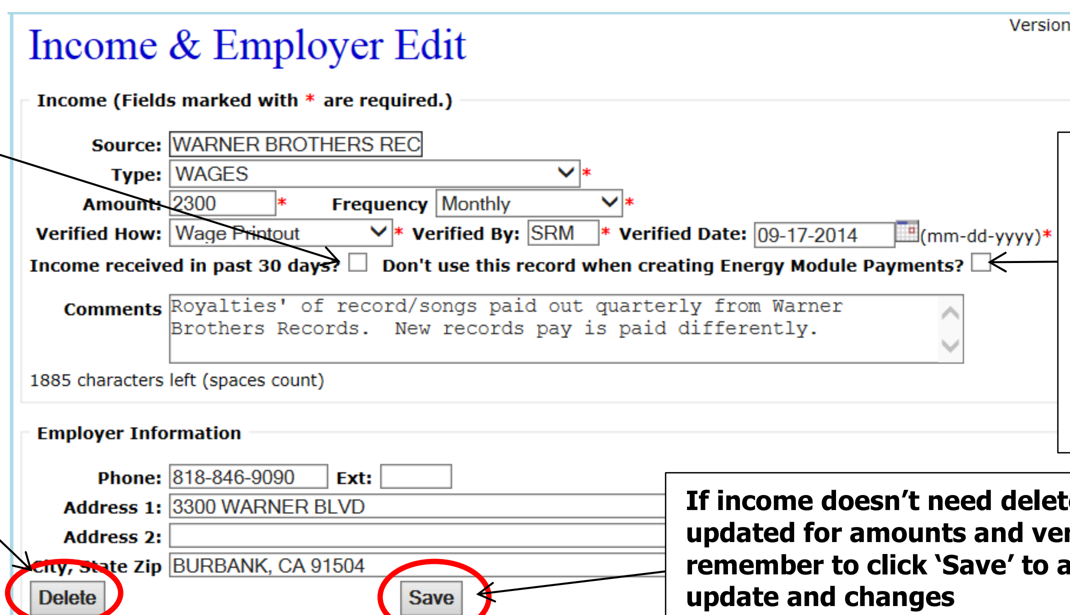
5-A. Income – verify, edit or delete a source of income

- On the '**Client View'** screen, scroll down to see '**Income**/**Employer'** section.
- Select and click on the '**Type'** name of income to delete or update. You will then be directed to the '**Income & Employer Edit**' Screen.

Type	Source/Emp	Monthly	Annual	Verified Date	Last 30 Days	Exclude
WAGES	WARNER BROTHERS RECORDS	$2,300.00	$27,600.00	09-17-2014	N	N
New Income	Total	$2,300.00	$27,600.00			

Mark if received in past 30 days when updating

To delete income record, click on 'Delete'. Then add new income

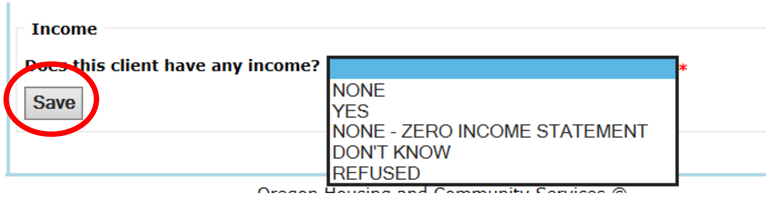


If this is marked, income will not be counted in determining a payment for household

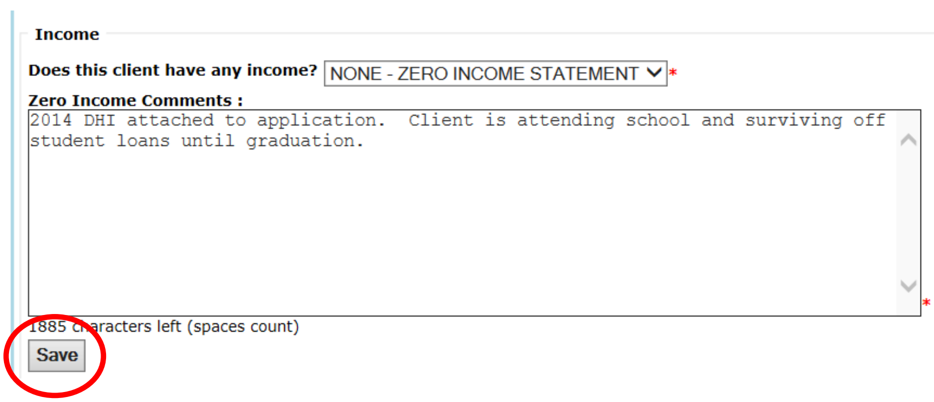
If income doesn't need deleted, but updated for amounts and verification, remember to click 'Save' to apply update and changes

5-B. Income – Adding a new source for a new client

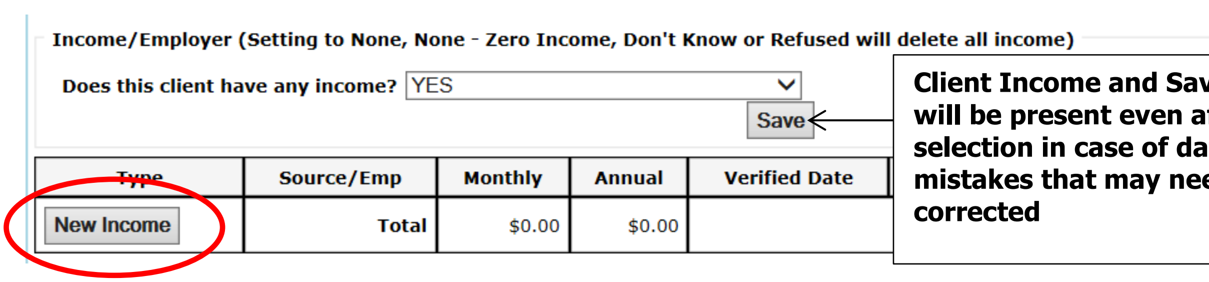
- On the '**Client View'** screen, scroll down to see **Income**/**Employer** section
- You will have started this process when entering the new client into OPUS by answering "Does this client have any income?" Click on '**Save'** after making appropriate selection.



- **YES** or **NONE–ZERO INCOME STATEMENT** are the only acceptable answers for adults seeking energy assistance.
    - Any adult client that does not have income must have an accompanying Zero Income Statement (Declaration of Household Income attached to application)
    - **NONE, DON'T KNOW** or **REFUSED** are not acceptable answers for adult clients.
    - **NONE** is the response for any children 17 years or younger.
  - If **NONE – ZERO INCOME STATEMENT** is selected, then type "DHI attached" in comments. Click on '**SAVE**.' The intake worker completes the Declaration of Household Income. The client reviews and signs the DHI. DHIs are attached it to the application.



If **YES** is selected, then the Type and Source/Employer information must be entered. The option to enter the income will appear after you select '**Yes'** and click on '**Save**'. After you click on '**New Income'** button, you will then be directed to the '**Income & Employer New'** screen.



Client Income and Save button will be present even after saving selection in case of date entry mistakes that may need corrected

- Click on **'New Income'** button to be directed to the **'Income & Employer New'** screen. Fields with * are mandatory fields that will need to be completed before the record can be saved.
    - **Source (1)** – Employer name or name of income source (Social Security, TANF, Walmart, etc.)
    - **Type (2)*** – what type of income is it? (Dropdown with options to choose from adoption, wages, self-employed, Social Security, Veteran's, etc.)
    - **Amount (3)*** enter the exact amounts listed on income source documentation
    - **Frequency (4)*** – double check that what is selected actually matches the true frequency. (Every other week, monthly, one time, weekly, etc.)
    - **Verified How (5)* –** all sources must have back up documents attached to application.
    - **Verified By (6)*** – initials will automatically be entered once this cell is entered. It can be changed if another individual actually verified.
    - **Verified Date (7)*** – today's date will automatically be entered once this cell is entered. The date can be changed if data entry is done on a different day than the intake with client.
    - **Income received in past 30 day? (8)** – check this box if the income info being documented is from previous 30 days of apt. date (vs. previous month).
    - **"Don't Use This Record When Calculating Payment" (9) –** If this is checked, it will exclude the income from the determination.
    - **Comments (10)** if necessary, avoiding redundancy with "Verified How". These comments print on the application and should be formatted as follows:

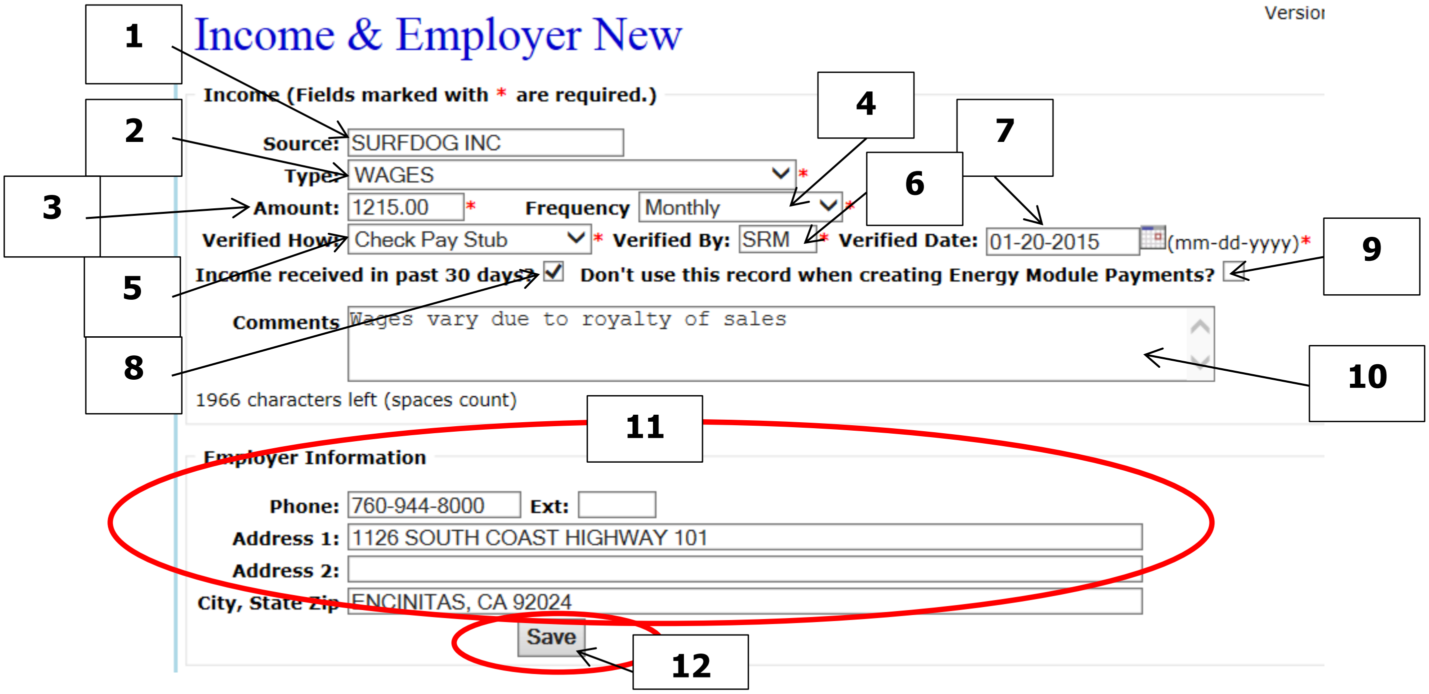
        LIHEAP 2014 Comment: <date> LP14 - <your comments here> - <initials>

        Example: 11/19/14 LP15 – client did not receive pay in the month of November as it was received in October due to calendar and State of Oregon Pay dates – SRM

    - **Employer Information (11)–** Fill in employer information of client (phone and address)

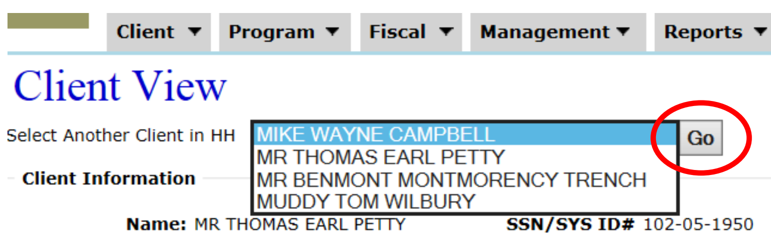
Tips: Income Errors

- ❖ Entering the correct income with the **incorrect frequency** changes the HH income so that the payment will be incorrect or may be denied altogether.
- ❖ Always double check your figures and what the frequency is.
- ❖ Every other week vs. twice a month



- Click on **'Save' (12)** to save the new income and employer information on the client. You will then be directed to the **'Client View'** screen

- To view/edit another HH member, select the next HH member from the '***Select Another Client in HH'*** drop down list from the top of the **'Client View'** screen. Then click on **'Go.'**



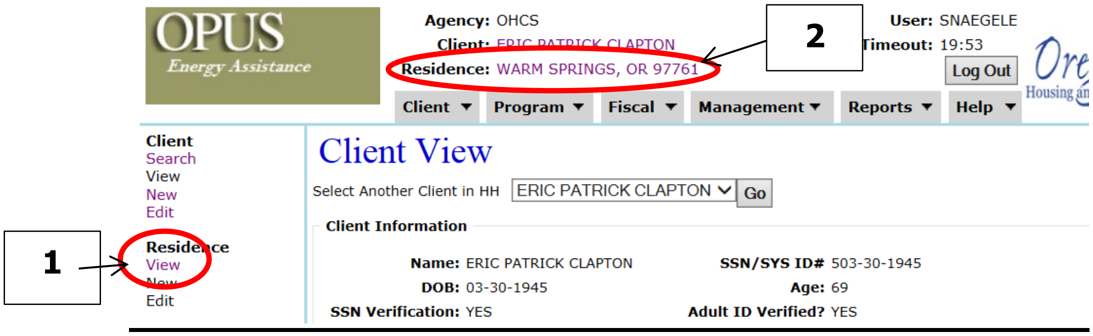
IMPORTANT NOTE: **Update the Payment after income was changed**

If income, frequency, etc. was changed or edited *AFTER* a payment has been issued, then you will need to edit the payment to update the total income amount <u>on the payment screen by requalifying the household</u>.

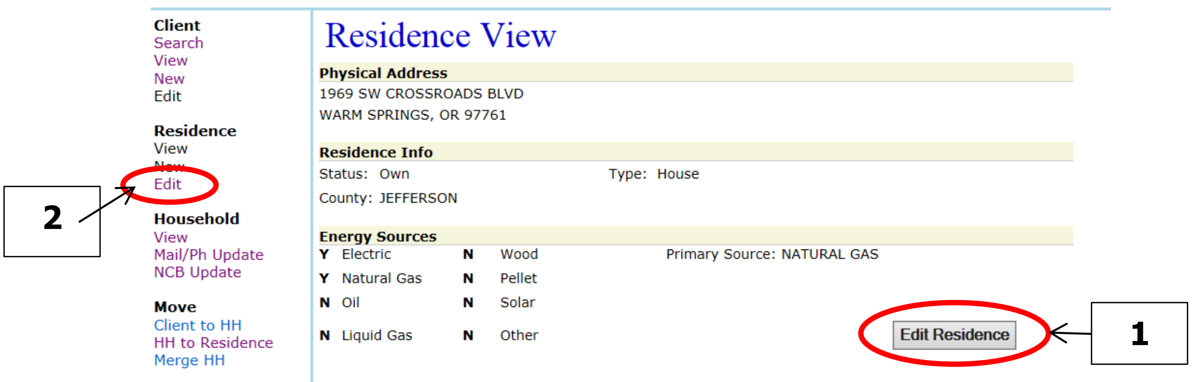
6. RESIDENCES

6-A. Verify or Edit a Residence

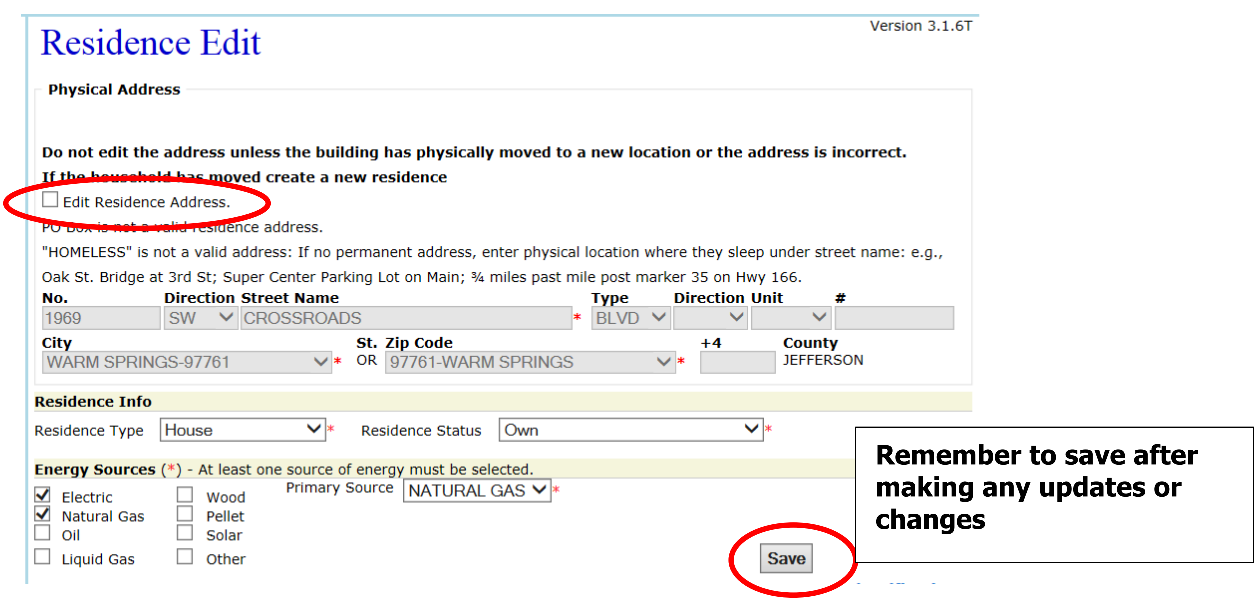
- Click on **'View'** under '**Residence'** from the left navigation sidebar **(1)**. *(Note: if the **'View'** link is not an option, then the HH is not in a residence)* You can also click on the **'Residence'** link at the top of the page to be directed to the **'Residence View'** screen **(2)**.



- Once at the **'Residence View'** screen, ensure the current residence information is accurate and does not need to be corrected.



- *Current information needs to be edited;* to get to the **'Residence Edit'** screen, select either the ***'Edit Residence'*** button (1) or the ***'Edit'*** link under **'Residence' (2)** from the left navigation sidebar while in the **'Residence View'** screen.
    - In order to ***Edit*** a residence you need to check the **'Edit Residence Address'** box. If the 'Residence Info' (House, Multi-Unit, MFD), 'Residence Status' (own, rent), or 'Energy Source' (Electric, Natural Gas, Oil) are the only information that needs updated, the **'Edit Residence Address'** box does not need to be checked.



- ❖ **THE ONLY TIME YOU WOULD EDIT A RESIDENCE IS WHEN INCORRECT INFORMATION WAS ENTERED (errors, not because they moved from one to another)**
- ❖ **IF YOU ARE TRYING TO CHANGE THE STREET, CITY, ZIP BECAUSE THE HOUSEHOLD HAS MOVED, THEN DO NOT CHANGE THE INFORMATION. FOLLOW THE INSTRUCTIONS TO MOVE THE HH TO A NEW RESIDENCE!!!**

- Delineate the information to correct fields:
  - "1234 Main St. Apt. 2" should ***not*** show

  - Proper format ***should*** be

- Select the correct '**Residence Type'**

House	Hotel
Multi-Unit (2-4)	Travel Trailer
Multi-Unit (Over 4)	Other*
MFD/Mobile	Unknown*

***Should not be used due to accurate data and eligibility requirements**

- Make sure '**Residence Status'** is accurate (especially for Subsidized).

Rent (Heat not)	Subsidized Rent (Heat not)
Rent (Heat inc)	Subsidized Rent (Heat inc)
Own	Subsidized Rent (No Allowance)
Unknown* **(Should not be used for data accuracy)**	

*****TIP: Subsidized Households/Residences**

- ✓ If a household is subsidized then you need to determine if they have an Energy Burden. Make the household accordingly. Not all subsidized households qualify for energy assistance.
- ✓ See Energy Burden Table on the following page to assist in determining Energy Burden of HH.
- ✓ If a household is subsidized, it must be marked in the **'Residence Edit'** screen.
- ✓ If the Residence Status is marked as **'Subsidized Rent (Heat Inc)** the HH is ineligible. The following will appear when trying to issue a payment: "**Payment Eligibility Status: Denied. Subsidized residences with heat included do not qualify for a payment.**

Applicant Heat Situation	Energy Burden?	Rationale	Type of Payment	Documentation
Applicant pays a vendor directly for utilities	**Yes**	**HH Energy bills will rise and fall with market.**	Regular, Paid to Vendor(s)	Utility Bill
Energy Costs included in rent (non-subsidized)	Yes	HH Rent may increase with an increase in Energy Costs	Regular, Paid to Applicant(s) or Landlord	Landlord Letter or Rental Agreement
Applicant lives in Subsidized Housing and heat is included in rent.	No	HH Rent and HH Energy Bill will not increase with an increase in Energy Costs	--	--
Applicant lives in Subsidized Housing and pays a vendor directly for utility costs (receives a utility allowance).	Yes	HH energy costs will rise with market	Regular Paid to Vendor(s)	Utility Bill, Subsidized Housing Contract
Applicant lives in Subsidized Housing and pays a landlord for utility costs (receives a utility allowance).	Yes	HH energy costs will rise with market	Regular, Paid to Applicant(s) or Landlord under Contract	Landlord Letter, Subsidized Housing Contract
Applicant lives in Subsidized Housing and pays a vendor directly for all utility costs **and does not receive a utility allowance**.	Yes	HH Energy bills will rise and fall with market	Regular, Paid to Vendor(s)	Utility Bill, Subsidized Housing Contract
Applicant lives in Subsidized Housing and pays the landlord for all utility costs based on usage **and does not receive a utility allowance** *(this is rare).*	Yes	HH Energy bills will rise and fall with market	Regular, Paid to Applicant(s) or Landlord under Contract	Landlord Letter, Subsidized Housing Contract

- Check off ALL '**Energy Sources'** used in the residence:

Electric	Liquid Gas	Solar
Natural Gas	Wood	Other
Oil	Pellet	

- Make sure '**Primary Source'** (of energy used to heat the home) matches the Vendor type that will receive a higher portion of payment.

  Vendor is **NW Natural Gas** so the Primary Source is **Natural Gas**

  Vendor is **Pacific Power** so the Primary Source is **Electric**

  Vendor is **Tyree Oil Inc** so the Primary Source is **Oil**

- Save any changes by clicking on the **'Save'** button at the bottom of the **'Residence Edit'** screen.

6-B. Creating a New Residence

- On the '**Client Search'** screen, type in the partial address, then click on **'Search'**.

  ✓ This is to ensure that the residence is not already in OPUS and populated by another household.

  ✓ If residence is already in OPUS with another HH listed, refer to **Section 10-A Adding, Moving Clients to New Residence**

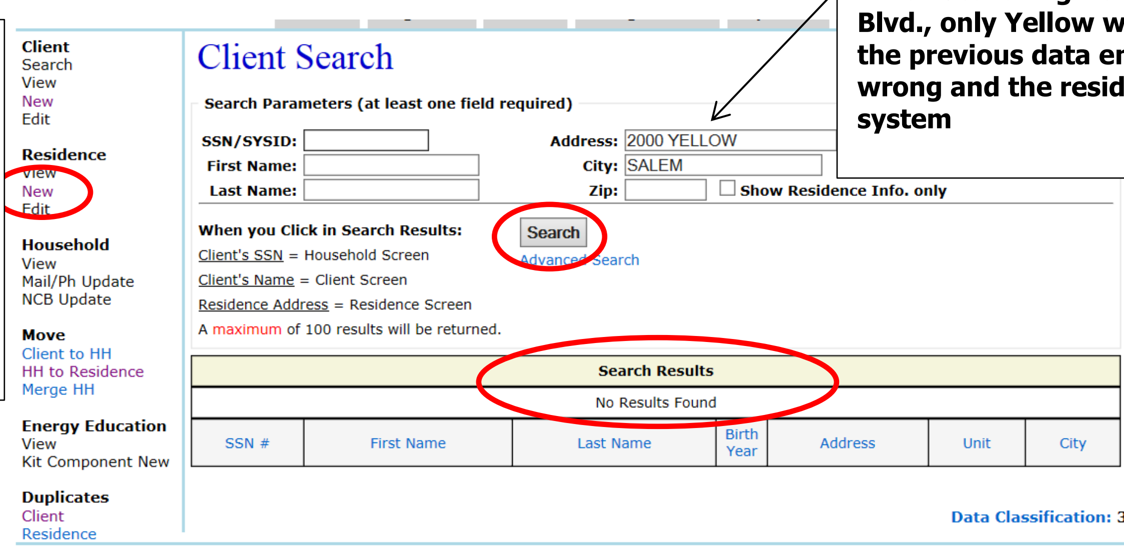
- After ensuring that the residence is not already in the system, select **'New'** under **Residence** from the left navigation side to go to '**Residence New'** screen. The OPUS System will not let you duplicate an exact address.

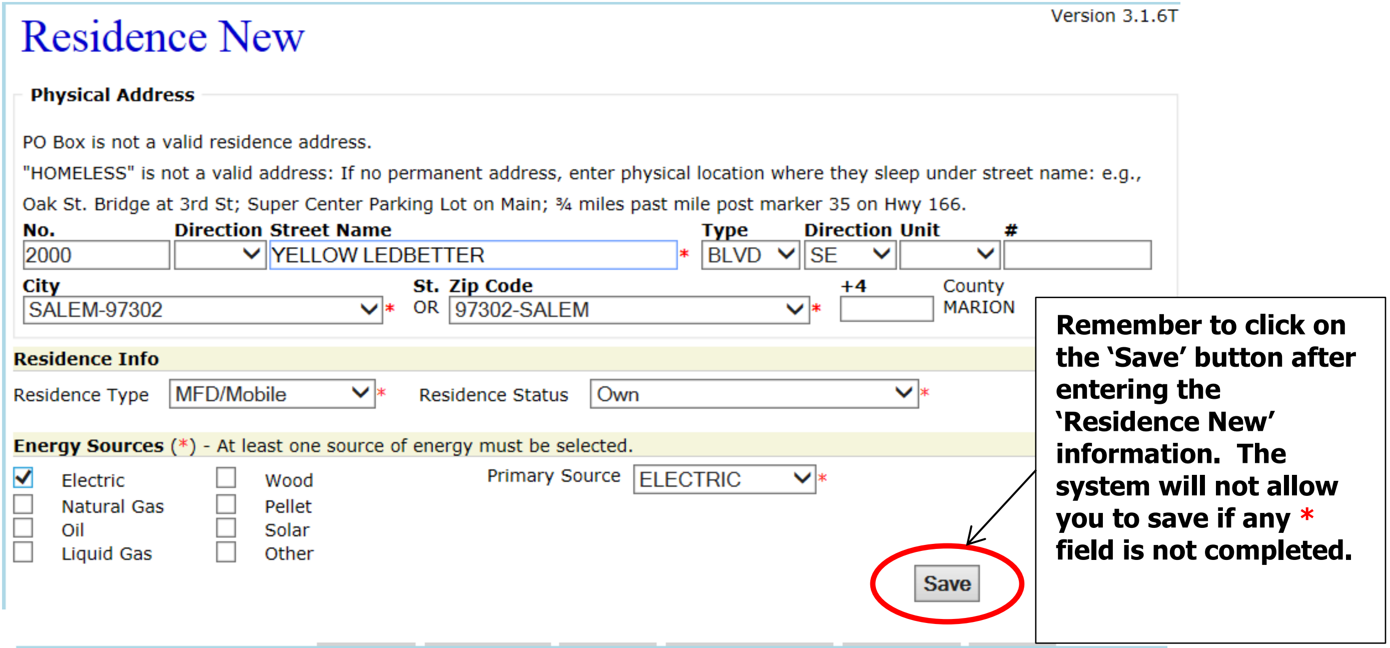
- **Follow data entry formatting instructions as listed in section 6-A. *Remember to 'SAVE.'***

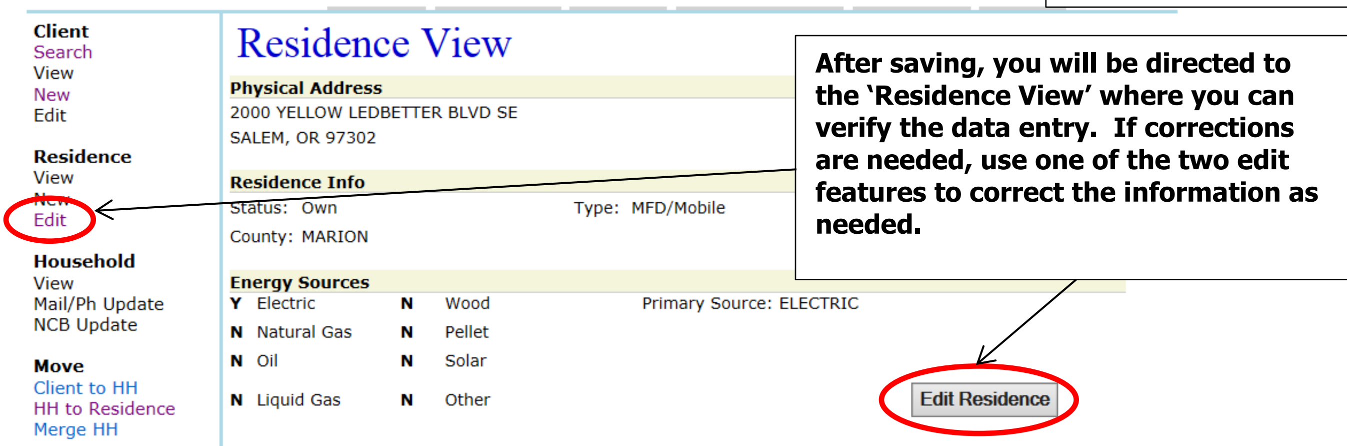
- After clicking on **'Save,'** you will be directed back to the '**Residence View'** screen where you can verify the data entry that was entered.

When searching Yellow Ledbetter Blvd., only Yellow was used in case the previous data entry was entered wrong and the residence is in the system

With No Results found, use the 'New' link to create a new Residence







7. Household Summary - Verifying / Editing

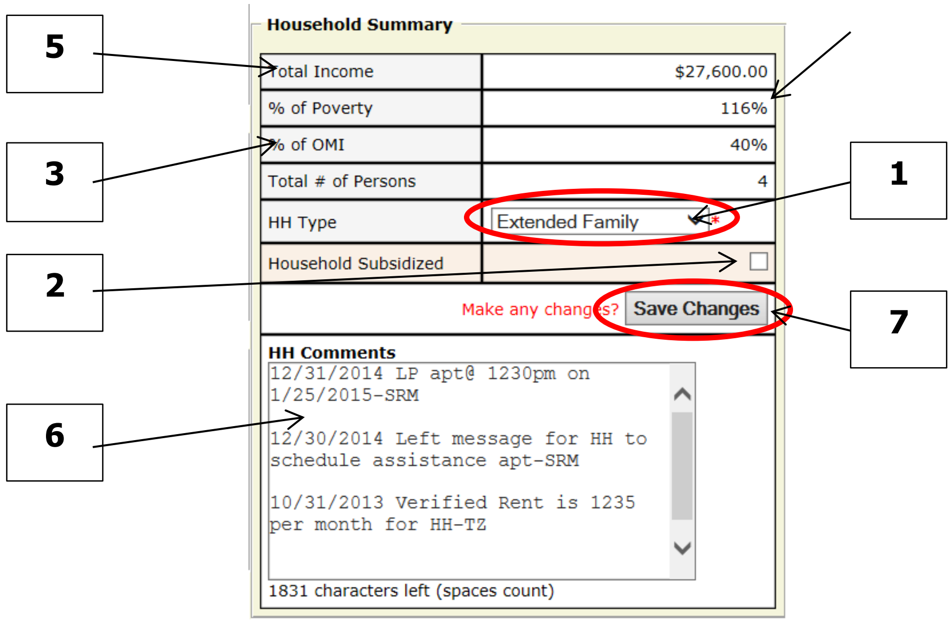
- From the **'Household View'** screen, update **'HH Type'** (Single, 2-Parent, Co-Habitants, etc.) if HH composition has changed (1).

- Check eligibility:- Some programs determine eligibility at 60% or less of Oregon Median Income (3); and other programs requirements will be at the 150% Federal Poverty Guidelines (4). Check actual $$ total on income limits charts (5).

- Enter Comments if needed (6):
  - ❖ Comments should apply to entire HH
  - ❖ Client has paid Care Attendant in residence or a Power of Attorney.
  - ❖ Any special circumstances that could use explanation.
  - ❖ Rental Verification
  - ❖ **Direct, Crisis, and Special payment comments MUST go on the payment screen, not HH comments.**

- Click on **'Save'** after updating the **'Household Summary'** information to apply changes and updates (7).

4



8. VENDOR/UTILITY

To update, edit, or add a Utility/Vendor to a Household for payment, will be completed from the **'Household View'** screen.

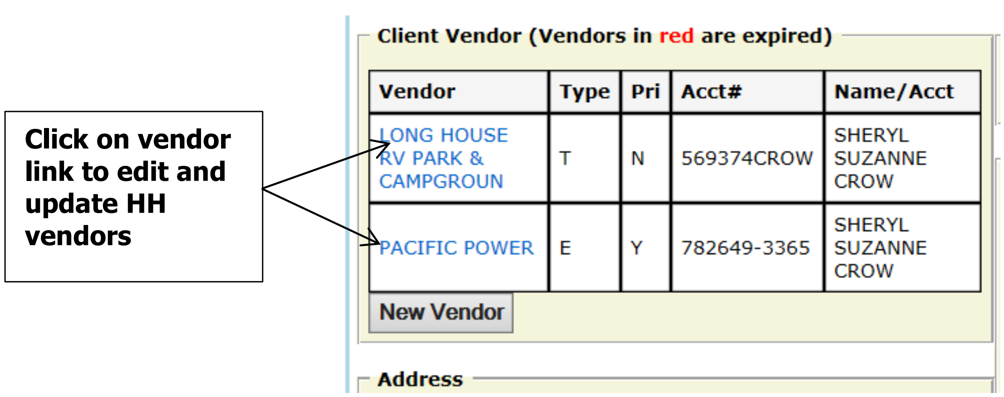
UPDATING VENDOR INFORMATION MUST BE DONE AT EACH INTAKE TO ENSURE CORRECT PAYMENT PROCESSING.

Vendors that are in red are expired vendors that will need to be updated as they will not appear on the payment screen when attempting to make payments.

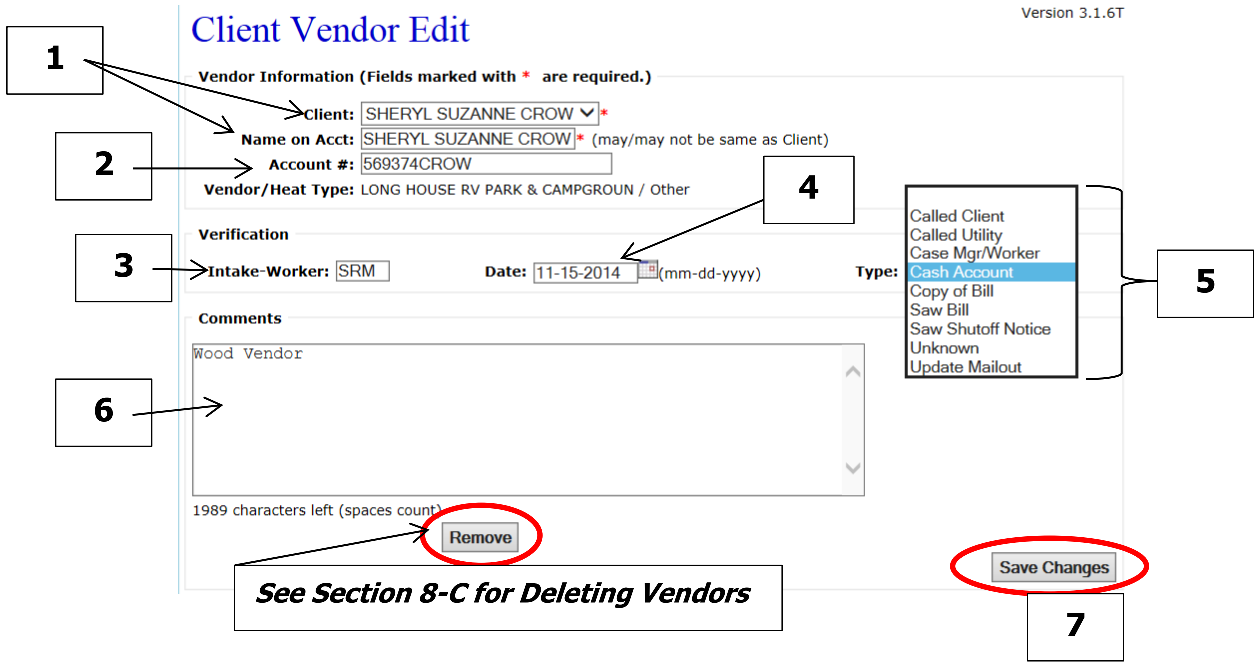
If the HH will receive a **'Direct Payment'** type, skip this step.

8-A. Verifying and Editing Utility/Vendor information

From the **'Household View'** screen click on the vendor link under **'Client Vendor'** to be directed to the **'Client Vendor Edit'** screen.



Edit the active Vendor by clicking on the vendor name to be updated, you will then be directed to the **'Client Vendor Edit'** screen.



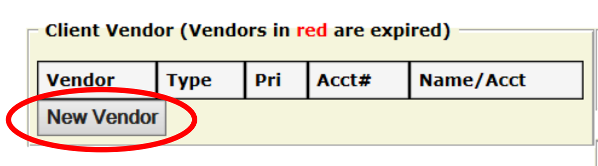
What to check:

- **Correct names on accounts** (1)– name on acct must be one of the adult HH members listed on application regardless of which program they are applying for.
    - Some programs require that the acct holder is the same as the applicant (or applicant's legal spouse/domestic partner as listed with utility).
    - Some landlords require that the utility bill stay in their name. These Households may be eligible for a 'Direct payment'.
- Check for **Correct Account Numbers** (2)– check against copy of bill.
- Update **Intake-Worker initials** (3).
- Update **Date verified** (4).
- Update '**Type'** (5) of verification with dropdowns.
- Add **'Comments'** (6) if needed.
- Be sure to **'Save'** (7) changes.

8-B. Entering New Vendor/Utility

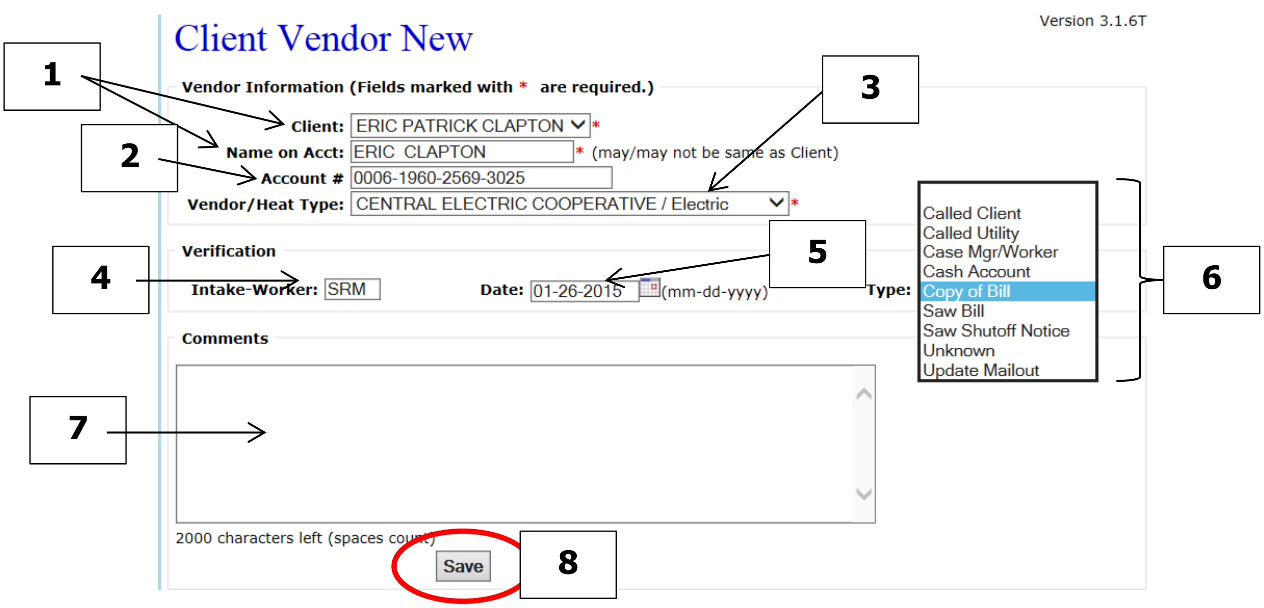
Skip this step if Household receives **'Direct payment'** only.

- On HH view, select **'New Vendor'** button to be directed to the '**Client Vendor New'** screen.



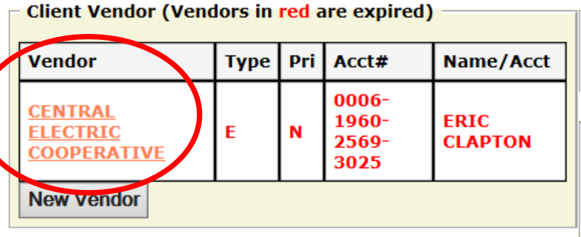
All fields marked with a * are required to be completed in order to proceed or save.

- **Client Vendor New and What to check:**
  - **Correct names on accounts** (1)– name on acct must be one of the adult HH members listed on application regardless of which program they are applying for.
    - Some programs require that the acct holder is the same as the applicant (or applicant's legal spouse/domestic partner as listed with utility).
    - Some landlords require that the utility bill stay in their name. These Households may be eligible for a 'Direct payment'.
  - Check for **Correct Account Numbers** (2)– check against copy of bill.
  - Choose a **Vendor/Heat Type** (3) from the dropdown
  - Update **Intake-Worker initials** (4).
  - Update **Date verified** (5).
  - Update '**Type'** (6) of verification with dropdowns.
  - Add **'Comments'** (7) if needed.
  - Be sure to **'Save'** (8) changes.

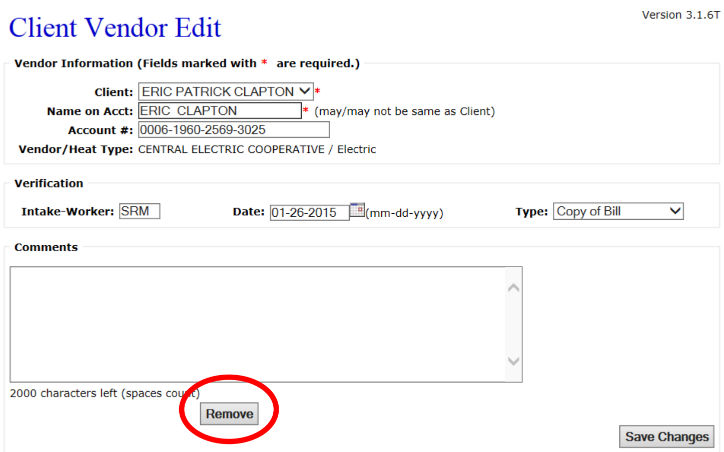


8-C. Delete Vendors

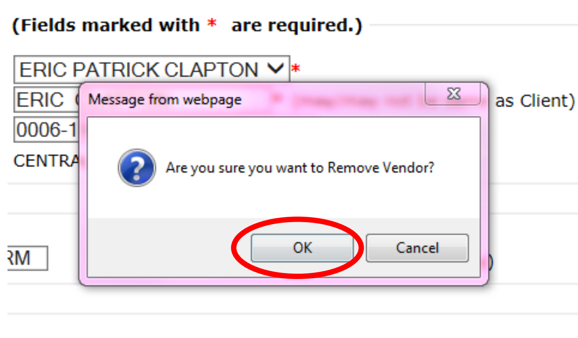
- Always delete vendors that no longer serve the household or are expired vendors. Expired Vendors will display Red in the **'Client Vendor'** section of the **'Household View'** screen.



- Select the vendor name link under the **'Client Vendor'** section to be directed to the **'Client Vendor Edit'** screen.



- Click **'Remove'** at the bottom of the screen. You will then be asked **'Are you sure you want to Remove Vendor?'** Click on the **'Ok'** button to confirm.



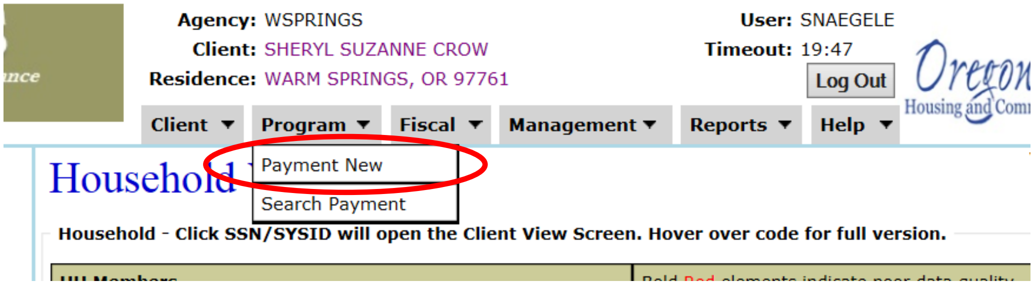
You will then be directed to the **'Household View'** screen.

9. PAYMENTS, INTAKE REPORTS (APPLICATIONS), RECEIPTS

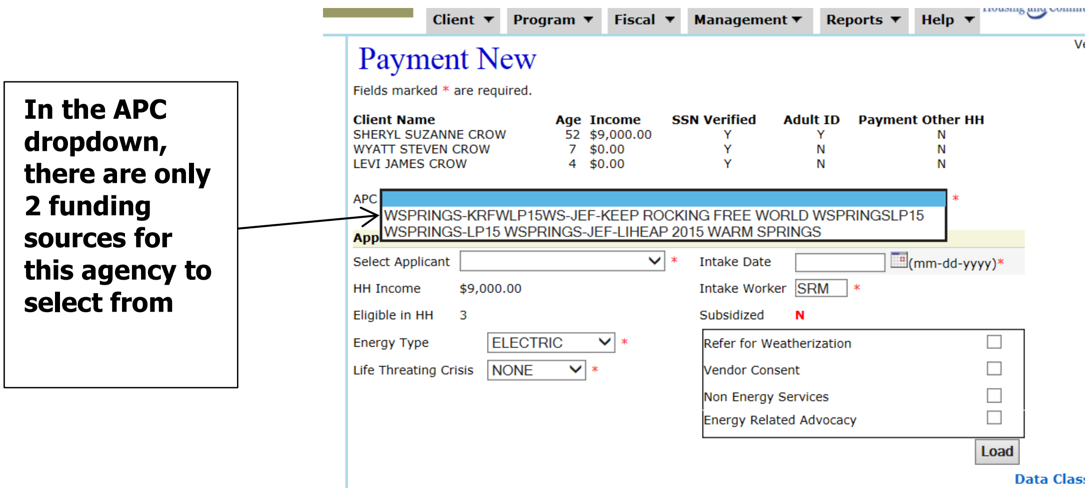
9-A. Creating a New Payment

Only create a payment when all other information has been entered or updated. This includes all HH members, their information and income, vendor/utility, and residence information.

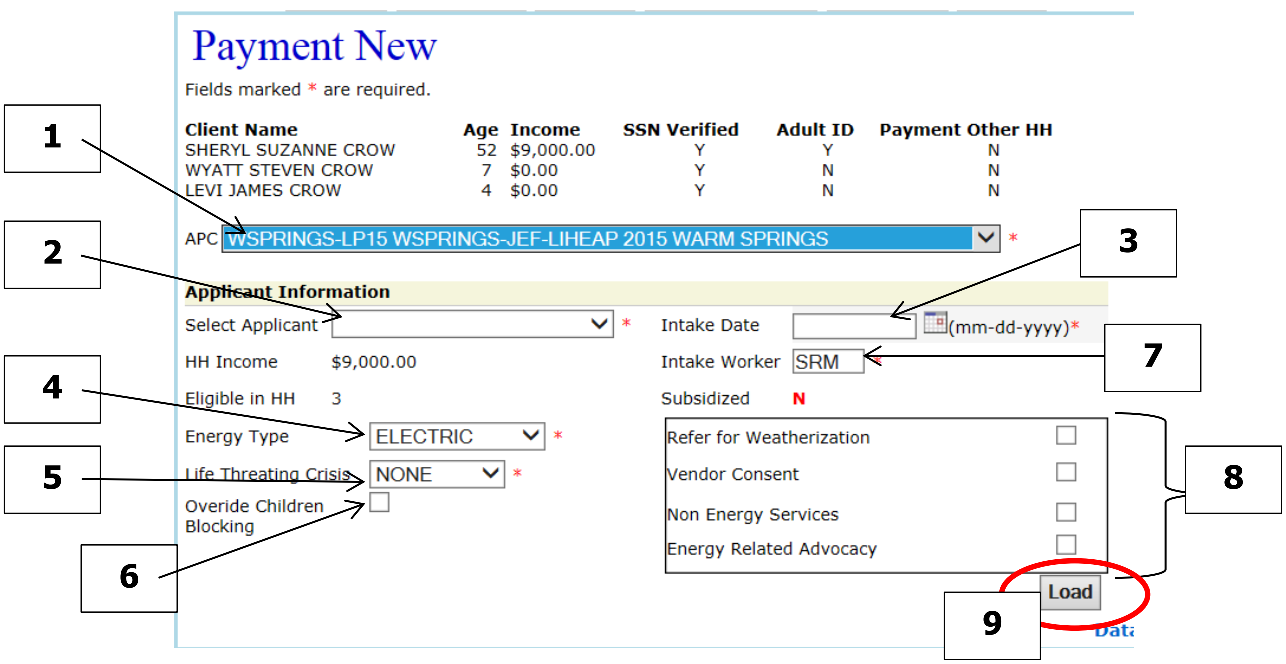
- Select '**Payment New'** from the top navigation dashboard under '**Program'** at top of screen to go to the '**Payment New'** screen. This can be completed from any screen view.



- APC pull-down lists all program payments available for your agency.



- Carefully highlight and click on correct program **APC** (1) for payment. All fields with a * are mandatory fields.



- Select **Applicant** (2) name (this is the person that will be signing the application)

- **Intake Date** (3) will populate once clicked in. This can be changed if data entry is done after client appointment.

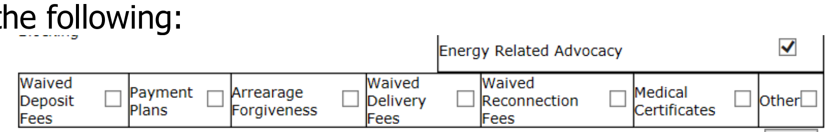
- **Energy Type** (4) – the fuel type must match the vendor type, or must match the vendor type that the majority of the split payment is going to. (This allows you to temporarily switch the Primary Heat Source for this one payment without going into **'Residence Edit'**.)

- **Life Threating Crisis** (5): This is where you record the response time for a Crisis payment (18/48 Hours) that is for a Life Threatening crisis situation.

- **Override Children Blocking** (6) if a minor child has already received a benefit this year in a previous household, and how has been moved in to the current household, this box will need to be checked to ensure they are counted and calculated in the households eligibility determination

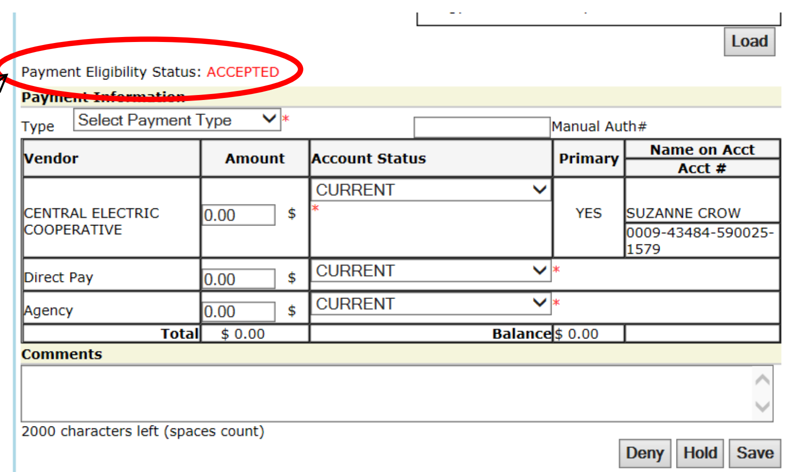
- **Intake Worker** (7) initials will automatically populate with your initials. Initials can be changed as well; however, the initials will have to be by a user in the system.

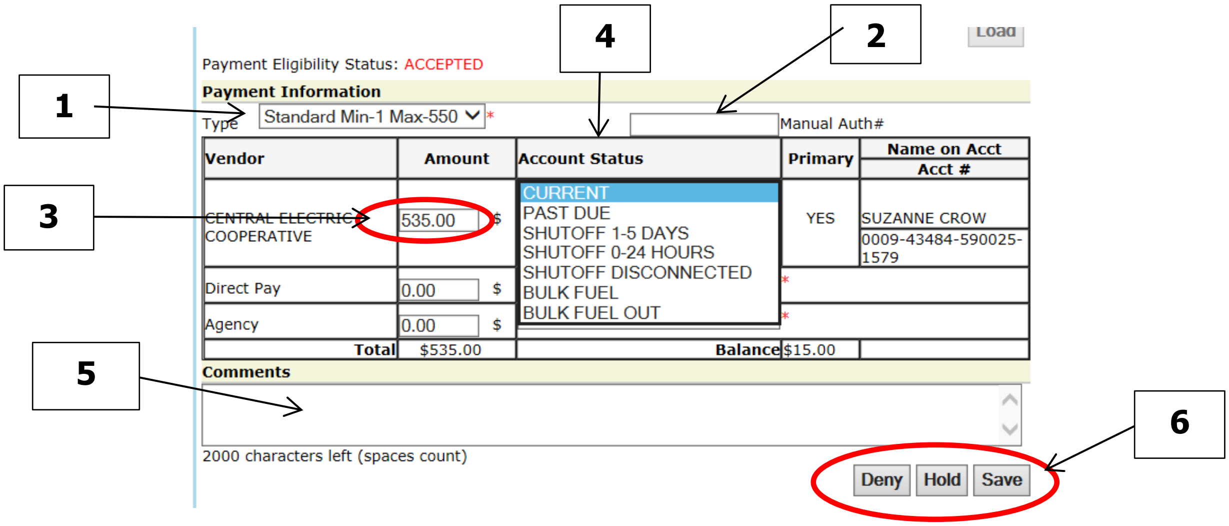
- **Referrals/Advocacy** (8)
    - Click box next to **'Refer for Weatherization'** if you've passed on weatherization info to client.
    - Click box next to **'Non Energy Services'** if you've passed on non-energy related service information or resources.
    - Click box next to **'Energy Related Advocacy'** if you've advocated with utility company on client's behalf.
        - ✓ If you select **'Energy Related Advocacy'**, then you must also select one or more of the following:



- Click on **'Load'** (9) button to continue the payment process. After you click on the **'Load'** button, the screen will expand to display the **'Payment Information.'** Check the **'Payment Eligibility Status'** to make sure it says **'ACCEPTED**.'

Check the '**Payment Eligibility Status'** to make sure it says **ACCEPTED;** if not, there could be various reasons why a payment was not accepted (over income, SSN/ID Verification not marked, HH not in a residence, etc.)





- Select '**Payment Type'** (1) from dropdown menu (Standard, Crisis, Combo, Special, Fuel, Health & Safety, etc.).

- **Manual Auth #** (2) If you don't enter a number manually, then OPUS generates a number starting with 'C' once the payment is saved.

- Enter **Amount** (3) of payment in field for correct **Vendor**.
  - For split payments, greater amount must go to Primary Heat Source vendor (which must match the '**Energy Type'** above.)

- Enter the **Account Status** (4): (Current, Past Due, Shutoff 1-5 days, Shutoff 0-24 hours, Shutoff Disconnected, Bulk Fuel, Bulk Fuel out).

- Enter payment **Comments** (5) if necessary.
  - Documentation AND Comments are required for Direct Pay, Crisis, Special, and Fuel payments. Comment should contain a description of the supporting documents.
    - All comments should be dated, including program year and user's initials.

Example comments for payment screen:

11/10/14 LP15 – DIRECT PAYMENT - Copies of wood receipts attached to application to support direct payment – SRM

11/10/14 LP15 – CRISIS - Approved MEDICAL NOTE attached to application. Client has paid <$$> on their bill on < date > – ELR

11/10/14 LP15 – SPECIAL payment approved for cooling assistance due to health & safety of the HH - SLB

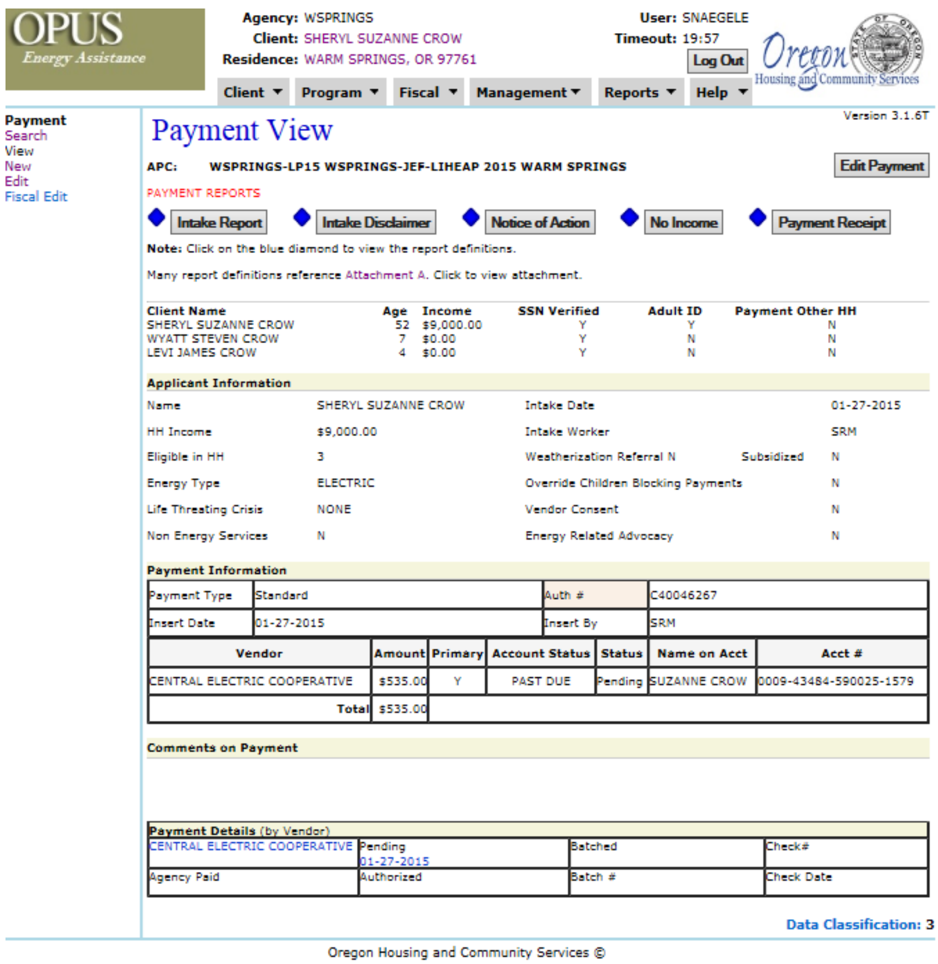
- Press **'Save'** (6) button when information is complete and accurate.

OR

- Press **'Hold'** (6) if more follow-up must be completed prior to processing the payment. Comments are required. This assist in not processing the payment before all necessary documentation has been collected.

OR

- Press **'Deny'** (6) if the HH is over income or not eligible due to program requirements. Comments are required.
- After choosing the payment status, you will be directed to the '**Payment View'** screen where you can confirm and check on the payment information that was entered, as well as print various reports.



9-B. Editing Payments

If you have made an error in the payment, it can be edited as long as payment is **'*Pending*'**, '***Deny***', or '***Hold***' status by selecting the '***Edit Payment***' button or from the left side navigation the '**Edit'** link while on the '**Payment View'** screen.

Mistakes that require editing a payment could include:

✓ Created payment with wrong program/APC;

- ✓ Split payment was divided incorrectly between two utilities;
- ✓ Income calculation error resulting in incorrect amount of payment;
- ✓ Incorrect vendor was selected for payment;
- ✓ Wrong payment type was selected; or
- ✓ Denied payment resulting from calculation or data entry error, etc.

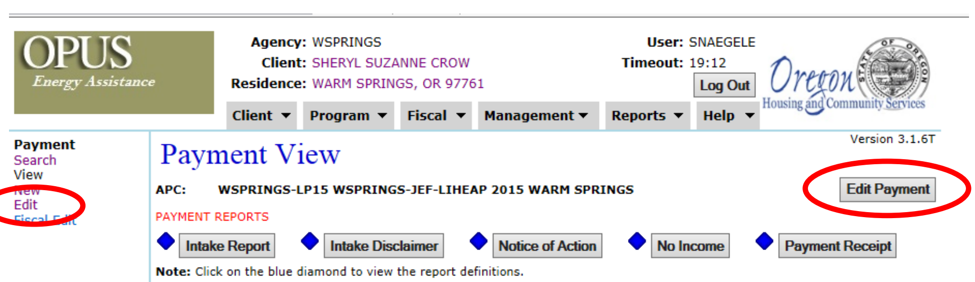
Before editing the payment, correct all errors in the client data, income, vendor information, residence, or household status; then go the payment and edit as needed.

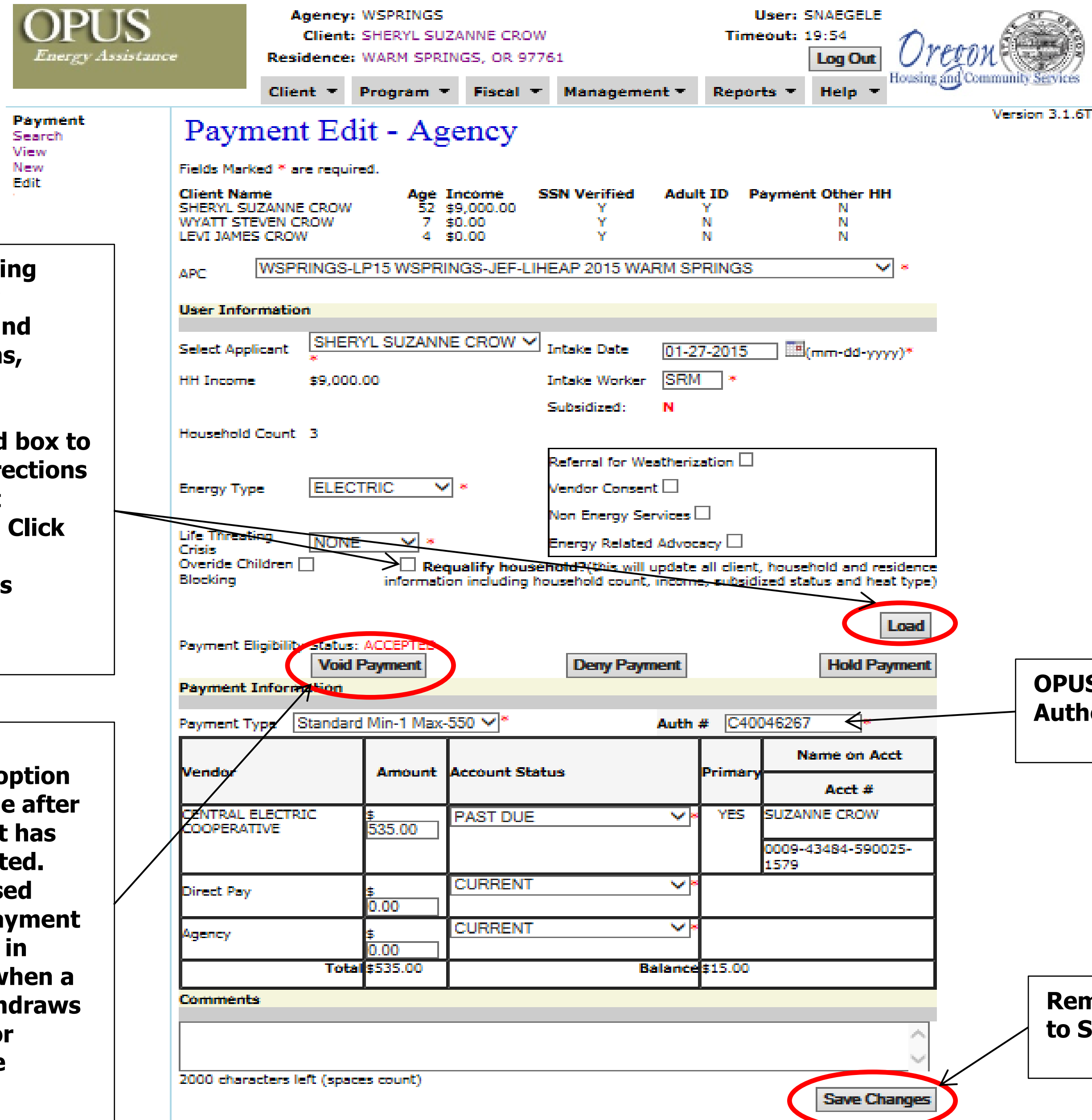
After making the necessary corrections and updates, while on the '**Household View'** screen or the '**Client View'** Screen, select the correct payment to edit. The payment must be a '**Payments –This Household'**; if you select a payment that is from a '**Previous Household'** and try to edit, you will receive an error message indicating to call the OPUS HelpDesk for assistance.

Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)

Name	Amount	Chk No	Chk Date	Auth #	Type	Status
KRFWLP15WS	$385.00			C40046265	Standard	Agency Paid
LP14KT	$350.00			C10039459	Standard	Agency Paid
LP14KT	$500.00			C10039460	Crisis	Agency Paid
LP15 WSPRINGS	$535.00			C40046267	Standard	Pending

After you click on the correct payment to edit, you will then be directed to the '**Payment View**' screen of the payment. Using either way, click on the **'Edit Payment'** button or link to be directed to the '**Payment Edit'** screen.





After making necessary changes and corrections, Check the Requalify Household box to apply corrections to current payment. Click on Load afterwards

OPUS generated Authorization #

The Void Payment option is available after a payment has been created. Usually used when a payment is created in error, or when a client withdraws request for assistance

Remember to SAVE

- If changes are made to the household information, especially income information, or changes in household members, you will need to click '**Requalify Household'** then the **'Load'** button on the top portion of the payment. Make necessary corrections in the '**Payment Information'** section as needed. Click on **'Save'** to apply the changes.
- **Void Payment-** Void payment is usually used when a client has withdrawn their application for services.
- **Deny Payment-** use this button to deny a payment that was created to a household. Deny indicates that a household is not eligible for services, usually due to program requirements.
- **Hold Payment-** this is button is used to hold a payment until the intake can be completed. Holding the payment is another way to ensure Pending payments that are still waiting for information do not get accidentally processed.

- **Comments** – if the payment type is changed, you may be required to add a comment. If you place the payment in '**HOLD'**, you may want to put in the comments the additional follow-up or documentation needed to complete the payment process. If there were changes to the HH and you had to requalify, you would use the comments to indicate how you communicated this to the HH (NOA, phone call, etc).

9-C. Printing Applicant Reports/Documents

There are 5 different payment reports that can be access for a Household and its payments with the OPUS database. These can only be accessed from the '**Payment View'** screen.

REPORT/DOCUMENT TIPS- Whenever a blue diamond is present, it is a link that will provide you with a Report Definition overview, and how the data is collected or used in the report.

- **INTAKE REPORT-** This report prints very detailed data about a selected, the client's household members, address and phone numbers. Employment information is also displayed here along with the client's income that was used to approve or deny their application. Any services or programs received by the client(s) are captured here containing payments made and vendor information. This form also contains client characteristic data and dwelling / heat type information. (Provided client copy of OPUS data entered)

- **Intake Disclaimer-** This report will print just the disclaimer page of the Intake Report.

- **Notice of Action-** This document explains the end result action(s) of a denial or approval of an application for energy assistance. It also outlines clients' rights and actions they can take if an application is denied. The data on this form supplies the reason(s) for a denial of an application if applicable. (Can be provided to client as documentation of needs to complete intake)

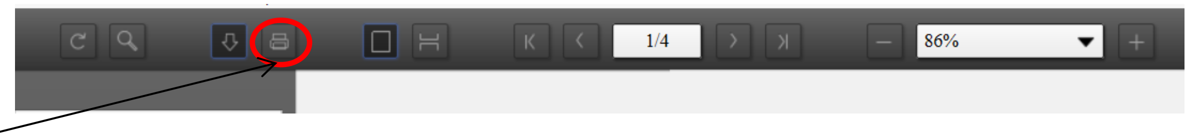
- **No Income-** This report/document is a signed declaration by the client stating that they do not receive any monthly income. Any applicants that do not currently have a steady income must fill out this form. Any person(s) living within the same residence as the client and meets the following criteria must also fill out this form: is not related to the client, is over 18 and is unemployed. (Some agencies will have their own No Income form to use)

- **Payment Receipt-** This report provides a list of important information to a client that has received a payment through energy assistance.

Click on the button of the report that you want to print; it will open in a different tab **'OHCS Report Viewer.'**

To print the reports or documents, use the print button on the top of the report viewer.

Use Print Button at top of Report Viewer



MOVING CLIENTS BETWEEN RESIDENCES

*****NEVER REMOVE CLIENTS FROM A HOUSEHOLD THAT HAS PENDING PAYMENTS*****

When to move clients:

- Some household members exist in OPUS while others don't
- Existing household members appear in different households or at different residence.
- The household contains records for clients who no longer belong in the HH
- Existing household members appear with no residence attached

When removing clients from a household it is **VERY** important to mimic in OPUS what actually happens in the physical world.

- ✓ If all but one household member has moved out, then you will need to move out all but that one member of the household.
- ✓ Don't remove the one member and change the residence address to match where the four remaining clients now reside.

Do not edit the residence address unless the building has physically moved to a new location or the address was entered incorrectly.

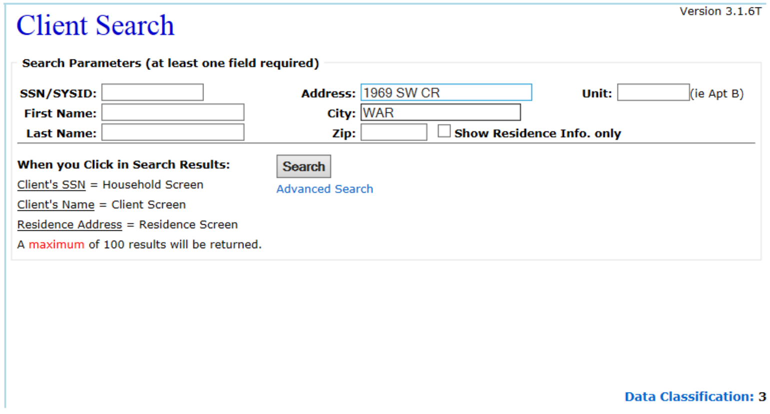
- ✓ If the household has moved, create a new residence OR find an already existing residence in OPUS to move the clients to. (Even if the client moved within the same complex, you still need to find or create a new residence. **DO NOT just change the apartment or space number**.)

Removing a client from a HH does **not** delete them from OPUS.

If you receive an error screen stating that the client cannot be removed, **call OPUS HelpDesk for help removing this client.** (Most times the client cannot be removed from the current HH because they are enrolled is some other social service program in a different OPUS module)

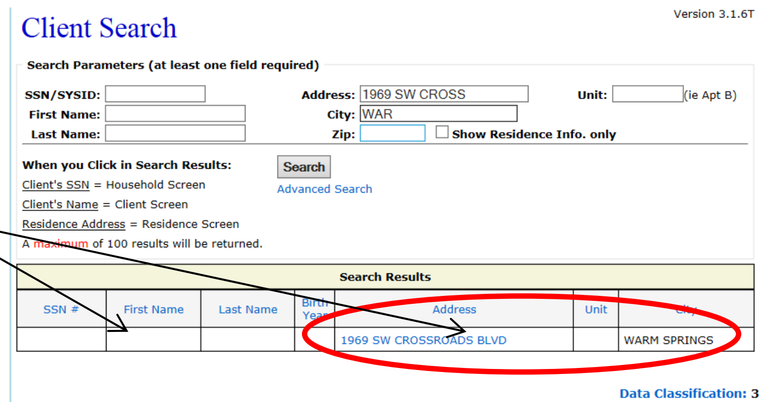
10-A Household has a new residence address

- Look up the household's new residence address in OPUS using the Client Search screen, then skip down to the section that fits the HH scenario.

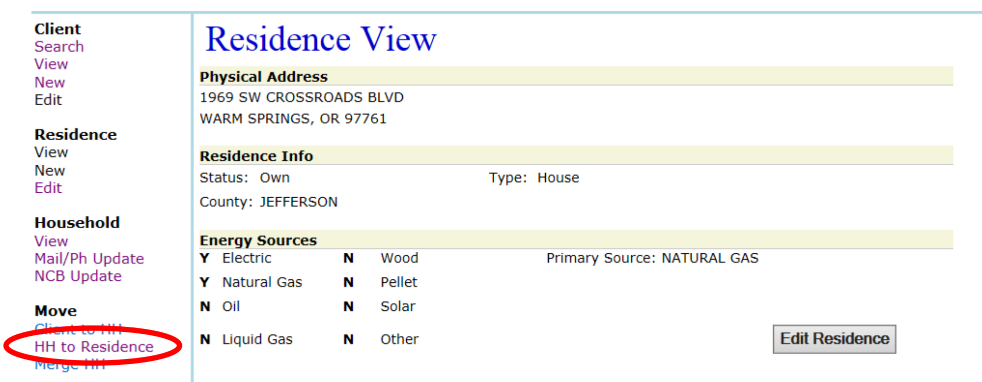


10-A.1 HH's New Residence Address is already in OPUS: UNOCCUPIED BY ANOTHER HH

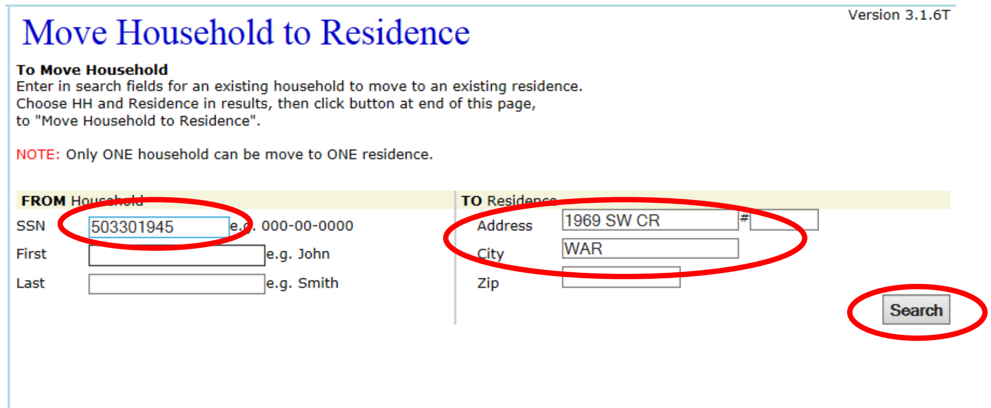
Search results indicates that the residence is in the system, and there are no clients in the residence



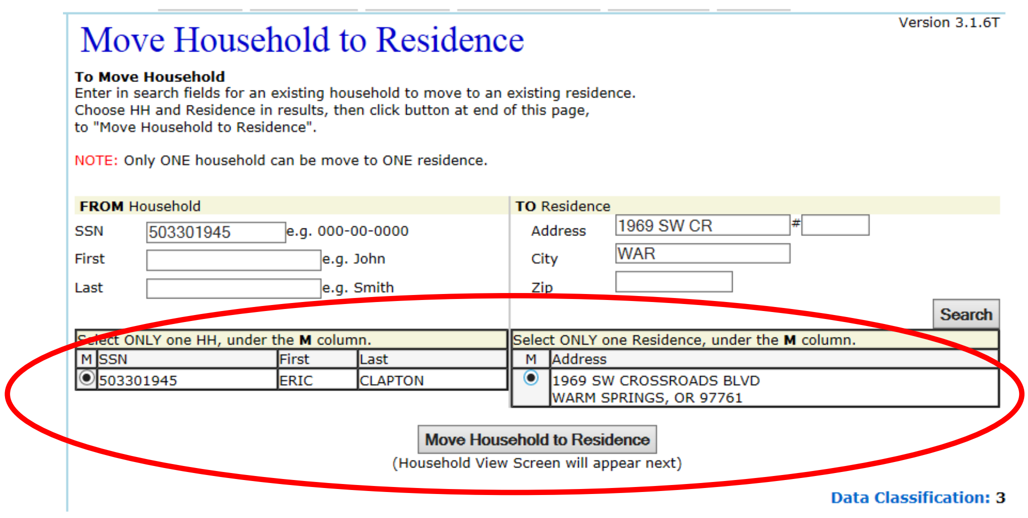
- Click on the '**Address'** link to be directed to the '**Residence View'** screen.



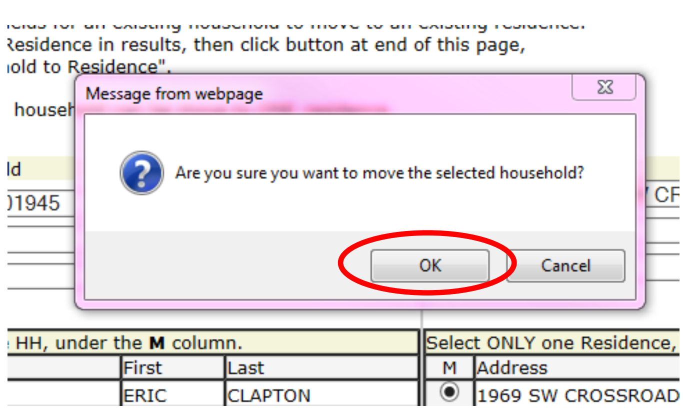
- On the **'Residence View'** screen, click on the **'HH to Residence'** link located on the left navigation side bar under '**Move'**. You will then be directed to the **'HH to Residence'** screen.



- Fill in one of the **SSN/SYSID** numbers for a household member on the left side (From Household), fill in the address on the right side (To Residence) and select **'SEARCH'.** OPUS will then provide selections to choose from.

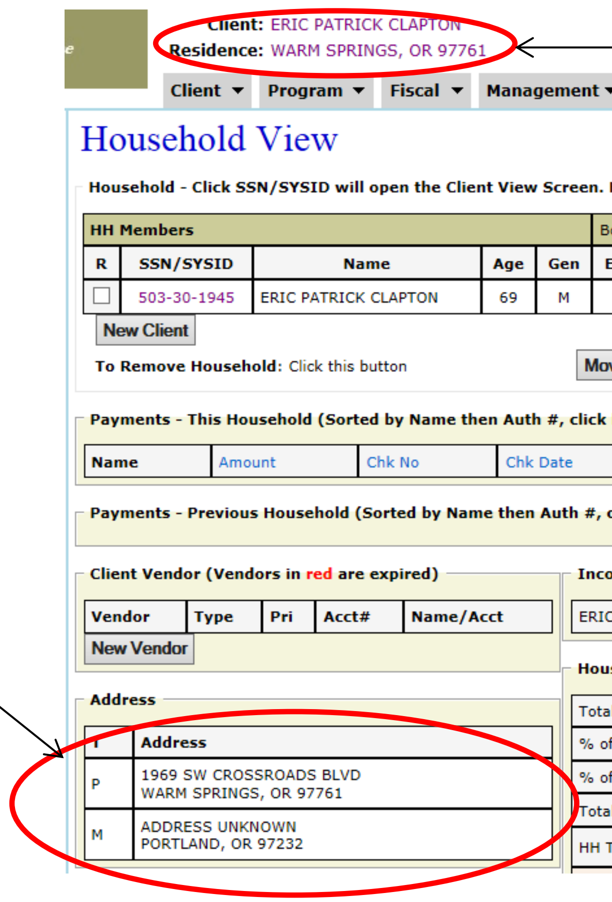


- Verify that the found '**HH'** and '**Residence'** match the ones you wanted. Click the **M** circle for each and select '**MOVE HOUSEHOLD TO RESIDENCE**'. After clicking on **'Move Household to Residence'** button, a box will open asking **'Are you sure you want to move the selected household?'**.



- Click on **'OK'.** You will then be directed to the **'Household View'** screen.

Link indicates HH is in a residence. You can also use this link to be directed to the Residence View Screen

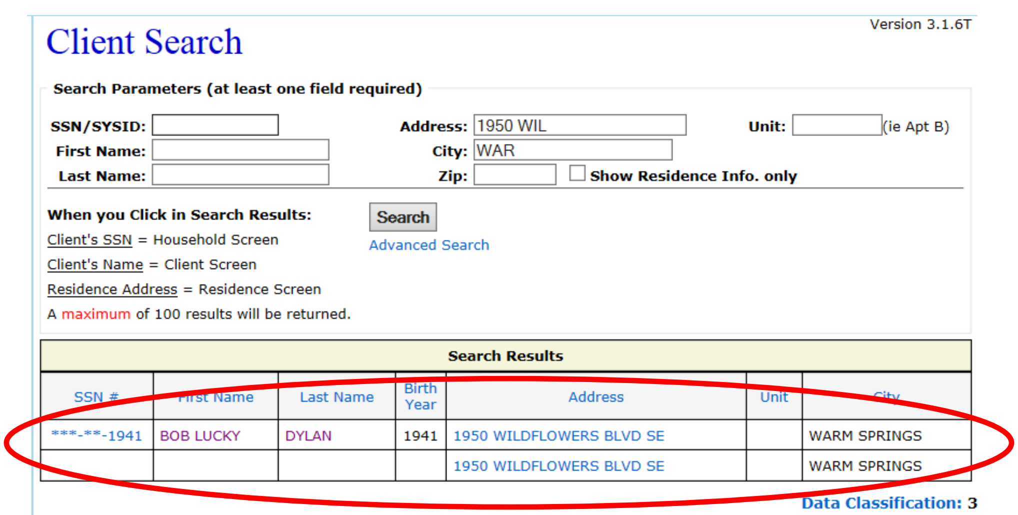


HH is in a residence; however, the Mailing Address will need to be updated to remove the Address Unknown

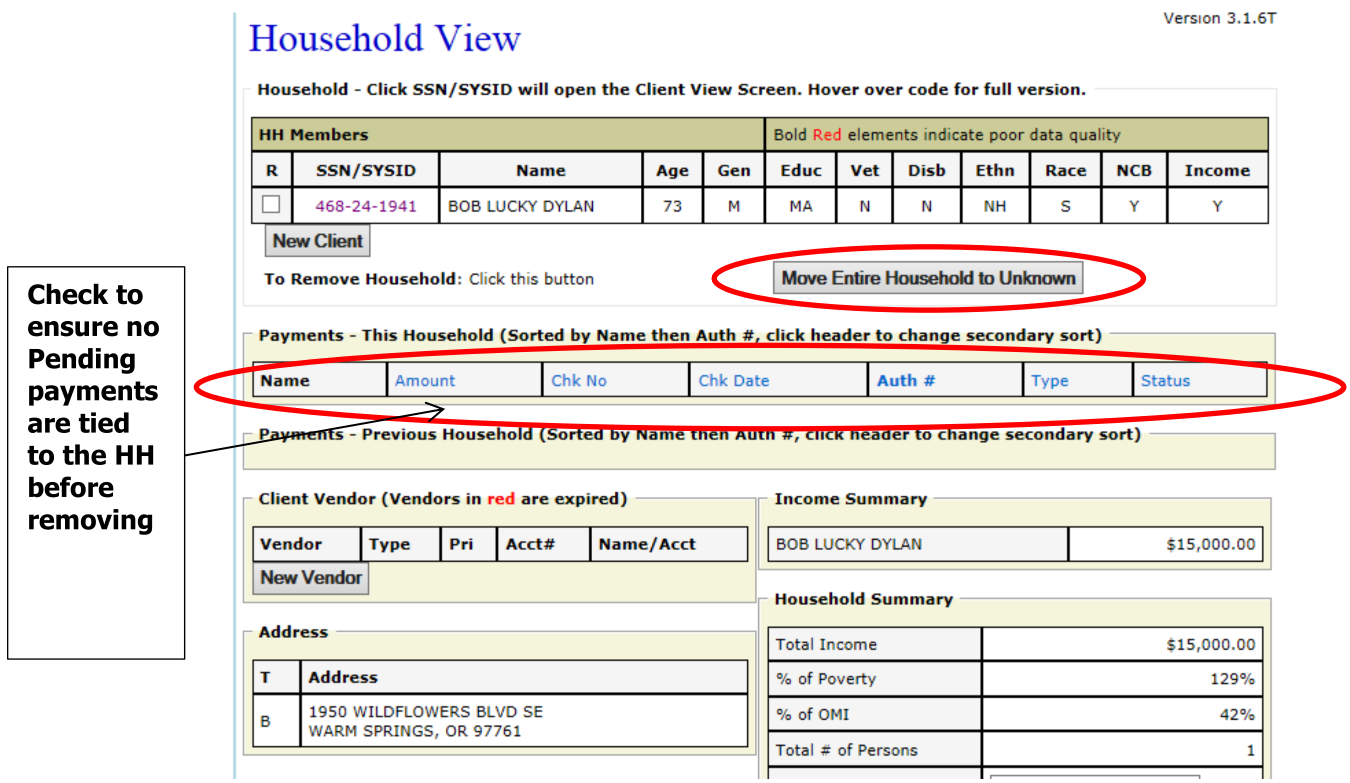
- Use the '**Mail/PH Update'** link to update the HH Mailing address and remove the address unknown.

10-A.2 HH's New Residence Address is already in OPUS: OCCUPIED BY ANOTHER HH

- Searching the database, results indicate a different HH is in the residence. The HH members currently in the HH will need to be removed first.

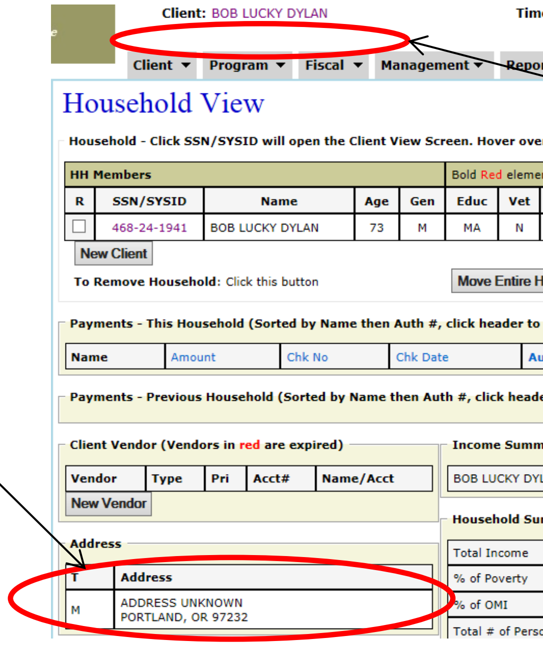


- Click on the social security/system id to go directly to the 'Household View' screen; or
  - Click on the name of the HH in the residence. You will be directed to the '**Client View'** screen. Using either the top dashboard, or the left navigation sidebar, go to the '**Household View'** screen.
- Determine if the *OCCUPIED* HH has any pending payments. **NEVER MOVE CLIENTS FROM A HOUSEHOLD THAT HAS PENDING PAYMENTS; CALL THE OPUS HELPDESK FOR ASSISTANCE.**



- After verifying the current HH members in the residence do not have pending payments, click on the **'Move Entire Household to Unknown.'** This will remove the HH out of the residence and into the unknown. You will then be directed to the **'Household View'** of the HH you removed to verify that they have been removed from the residence.

Previous HH members are no longer in residence and have been moved to the unknown



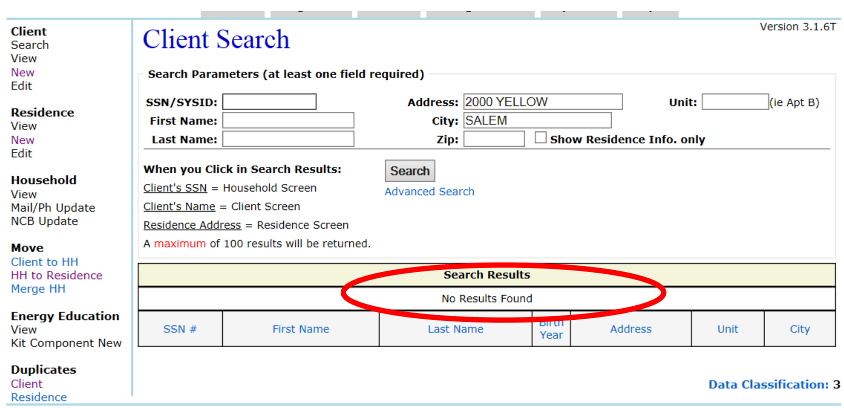
There is also not a link to the residence screen which indicated the HH is not in a residence at this time and has been removed

- Go to **Section 10-A.1** above to move the HH into the vacated residence.

10-A.3. HH's New Residence Address is NOT in OPUS

Always search for a residence address before creating a new one.

- On the '**Client Search'** screen, type in the partial address and click '**SEARCH'.**



- To create a new residence in OPUS, go to **Section 6-B**.

10-B Removing a Client from an Existing HH

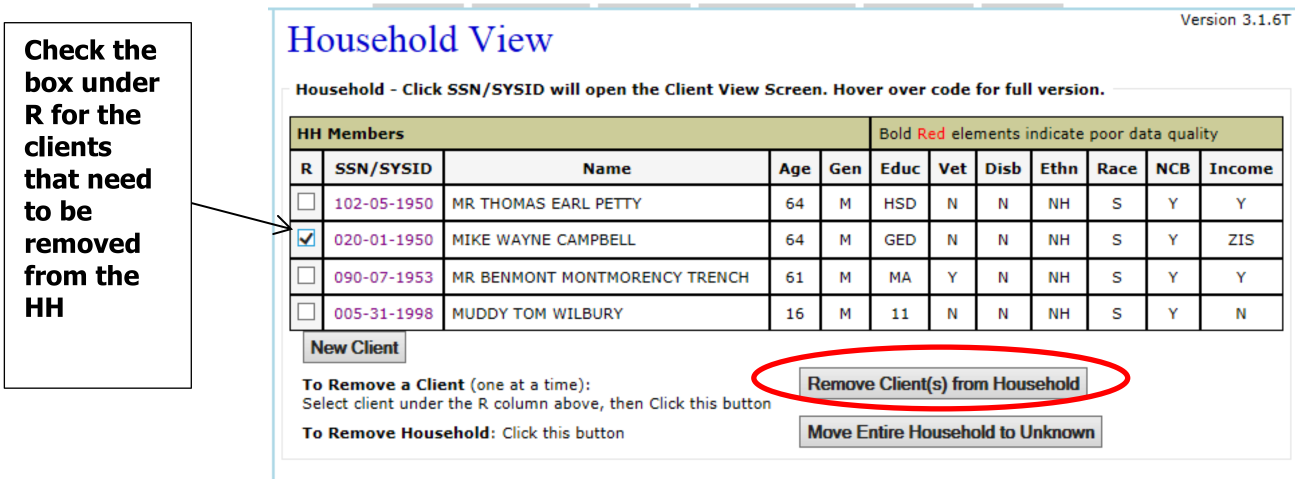
*****NEVER MOVE CLIENTS FROM A HOUSEHOLD THAT HAS PENDING PAYMENTS; CALL THE OPUS HELPDESK FOR ASSISTANCE*****

When removing clients from a household it is **<u>VERY</u>** important to mimic in OPUS what actually happened in the physical world.

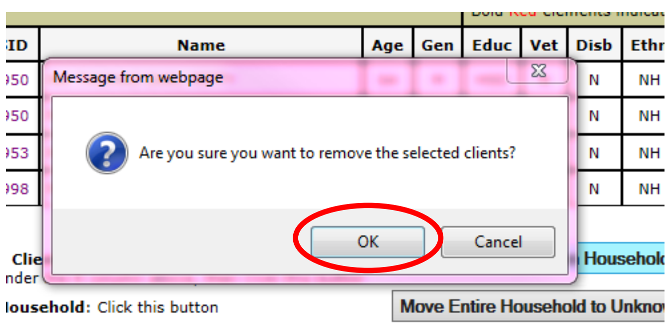
✓ If all but one household member has moved out, then you will need to move out all but that one member of the household.

- ✓ Don't remove the one member and change the residence address to match where the four remaining clients now reside.

- On the '**Household View'** screen, click the box just left of the SSN/SYSID numbers for the client(s) that have moved from the HH. Click on the '**REMOVE CLIENT(S) FROM HOUSEHOLD'** button.



- After clicking on the **'Remove Client(s) from Household'** button, a pop-up message will appear to confirm that you want to move the clients out of the HH.

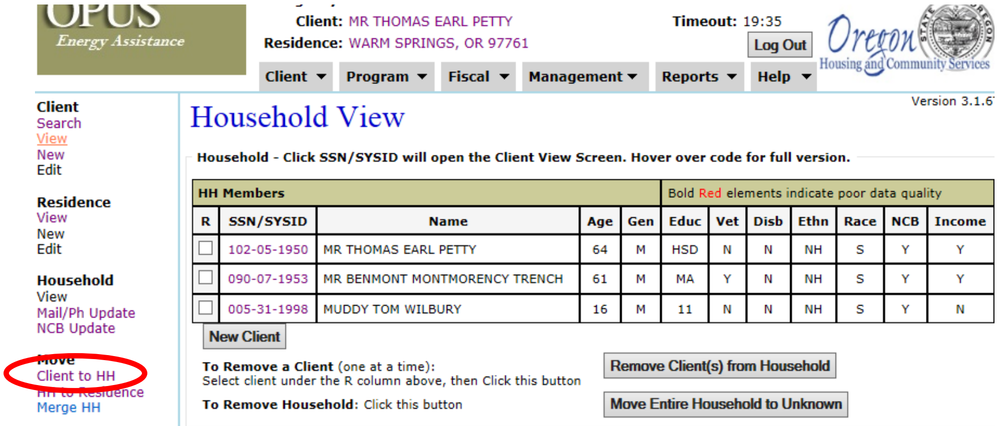


- Click on **'OK'** to remove the clients out of the household.

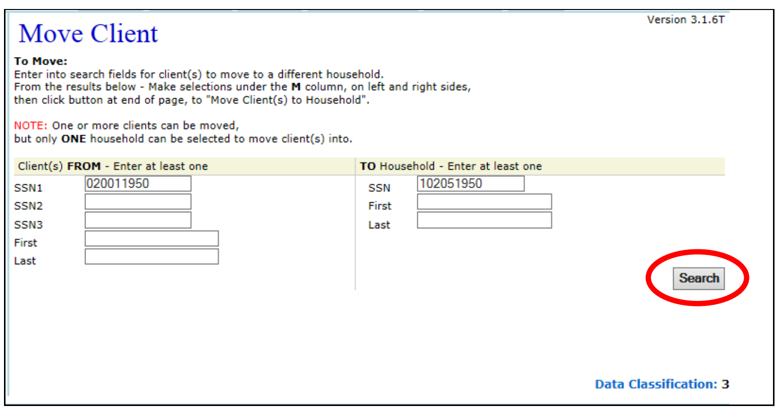
10-C. Adding an Existing Client To an Existing HH

Always verify that a client ***is*** or ***is not*** in the OPUS System.

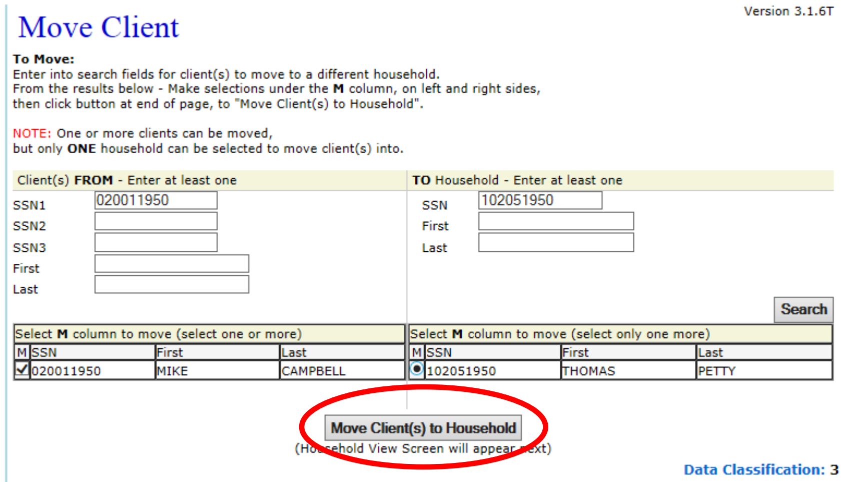
- On the HH view for the household that is to have a member added; select '**Client to HH'** under '***Move'*** on the left navigation sidebar.



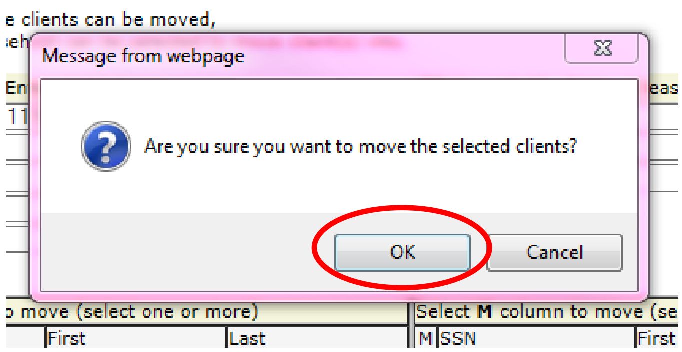
- You will then be directed to the **'Move Client'** screen.
- On the '**Move Client'** screen:
  - **FROM:** Type in either the SSN/SYSID or use the 3 & 3 Name method for locating the client to be moved into the HH.
  - **TO:** Type in either the SSN/SYSID or use the 3 & 3 Name method for locating the HH that the client will be moved into.
  - Click on **'Search'.**



- The '**Move Client'** screen will reload. This is the screen where you need to verify the client moving and the HH receiving the client.



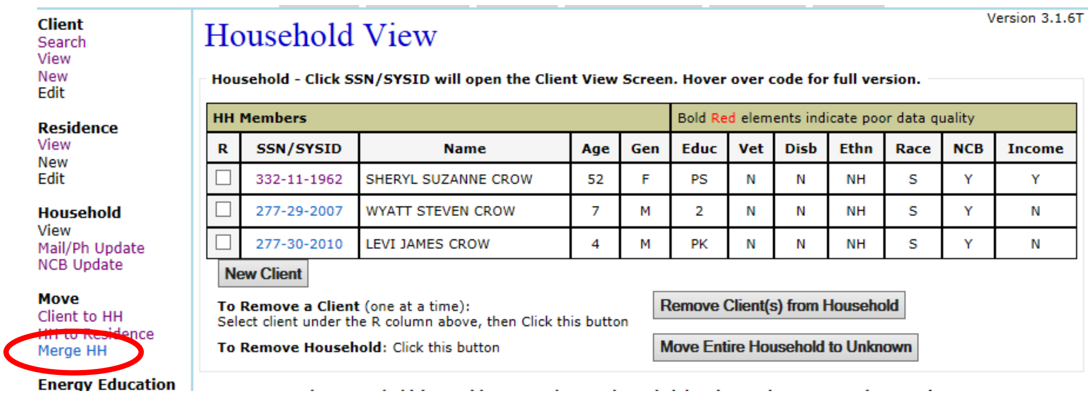
- Click in the box next the correct client in the '**FROM'** column.
- Click the circle next to the correct client in the **TO** column
- Click on the **'Move Client(s) to Household'** button.
- A pop-up message will appear to confirm you want to move the selected clients. Click **'OK'.**



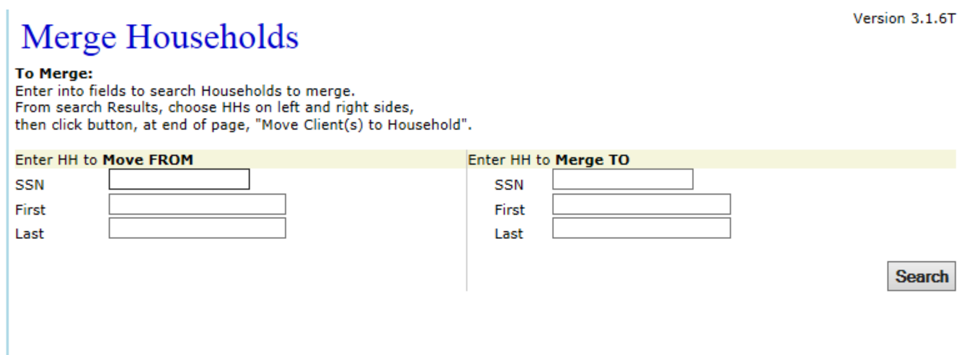
10-D. Merge Two Existing Households Together

There may be a time, when two existing households already in OPUS become one household and reside in a single residence together.

- Go to either one of the existing household's '**Household View'** or **'Client View'** screen in the database. On the left navigation sidebar, click on **'Merge HH'** under the **'Move'** section.

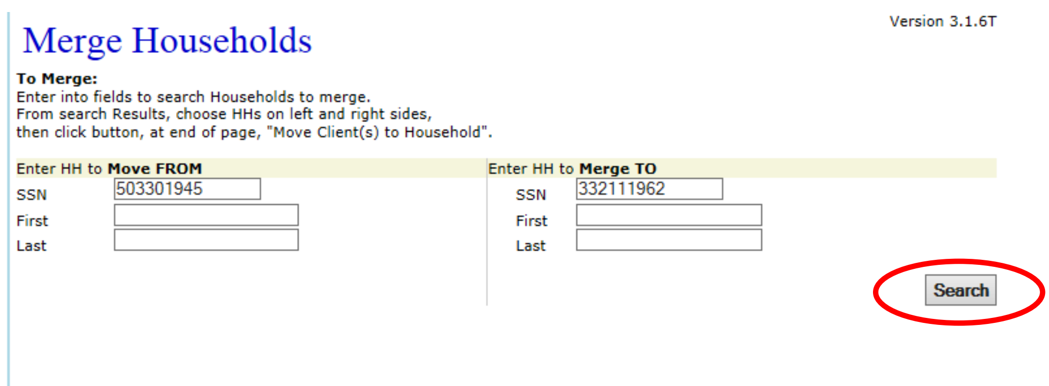


- You will then be directed to the **'Merge Household'** screen.

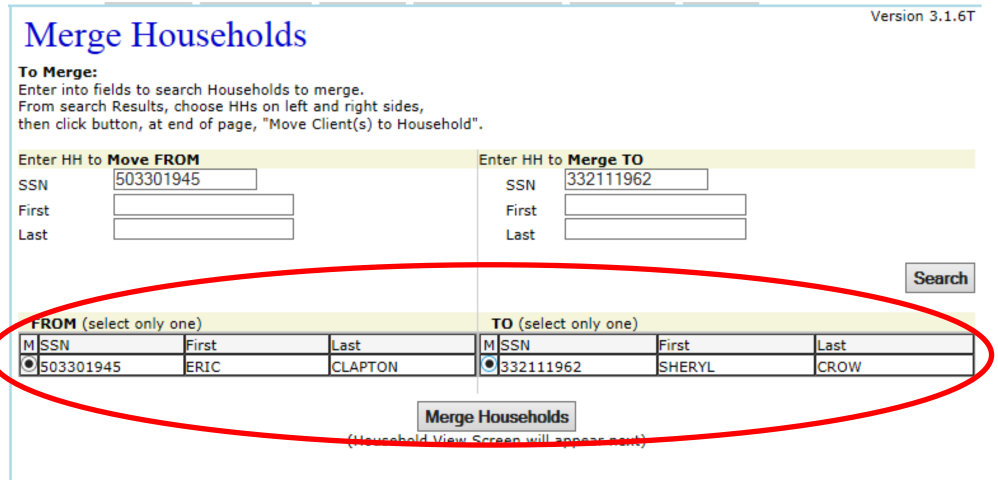


- On the '**Enter HH to Move From,'** enter the HH SSN/SYSID or use the 3 & 3 Name method for locating the household that needs moved into another existing household.

- On the **'Enter HH to Merge To,'** enter the HH SSN/SYSID or use the 3 & 3 Name method for locating the other household that needs combined. If one of the household is already in the correct residence, they would want to be the HH entered on the '**Enter HH to Merge To'** side.

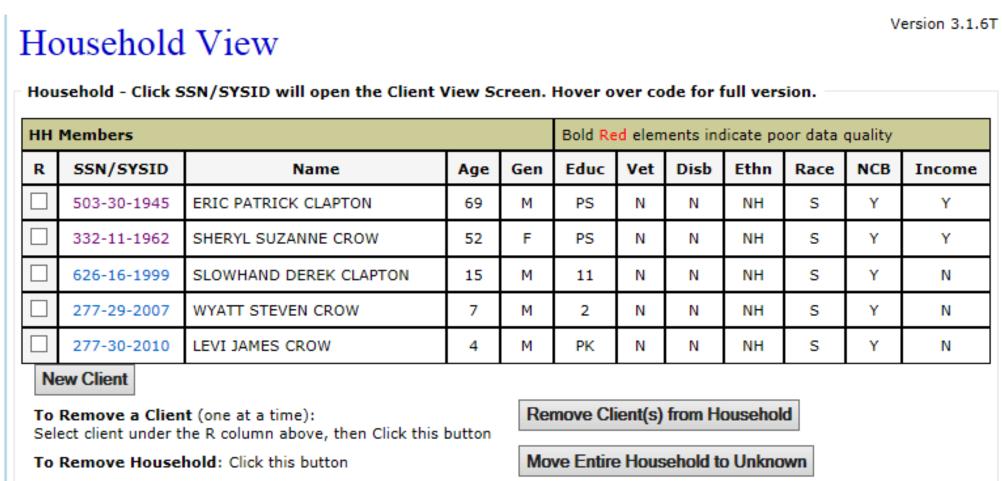


- Click on **'Search'** for results to appear.



- Select and click on the circle next to the correct client in the **'From'** column.
- Select and click on the circle next to the correct client in the **'To'** column.
- Click on the **'Merge Households'** button to merge the two households.
- A pop-up message will appear confirming that you want to merge the two households together.

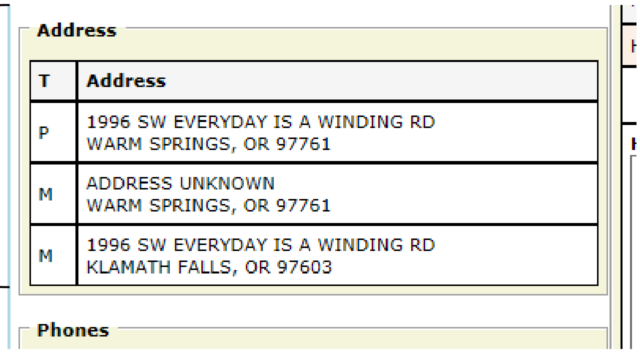
- Click on **'OK'** to merge the two households together. You will then be directed to the **'Household View'** screen will you can confirm the two households have been merged.



R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
	503-30-1945	ERIC PATRICK CLAPTON	69	M	PS	N	N	NH	S	Y	Y
	332-11-1962	SHERYL SUZANNE CROW	52	F	PS	N	N	NH	S	Y	Y
	626-16-1999	SLOWHAND DEREK CLAPTON	15	M	11	N	N	NH	S	Y	N
	277-29-2007	WYATT STEVEN CROW	7	M	2	N	N	NH	S	Y	N
	277-30-2010	LEVI JAMES CROW	4	M	PK	N	N	NH	S	Y	N

- Make sure to check and update the merged household's information before proceeding with a payment.

Be sure to check and update HH information after merging households together



ADMIN INTRODUCTION

In this section of the guide, various OPUS administrative processes will be covered that apply to payments for energy assistance, as well as administering the database at the agency level.

11. OPUS SYSTEM ADMINISTRATORS REQUIREMENTS

11-A Required Documentation

This is the absolute minimum documentation required. Please consult with your own agency's internal policy for an additional requirement.

1. OPUS System Administrator Agreement must be signed on an annual basis
    a. Original send to Oregon Housing and Community Services
    b. Copy 1 maintain a copy for your records and review/audit
2. User Policy, Responsibility, & Code of Ethics (for the OPUS Administrator) must be signed on an annual basis.
    a. Original send to Oregon Housing and Community Services
    b. Copy 1 maintain a copy for your records and review/audit
3. User Policy, Responsibility, & Code of Ethics (for all users with the agency including subrecipients) must be signed on an annual basis.
    a. Original must be at your agency
    b. Copy 1 goes to the OPUS user
    c. Copy 2 maintained at subrecipients locations if applicable

11-2 Recommended Responsibilities

OPUS System Administrator- Creates New Users/Activates and Disables Users. Assigns Roles and Responsibilities for Program Managers only in accordance with instructions from their agency director.

Program Manager- Assigns Roles and Responsibilities based on work assignments and demonstrated competency. Notifies the OPUS System Administrator as needed when users accounts need to be created and or disabled.

End User- Ensures compliance with the User Policy, Responsibilities, & Code of Ethics. Signs documents annually and reports any violations to the Program Manager, OPUS System Administrator, or the OPUS HelpDesk.

12. PAYMENT PROCESSING

This section will cover how to process **'Pending'** payments that have been entered into the OPUS database so that they no longer appear in the **'Pending'** status. Besides **'Pending,' 'Hold,' 'Deny,' and 'Void,'** there are 3 other types of **'Payment Statuses'** that indicate where the households payments are in process to be completed **('Local Auth,' 'Batched,' and 'Agency Paid').**

From the **'Household View'** screen or the **'Client View'** screen, where the clients and household payments are listed, the left column indicates the status of the payments that have been issued.

Payments - This Household (Sorted by Name then Auth #, click header to change secondary sort)

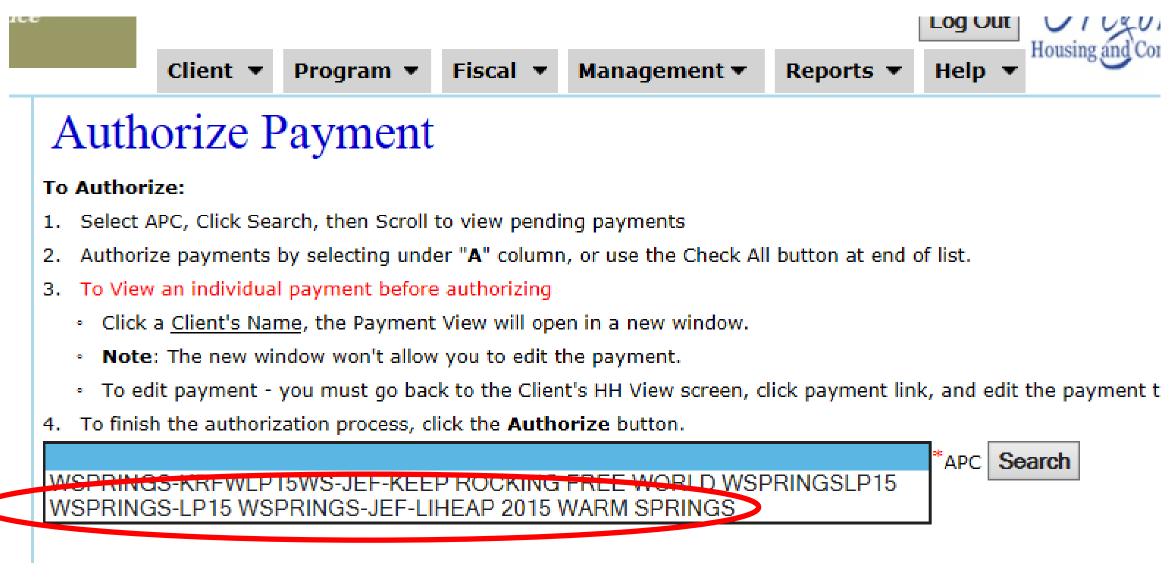
Name	Amount	Chk No	Chk Date	Auth #	Type	Status
LP13	$495.00			C40046266	Standard	Agency Paid
LP14	$440.00	568901	01-31-2014	C25325309	Standard	Agency Paid
LP15	$455.00			C25325310	Standard	Deny
LP15 WSPRINGS	$415.00			C40046270	Standard	Pending
LP15KT	$350.00			C10039455	Standard	Batched
LP15KT	$500.00			C10039456	Crisis	Deny

- **'Local Auth'** gives an opportunity for the double check on the data entry of intakes and applications that have been entered into the system before batching them for payment
- **'Batched'** is when payments are ready to be paid to the vendor indicating payments are no longer in pending and have been approved through the local auth process
- **'Agency Paid'** indicates that the payments have been completed and where the check number and check date for the payments can be added

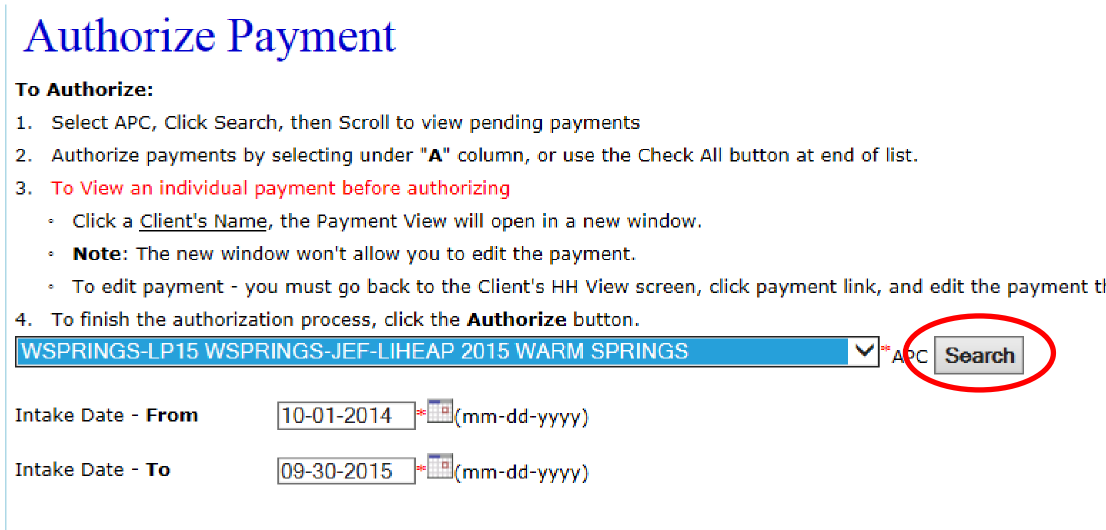
12-A LOCAL AUTH

From any screen in the Energy Module of the OPUS system, using the top dashboard under **'Fiscal'** click on the **'Authorize'** dropdown.

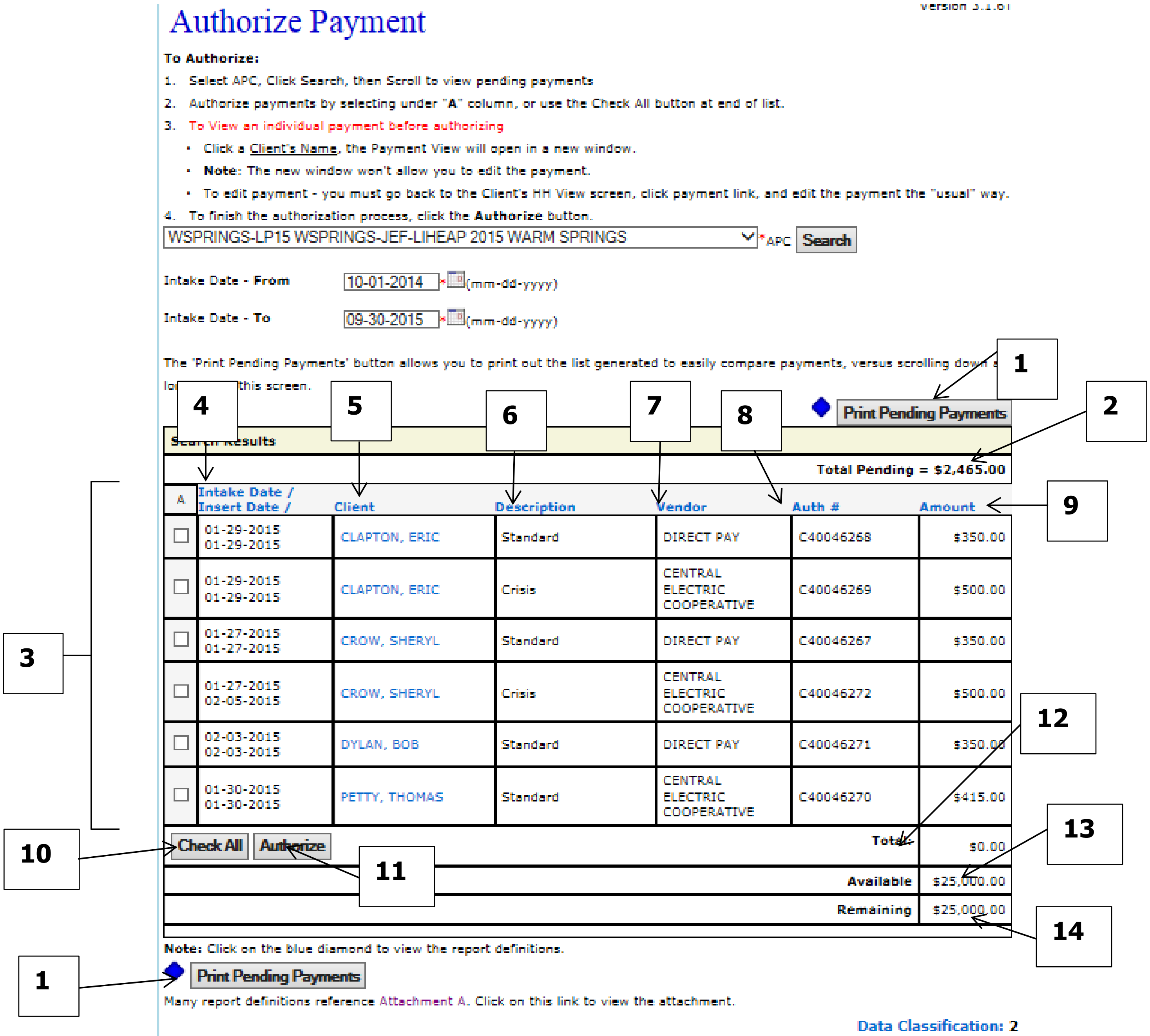
You will then be directed to the **'Authorize Payment'** screen.



Using the dropdown, click on the APC for payment that need to be authorized. After choosing the appropriate APC, the option for selecting a particular data range will appear.



The system will automatically populate with the program year of the APC selected. However, if only a certain date range needed to be processed, you could change the dates as needed. Click on **'Search'** for the pending payment of the APC to expand and appear.



The expanded '**Authorize Payment'** screen can provide a lot of information to finish processing payments and be able to perform a double check:

1) The **'Print Pending Payment'** button allows you to print out a list to easily compare payment versus scrolling down a long list on the **'Authorize Payment'** screen

2) The **'Total Pending'** payments currently available for processing total $2,465.

3) The column **'A'** is the box that needs check to authorize the pending payment for authorization

4) The '**Intake Date'** (date of intake/application) and the **'Insert Date'** (date of OPUS data entry) assist in knowing the timing in processing the application and payments

5) The **'Client'** or applicant that is associated with the payment is also a link. If clicked on, the **'Household/Payment Popup'** (15 & 16) screen will appear for a double check of the payment and household information before authorizing

6) The **'Description'** indicates the type of payment that is pending (**Standard, Crisis, Combo, Special, Fuel, Health & Safety, etc.)**

7) The **'Vendor'** shows the vendor that the payment is pending to go to

8) The **'Auth #'** indicates the authorization number of the households payment

9) **'Amount'** shows the amount of the pending payment for the household

10) The **'Check All'** button allows you to authorize all the payments that appear by automatically marking the A box

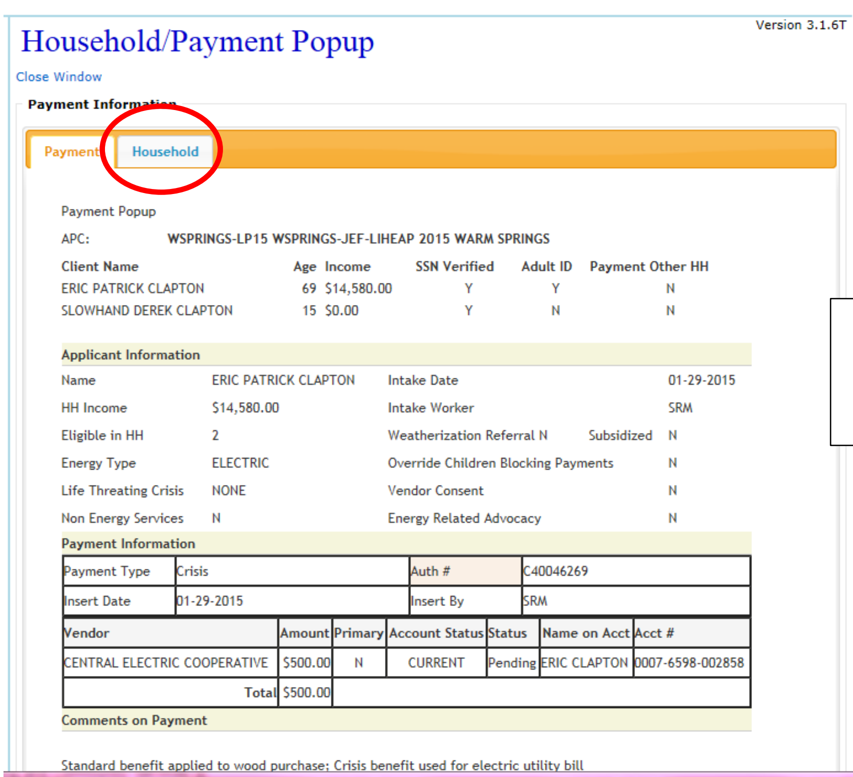
11) The **'Authorize'** button is the button after making the selection of which payment to authorize, will move the pending payment to the **'Local Auth'** status

12) The **'Total'** listed at the bottom of the screen will total amount of the selected payments to be authorized

13) **'Available'** indicates how much funding is available in the APC for payment processing

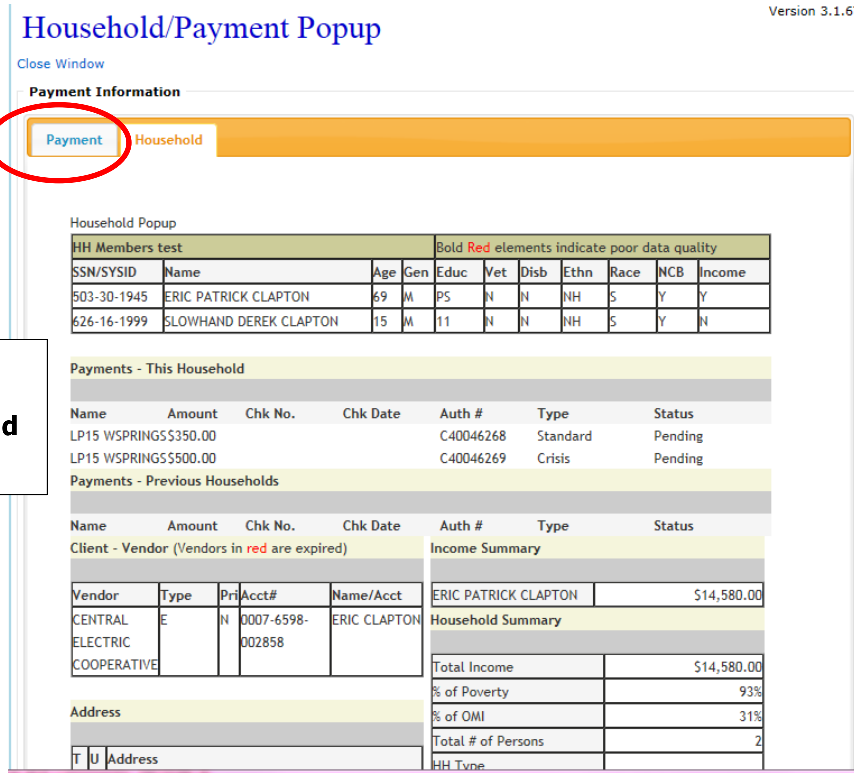
14) **'Remaining'** indicates how much is funding is available in the APC after you have selected the payment to authorize

(15 & 16) IF you click on the client name link on the Authorize Payment screen, the Household/Payment Popup will appear. This Popup allows a double check before authorizing the payments. Using the tabs up top, you can navigate from the Payment View to the Household View.



15

Payment Popup



Version 3.1.6

Household/Payment Popup

Close Window

Payment Information

Payment | Household

Household Popup

HH Members test					Bold Red elements indicate poor data quality						
SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income	
503-30-1945	ERIC PATRICK CLAPTON	69	M	PS	N	N	NH	S	Y	Y	
626-16-1999	SLOWHAND DEREK CLAPTON	15	M	11	N	N	NH	S	Y	N	

Payments - This Household

Name	Amount	Chk No.	Chk Date	Auth #	Type	Status
LP15 WSPRINGS	$350.00			C40046268	Standard	Pending
LP15 WSPRINGS	$500.00			C40046269	Crisis	Pending

Payments - Previous Households

Name	Amount	Chk No.	Chk Date	Auth #	Type	Status

Client - Vendor (Vendors in red are expired)

Vendor	Type	Pri	Acct#	Name/Acct
CENTRAL ELECTRIC COOPERATIVE	E	N	0007-6598-002858	ERIC CLAPTON

Income Summary

ERIC PATRICK CLAPTON	$14,580.00

Household Summary

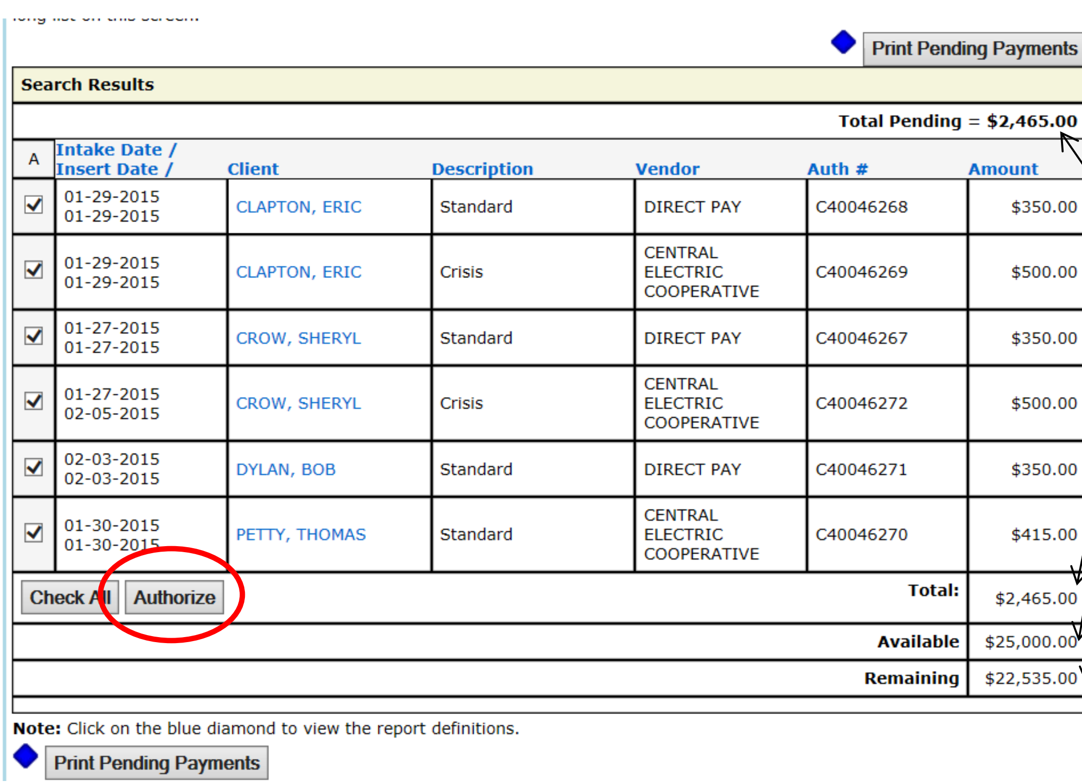
Total Income	$14,580.00
% of Poverty	93%
% of OMI	31%
Total # of Persons	2
HH Type	

Address

T	U	Address

16

Household Popup



Print Pending Payments

Search Results

Total Pending = $2,465.00

A	Intake Date / Insert Date /	Client	Description	Vendor	Auth #	Amount
☑	01-29-2015 01-29-2015	CLAPTON, ERIC	Standard	DIRECT PAY	C40046268	$350.00
☑	01-29-2015 01-29-2015	CLAPTON, ERIC	Crisis	CENTRAL ELECTRIC COOPERATIVE	C40046269	$500.00
☑	01-27-2015 01-27-2015	CROW, SHERYL	Standard	DIRECT PAY	C40046267	$350.00
☑	01-27-2015 02-05-2015	CROW, SHERYL	Crisis	CENTRAL ELECTRIC COOPERATIVE	C40046272	$500.00
☑	02-03-2015 02-03-2015	DYLAN, BOB	Standard	DIRECT PAY	C40046271	$350.00
☑	01-30-2015 01-30-2015	PETTY, THOMAS	Standard	CENTRAL ELECTRIC COOPERATIVE	C40046270	$415.00
Check All	Authorize				Total:	$2,465.00
					Available	$25,000.00
					Remaining	$22,535.00

Note: Click on the blue diamond to view the report definitions.

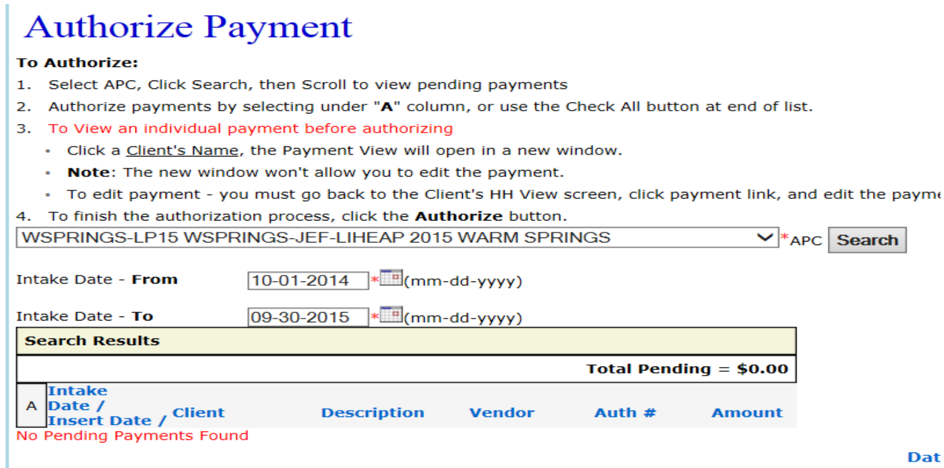
Print Pending Payments

The 6 pending payments total amount are listed at the top of the screen. After making my authorizing selection, my total of payments to process is at that bottom, as well as how much funding is available in my APC and then what will be remaining after authorizing the 6 payments.

Local Auth Tips: There are a couple of ways that authorizing payments can be done as indicated. For some agencies, and fiscal procedures, it may be that all **'Standard'** types of payments are authorized in one batched and then the **'Crisis'** types in a different. Where, another agency or program may not need to separate them and they can be all authorized together.

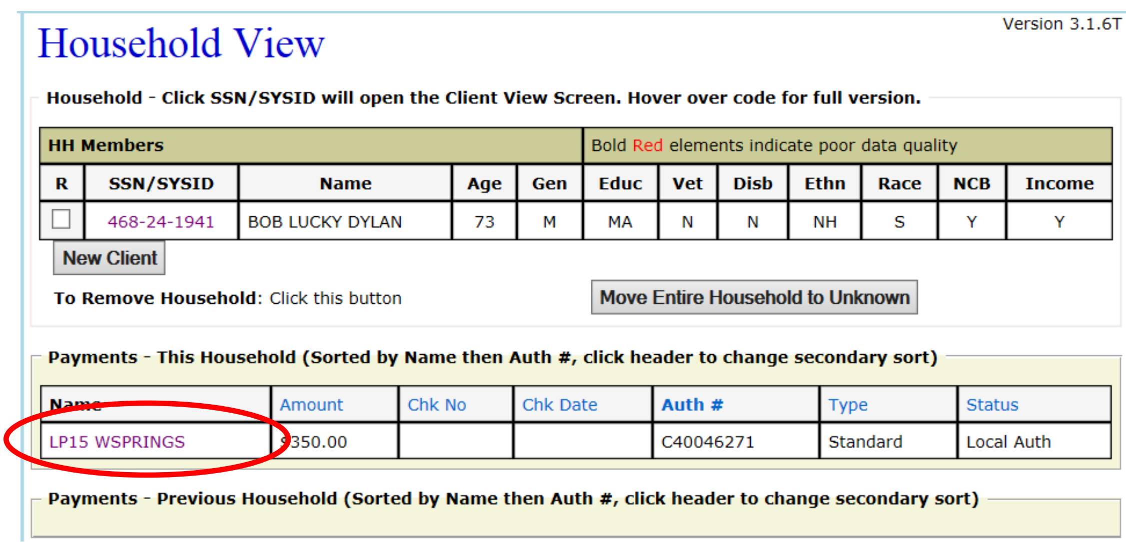
After marking the selection of pending payments to authorize, click on the **'Authorize'** button.

The **'Authorize Payment'** screen will then be reloaded to show any current payments that are in **'Pending'** status that have not been authorized for the APC.



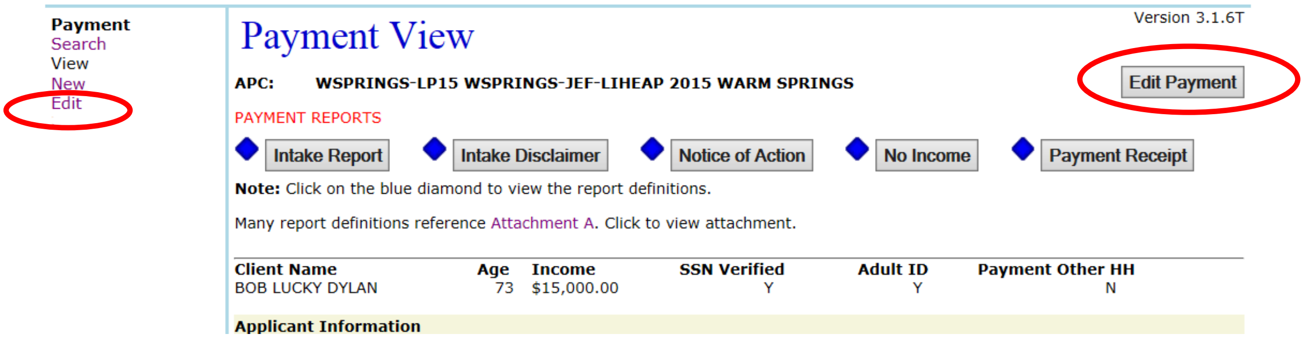
12-A.1 Un-Authorize Payment

Payments can only be edited while in the **Pending, Deny,** and **Hold** status. If a date entry error is discovered while the payment is still in **'Local Auth'** status, it still can be corrected without having to contact the OPUS HelpDesk for assistance. There is an option for the payment to be '**Un-Authorized'** and place back into the **'Pending'** status.

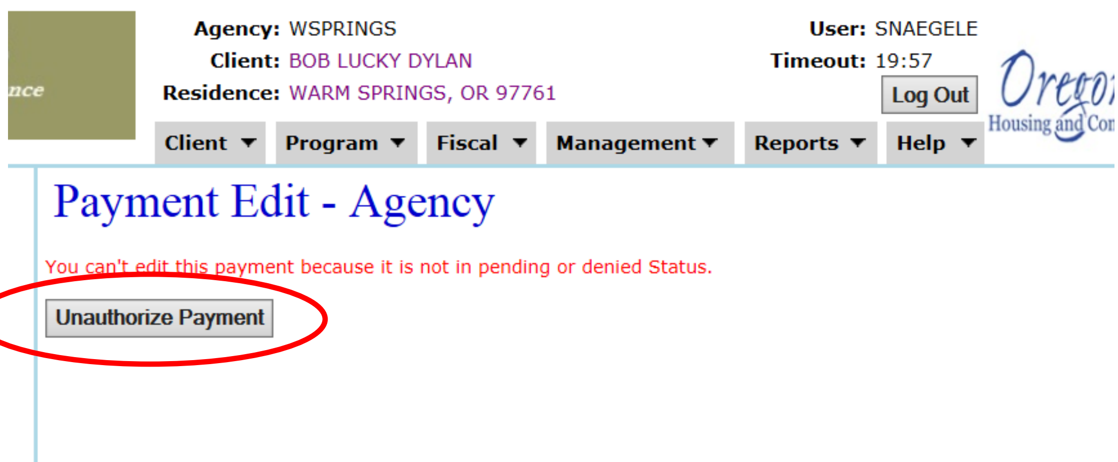


While the payment is in **'Local Auth'** status, from the **'Household View'** screen or the **'Client View'** screen, click on the **'Local Auth'** payment. You will then be directed to the **'Payment View'** screen.

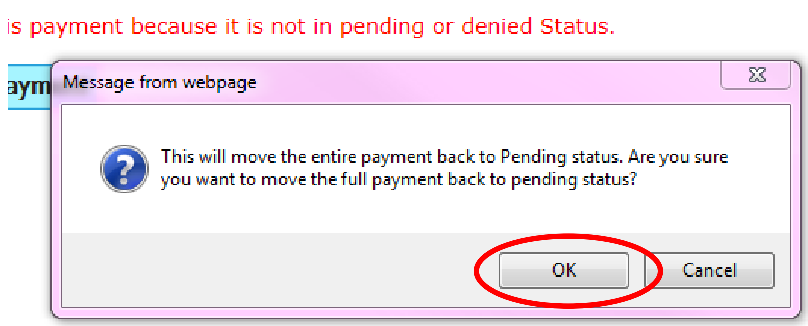
Using either the **'Edit Payment'** button, or the **'Edit'** link on the left navigation side bar under **'Payment'** click on to be directed to the **'Edit Payment'** screen.



Click on the '**Unauthorize Payment'** button.



A pop-up message will appear confirming that you want to move the payment from **'Local Auth'** back into the **'Pending'** status.



Click on **'OK'** to move the entire payment back to **'Pending'** status. You will then be directed to the **'Payment View'** screen.

Complete corrections as needed. **Remember to 'Requalify the Household' through the 'Edit' feature to ensure the made changes apply to the household intake report and payment.**

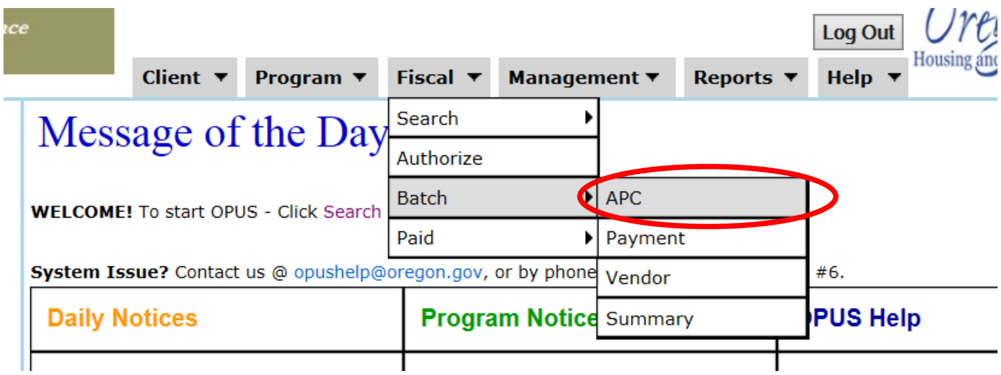
12-B BATCHED

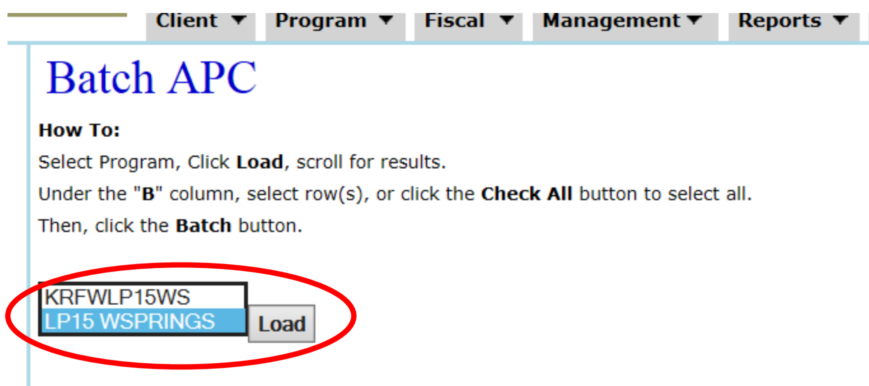
Batching payments is the process for getting ready to make payment of the pending payments for vendors. Multiple reports assist in the fiscal process of program payments.

There are 2 ways to **'Batch'** payments in the OPUS system; you can batch **'Local Auth'** payment by APC or by the payment.

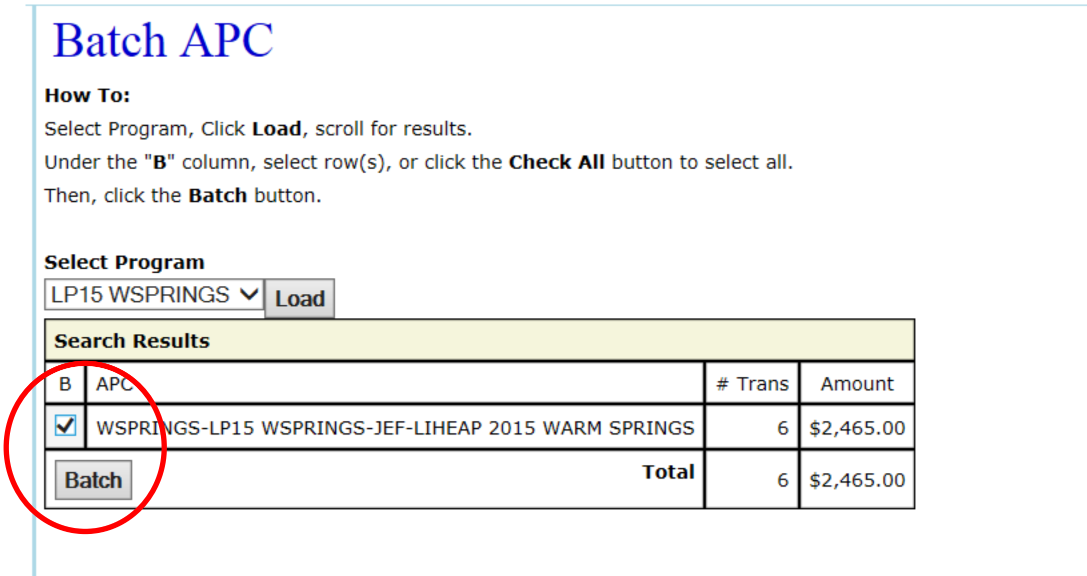
12-B.1 BATCH by APC

Using the top dashboard under the '**Fiscal'** dropdown, go to **'Batch'** and click on **'APC.'** You will then be directed to the **'Batch APC'** screen.



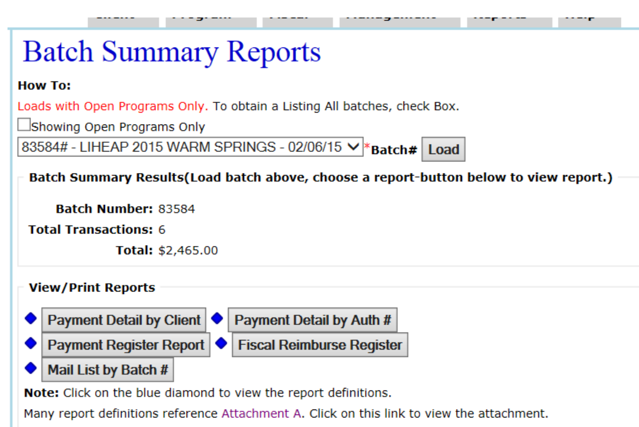


Using the dropdown on the **'Batch APC'** screen, choose the APC with the '**Local Auth'** payments that need to be batched. After selecting the APC, click on the **'Load'** button. The screen will then expand to list the available payments in the APC that are in **'Local Auth'** status that can be batched.



Mark the box next to the APC that needs batched. After selecting the APC's to batch, click on the **'Batch'** button. You will then be directed to the **'Batch Summary Reports'** screen.

On the **'Batch Summary Reprots'** screen, using the dropdown, select the batch for reports if different then the preloaded report and click on **'Load.'** The **'Batch Summary Reports'** screen will expand and load with reports related to the batch selected.



There are five different batch reports that can be run and printed:

1. **Payment Detail by Client** this report summarizes energy assistance payments grouped by batch, utility vendor, and client name. It also produces totals for each vendor and batch.

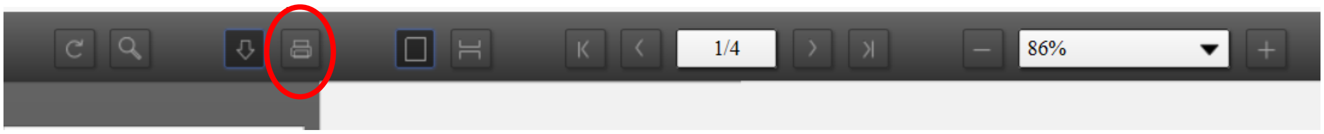
2. **Payment Detail by Auth #** this report summarizes energy assistance payments grouped by batch, utility vendor, and client name. It also produces totals for each vendor and batch

3. **Payment Register Report** this report summarizes energy assistance payments grouped by batch and utility vendor. It also produces totals for each batch.

4. **Fiscal Reimburse Register** this report summarizes energy assistance payments grouped by batch number and program. It is sorted by grant, county, and agency. It also produce totals for each program and grant.

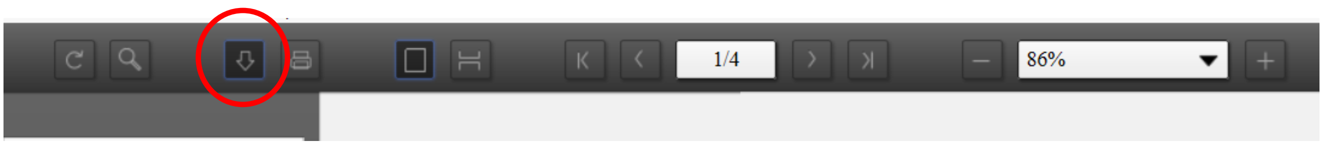
5. **Mail List by Batch #** this report provides a mail list of applicants who are enrolled in the LIHEAP-OEA energy program and their payment is in batched or paid status

Click on the button of the report that you want to run. The report will open in a new browser tab **'OHCS Report Viewer'**. To ensure readable printing, use the print button located on the browser.

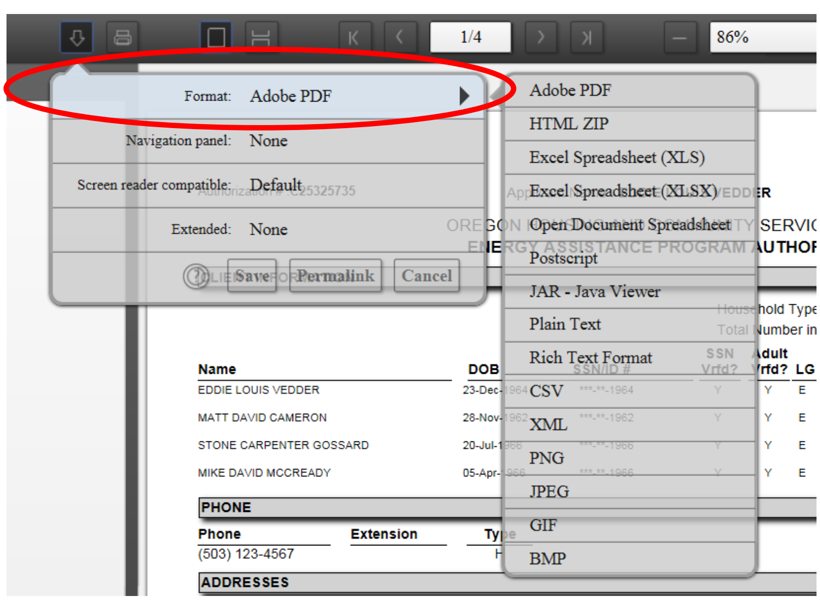


Besides printing, you can also export the reports so that they can be saved electronically.

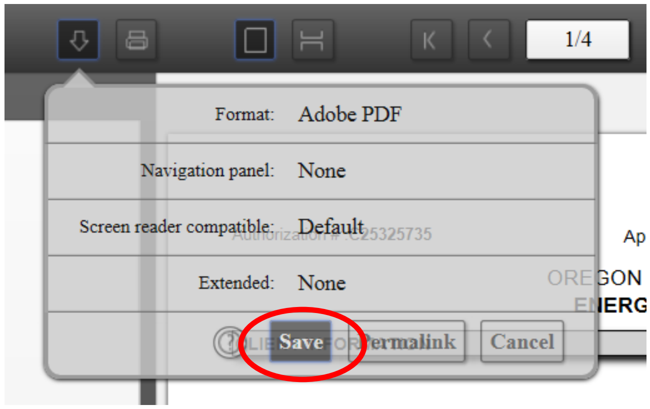
Click on the downward arrow next to the Print button.



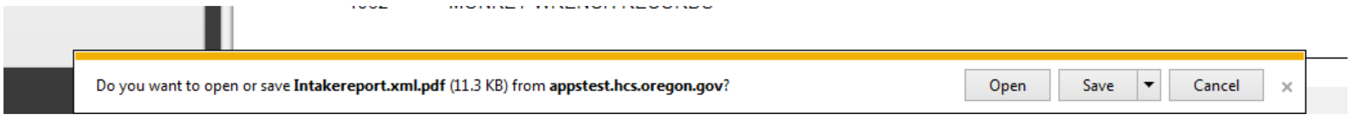
The **'Export'** popup window will appear for you to choose what program you would like to export to as well as where to save the report once it has completed. Click on the Format arrow to change format of export.



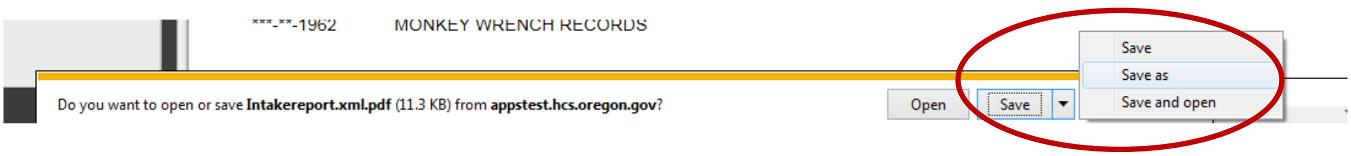
After making the format selection, click on Save.



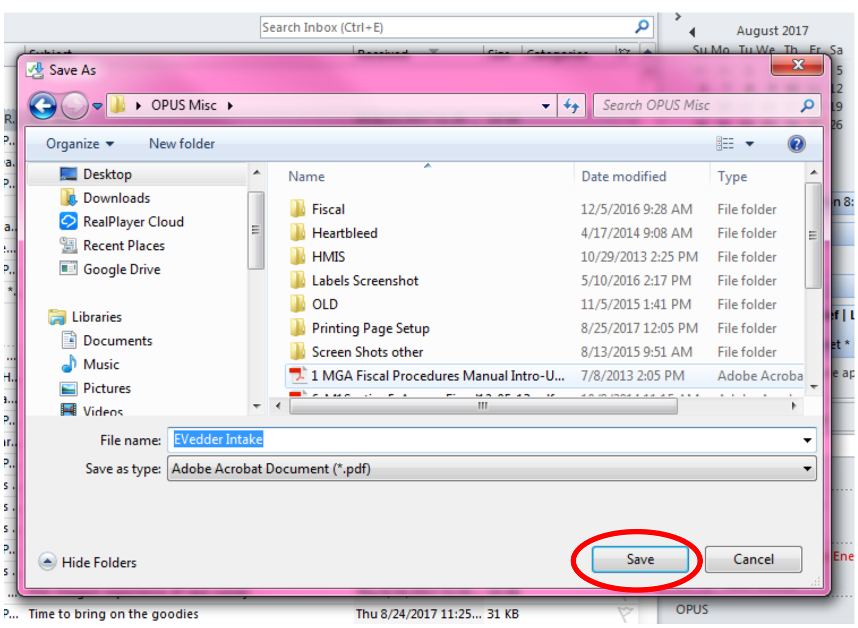
If using Internet Explorer, a pop-up will appear.



Using the arrow, click on Save As.

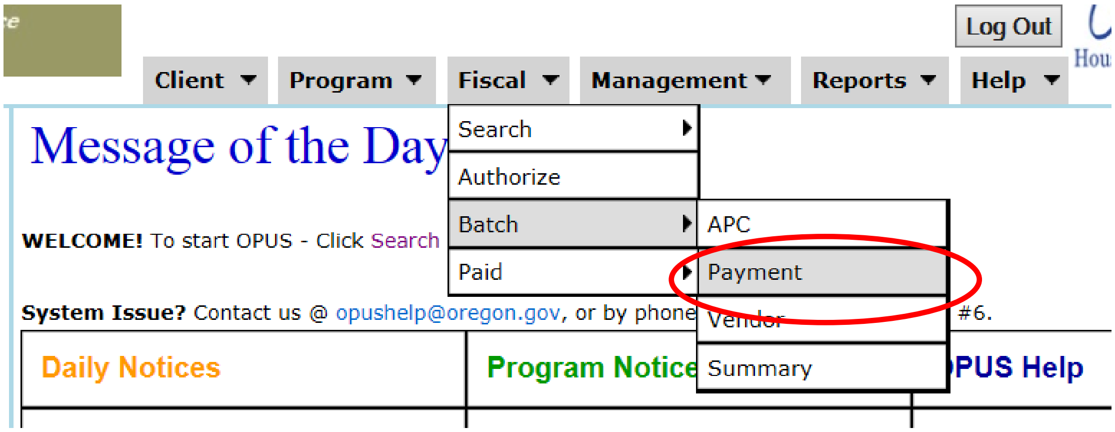


You will then be able to name the report and determine where to save it. Click on Save.

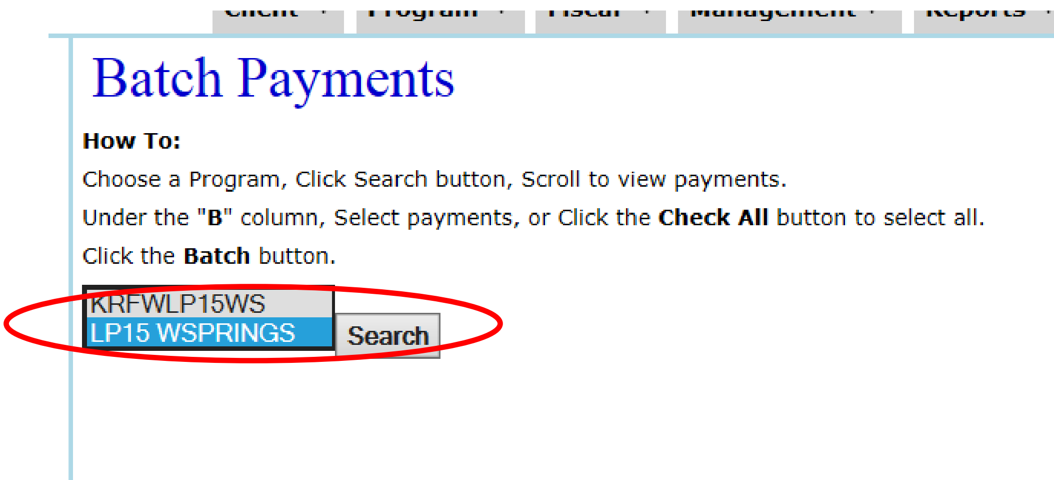


12-B.2 BATCH by PAYMENT

The second way to batch is to **Batch by Payment.** After **'Authorizing'** payments, using the top dashboard **'Fiscal'** tab, go down to the **'Batch'** and when it expands click on the **'Payments'** link.



You will then be directed to the **'Batch Payment'** screen. Using the dropdown, select the program that you want to batch payments from.



After making selection, click on the **'Search'** button. Payments that have been **'Authorized'** and are ready to be batched will appear.

You can mark individual payments that only need to be batched, or you can use the **'Check All'** button feature.

After making the selection of what payments to batch, click on the **'Batch'** button. You will then be directed to the **'Batch Summary Reports'** screen.

Version 3.1.6T

Batch Payments

How To:

Choose a Program, Click Search button, Scroll to view payments.

Under the "**B**" column, Select payments, or Click the **Check All** button to select all.

Click the **Batch** button.

Select Program:

LP15 WSPRINGS | Search

Check the box of payments to include in the batch or use the Check All option

Batching by Payments only will show the total of all payments available

Search Results

B	Auth Date	Client Name	Vendor	APC	Amount
☐	02-09-2015	ERIC PATRICK CLAPTON	CENTRAL ELECTRIC COOPERATIVE	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$500.00
☐	02-09-2015	SHERYL SUZANNE CROW	CENTRAL ELECTRIC COOPERATIVE	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$500.00
☐	02-09-2015	MR THOMAS EARL PETTY	CENTRAL ELECTRIC COOPERATIVE	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$415.00
☐	02-09-2015	ERIC PATRICK CLAPTON	DIRECT PAY	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$350.00
☐	02-09-2015	SHERYL SUZANNE CROW	DIRECT PAY	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$350.00
☐	02-09-2015	BOB LUCKY DYLAN	DIRECT PAY	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$350.00
Check All | Batch				Total	$2,465.00

Version 3.1.6T

Batch Payments

How To:

Choose a Program, Click Search button, Scroll to view payments.

Under the "**B**" column, Select payments, or Click the **Check All** button to select all.

Click the **Batch** button.

Select Program:

LP15 WSPRINGS | Search

After selecting payments to batch, click on the Batch button. You will then be directed to the Batch Summary Reports screen

Search Results

B	Auth Date	Client Name	Vendor	APC	Amount
☑	02-09-2015	ERIC PATRICK CLAPTON	CENTRAL ELECTRIC COOPERATIVE	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$500.00
☑	02-09-2015	SHERYL SUZANNE CROW	CENTRAL ELECTRIC COOPERATIVE	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$500.00
☑	02-09-2015	MR THOMAS EARL PETTY	CENTRAL ELECTRIC COOPERATIVE	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$415.00
☑	02-09-2015	ERIC PATRICK CLAPTON	DIRECT PAY	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$350.00
☑	02-09-2015	SHERYL SUZANNE CROW	DIRECT PAY	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$350.00
☑	02-09-2015	BOB LUCKY DYLAN	DIRECT PAY	WSPRINGS-LP15 WSPRINGS-JEF-LIHEAP 2015 WARM SPRINGS	$350.00
Un-Check All | Batch				Total	$2,465.00

Data Classification: 2

Client ▾ Program ▾ Fiscal ▾ Management ▾ Reports ▾ Help ▾

Batch Summary Reports

How To:

Loads with Open Programs Only. To obtain a Listing All batches, check Box.

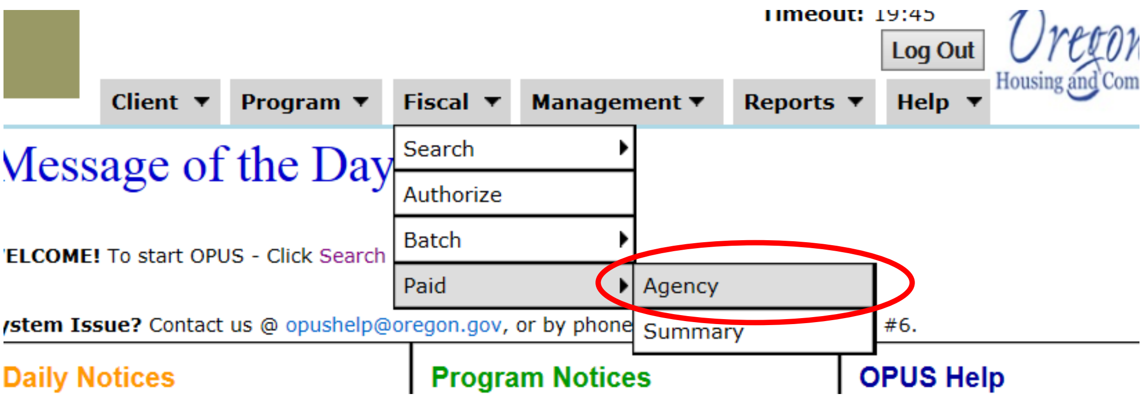
☐ Showing Open Programs Only

83585# - LIHEAP 2015 WARM SPRINGS - 02/09/15 | ***Batch#** | Load

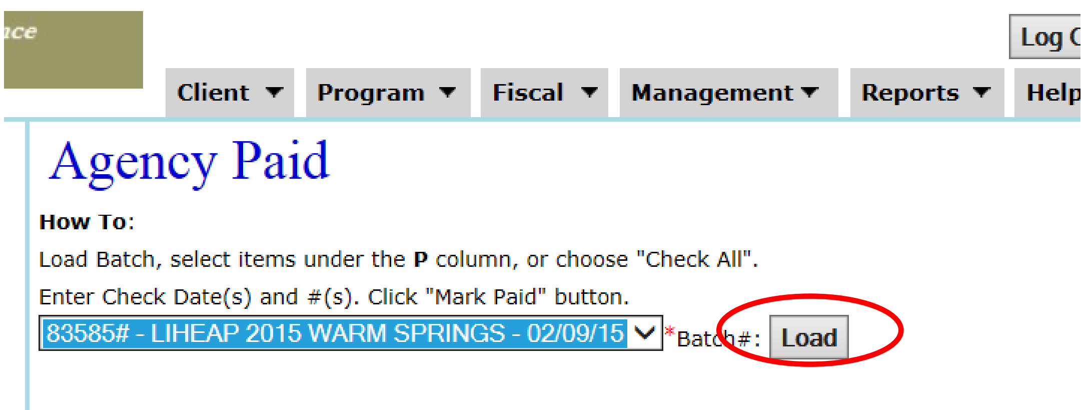
12-C AGENCY PAID

'Agency Paid' is the last step in processing payments. In this step, you can provide the check number and the check date for the payments that have been issued for clients.

Using the top dashboard under the **'Fiscal'** dropdown, go **'Paid,'** and click on the expanded **'Agency'** link.

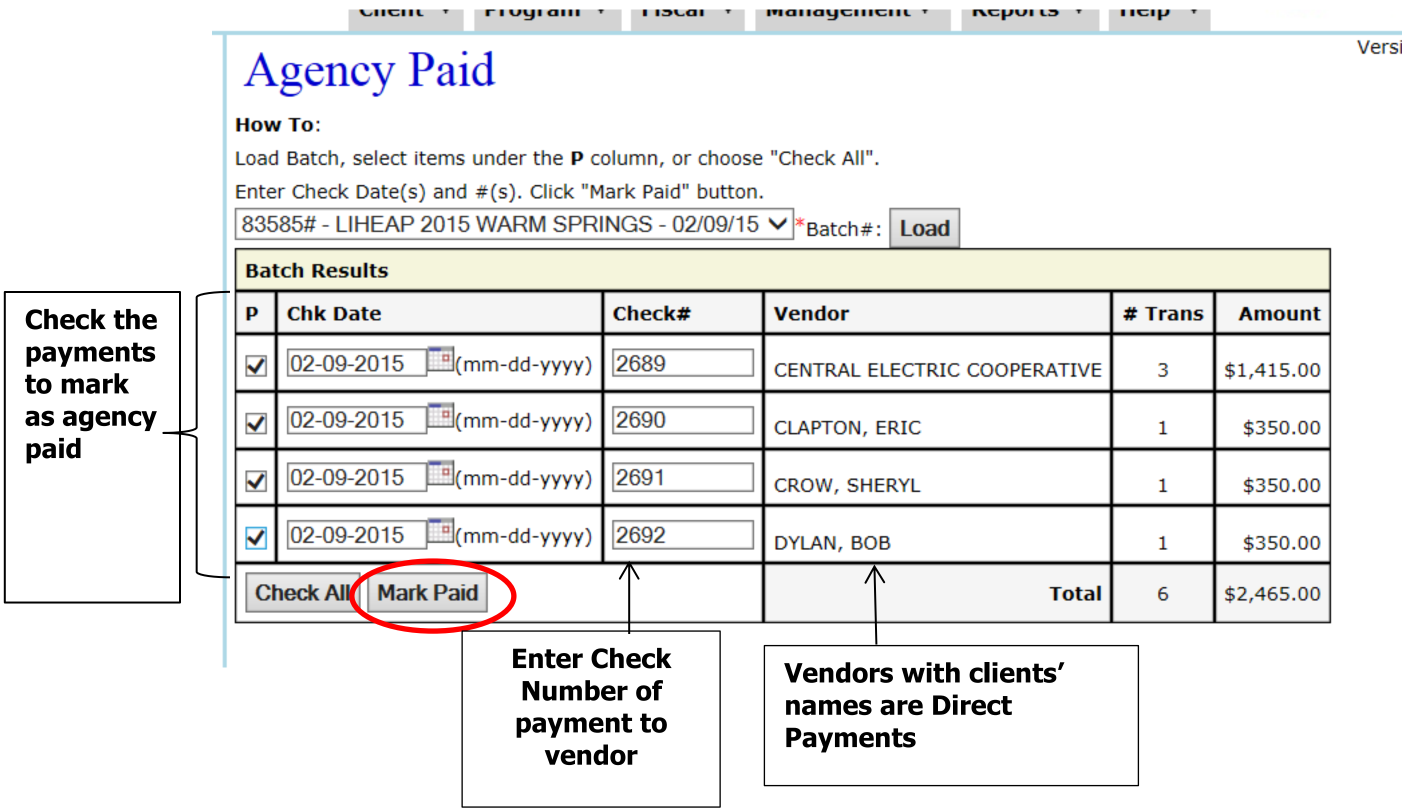


You will then be directed to the **'Agency Paid'** screen. Using the dropdown, select on the '**Batch'** number that need to be finished.

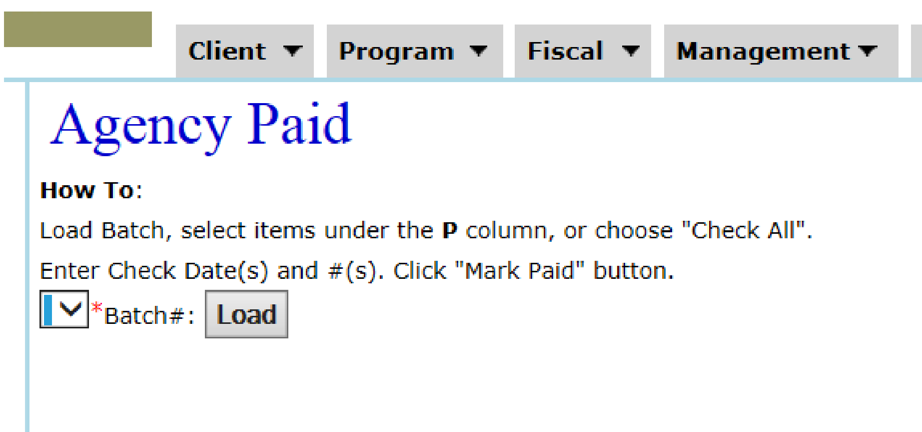


After selecting the **'Batch'** click on the **'Load'** button. The **'Agency Paid'** screen will expand to enter the check date and number for the payments that included in the **'Batch'** selected.

After marking which payments to indicate as **'Agency Paid,'** and entering the check date and check number of the checks to the vendors, click on the **'Mark Paid'** button.

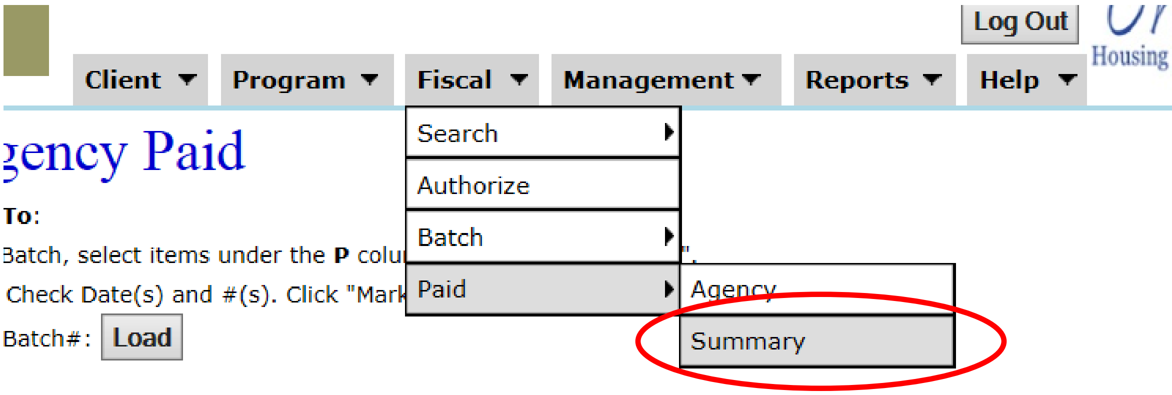


After clicking on the **'Mark Paid'** button, the **'Agency Paid'** screen will re-load.



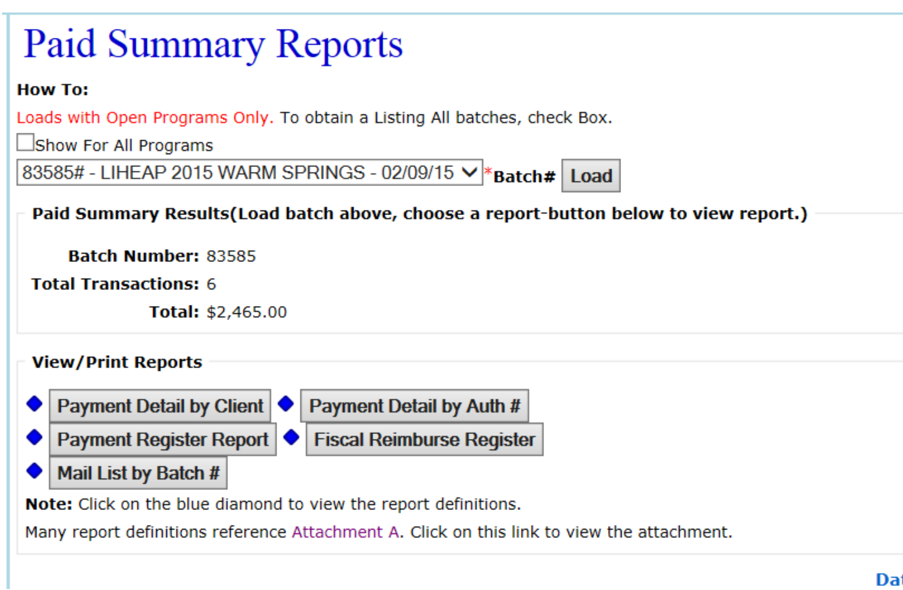
The same reports available during the Batching process are also available after the payments have been **'Agency Paid.'**

Using the top dashboard under the **'Fiscal'** dropdown, move down to **'Paid'** and click on **'Summary'** after it expands.



You will then be directed to the **'Paid Summary'** screen. Using the dropdown, select the **'Batch'** number of the **'Agency Paid'** payments you want to run reports for.

After selecting the batch number, click on the **'Load'** button. The **'Paid Summary Reports'** screen will expand to select the type of report to run.



13. CREATING THE APC FOR LOCAL PROGRAMS

13-A Overview

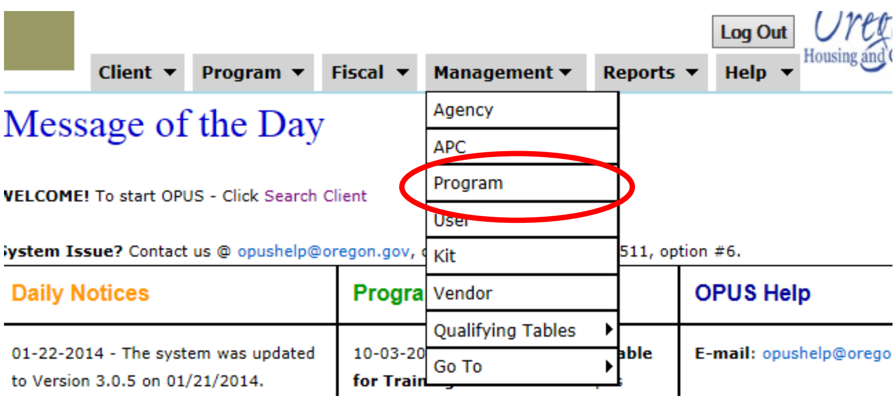
In this section creating APC's for local programs will be covered. However, if the local program needs to be created to follow LIHEAP or OEAP, please contact the OPUS HelpDesk for assistance to complete the request.

There are 3 main elements to remember when creating the APC:

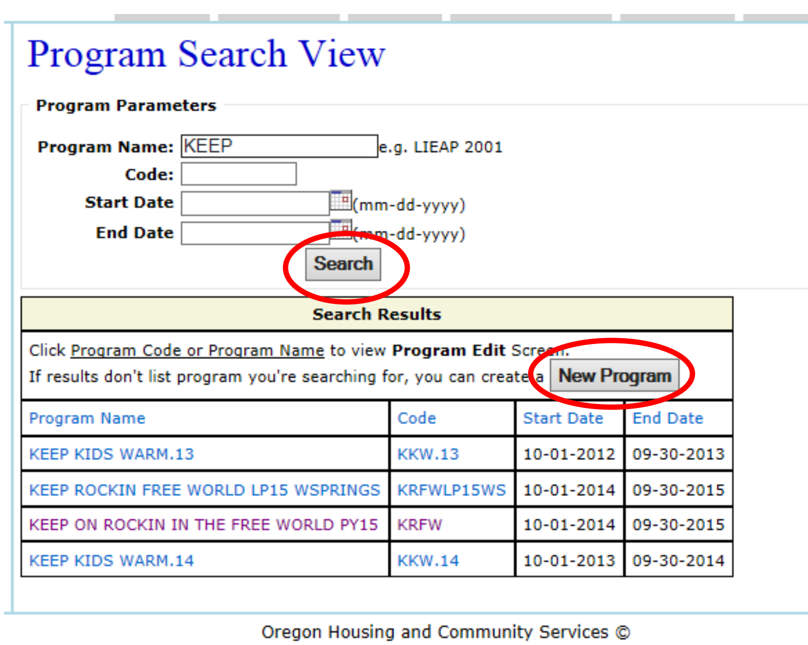
1. Create the Program
2. Create the Grant
3. Create the APC by tying together the Program and Grant

13-B Create the Program

In creating the local program, we first will need to create the program in the OPUS database. Using the dropdown dashboard under '**Management'**, click on the '**Program'** link.

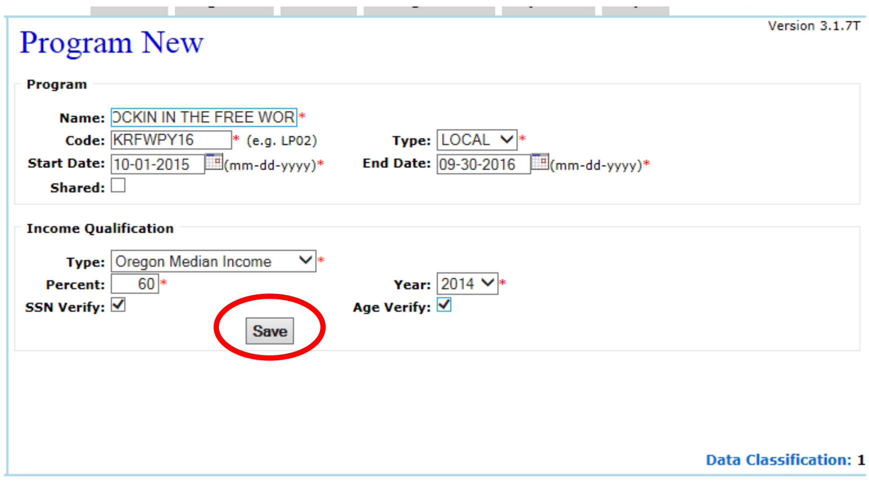


You will then be directed to the '**Program Search View'** screen. Enter in the '**Program Name'** or '**Code'** and click on the '**Search**' button to make sure there is not already a created program in the database.



If the program is not listed in the '**Search Results',** click on the '**New Program'** button. You will then be directed to the '**Program New'** screen.

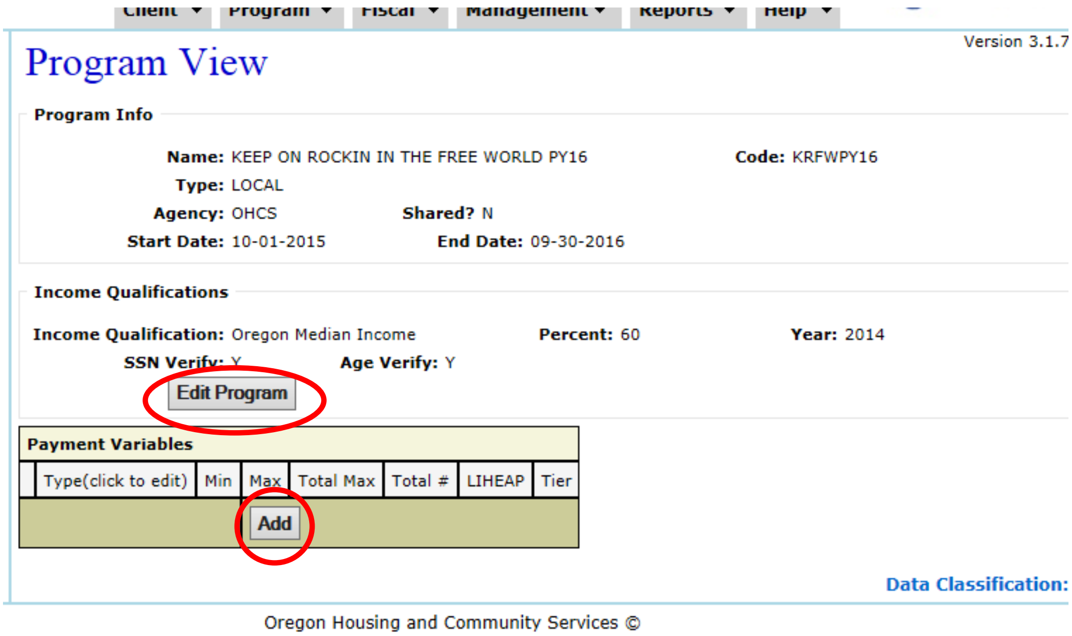
On the **'Program New'** screen, complete the fields for the local program. Red * asterisk are required fields that need to be entered before the program data can be saved.



1. **Name**- Name of local program created
2. **Code**- acronym of program (e.g. LP15)
3. **Type**- type of program, this should be marked '**Local'. If a program needs to be set-up to mirror LIHEAP or OEAP, please contact the OPUS HelpDesk.**
4. **Start Date**- this is the date when the program will start for intakes
5. **End Date**- this is the date of when the program will end for intakes
6. **Shared**- this indicates if the program will be shared with other agencies
7. **Type**- this indicates the type of '**Income Qualification'** for the program (No, Oregon Median Income, or Federal Percent of Poverty)
8. **Percent**- this indicates the percent of the income type selected. For example, a local program may use Federal Percent of Poverty, and serve only 120% instead of 150%
9. **Year**- this indicates the year of income type selected. Please note, this is different as the year selected will almost always be the previous year than the program year. For example, LP15 Oregon Median Income is 60% of Year 2014.
10. **SSN Verify**- this indicates if a social security number is required for the program eligibility
11. **Age Verify**- this indicates if adult id needs to be marked for program eligibility

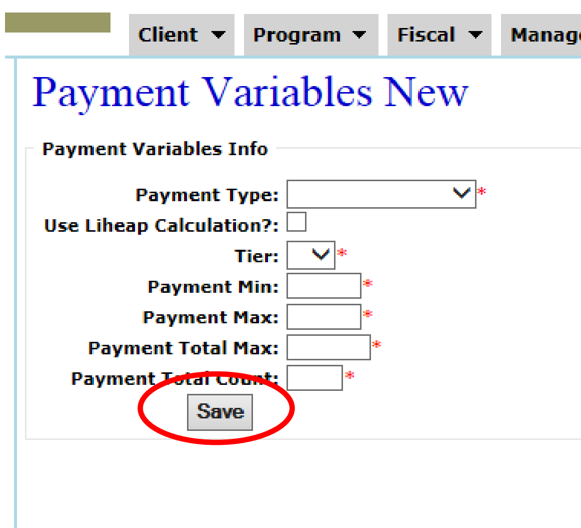
After completing entering the program information, click on the '**Save'** button. You will then be directed to the '**Program View'** screen where the 'Payment Variables' will be added and you can verify the program information entered.

If the program information needs to be edited, click on the '**Edit Program'** button to be directed to the '**Program Edit'** screen where corrections can be made.



After creating the program in the database, before creating the grant, '**Payment Variables'** or payment types need to be added to the program to determine the types of payments that the program will give to clients.

On the '**Program View'** screen click on the '**Add'** button under the '**Payment Variables'** box. You wil then be directed to the '**Payment Variables New'** screen. **Payment Variables/Types** are entered one at a time.

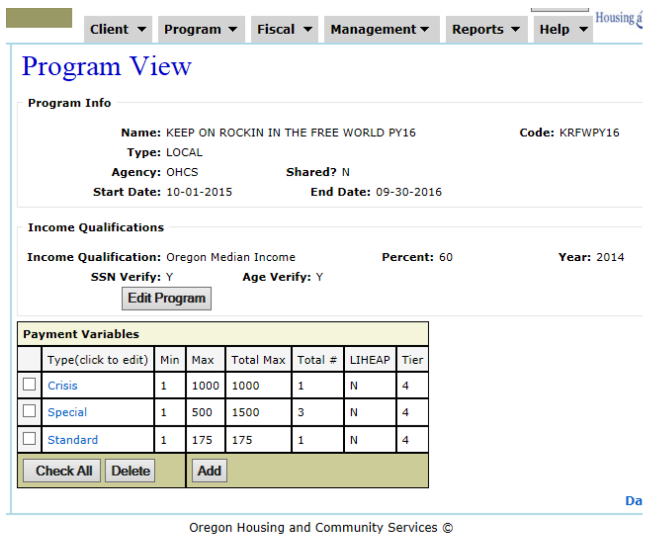


1. **Payment Type**- this is the type of payments you want to give clients form the program. The types used today are: Combo, Crisis, Fuel, Furnace, Health & Safety, Roomer/Boarder, Special and Standard

2. **Use LIHEAP Calculation**- for local program this should be left unchecked. If a program needed to mirror LIHEAP or OEAP, please contact the OPUS HelpDesk for assistance.

3. **Tier**-in creating local programs, please mark this tier as a 4

4. **Payment Min**-this indicates the minimum payment allowed
5. **Payment Max-** this indicated the maximum payment that can be issued
6. **Payment Total Max**- this indicates the total max amount is payments to be given
7. **Payment Total Count**- this indicates how many payments can be given to get to the payment total max allowed
8. Click on '**Save'** to save the payment variable/type for the program. You will then be directed to the '**Program View'** screen where you can verify the added variable(s).
9. Follow the steps through until you have added all the payment variables/types needed for the program.

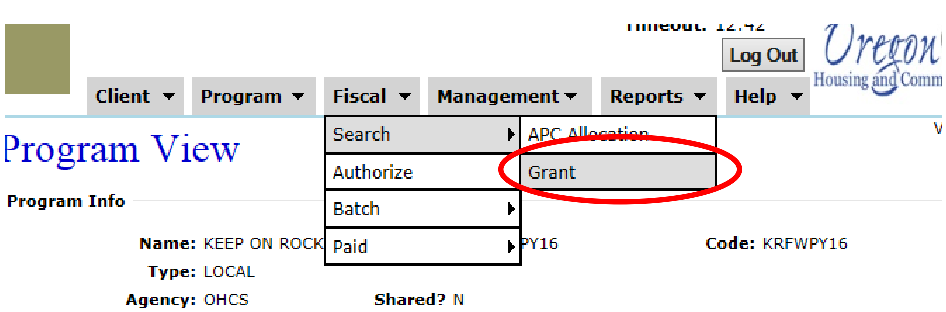


If a '**Payment Variable'** was added and found not to be needed in the program, it can be easily removed by checking next to the payment type and clicking on the '**Delete'** button.

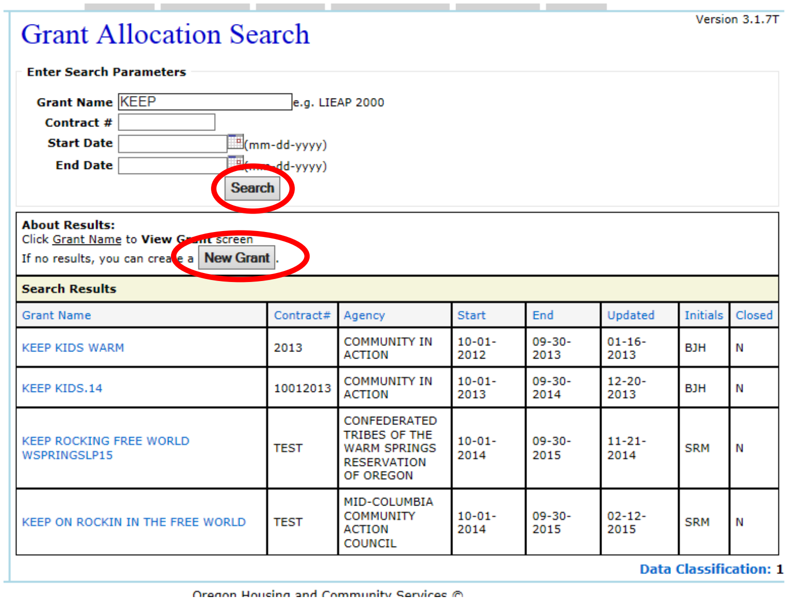
After the **'Program'** has been created in the system, it is now time to create the '**Grant'.**

13-C Create The Grant

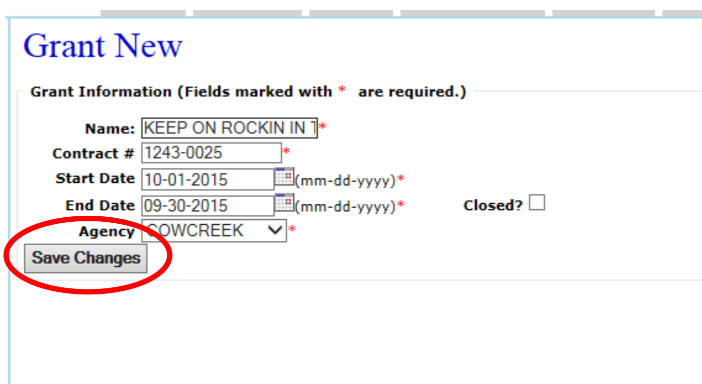
Using the top dashboard dropdowns, under the '**Fiscal'** tab and then '**Search'** click on the '**Grant'** link.



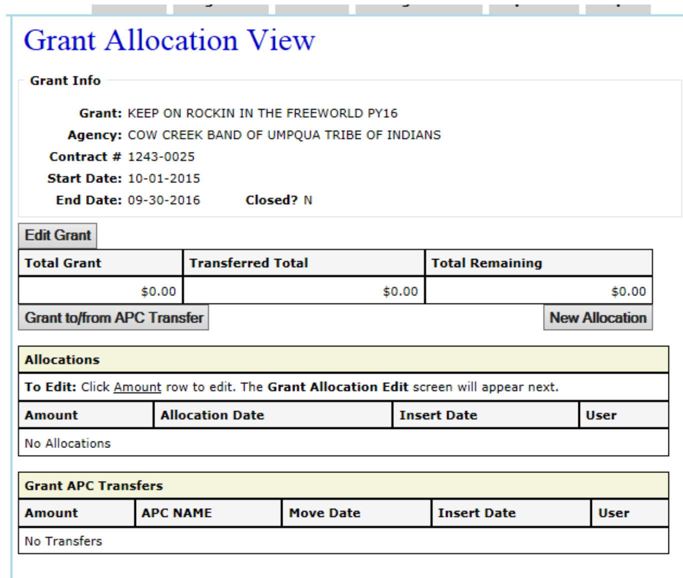
You will then be directed to the **'Grant Allocation Search'** screen. Enter the **'Grant Name'** and click on the **'Search'** button to start a search.



After checking the **'Search Results'** and not finding the grant, click on the **'New Grant'** button located above the **'Search Results'.** You will then be directed to the **'Grant New'** screen. Complete the required fields.



1. **Name-** name of the grant
2. **Contract #-** enter the contract number of the grant
3. **Start Date-** enter the start date of the grant
4. **Closed?-** if this is checked it will tell the system the grant is closed
5. **End Date-** enter the end date of the grant
6. **Agency-** dropdown agency to select the grant agency is for
7. Click on the **'Save'** button after completing required fields. You will then be directed to the **'Grant Allocation View'** screen where the entered grant information can be verified. If any edits need to be made, click on the **'Edit Grant'** button to be directed to the **'Grant Edit'** screen.



After creating the local program and the local grant, it is time to tie them together to create the APC.

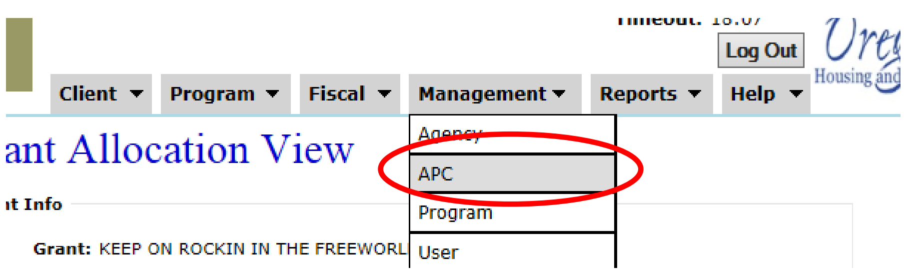
13-D CREATE THE APC

To create the APC we will bring together the program we created and the grant. During this section, there will be two types of APCs created. One APC will indicate how to simply make an APC for an agency that only covers one county, while the second APC will demonstrate how to make an APC for agency's that cover more than one county with the local programs.

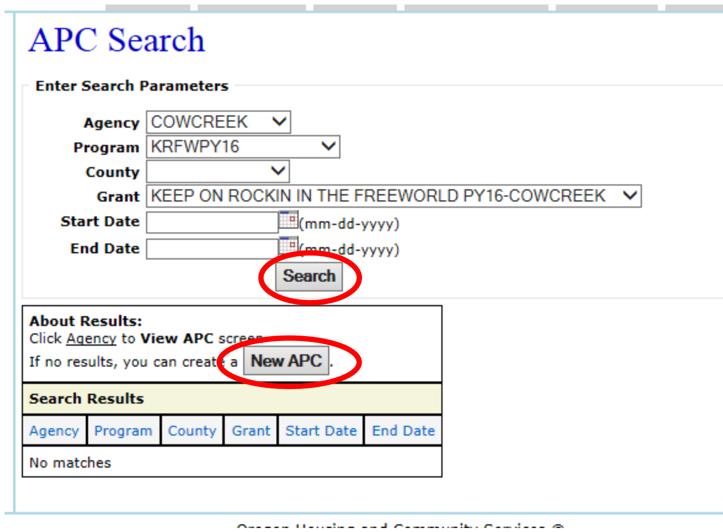
13-D.1 Create Single County Apc

This section will cover how to create an APC that does not need to have multiple counties to serve clients.

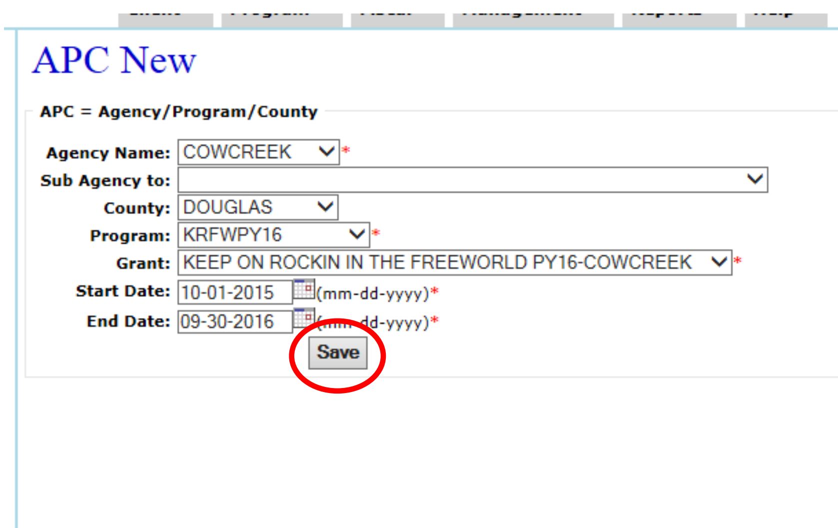
Using the top dashboard dropdown, under the '**Management'** dropdown, click on the '**APC'** link.



You will then be directed to the '**APC Search'** screen. Select the Agency and complete a few field to search for the APC. **Note; the 'Program' dropdown will have programs listed by the program code assigned to it.**



Search results indicate there is not an APC built for the program or grant. Click on the '**New APC'** button. You will then be directed to the '**APC New'** screen.



Complete the following fields:

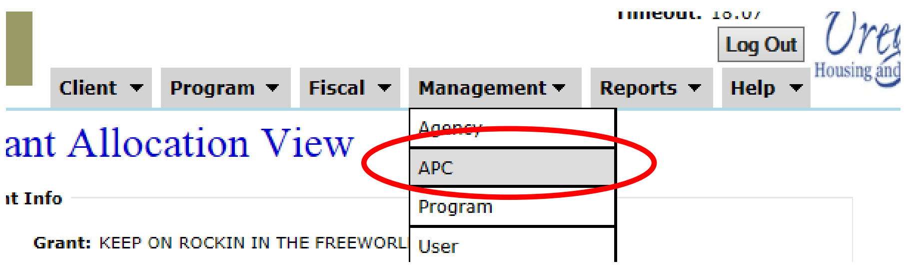
1. Agency Name- the agency the APC is for
2. Sub Agency to- if this is child APC, find the parent APC in dropdown
3. County-select the county the APC is to serve
4. Program- select the program for the APC to determine eligibility by. Programs are listed in by the program code assigned to the program
5. Grant- select the grant the APC will be funded by
6. Start Date- select the start date for the APC to be used
7. End Date-select the end date the APC will end
8. Click on '**Save'.** You will then be directed to the '**APC View'** screen. If you notice a mistake with the APC, it can be edited, or deleted as long as not payments are associated with it

The APC is now ready to be funded. Funding the APC is discussed in section 14 of the OPUS Friendly Users' Guide.

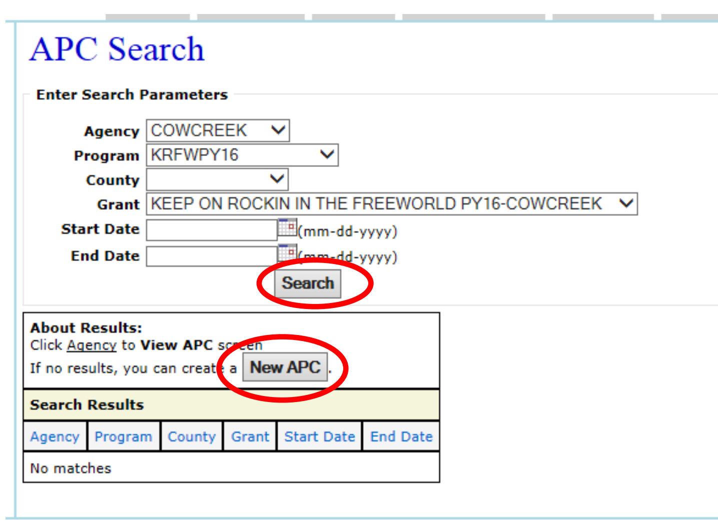
13-D.2 Create Multiple County Apc

This section will cover how to create an APC that needs to have multiple counties to serve clients.

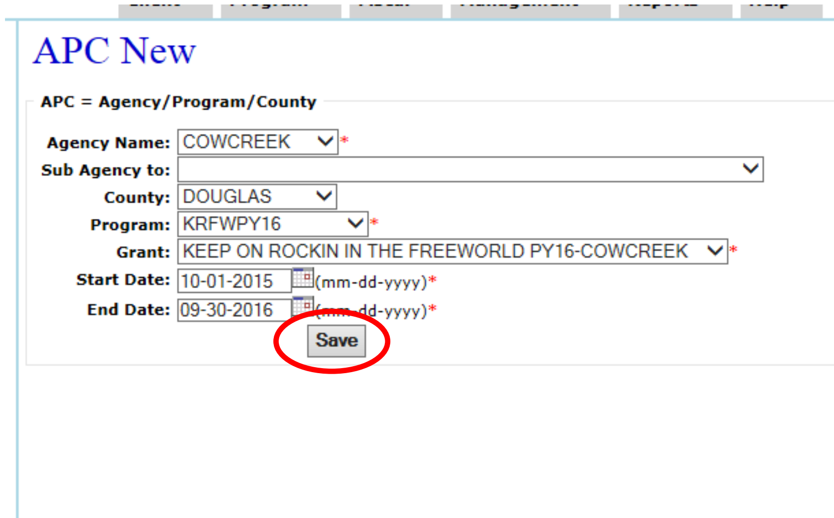
Using the top dashboard dropdown, under the '**Management'** dropdown, click on the '**APC'** link.



You will then be directed to the '**APC Search'** screen. Select the Agency and complete a few field to search for the APC. **Note; the 'Program' dropdown will have programs listed by the program code assigned to it.**

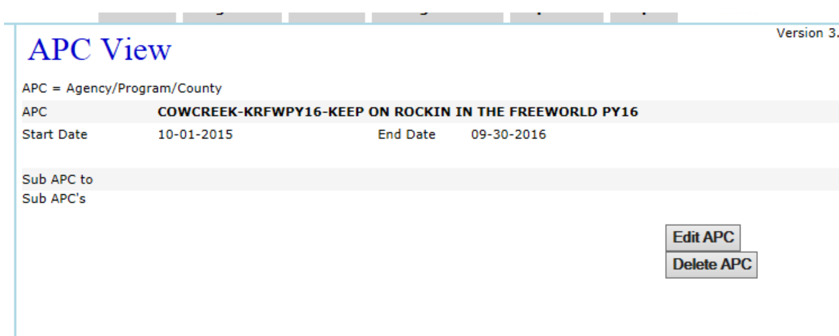


Search results indicate there is not an APC built for the program or grant. Click on the '**New APC'** button. You will then be directed to the '**APC New'** screen. The first step is to create the '**Parent APC'.** This will be the overarching APC and the Counties will be created under it.

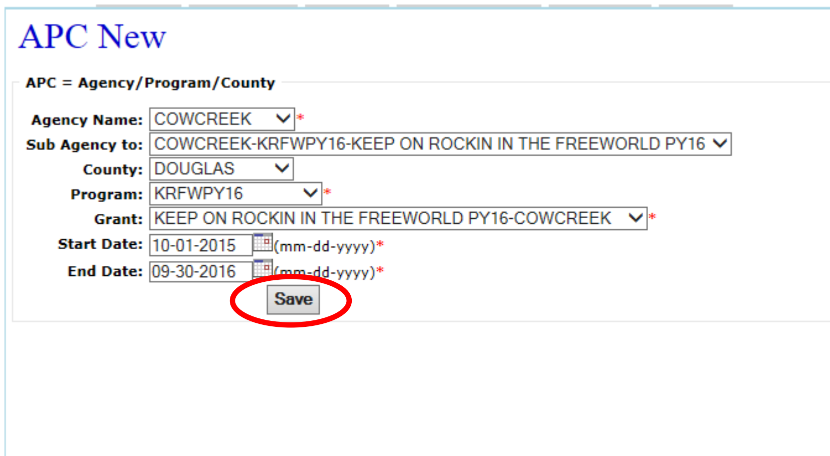


Complete the following fields:

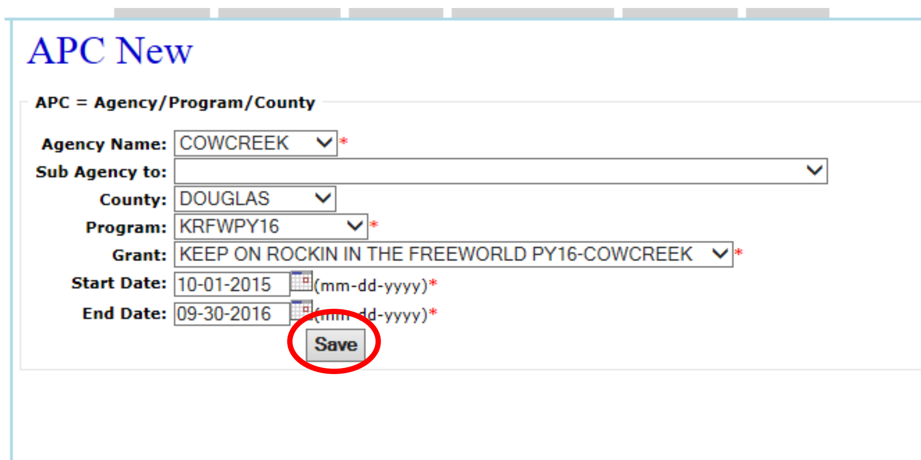
1. Agency Name- the agency the APC is for
2. Sub Agency to- if this is child APC, find the parent APC in dropdown
3. County-when creating an APC that will serve multiple counties, the first APC created will not have a County. This will be referred to as a Parent APC.
4. Program- select the program for the APC to determine eligibility by. Programs are listed in by the program code assigned to the program
5. Grant- select the grant the APC will be funded by
6. Start Date- select the start date for the APC to be used
7. End Date-select the end date the APC will end
8. Click on '**Save'.** You will then be directed to the '**APC View'** screen. If you notice a mistake with the APC, it can be edited, or deleted as long as not payments are associated with it



Next, we will follow the same steps, but associate counties the APCs will need to serve. This time when I search for an APC, in the search results, the **Parent APC** will now display.



Click on the '**New APC'** button. You will then be directed to the '**APC New'** screen.



Complete the following fields:

1. Agency Name- the agency the APC is for
2. Sub Agency to- if this is child APC, find the parent APC in dropdown
3. County-when creating an APC that will serve multiple counties, the first APC created will not have a County. This will be referred to as a Parent APC.
4. Program- select the program for the APC to determine eligibility by. Programs are listed in by the program code assigned to the program
5. Grant- select the grant the APC will be funded by
6. Start Date- select the start date for the APC to be used
7. End Date-select the end date the APC will end
8. Click on '**Save'.** You will then be directed to the '**APC View'** screen. If you notice a mistake with the APC, it can be edited, or deleted as long as not payments are associated with it


Client ▾ Program ▾ Fiscal ▾ Management ▾ Reports ▾ Help ▾

Versic

APC View

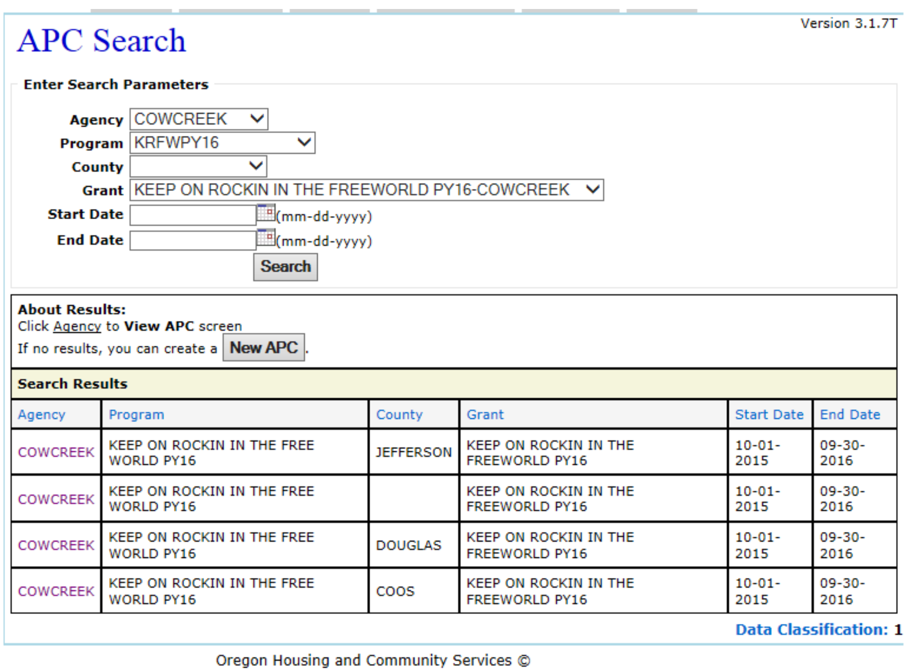
APC = Agency/Program/County

APC	**COWCREEK-KRFWPY16-DOU-KEEP ON ROCKIN IN THE FREEWORLD PY16**		
Start Date	10-01-2015	End Date	09-30-2016
Sub APC to	COWCREEK-KRFWPY16-KEEP ON ROCKIN IN THE FREEWORLD PY16		
Sub APC's			

Edit APC
Delete APC

Repeat the previous steps to make the county APCs as needed. After all county APCs have been created under the Parent APC, see section 14 on Funding the APC.

At any time, a search can always be done to see what counties APC have been created by using the '**APC Search'** feature.


Version 3.1.7T

APC Search

Enter Search Parameters

Agency COWCREEK
Program KRFWPY16
County
Grant KEEP ON ROCKIN IN THE FREEWORLD PY16-COWCREEK
Start Date (mm-dd-yyyy)
End Date (mm-dd-yyyy)
Search

About Results:
Click Agency to **View APC** screen
If no results, you can create a New APC.

Search Results

Agency	Program	County	Grant	Start Date	End Date
COWCREEK	KEEP ON ROCKIN IN THE FREE WORLD PY16	JEFFERSON	KEEP ON ROCKIN IN THE FREEWORLD PY16	10-01-2015	09-30-2016
COWCREEK	KEEP ON ROCKIN IN THE FREE WORLD PY16		KEEP ON ROCKIN IN THE FREEWORLD PY16	10-01-2015	09-30-2016
COWCREEK	KEEP ON ROCKIN IN THE FREE WORLD PY16	DOUGLAS	KEEP ON ROCKIN IN THE FREEWORLD PY16	10-01-2015	09-30-2016
COWCREEK	KEEP ON ROCKIN IN THE FREE WORLD PY16	COOS	KEEP ON ROCKIN IN THE FREEWORLD PY16	10-01-2015	09-30-2016

Data Classification: 1

Oregon Housing and Community Services ©

14. FUNDING the APC

14-A Overview

In order to process payments, there has to be funding in the **APC**. An **APC** is a combination resulting from the agency, program, and a grant. The **Program** indicates the type of payments to provide, and the **Grant** holds the funding of the program. Together, they will create and provide the **APC** for agencies to provide payments to individuals; a payment code.

Programs are created with payment variable that the **APC** will provide when creating payments. These variables are also known as the payment types (**Standard, Combo, Crisis, Fuel, etc.**). The program also determines eligibility criteria, as well as the type of program including the dates of operation.

The grant is created and usually mirrors the program but contain the dollar amounts that will fund the program. Funds need to be allocated into the grant, and then from the grant to the **APC** for issuing payments to households.

Depending on the **Grant** and **Program,** there may be more than just one APC for creating payments. Multiple **APC's** are created for a grant and program that serves more than one county in an agency's delivery territory. This greatly assists in program monitoring and data collection of low-income programs.

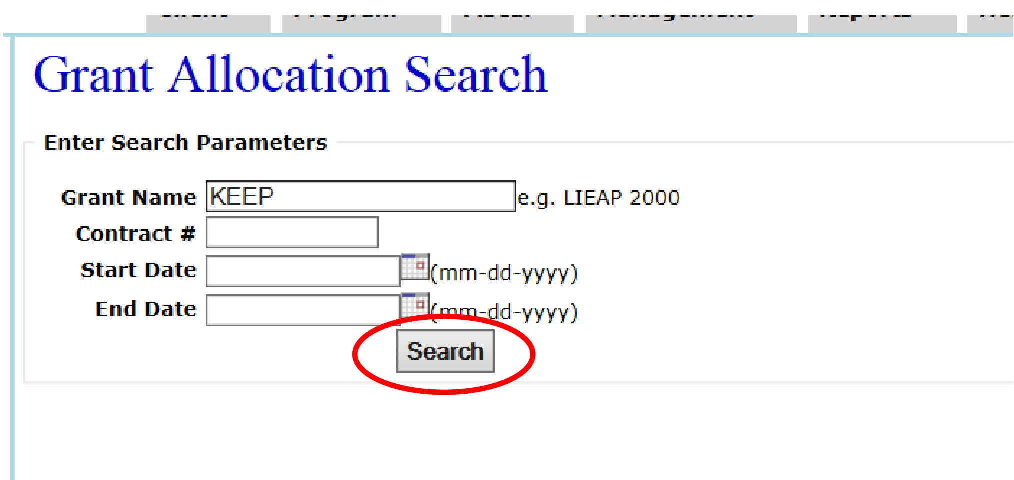
This section will cover how to transfer money allocated into the grant down to the appropriate **APC's** for the service delivery.

14-B Grant Allocation

We first need to look at the grant and make sure funding has been allocated into the grant to be transferred into the **APC.** Using the top dashboard, under the **'Fiscal'** tab, move the cursor over the **'Search'** and click on the **'Grant'** link.

You will then be directed to the **'Grant Allocation Search'** screen. Depending on the length of the grant title, enter the **'Grant Name'** and click on **'Search.'**

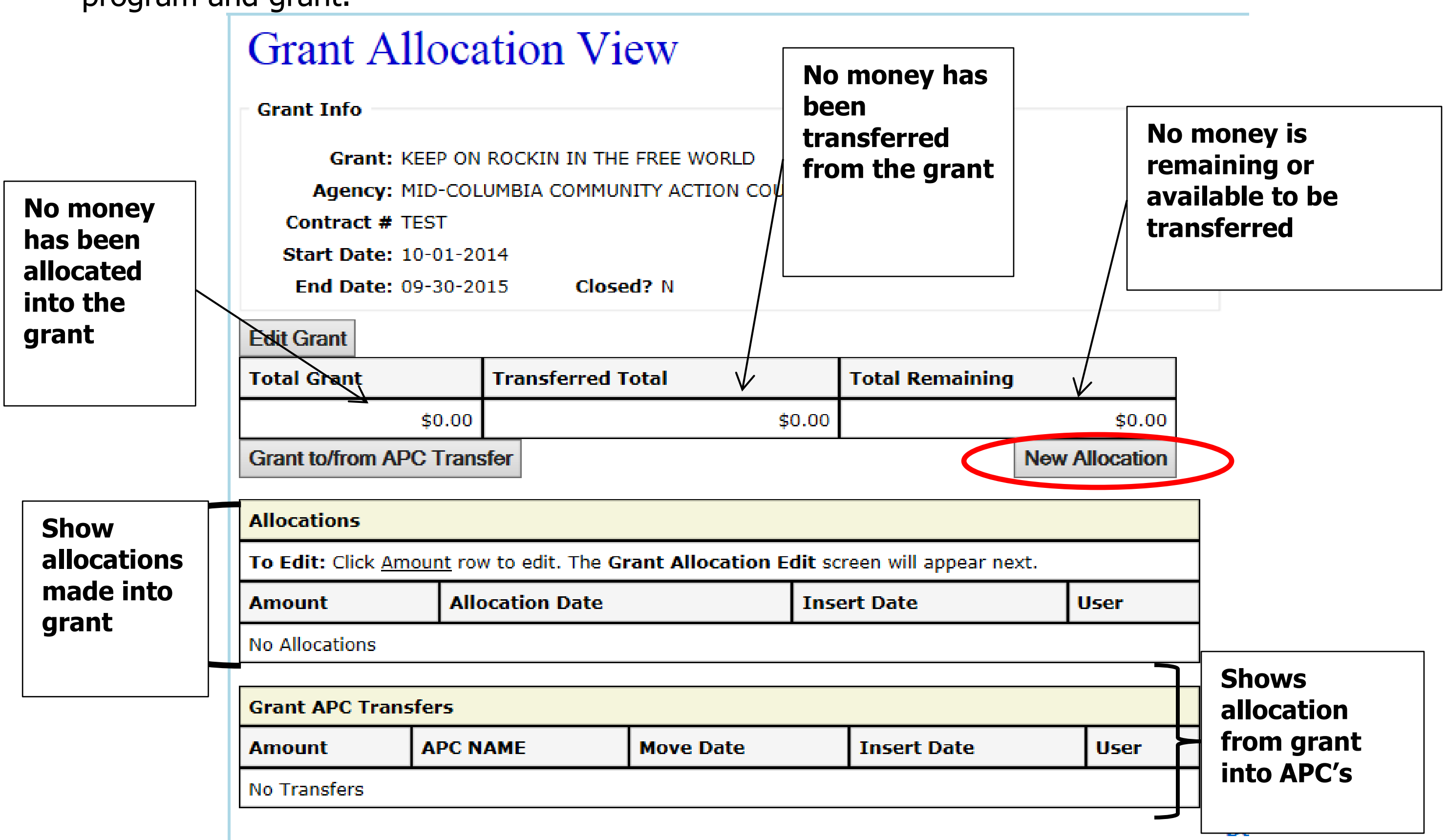
Grant Search Tip: knowing the Grant Name is so long, and unsure exactly how it may be entered, I only used the first word in the title for.



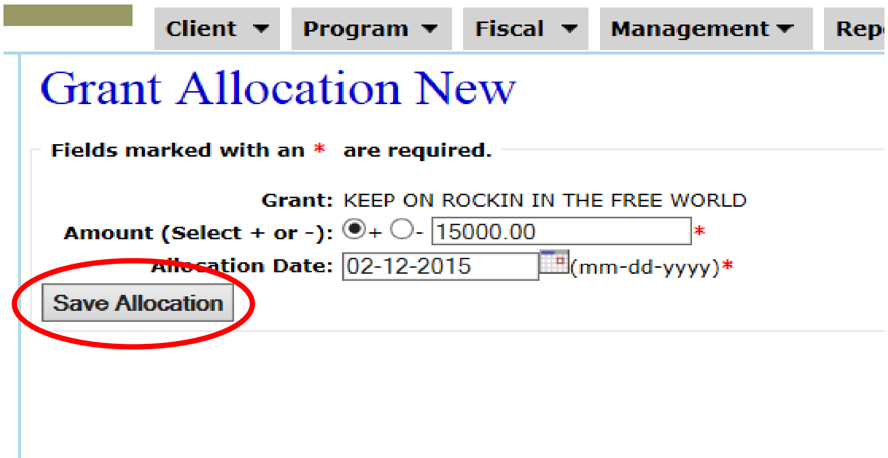
The results of the search will populate and expand on the **'Grant Allocation Search'** screen.

Click on the grant link under **'Grant Name'** for the grant that is needed. You will then be directed to the **'Grant Allocation View'** screen.

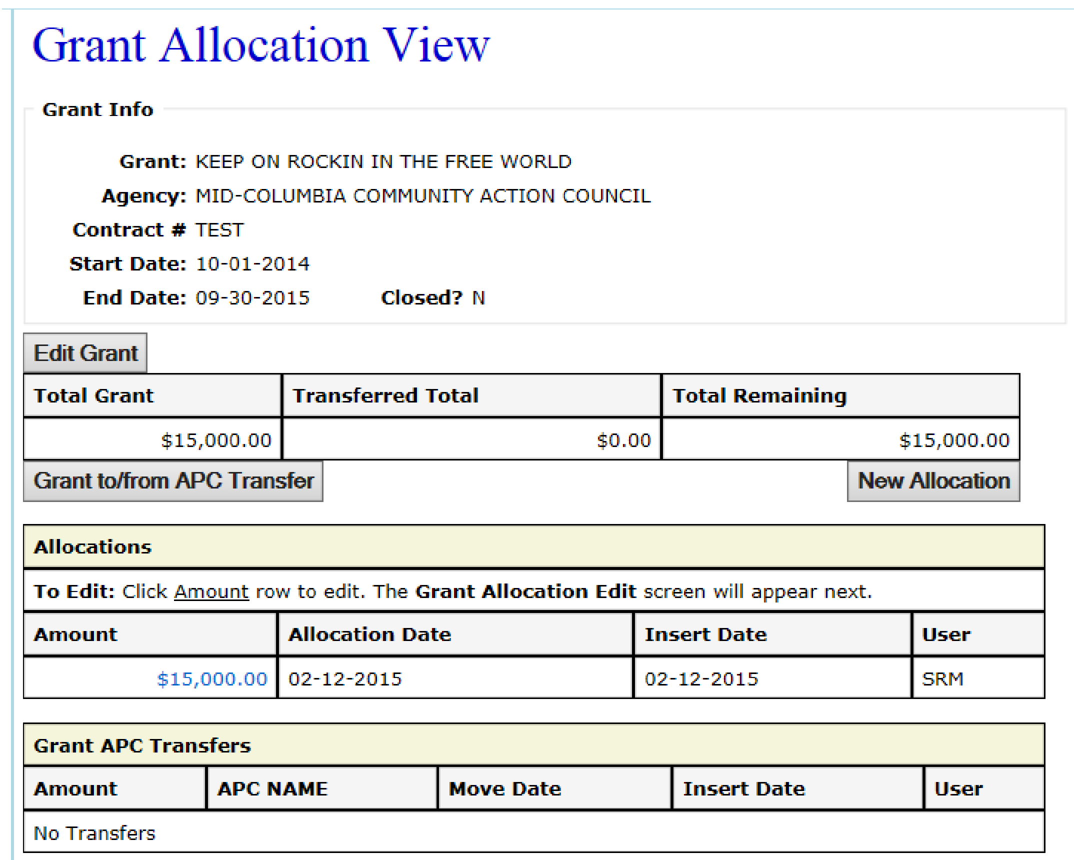
From the **'Grant Allocation View'** screen, a lot of information can be indicated related to the program and grant.



Click on the **'New Allocation'** button. You will then be directed to the **'Grant Allocation New'** screen.



After entering the new allocation amount to be allocated into the grant, click on the **'Save Allocation'** button. You will then be directed to the **'Grant Allocation View'** screen where the entry can be doubled checked. In the grant allocation, you can remove funding from the grant as well by marking the minus circle before entering an amount.



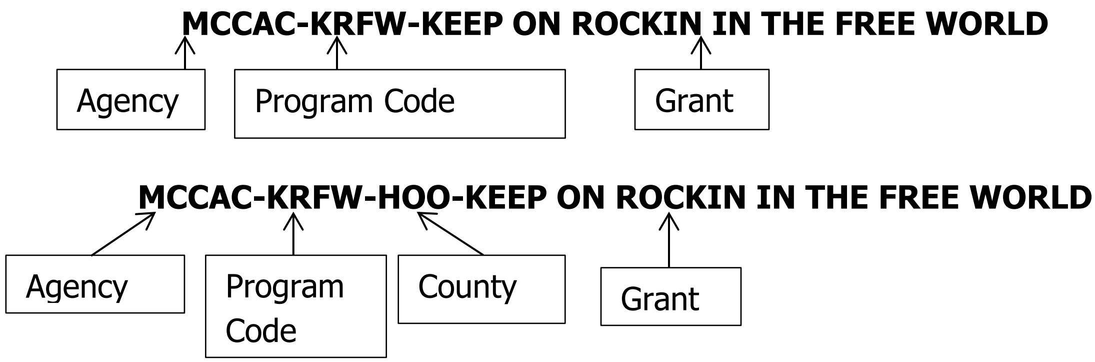
14-C Allocate Grant To Apc's

The **APC** is what is listed as payments for households that receive program assistance. All **APC's** have a format to them. There are two basic types of **APC's** that will be seen;

1. **MCCAC-KRFW-KEEP ON ROCKIN IN THE FREE WORLD** the first APC is the parent APC. This is the overarching or umbrella APC. Agencies with programs and grants that serve more than one county will have a parent APC. Money will be allocated into the parent before it is transferred to the child.

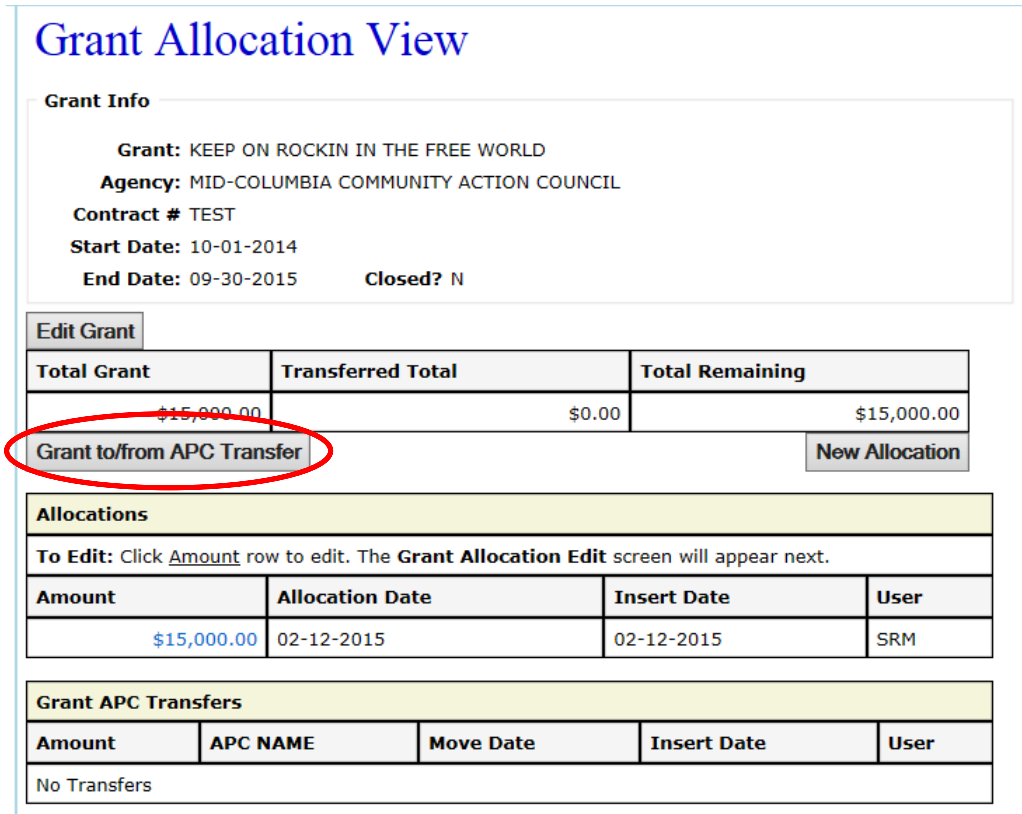
2. **MCCAC-KRFW-HOO=KEEP ON ROCKIN IN THE FREE WORLD** the second APC is the child parent that has the county associated with it.

Another APC explanation;

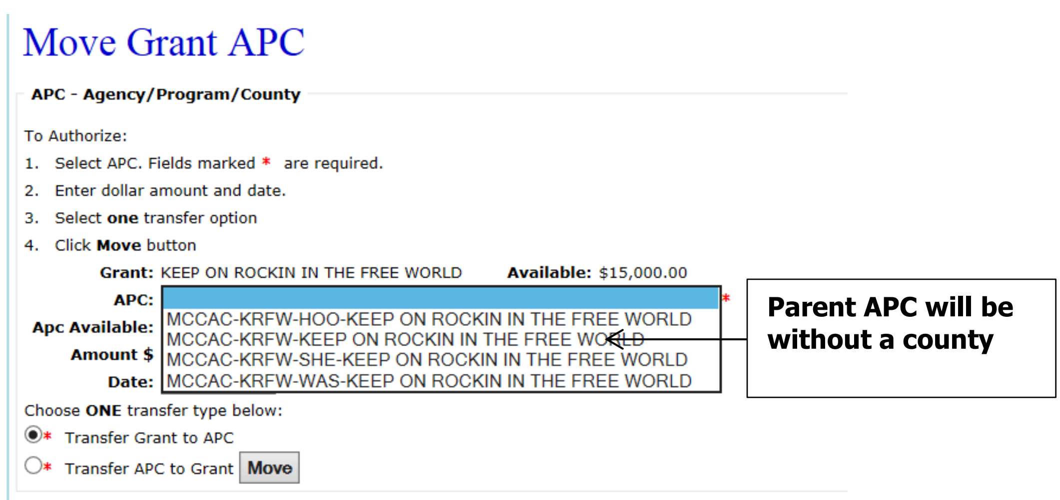


The first step in allocating money from the **Grant** to the **APC's** is to allocate funding into the **Parent** overarching **APC** so that it then can be allocated into the counties for program delivery.

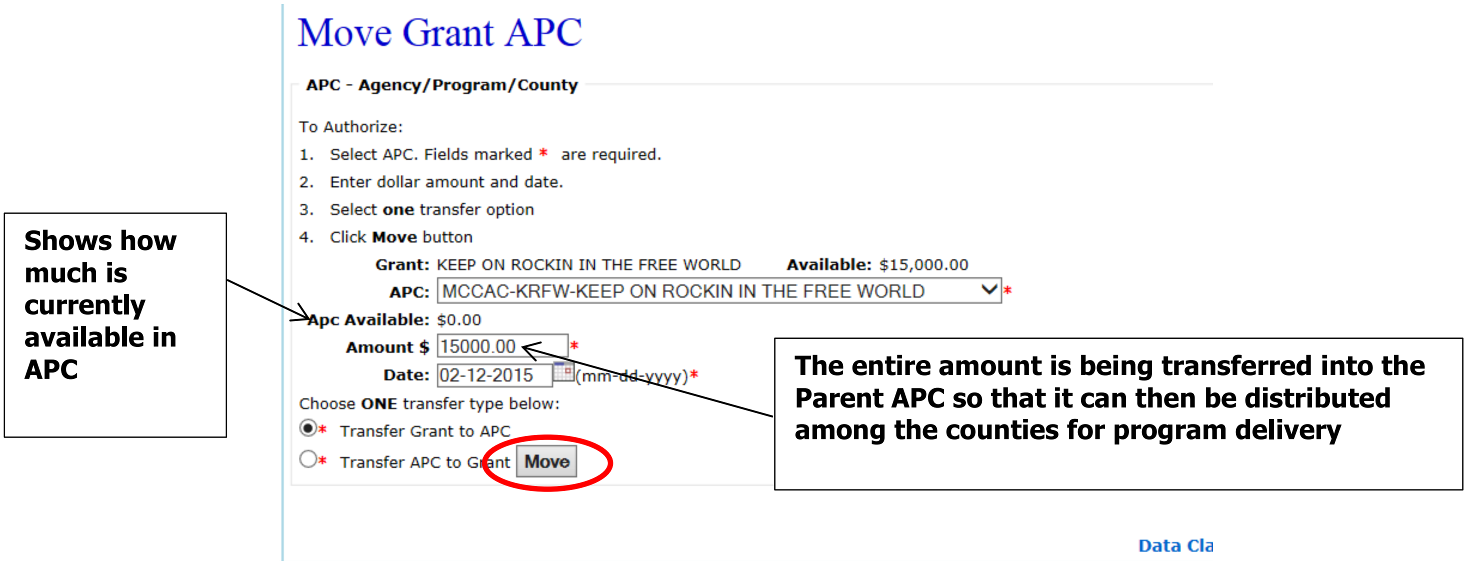
Using the steps in the **Grant Allocation** section, go to the **'Grant Allocation View'** screen of the grant to transfer funding from.



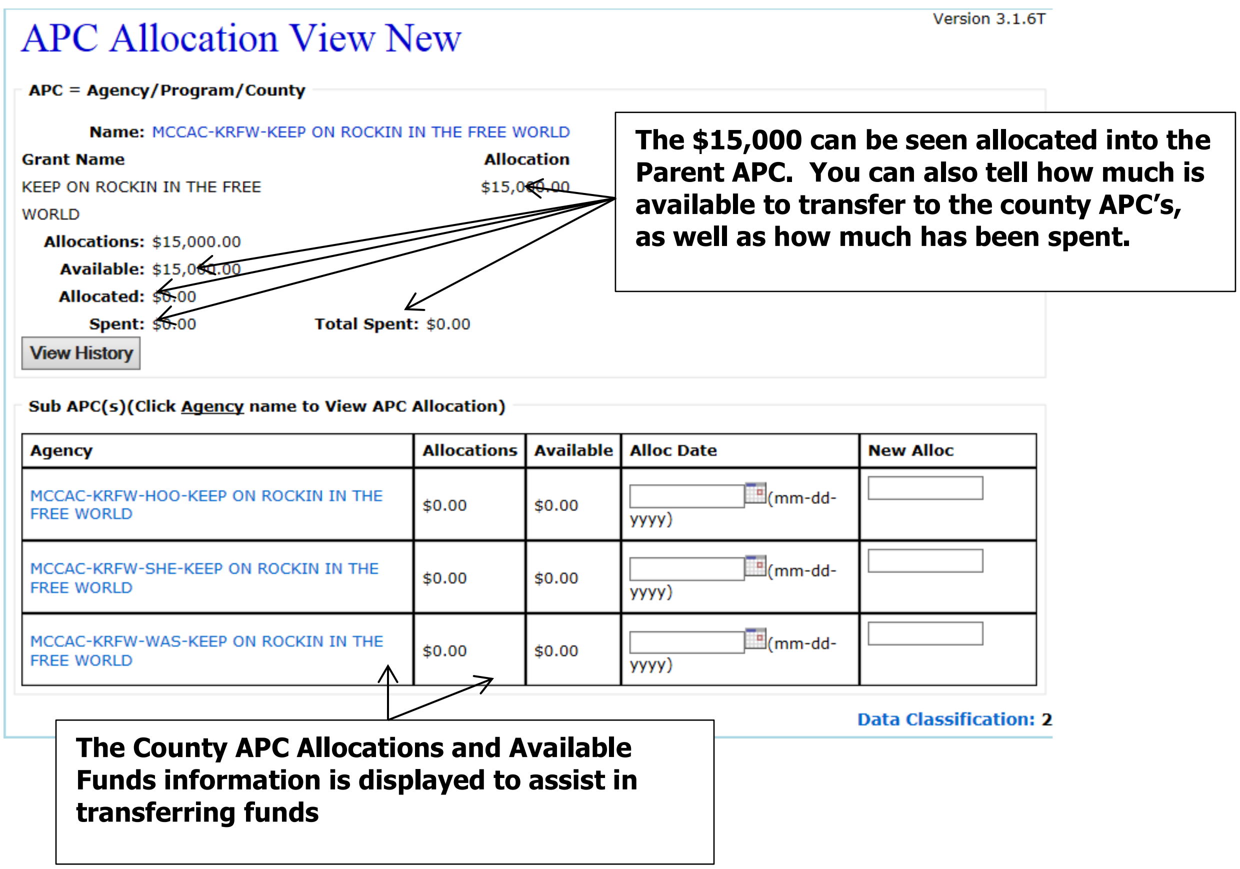
Click on the **'Grant to/from APC Transfer'** button. You will then be directed to the **'Move Grant APC'** screen.



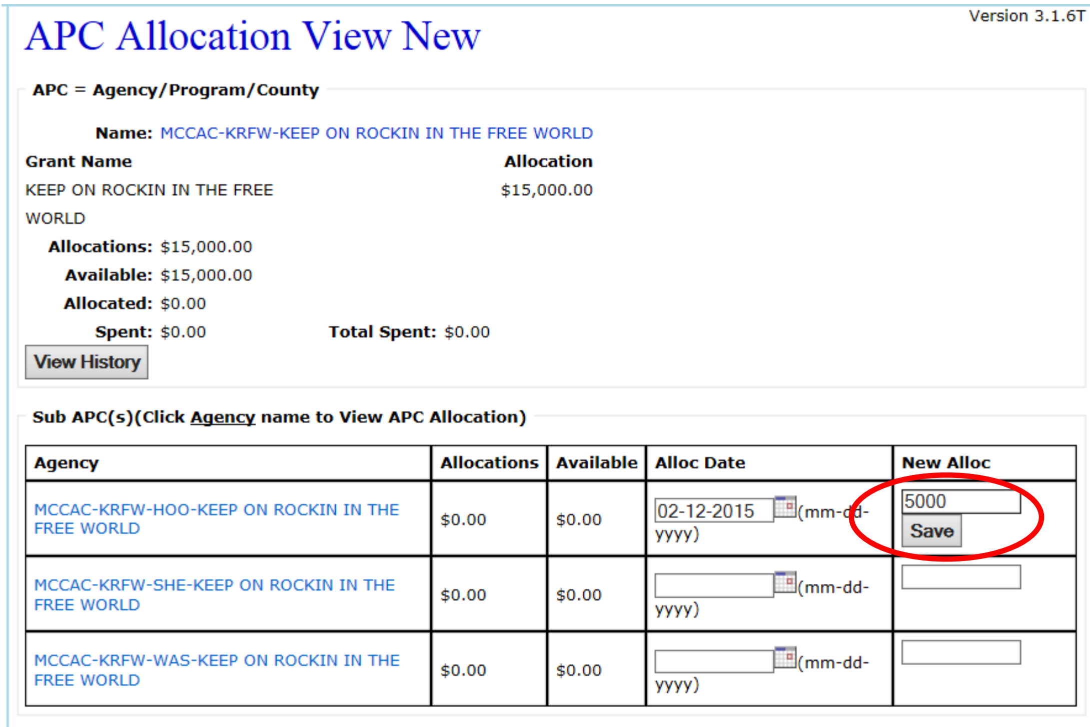
Using the dropdown on the **APC** selection, click on the parent APC. Enter the amount to transfer, the date will populate, and the transfer type. You would only select the **'Transfer APC to Grant'** option if the grant and APC were over allocated and you were removing funding out of both. You may also need this option if you have to move funding around between the county APC's of your service delivery territory.



After making entries, click on the **'Move'** button. You will then be directed to the **'APC Allocation New'** screen.

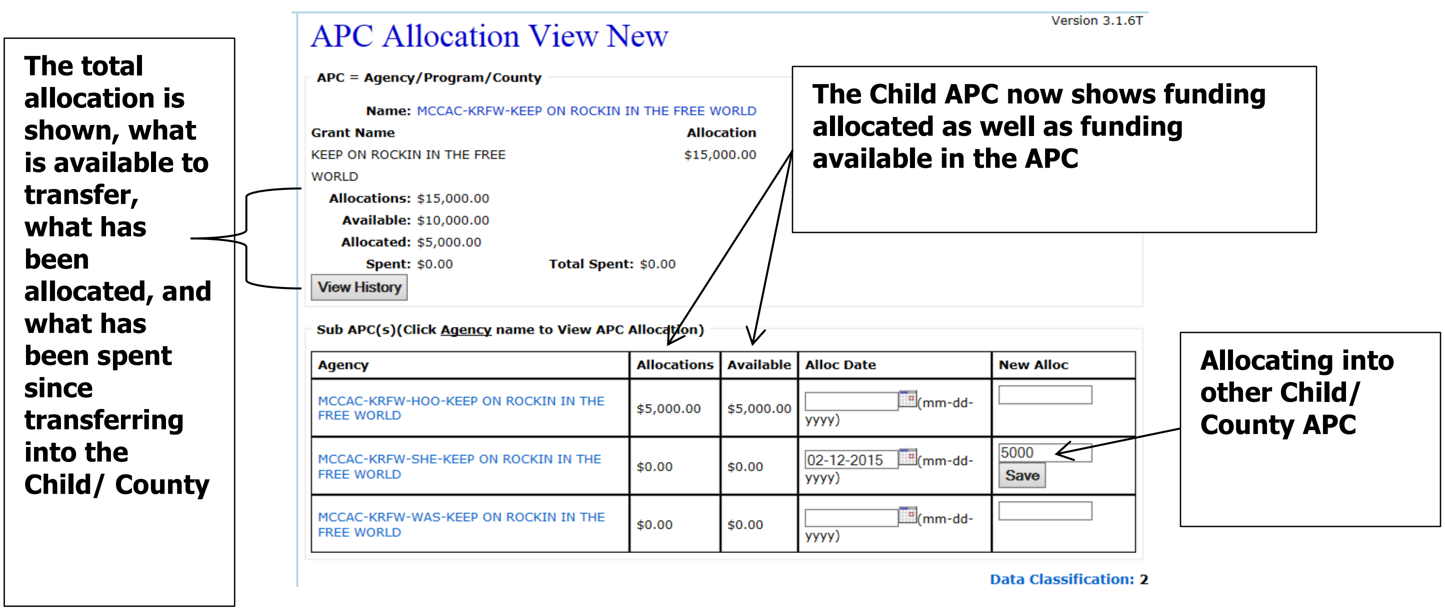


On the **'APC Allocation View New'** screen, money can be transferred from the Parent APC to the Child APC's.



The **'Alloc Date'** will populate by clicking on the box (can be changed if needed), enter the amount of the allocation in the box under the column **'New Alloc'** and click on the **'Save'** button to apply the allocation transfer.

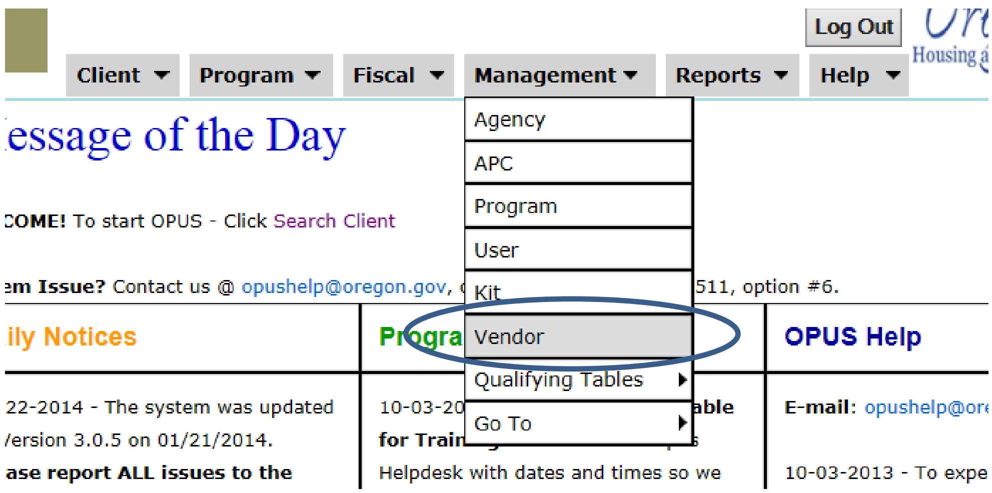
The **'APC Allocation View New'** screen will reload with the saved information. Continue transferring into the child APC's as needed.

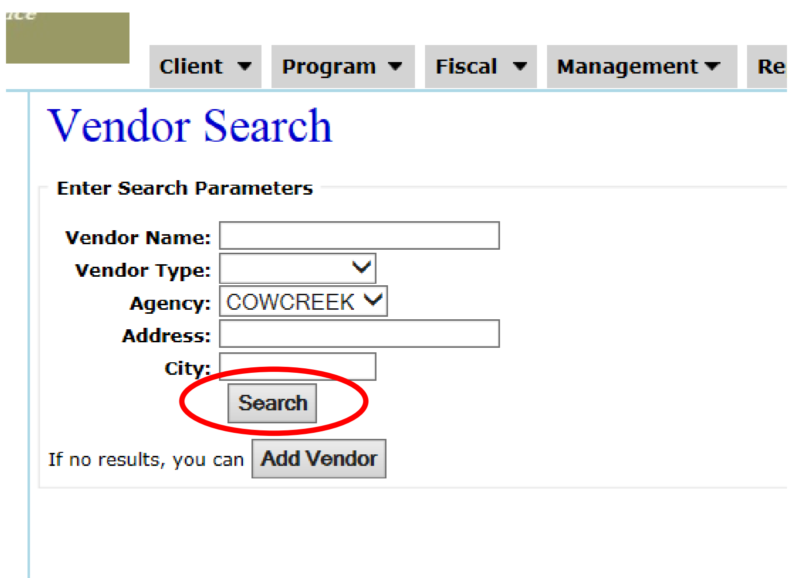


15. VENDORS

This section will cover how to create vendors in the OPUS system for tracking household payments. If a household does not have vendors with their OPUS records, only direct payments will be available when making a payment. Vendors need to be added to the system and for the agencies to use and not at the time of client(s) data entry.

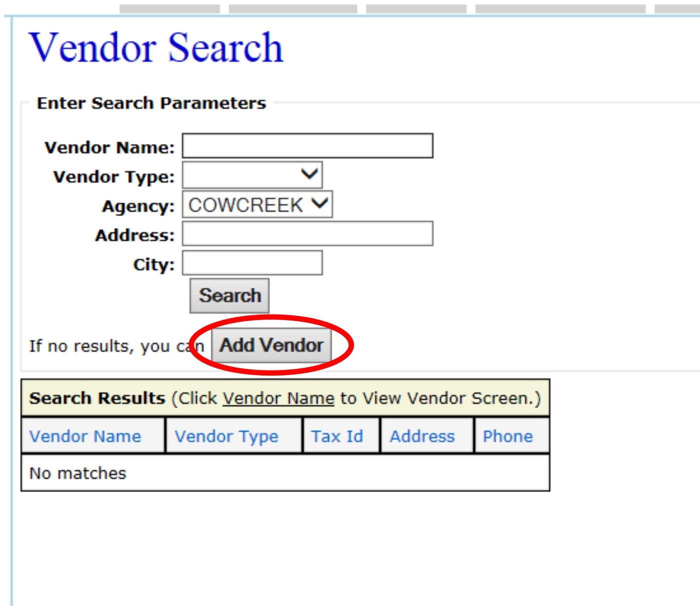
Using the top dashboard, under the **'Management'** tab click on the **'Vendor'** link. You will then be directed to the **'Vendor Search'** screen.



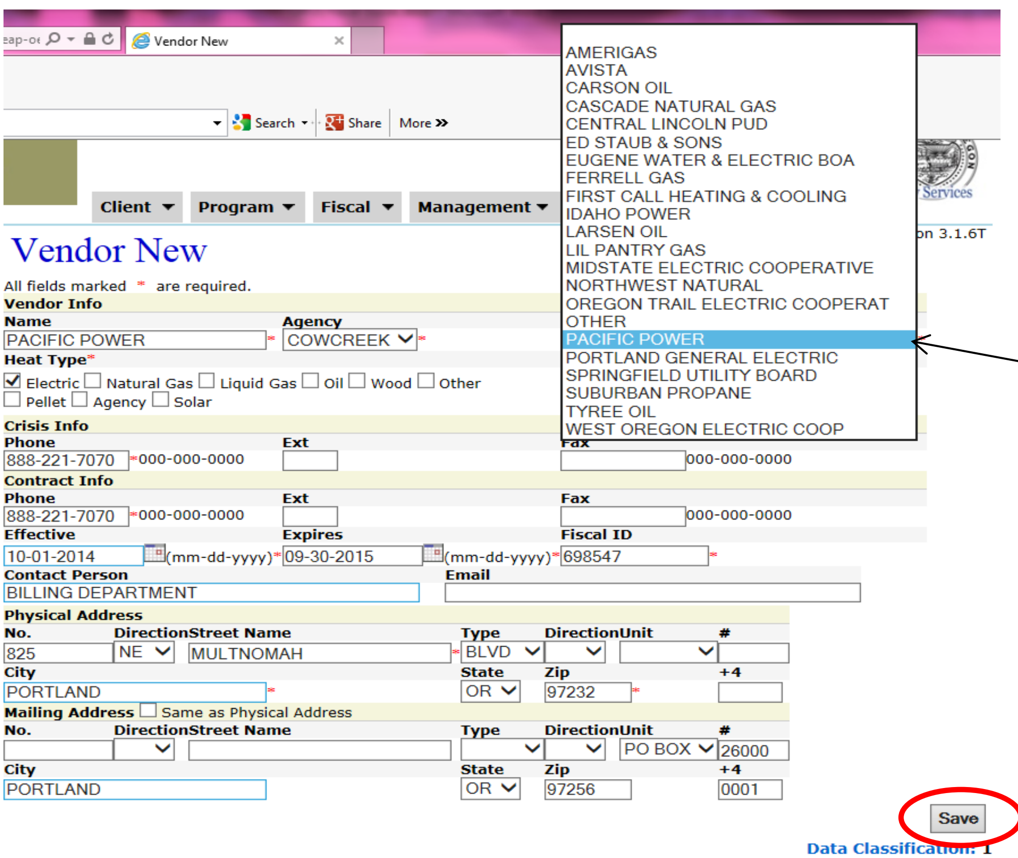


You can search for active vendors by either the **'Vendor Name,' 'Vendor Type,' 'Agency,' 'Address,'** or **'City.'** After completing search criteria, click on the **'Search'** button.

The **'Vendor Search'** screen will expand to display results of search.

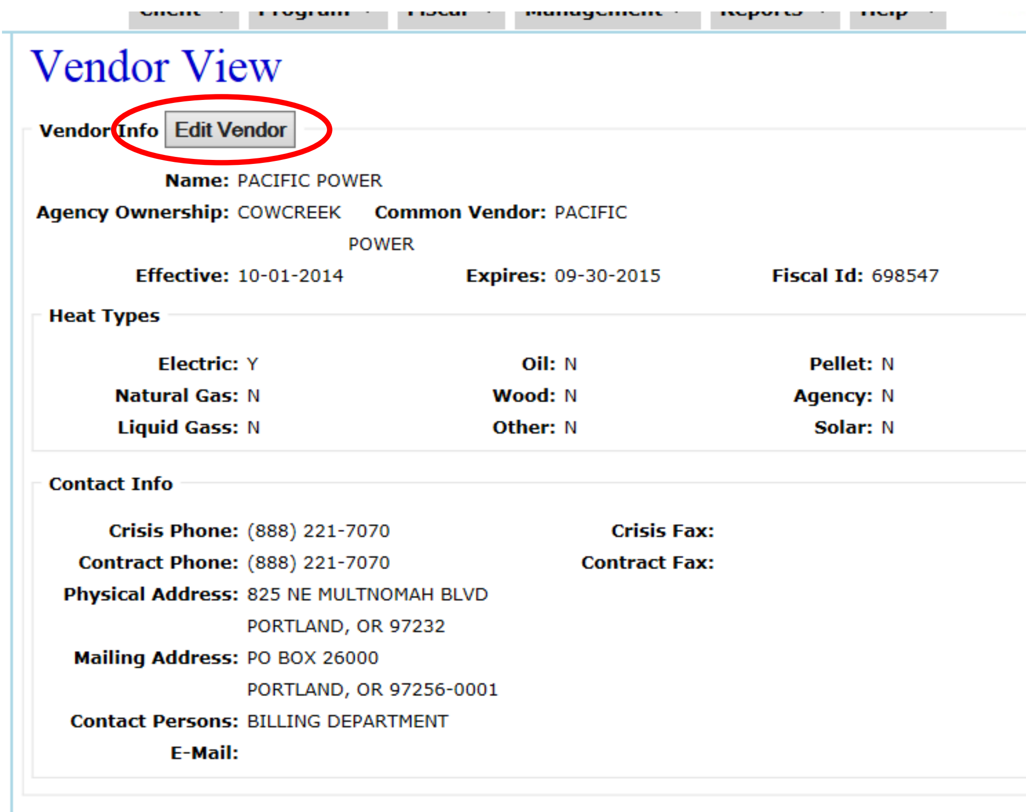


As the search results indicates no vendors in the system for the agency selected, click on the **'Add Vendor'** button. You will then be directed to the **'Vendor New'** screen. All fields with * are required to be completed before the entry can be saved.



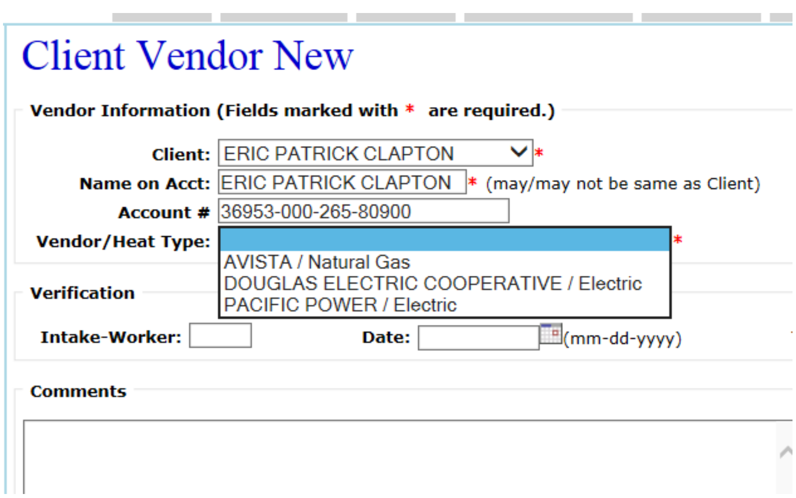
Be sure to check the Common Vendor Dropdown and look for the vendor being entered to see if it is one of the common vendors in the State. If the vendor cannot be found in the list, use Other.

After completing the required fields, click on the **'Save'** button. You will then be directed to the **'Vendor View'** screen where the information entered can be verified.



If any entered information needs to be corrected, click on the **'Edit Vendor'** button. You will then be directed to the **'Edit Vendor'** screen where you can make the necessary corrections as needed.

After vendors have been entered in the system for an agency, they will now appear in the dropdown for selection when adding a vendor to the household for issuing a payment.



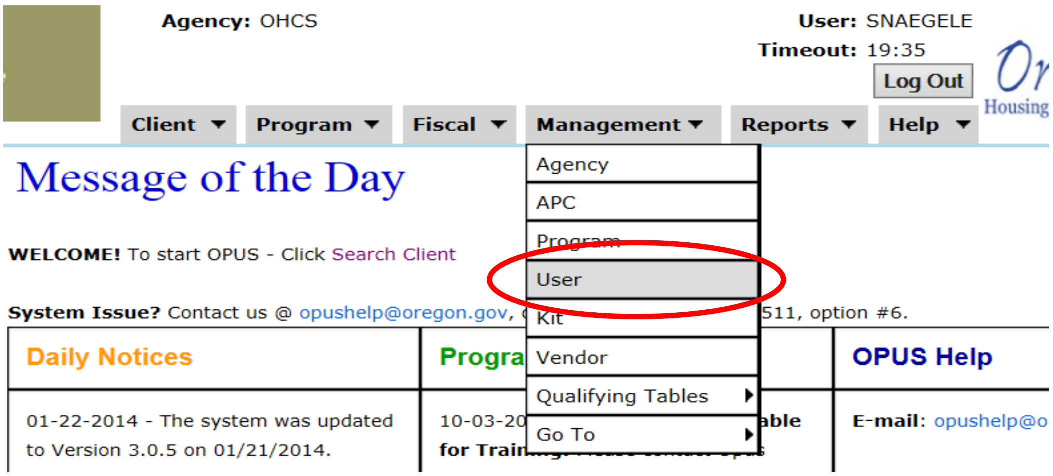
16. OPUS USERS'

As described in the Agency Administrator Agreement, the OPUS Administrator is responsible for managing agency level user accounts. This section will cover how to set-up and end a user's access to the OPUS system.

16-A New User SET-UP

******NOTE; REMEMBER BEFORE SETTING UP USERS' IN THE OPUS SYSTEM, THEY ARE REQURIED TO READ AND SIGN THE "OPUS USER POLICY, RESPONSIBILITIES, AND CODE OF ETHICS"******

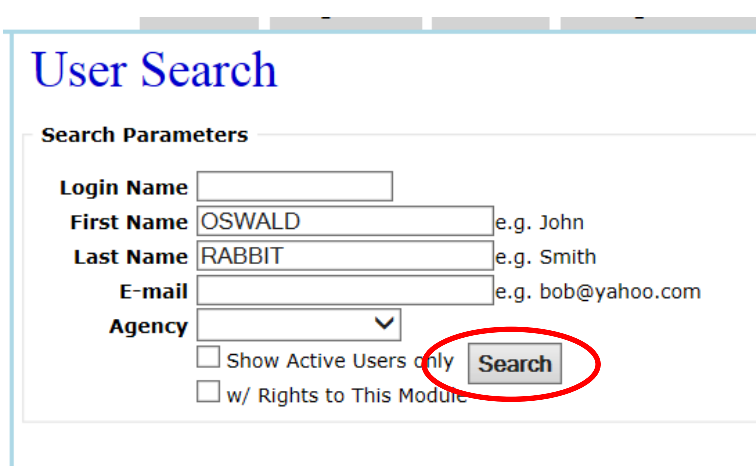
From the top dashboard dropdowns, under the **'Management'** tab, select on **'User.'**



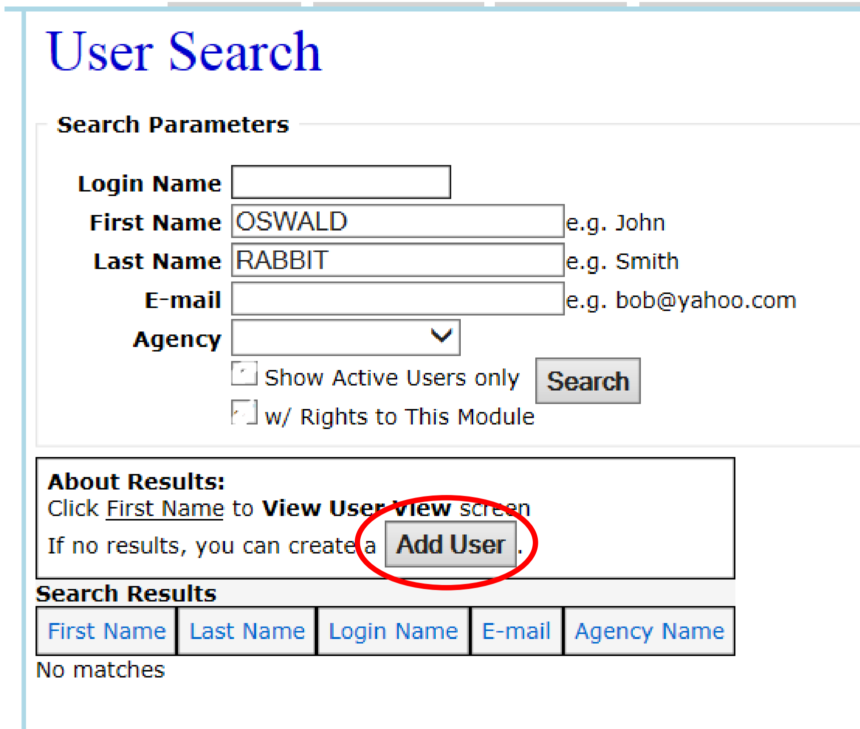
You will then be directed to the **'User Search'** screen.

Leaving the boxes checked, will only search for current users, and users in the current module

Using only the first and last name of the new user, complete a search to ensure they are not already in the system. **Uncheck the check boxes 'Show Active Users only' and 'w/Rights to This Module'** before clicking on the **'Search'** button.

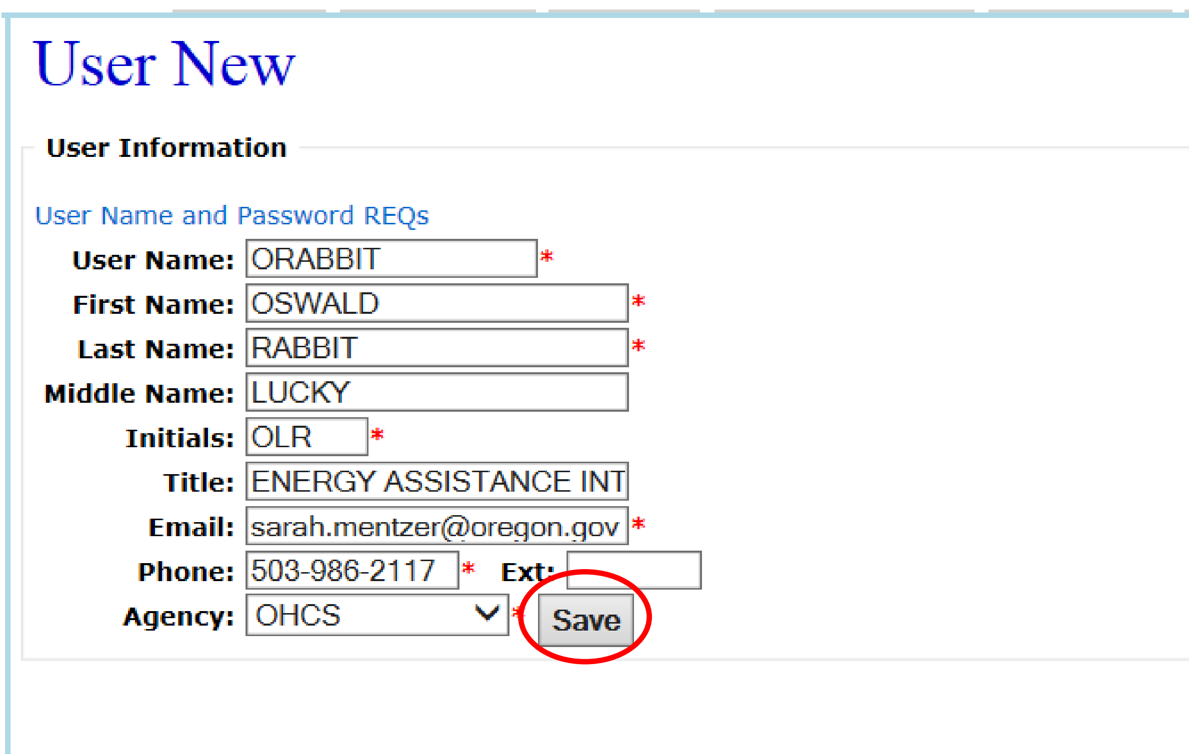


After completing a couple fields, click on the **'Search'** button.



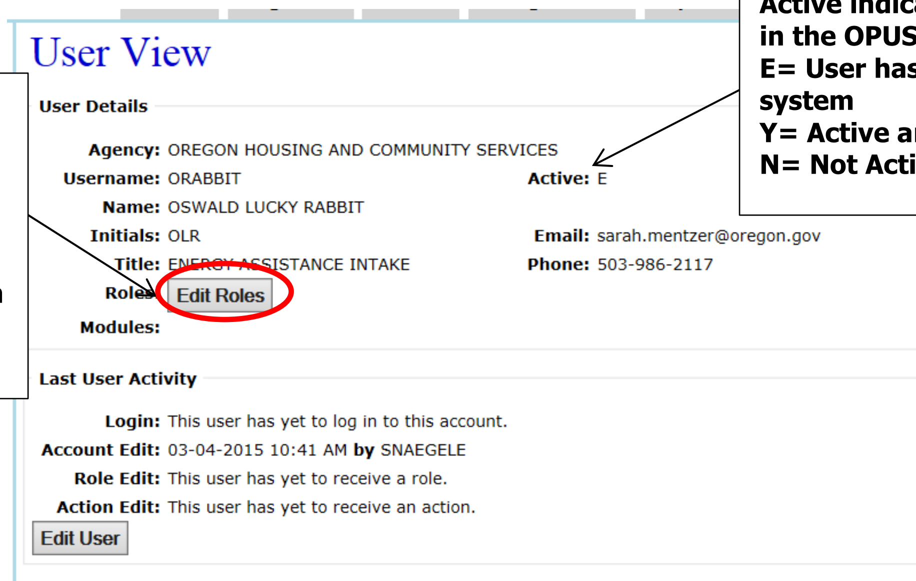
With the **'Search Results'** providing **'No Matches,'** click on the **'Add User'** button. You will then be directed to the **'User New'** screen.

All fields marked with a * indicate a required field to be completed before saving.



After completing the necessary fields, click on the **'Save'** button to be directed to the **'User View'** screen.

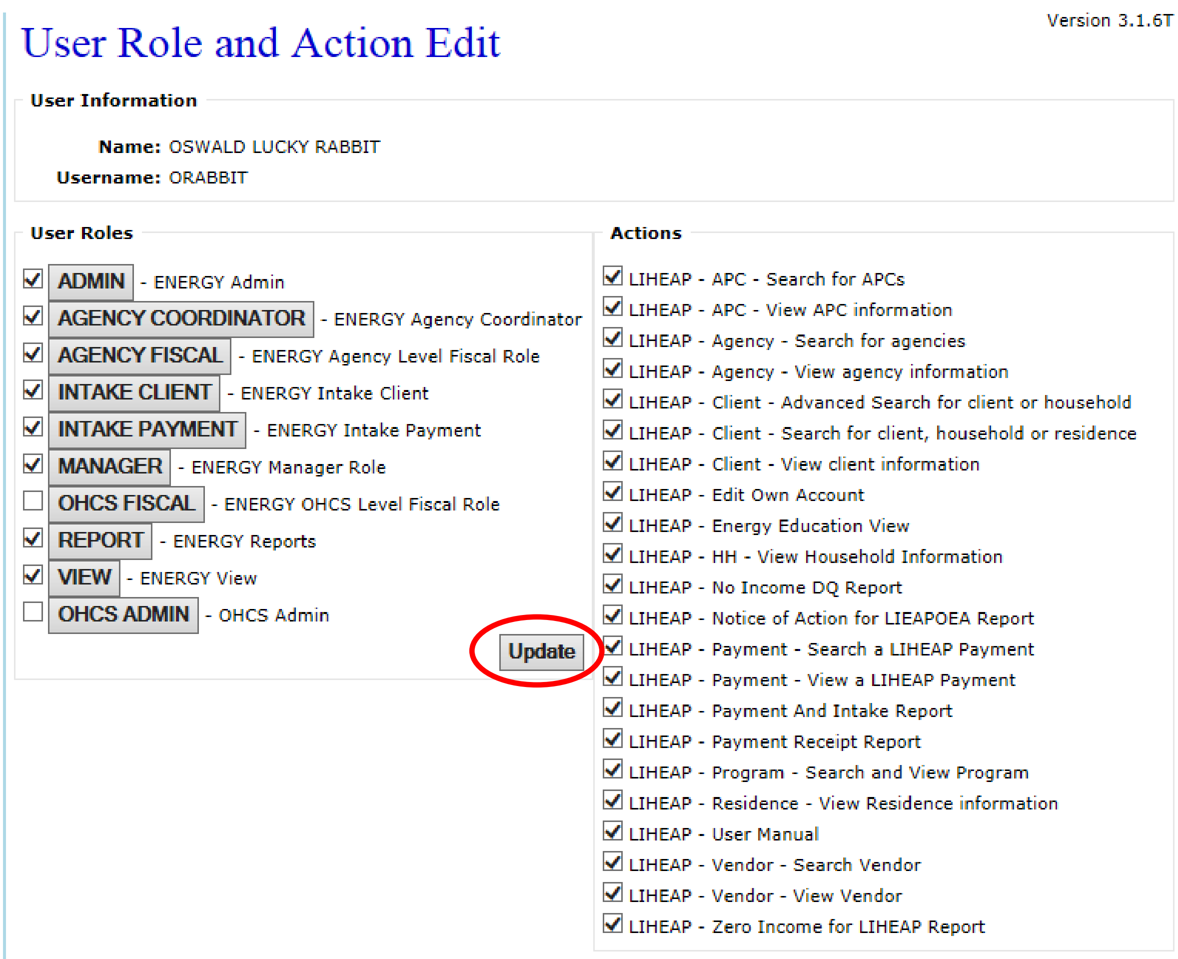
User is in the OPUS system; however, they have not received Roles and Actions for the database. Click on Edit Roles to assign



Active indicates the user's activity in the OPUS system:
E= User has not logged into system
Y= Active and Current User
N= Not Active or Current

Verify the information of the new user is correct. If any edits need to be made, click on the **'Edit User'** button to be directed to the **'Edit User'** screen to make corrections.

The new user has been set-up in the OPUS system with a Username, and the System has sent them a temporary password. However, the user has not been assigned roles and actions for their work in the system. Click on the **'Edit Roles'** button to assigned the appropriate Roles and Actions to the user; you will then be directed to the **'User Role and Action Edit'** screen.



When you click on the button or mark the box for **'User Roles,'** the **'Actions'** available under the roles will expand under the **'Actions'** column. The system automatically checks all boxes when the role button is selected. Actions under roles can be unchecked if the user will not be using those actions in their job duties.

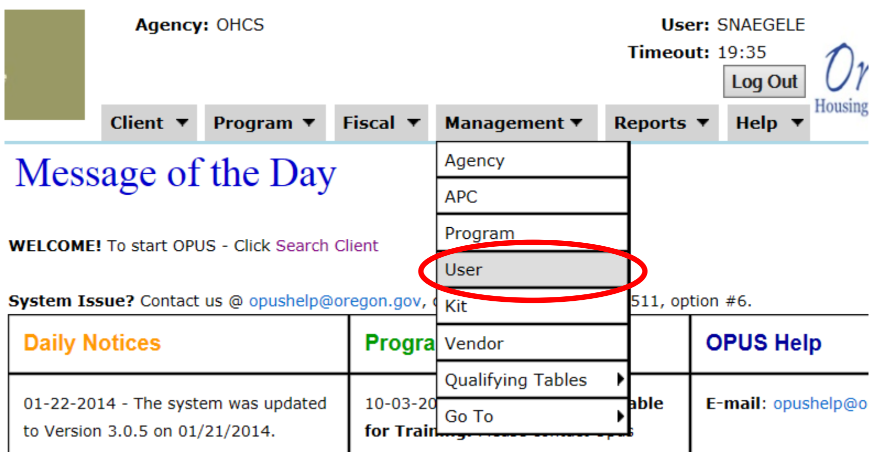
For example, under the **'Manager'** roles are the actions to enter and disable users' in the OPUS system. Not all users should be assigned this action except the OPUS System Administrator.

After assigning the appropriate **'User Roles'** and **'Actions,'** click on the **'Update'** button to apply to user's profile. The **'User Role and Action Edit'** screen will re-load and you will not be directed to another page.

16-B Previous User SET-UP

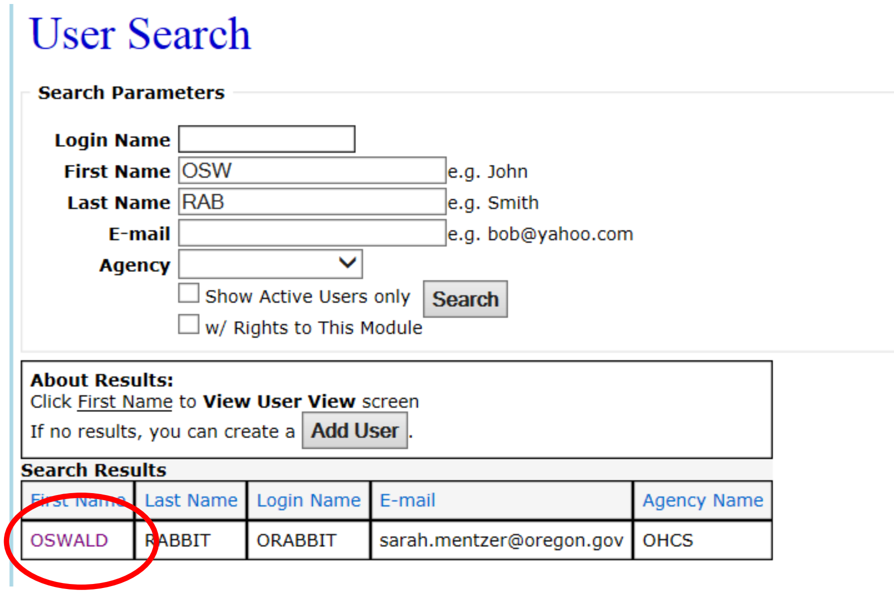
If the user to be set-up in OPUS has been in the system before, they do not need to be re-entered into the database. They just need to be enabled.

From the top dashboard dropdowns, under the **'Management'** tab, select on **'User.'**

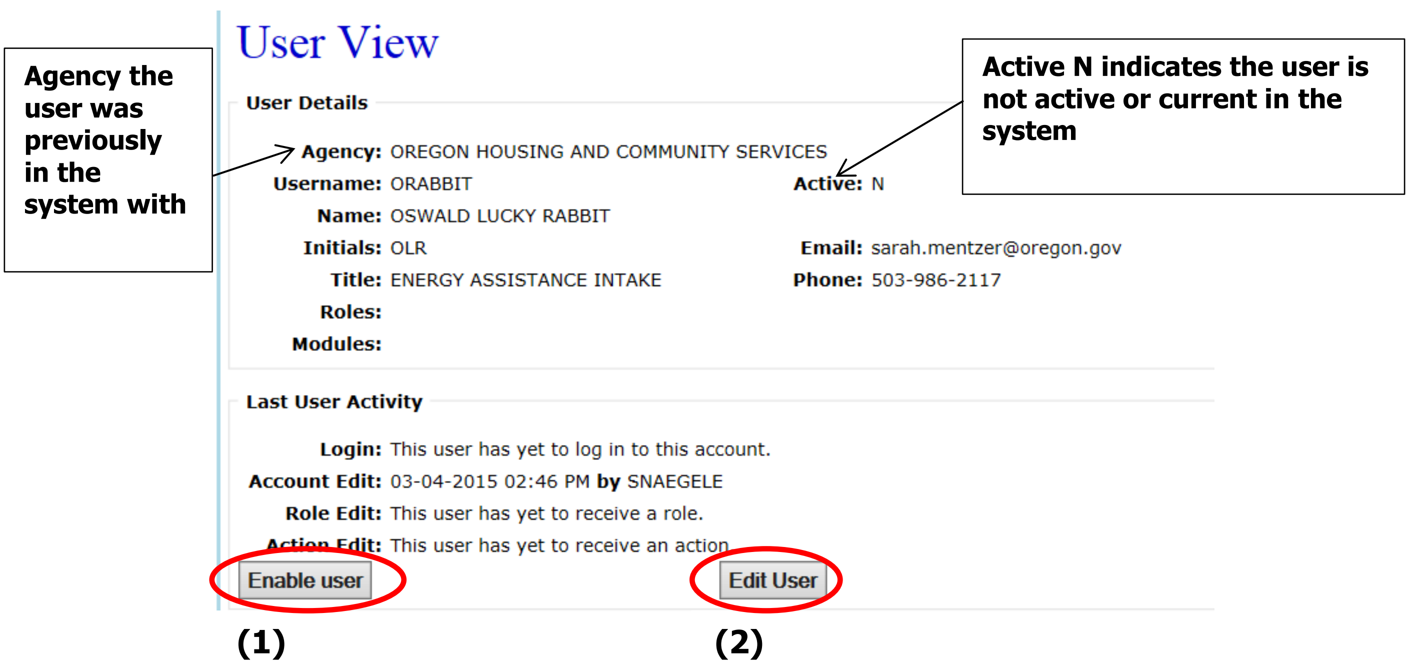


You will then be directed to the **'User Search'** screen. Using only the first and last name of the new user, complete a search to ensure they are not already in the system. **Uncheck the check boxes 'Show Active Users only' and 'w/Rights to This Module'** before clicking on the **'Search'** button.

After completing a couple fields, click on the **'Search'** tab. The system will show its results on the same screen.



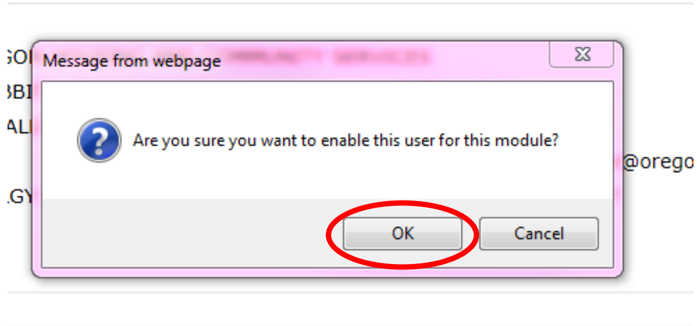
As the previous user is in the system, click on the link under the **'First Name'** column. You will then be directed to the **'User View'** screen where you can enable the user as well as look for updates to be made.



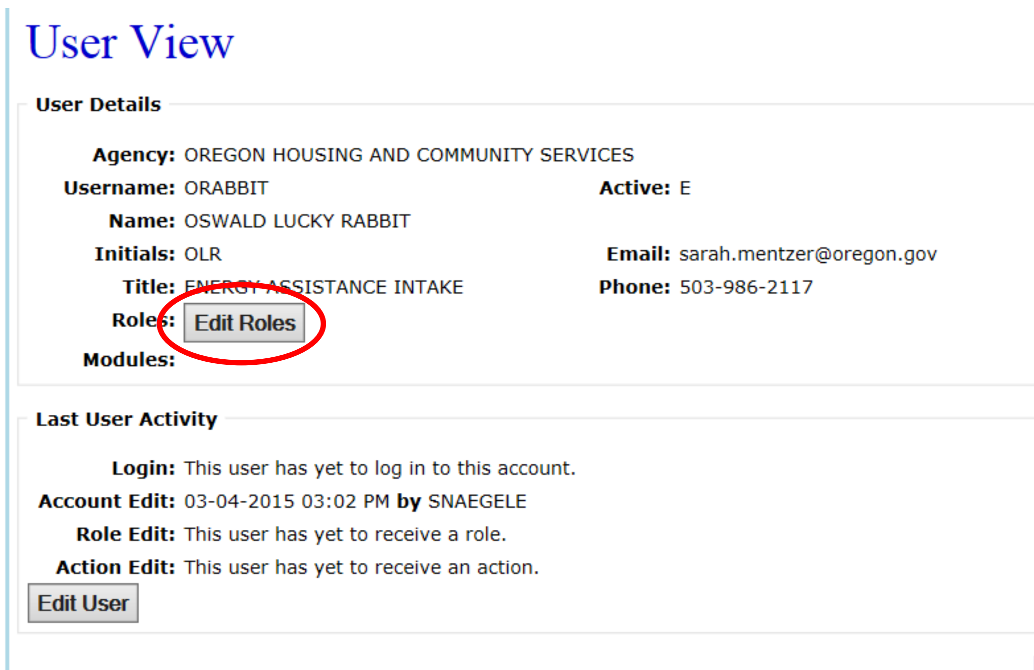
One of two things may need to be done at this time;

1) If all the information listed on the **'User View'** is correct, click on the **'Enable User'** button.

A pop-up will appear to confirm that you want to enable the user.



Click on the **'OK'** button. You will then be directed to the **'User View'** screen. The **'Active E'** indicates that the temporary password has been sent to the user enabling them in the system.

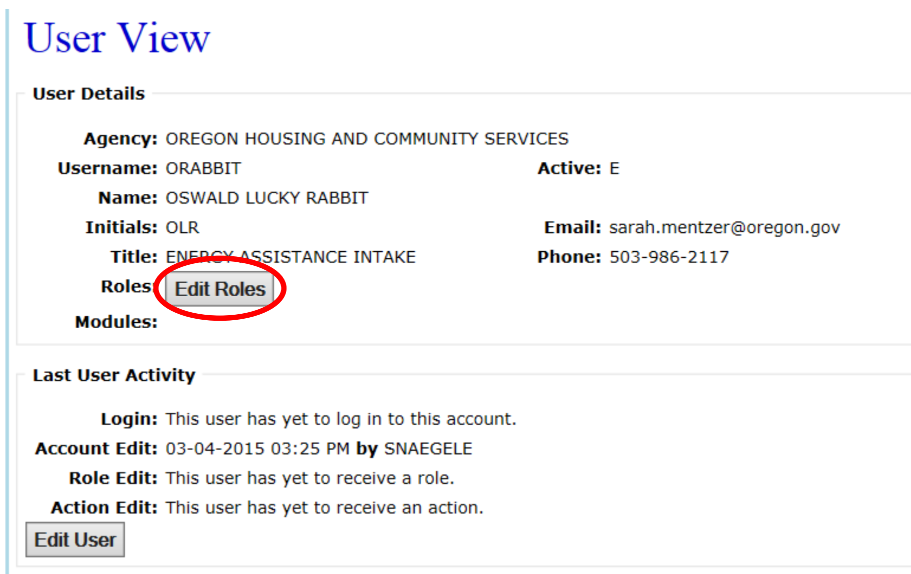


Next you will need to assign the **Roles** and **Actions** to the user as indicated in the New User Set-Up section.

2) IF the User is already in the system, however, they have changed agencies or other information is incorrect, click on the **'Edit User'** button. You will then be directed to the **'User Edit'** screen.

Make the necessary corrections of the User (Title, current/new E-mail, Phone, and Agency). Mark the Check Box **'Reset Password'** and click on the **'Save Changes'** button.

You will then be directed to the **'User View'** screen to verify the changes.



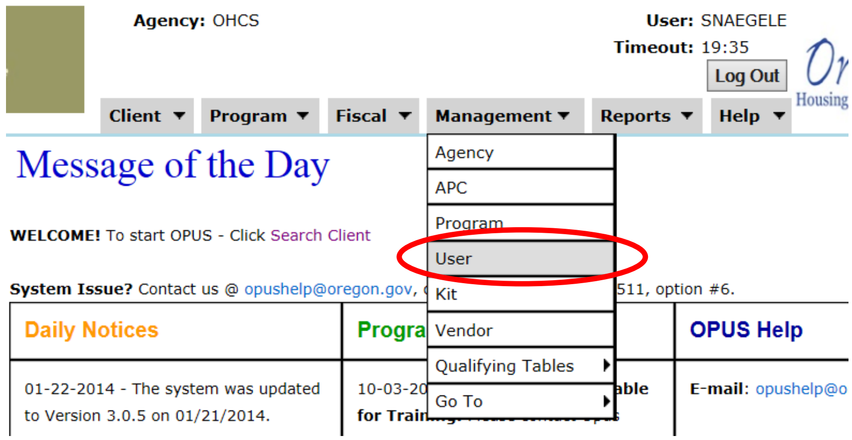
The **'Active E'** indicates that the temporary password has been sent to the user enabling them in the system.

Next you will need to assign the **Roles** and **Actions** to the user as indicated in the New User Set-Up section.

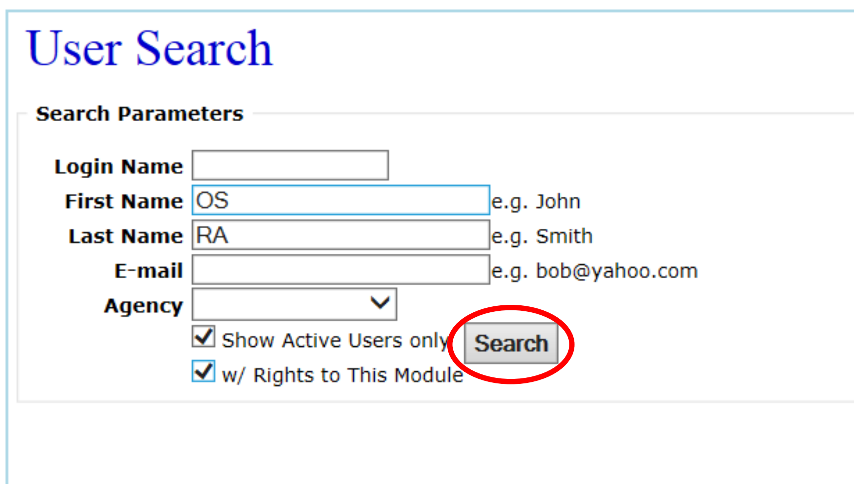
16-C Disable Users

Besides setting-up new OPUS Users, Agency Level OPUS Administrators need to also be able to disable users should they leave the agency, or violate the agreements in regards to the system.

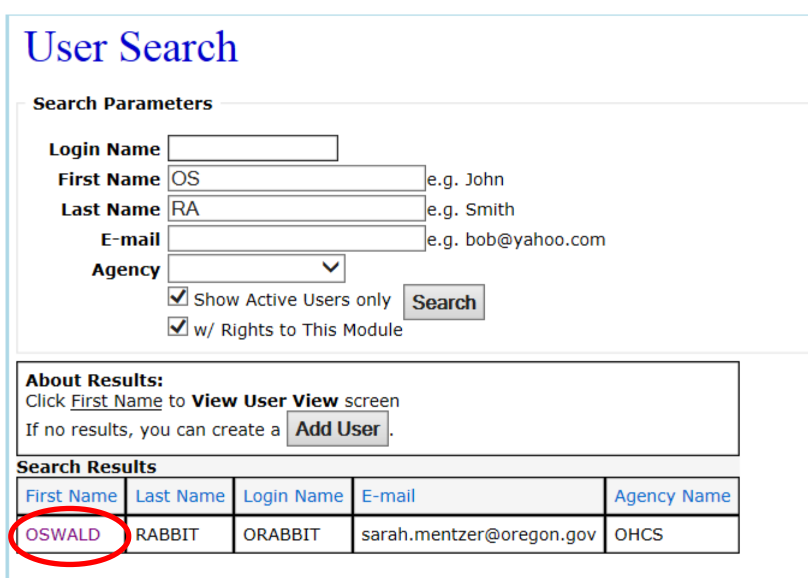
From the top dashboard dropdowns, under the **'Management'** tab, select on **'User.'**



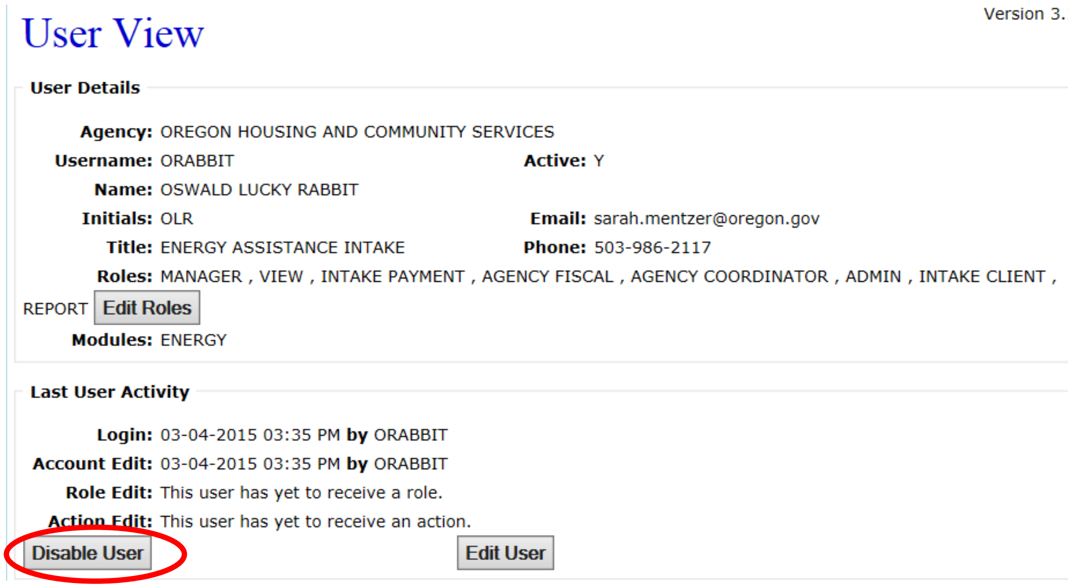
You will then be directed to the **'User Search'** screen.



After entering fields to complete the search, click on the **'Search'** button. Note; since I am not searching for a possibility of a user being in the system, I left the check boxes marked since I know the user is in the database. The results of the search will be displayed.

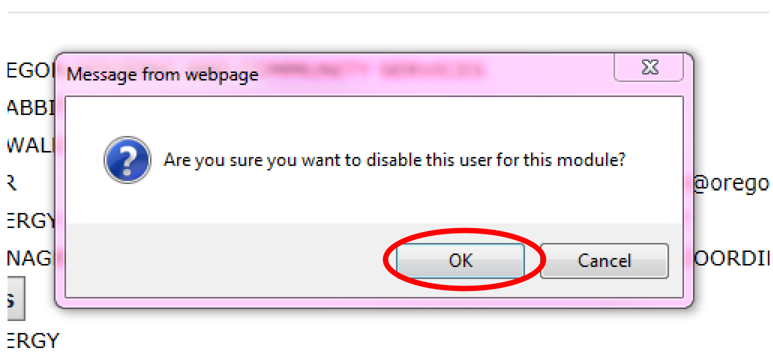


Click on the user link under the **'First Name'** column. You will then be directed to the **'User View'** screen.

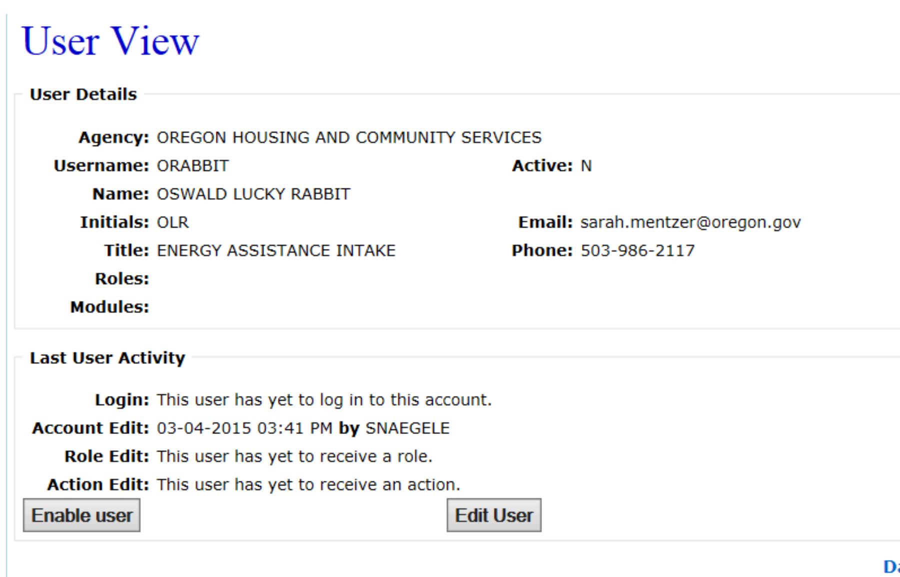


Click on the **'Disable User'** button to make the user inactive in the system. If the user has access to more than one module, you may see a **'Disable User/All Modules'** button to disable from all modules.

A pop-up will appear to confirm that you want to disable the user from the module.



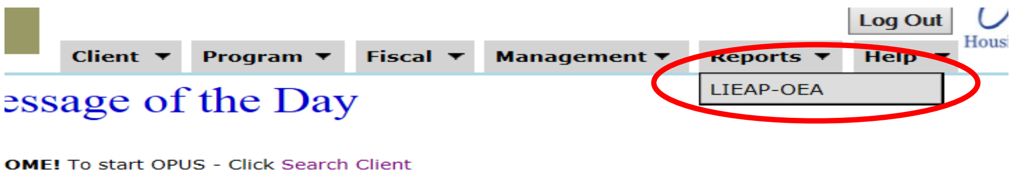
Click on **'OK.'** You will then be directed to the **'User View'** screen where you can verify that the user has been disabled. The **'Active: N'** indicates that the user is no longer an active OPUS user.



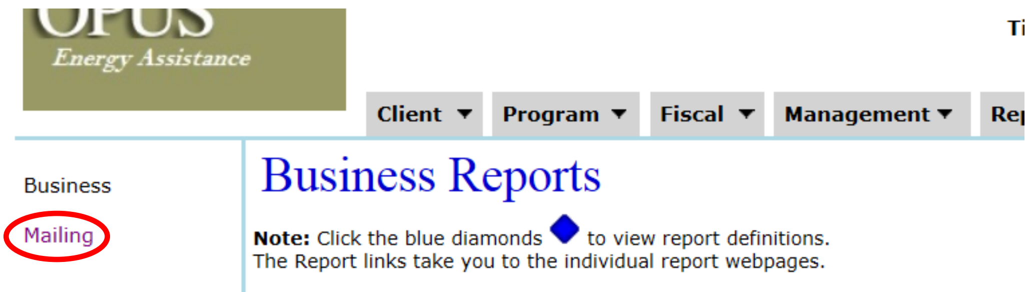
17. REPORTS

There are various reports in the OPUS Energy Assistance Module that can assist with the program and delivery.

Using the top dashboard, under the **'Reports'** tab, click on the **'LIEAP-OEA'** link.



You will then be directed to the **'Business Reports'** screen. There are multiple reports in two sections; **Business Reports** and **Mailing Reports**. To get between the business and mailing reports, use the left navigation sidebar.



If there is every a question about what reports provide what data, click on the Blue Diamond next to the report. The definition of the report will be providing in a new browser tab.

Only reports that are highlighted as a link will be able to be run. If the link is not visible, the correct roles and actions have not been granted to provide the report by the user.

17-A Business Reports

1. **Authorization # by Agency**: this report prints out detail data about the applicants for the selected agency and program
2. **Client Characteristics:** this report calculates unduplicated counts for clients and household for specific characteristics
3. **Global Client Characteristics:** this report calculates unduplicated counts for clients and households for specific characteristics
4. **Duplicate Utility Number:** this report shows utility numbers used by multiple individuals, or utility numbers with more than one standard payment or more than one type of non-standard payment across APC's
5. **Energy Type:** this report summarizes energy assistance payments grouped by primary heart types. It counts the total households and clients for each heat type for the selected time period and program
6. **Program Comparison:** this report summarizes energy assistance payments grouped by program. It counts the total households, clients, and individual service codes for

each program for the two selected programs. This report compares these statistics between the two selected programs. The first set of data is from program one where the households did not received two services. The second set of data is for the second program selected where the households did not receive program one services. The third set of data is the combination of households that received services from both the first and second programs selected

7. **Payment Summary:** this report summarizes energy assistance payments grouped by APCG, status type, payment status, and payment type

8. **Percent of Poverty:** this report calculates unduplicated counts for clients and households within specific poverty level percentages

9. **Account Status:** this report calculates the number of individual vendor payments in each account status category where the payment detail has a payment status of Authorized or better

10. **Transaction by Month & Batch:** this report calculates payment totals for each batch within each month as specified by the date range

11. **Vendor Payment Summary:** this report summarizes energy assistance payments grouped by agency and vendor; it also produces totals for each agency

12. **Vendor Pledge Sheet:** this report lists payments in either Pending or Local Auth status for a Vendor. It is used to print and sent to a vendor as proof a client has a payment in the system; this is not a guarantee the client will receive payments as described in the text on each page of the report

13. **APC Allocation Summary:** this report shows APC allocations, committed, available, percent expended, and payments by payment status for the selected APC

14. **Energy Program Monitoring:** this report provides payment information for the purpose of reviewing data qualify for a given APC and date range

15. **Duplicate Addresses:** this report shows all related data for housing projects. Its purpose is to be exported to CVS so the pdf that comes up doesn't show full data fields but when exported to CVS and opened in Excel all the data is there. Population units may add up to more than total affordable units because units can be designated for more than one population type

16. **No Income DQ:** this report shows the energy payments where the income reported question is entered as Don't Know or Refused or Yes with No Income Records associated with the program enrollment

17. **User Login Off-Times:** this report shows agency, user name, and login times between 6 p.m. – 4 a… over the last 90 days.

18. **Agency Vendors:** this report shows agency, vendor, program, and vendor agency for open programs

19. **System Generated Identifiers by Intake Worker:** this report shows the proportion of system generated Identifiers by intake worker

20. **45 Day Detail:** this report shows payment dates and the time differences (in days) between dates for use in tracking the time from intake to payment

21. **Residence Change:** this report shows residence records that are associated with energy payments or WX jobs where the residence address information was modified

22. **LIHEAP Household:** this report shows the unduplicated count of households that receive heating and weatherization assistance over the reported period. Heating Assistance = any payment not Crisis or Furnace or Health & Safety; Year Around Crisis = any payment type of Crisis, Furnace, Combo, or Health & Safety; Crisis Bill Payment Assistance = any payment type of Crisis or Combo; Furnace/Equip Repair = any payment type of Furnace or Health & Safety; Total WX = any WX job marked 'Completed' AND has a Job Cost Record AND is not a Residence Only Job; Any LIHEAP Type = any Energy and WX payment

23. **Program Snapshot:** this report shows all related data for the State Yearly Program Snapshot Report

24. **User Module Access:** this report shows roles and actions assigned to user for a selected agency and module

25. **Homebound Transportation:** the Homebound Transportation Report provides a list of all clients that have been identified as being homebound, based upon the homebound_id field being checked for the client

26. **Agency Performance Measure:** the Agency Performance Measure Report provides a summarized list of all clients by program, payment year, payment month, and zip code

17-B Mailing Reports

1. **Senior, Disabled Mailing List / Labels:** this report prints out a list of applicants that match any of the following four combinations of characteristics for the selected agency and program: Seniors only, Disabled only, Seniors and Disabled (this pulls all clients who are designated as both senior and as being disabled), and Seniors or Disabled (this pulls anyone who is either a senior or disabled; this differs from #1 and #2 in that they report on only one characteristic, this can be either or both

2. **WX Referral List / Labels:** this report prints out detail data about the applicants that received weatherization referrals for the selected agency and program; the data is grouped by Senior, Seniors with Disabilities, Disabled, Children Under 6, and Other categories

3. **Vendor Labels:** this report displays labels for Energy applicants who had a client in the household with a selected vendor and for a selected APC tree and intake date range; the client need not have received assistance for this vendor in the past

4. **Energy Type Labels:** this report displays labels for Energy applicants who had a residence with a selected heat type and for a selected APC tree intake date range; the client need not have received assistance for this heat type in the past

5. **ZIP Code Labels:** this report displays labels for Energy applicants who had a residence with an address within a selected Zip Code and for a selected APC tree and intake date range

6. **Race Labels:** this report displays labels for Energy applicants whose household contains a member of a selected race and for a selected APC tree and intake date range

7. **Homebound Labels:** this report displays labels for Energy applicants who had a household member designated as homebound and for a selected APC tree and intake date range

8. **Age Range Labels:** this report displays labels for Energy applicants who had a client in the household within a selected age range and for a selected APC tree and intake date range

*****Note; if a specific data request cannot be found by an already OPUS created report, contact the OPUS HelpDesk to see if data need request can be pulled by the OPUS HelpDesk Team*****

18 RESOURCES

18-A OPUS Forms

18-A.1 OHCS OPUS Data Collection System OPUS System Administrator Agreement

OHCS OPUS Data Collection System
OPUS System Administrator Agreement

Subgrantee Agency Name: ____
Subgrantee Agency Name

In order to meet the requirements of various Federal and State agencies; Oregon Housing and Community Services (OHCS) OPUS data collection system is a collaborative, statewide effort assisting agencies to document client-level needs and characteristics through a coordinated system that compiles common information at the agency, community, and state level. OPUS is a software tool that can assist agencies in focusing services and locating alternative resources to help low-income individuals.

- **"OPUS HelpDesk"-** OHCS staff providing information and support for OPUS database end users'
- **"End User" –** individuals who utilize and are granted access to the OPUS system

OPUS LIMITATION OF LIABILITY

The Subgrantee Agency agrees that under no circumstances shall OHCS be liable for any direct, indirect, punitive, incidental, special, or consequential damages that result from the use of, or inability to use the OPUS site. This limitation applies whether the alleged liability is based on contract, tort, negligence, strict liability or any other basis, even if OHCS has been informed of the possibility of such damage.

OPUS INDEMNIFICATION

Subject to applicable law, Subgrantee Agency agrees, and shall require its Subrecipients to agree, to defend, indemnify (consistent with ORS Chapter 180), and hold harmless OHCS and its employees, contractors, officers, and directors from all liabilities, claims, and expenses, including attorney fees that arise from use or misuse of this site. OHCS reserves the right, at its own expense, to assume the exclusive defense and control of any matter otherwise subject to indemnification by Subgrantee Agency, in which event Subgrantee Agency will cooperate with OHCS in asserting any available defenses.

The Subgrantee Agency OPUS System Administrator is the primary OPUS contact at the agency level. This individual will be responsible for:

- Providing a single point of contact between the Subgrantee Agency's end users and the OPUS HelpDesk at OHCS
- Work with Subgrantee Agency internal IT staff to ensure that Internet and Network connections are stable and secure
- Work with the Subgrantee Agency Program Managers and Staff to ensure that all end users receive appropriate OPUS application training before prior access and use to the system
- Ensure that the *OPUS User Policy, Responsibility, & Code of Ethics* form is signed by all Subgrantee Agency end users before they access the OPUS database, and that the form is reviewed, updated, and signed annually
- Ensure updated and approved *OPUS Privacy Posting* is properly displayed and visible for consumers of services to view
- Assist in monitoring compliance with standards of client confidentiality, ethical data collection, accurate data entry and data retrieval, and the consumer complaint process

- Assist in managing the Subgrantee Agency end users' accounts including immediate termination of access to OPUS for terminated Subgrantee Agency end users'

Each Subgrantee Agency participating in OPUS will designate an OPUS System Administrator to fulfill the duties described above.

Print Subgrantee Agency OPUS System Administrator Name | Subgrantee Agency OPUS System Administrator Signature | Date

The following individuals are identified as Program Managers for specific modules contained in the system:

Energy Module | Print Name, Program Manager | Program Manager Signature | Date

Weatherization Module | Print Name, Program Manager | Program Manager Signature | Date

E2C2 Module | Print Name, Program Manager | Program Manager Signature | Date

Fiscal Module | Print Name, Program Manager | Program Manager Signature | Date

Print Name, Executive Director | Executive Director Signature | Date

By signing this document, it is acknowledged the Subgrantee Agency is bound by and will comply with all requirements, terms, and conditions contained in the OPUS System Administrator Agreement; MGA in regards to OPUS; OPUS User Policy, Responsibilities, & Code of Ethics; OPUS Privacy Posting, and the OPUS Privacy Notice to Recipients of Services.

Sarah Renee Mentzer

OHCS OPUS HelpDesk | OHCS OPUS HelpDesk Signature | Date

18-A.2 OPUS User Policy, Responsibilities, & Code of Ethics

Print Name: ______________________________

Subgrantee Agency: ______________________________

OPUS USER POLICY, RESPONSIBILTIES, & CODE OF ETHICS

OHCS OPUS Data Collection System

USER POLICY

In order to meet the requirements of various Federal and State agencies, Oregon Housing and Community Services OPUS data collection system is a collaborative, statewide effort assisting agencies to document client-level needs and characteristics through a coordinated system that compiles common information at the agency, community, and state level.

OPUS is a software tool that can also assist agencies in focusing services and locating alternative resources to help low-income individuals. Subgrantee Agency staff may use the information in the system to target services to their client's and community's needs.

OPUS is an entirely web-based system hosted on a central statewide server coordinated by Oregon Housing and Community Services Department. The system is accessed via the Internet by providers offering various supportive services to low-income Oregonians'.

Participating agencies will have rights to the data pertaining to their agencies and the data they directly enter into OPUS.

All OPUS End Users must read, understand, and sign the **OPUS User Policy, Responsibilities, & Code of Ethics** form prior to accessing the database.

All OPUS End Users must be trained prior to using the system.

All OPUS End Users must read and understand their Agency's Privacy Notice.

All OPUS End Users must read and understand the *OHCS OPUS Data Collection System Privacy Notice to Recipients of Services.*

Informed client consent is required before any basic identifying client information is searched, accessed, or entered into OPUS.

DATA ENTRY

Accurate and timely data entry is necessary for the development of compiled reports of services; including but not limited to services needed, services provided, referrals, client goals, and outcomes.

RESTRICTED INFORMATION

Information including progress notes, case management notes, and information about the diagnosis, treatment or referrals related to medical issues, a mental health disorder, drug and alcohol issues, HIV/AIDS, child abuse, and domestic violence must **NOT** be entered in any open notes sections in the OPUS system. In addition, this information must **NOT** be shared with other participating agencies through OPUS.

USER RESPONSIBILITIES

Your User ID and Password gives you access and authority to use the OPUS system and creates an audit trail. *Failure to uphold the confidentiality standards set forth below is grounds for immediate termination of User privileges and you could be subject to further penalties.*

Print Name: ____

Subgrantee Agency: ____

- I have read and understand my Agency's Privacy Notice.
- My User ID and Passwords must be kept secure and are not to be shared with anyone, including other staff members. I must take all reasonable means to keep my password physically and electronically secure. This includes not having a written copy of my User ID and Password in a non-locked location. In addition, I will not save my User ID and Password with Internet Explorer or other browsers/software.
- I understand that my access to OPUS is limited to my designated work site and work schedule unless I am given expressed written consent by the Agency Administrator or other appropriate Subgrantee Agency staff to access the system from other specified locations and times.
- I understand that the only individuals who may view information in OPUS are authorized users who have received appropriate confidentiality training. OPUS End Users must respect that privacy and hold in confidence all information obtained in the course of their use of the system.
- I may only view, obtain, disclose, or use information from OPUS that is necessary to perform my job duties and responsibilities.
- As an OPUS User, I will look to the OPUS Home Page for messages and updates related to the OPUS system.
- Client information should be accessed only in order to retrieve, update, or report data relevant to a client requesting services from the agency.
- I understand that I must log-off the OPUS system before leaving the work area.
- I understand that a PC that has OPUS open and running must never be left unattended.
- A PC that will be using the OPUS system must not be placed so that unauthorized persons may see the information on the monitor.
- I understand that failure to log-off OPUS appropriately will result in a breach in client confidentiality and system security.
- Hard copies and downloads of information from OPUS must be kept secure to ensure that only authorized staff has access.
- When hard copies and downloads of OPUS client information are no longer needed, they must be properly destroyed as described in my agency's policies.
- If I notice or suspect a security breach, I must immediately notify my Agency's OPUS Administrator, my Program Coordinator/Manager, my Agency's Executive Director, and the OPUS HelpDesk.

Print Name: ______________________________

Subgrantee Agency: ______________________________

USER CODE OF ETHICS

A. OPUS End Users must treat other participating agencies with respect, fairness, and good faith.
B. Each OPUS User must maintain high standards of professional conduct in his/her capacity as an OPUS User.
C. All OPUS End Users' must endorse and maintain the client's rights related to privacy and confidentiality and must adhere to the OHCS *OPUS Policy Notice to Recipients of Services*.
D. The OPUS User has primary responsibility for his/her client(s).
E. All OPUS User's agree not to send any sensitive and confidential information in regards to a client through email (example; do not disclose full social security numbers) as email is not secure and jeopardizes and puts the client's confidential rights at risk. OPUS End Users agree to only provide basic identifying information when using systems that could risk client confidentiality.
F. OPUS End Users must not misrepresent the client in the Oregon OPUS system by entering knowingly inaccurate information (example; User will not purposefully enter inaccurate information on a new record or on updated record information).
G. Discriminatory or judgmental comments based on race, color, religion, national origin, ancestry, handicap, age, sex, and sexual orientation are not permitted in the Oregon OPUS System.
H. The User will not use the Oregon OPUS System with intent to defraud the federal, state, local government, an individual entity, or to conduct any illegal activity.
I. OPUS End Users understand that use of information entered into the database are subject, bound, and applicable to federal and state laws as required by the law.

By signing this agreement, I understand and agree to comply with all the statements listed in the OHCS OPUS USER POLICY, RESPONSIBILITIES, & CODE OF ETHICS.

____

OPUS User Name & Signature Date

____

OPUS Subgrantee Agency/System Administrator Name & Signature Date

____

Agency Executive Director Name & Signature Date

18-A.3 OHCS OPUS Privacy Posting Notice

OHCS OPUS Privacy Posting Notice

THIS NOTICE INFORMS YOU HOW YOUR INFORMATION MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION

PLEASE READ CAREFULLY

Effective Date: ________________(Date)

Duty to Protect Your Personal Information

_____________________________________(Agency Name) collects information about who uses and accesses our services. When we meet with you, we will ask you for information about your household and situation then we will enter it into a software system called OPUS. OPUS is used by other partnering agencies throughout the state that provide services to low-income individuals and households. We are required to protect the privacy of your identifying information and to provide you a copy, upon request, of the *OHCS OPUS Privacy Notice to Recipients of Services* that explains in greater detail how, when, and why we may use or disclose any information you may give us.

We are also required to follow the privacy practices described in this **Notice; Oregon Housing and Community Services (OHCS) reserves the right to change our privacy practices and the terms of this notice at any time.** You may request a copy of the new notice from any OPUS Agency.

How We May Use and Disclose Your Information

OPUS partner agencies will use disclosed information as appropriate to process and administer requests for a variety of self-sufficiency assistance programs. OPUS partner agencies may share *limited* information about the people they serve with other OPUS partners working to provide and advocate for services. This information is used to improve and coordinate services to your household and reduce the number of forms you will need to complete at participating agencies.

We use and disclose collective information for a variety of reports. We have limited rights to include some of your information for reports on poverty and low-income households and services needed by those populations. Please review the *OHCS OPUS Privacy Notice to Recipients of Services* for more details.

Rights Regarding Your Information

- You have the right to have corrections and additions made to your record
- You have the right to request a copy of the *OHCS OPUS Privacy Notice to Recipients of Services*

18-A.4 OHCS OPUS Privacy Posting Notice-Spanish

Anuncio sobre el Aviso de Privacidad de OHCS OPUS

ESTE AVISO LE INFORMA COMO SU INFORMACION PUEDE SER USADA Y DEVELADA Y COMO USTED PUEDE TENER ACCESO A ESTA INFORMACION

POR FAVOR LEA CUIDADOSAMENTE

Fecha de vigencia: ______________________

Obligación a Proteger Su Información Personal

____ (Agency Name) compila información de los que usan y obtienen acceso a nuestros servicios. Durante nuestra junta con usted, le pediremos datos sobre su hogar y su situación que serán capturados en un programa de computación llamado OPUS. OPUS es usado por otras agencias aliadas en el estado que proveen servicios a personas y hogares de bajos recursos. Estamos obligados a proteger la privacidad de su información de identificación y a proveerle una copia, si lo pide, del *Aviso de Privacidad de OHCS OPUS para los Beneficiarios* que explica en detalle cómo, cuándo, y porque podemos usar su información o develar cualquier información que usted nos provea.

Estamos también obligados a seguir las prácticas de privacidad descritas en este **Aviso**; **la Agencia de Vivienda y Servicios a la Comunidad (OHCS) se reserva el derecho de cambiar nuestras prácticas de privacidad y los términos de este aviso en cualquier momento.** Usted puede pedir una copia del nuevo aviso a cualquier agencia en OPUS.

Como Podemos Usar y Develar Su Información

Las agencias aliadas en OPUS pueden develar su información según sea apropiado para el procesamiento y administración de solicitudes a una variedad de programas de asistencia para la autosuficiencia. Las agencias aliadas en OPUS pueden compartir información *limitada* sobre sus beneficiarios con otros aliados en OPUS que trabajan para proveer y abogar por servicios. Esta información es usada para mejorar y coordinar servicios para su hogar y reducir el número de formularios que usted necesita completar con las agencias participantes.

Nosotros usamos y develamos información colectiva para una variedad de reportes. Tenemos derechos limitados para incluir parte de su información en reportes sobre pobreza y hogares de bajos recursos y los servicios que esta población ocupa. Para más detalles, por favor revise el *Aviso de Privacidad de OHCS OPUS para los Beneficiarios*.

Sus Derechos sobre su Información

- Usted tiene el derecho de que se hagan correcciones y añadiduras a su historial
- Usted tiene el derecho a pedir una copia del *Aviso de Privacidad de OHCS OPUS para los Beneficiarios*

18-A.5 Privacy Notice to Recipients of Services

Oregon Housing and Community Services (OHCS)
OPUS Data Collection System

Privacy Notice to Recipients of Services

THIS NOTICE DESCRIBES HOW PERSONAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND DESCRIBES HOW YOU CAN GET ACCESS TO THIS INFORMATION. **PLEASE REVIEW IT CAREFULLY. THE PRIVACY OF YOUR PERSONAL INFORMATION IS IMPORTANT TO US.**

OHCS OPUS Data Collection System
Privacy Notice

OPUS was developed to meet the data collection requirements of the United States Department of Health and Human Services (HHS). Congress passed these requirements in order to get a more accurate count of low-income individuals and to identify the need for and use of different services by those individuals and their households.

In working with the State of Oregon to meet the goals set by Congress, agencies will be collecting statistical information on individuals that receive services and reporting that information into OPUS, a central data collection system.

The information you provide us will be used to process and administer your application for assistance. Many other agencies in the state also use OPUS. The information you provide may be shared with other state and federal government agencies as well as other agencies that use OPUS.

The information we collect and may share includes: basic identifying demographic data (e.g., name, address, birth date, phone number, ethnic origin, family status, and income data), the nature of your situation, and the services and referrals you receive from the agency.

Sharing information with OPUS and other agencies helps us to better understand the number of individuals who need and receive services from more than one agency. This may help us to better meet your needs and the needs of others in our community by allowing us to develop new and more efficient programs. Sharing information through OPUS can also help make referrals more easily and require less paperwork for you.

Maintaining the privacy and safety of those using services is very important to us. Information gathered about you is personal and private. The State of Oregon and agencies collect information only when appropriate to provide services, ensure compliance with program requirements, manage our organization, or as required by law. Within the limits of the law, your record of services will only be shared through OPUS with funding agencies including Oregon Housing and Community Services who administers the OPUS database.

CONFIDENTIALITY RIGHTS

This agency has an approved confidentiality policy. Records about medical conditions, substance abuse, physical and mental health, HIV/AIDS, child abuse, and domestic violence ***will not*** be collected, entered, or shared through OPUS.

This agency may use or disclose personal information from OPUS for the following purposes:

- To assist in determining and verifying eligibility for services;
- To conduct quality assessment and improvement activities such as reducing and preventing program fraud;
- To provide or coordinate services to an individual/household;
- For functions related to payment or reimbursement for services;
- To carry out administrative functions including but not limited to legal, audit, personnel, planning, oversight, and management functions;
- Databases used for research, where all personally identifying information has been removed
- Contractual research where privacy conditions are met; and
- Where a disclosure is required by law and the disclosure complies with and is limited to the requirements of the law. Instances where this might occur are during a medical emergency, to report a crime against staff of the agency, or to avert a serious threat to health or safety.

YOUR INFORMATION RIGHTS

As a client receiving services at this agency, you have the following rights:

- ***Access to your record.*** You have the right to request a copy of your personal record and information at any time to ensure its accuracy.
- ***Correction of your record.*** You have the right to request to have your record corrected so that information is up-to-date and accurate to ensure fairness in its use.
- ***Grievance.*** You have the right to be heard if you feel that your confidentiality rights have been violated, if you have been denied access to your personal records, or you have been put at personal risk or harm.
- ***Privacy Notice to Recipients of Services.*** You have a right to request a copy of this notice at any time.

HOW YOUR INFORMATION WILL BE KEPT SECURE

Protecting the safety and privacy of individuals receiving services and the confidentiality of their records is of the highest importance. Through training, policies and procedures, and software, several things have been done to make sure your information is kept safe and secure:

- OPUS uses multiple security protections to prevent unauthorized access;
- Only trained and authorized individuals may enter or view your personal information;
- Your personal identifying information ***will not*** be contained in OPUS reports that are issued to local, state, federal, or national agencies;
- Employees and volunteers receive training in privacy protection and agree to follow strict confidentiality standards before using the system;
- The server/database/software is designed to only allow authorized individuals access to the information;
- The server/database/software only sends encrypted data; using an Internet technology intended to keep information private while it is transported back and forth across data networks. In addition, identifying data stored on the server is also encrypted or coded so that it cannot be recognized;
- The server/database/software is protected by a firewall a computer security technique designed to keep hackers/viruses/etc. away from the server;
- The main database will be kept physically secure, meaning that it is designed so that only authorized personnel may have access to the server/database; and
- Database administrators support the daily operations of the database. Administration of the database is governed by agreements that limit the use of personal information to providing administrative support and generating reports using available information. These agreements further insure the confidentiality of your personal information.

WHAT IS INFORMED CONSENT

Confidential information about you and the confidential services provided to you cannot be given to anyone other than permitted by law without you giving informed consent. In order to be able to give informed consent:

- **KNOWLEDGE;** You should be told about the benefits, risks, and available alternatives to sharing your information.
- **UNDERSTANDING;** You should be able to understand this information including the potential risks, benefits, options, and consequences.
- **VOLUNTARY;** You should not be forced or pressured into a decision; the choice you make should be your decision.

BENEFITS OF OPUS AND AGENCY INFORMATION SHARING

Information you provide us can play an important role in our ability and the ability of other agencies to continue to provide the services that you and others in our community are requesting.

Allowing us to share your basic identifying demographic information results in a more accurate count of individuals and the services they use. A more accurate count is important because it can help us and other agencies:

- Conduct quality assessment and improvement activities such as reducing and preventing fraudulent use of program funds;
- Ensure program compliance with policies and procedures;
- Accurately demonstrate the need for services and the specific types of assistance needed in the community;
- Obtain more money and other resources to provide services;
- Plan and improve the delivery of quality services to your family and you;
- Assist the agency to improve its work with families and individuals who are in need;
- Maintain required statistics for state and federal funders;
- Promote coordination of services to better serve your household needs;
- Make referrals easier by reducing paperwork;
- Advocate for our community needs; and
- Avoiding as much as possible duplicating information to get assistance from other agencies.

RISKS IN SHARING INFORMATION

While the OPUS system has multiple security layers in place and was designed to promote better services for those who are in need, there are risks you should consider before accepting services:

- Could there be physical harm or other negative consequences to your family or yourself if someone within an OPUS participating agency knew that they could find you from the information shared with other participating OPUS agencies?
- Could there be physical harm or other negative consequences to your family or yourself if someone within an OPUS participating agency found out you sought help; particularly if your children or you have experienced domestic violence, sexual assault, stalking, or child abuse?
- Are there others who may work or volunteer at other OPUS participating agencies who you may not want to have access to your information or to know you are seeking services?

OUR LEGAL DUTY

The State of Oregon and receiving agencies are required by applicable federal and state law to maintain the privacy of your personal information within the limits of the law. We are also required to give you this notice about privacy practices, legal duties, and your rights concerning your private personal information. We must follow the privacy practices that are described in this notice while it is in effect. This notice takes effect immediately, and will remain in effect until we replace it.

Oregon Housing and Community Services reserve the right to change the privacy practices and the terms of this notice at any time provided such changes are permitted by applicable law. The agency reserves the right to make changes to privacy practices and the new terms of the notice. These changes affect all personal information that is maintained including personal information created or received prior to the changes.

The agency may deny you the right to inspect or copy your personal information for the following reasons: (1) information is compiled in reasonable anticipation of litigation or comparable proceedings; (2) information about another individual other than the agency staff would be disclosed; (3) information was obtained under a promise of confidentiality and disclosure would reveal the source of the information; (4) information, disclosure would be reasonably likely to endanger the life or physical safety of any individual; or (5) this disclosure of information is otherwise limited by law.

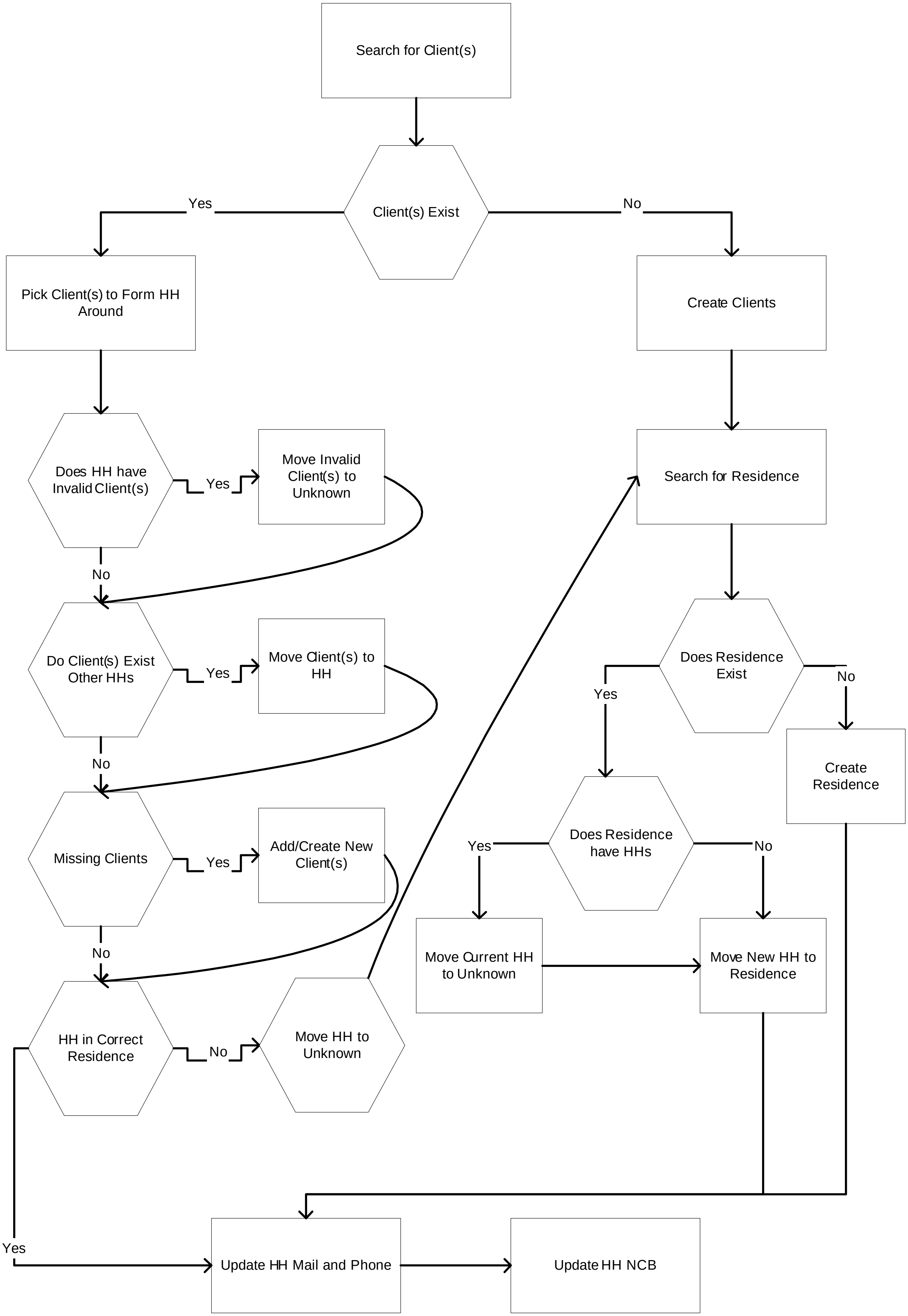
The agency reserves the right to reject repeated or harassing requests for access or corrections. However, if the agency denies your request for access or correction, you will be provided written documentation regarding your request and the reason for denial. A copy of that documentation will also be included in your client record.

You have the right to request a copy of this notice at any time. You also have a right to request a copy of your personal information at any time to ensure its accuracy. For more information about our privacy practices or for additional copies of this notice; as well as to request a copy of your personal information, please feel free to make a request to any staff here at the agency.

In addition, you may also inquire with Oregon Housing and Community Services on how you may request a copy of the OPUS Data Collection System Privacy Notice as well as how to obtain a copy of your personal information record.

PRIVACY NOTICE ADMENDMENTS: The policies covered under this Privacy Notice may be amended over time and those amendments may affect information obtained by the agency before the date of the change. All amendments to the Privacy Notice must be consistent with the requirements of the Federal Standards that protect the privacy of the consumers and guide OPUS implementation and operations.

18-B Energy Assistance Client Flowchart


Search for Client(s)
Client(s) Exist
Yes
No
Pick Client(s) to Form HH Around
Create Clients
Does HH have Invalid Client(s)
Yes
Move Invalid Client(s) to Unknown
Search for Residence
No
Do Client(s) Exist Other HHs
Yes
Move Client(s) to HH
Does Residence Exist
Yes
No
No
Create Residence
Missing Clients
Yes
Add/Create New Client(s)
Does Residence have HHs
Yes
No
No
Move Current HH to Unknown
Move New HH to Residence
HH in Correct Residence
No
Move HH to Unknown
Yes
Update HH Mail and Phone
Update HH NCB