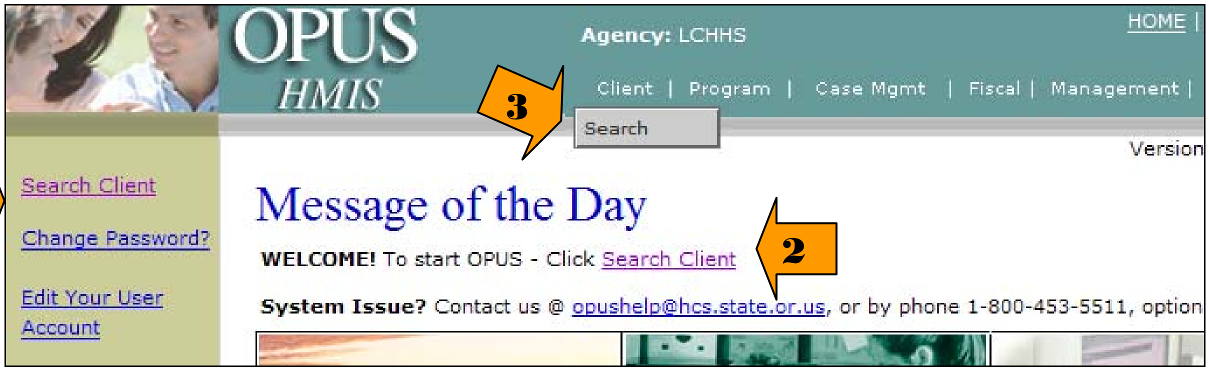
Adding a Client to the OPUS Database

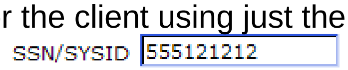
Lane County has almost 70,000 residents in the database already, so your client has a good chance of already being in the OPUS system.

Open the Client Search Screen. .

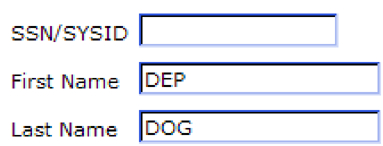


You can get to the Client Search function any of the above 3 ways.
Tip: All the top navigation menu options such as #3 require that you hover over the word <Client> then drag your mouse down to the option(s) in the box.

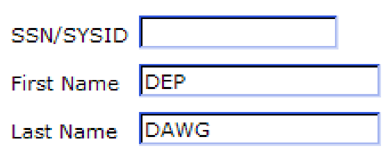
❒ Search for your client using 3 methods.

1. Search for the client using just the Social Security Number. Do not enter dashes in the number. 

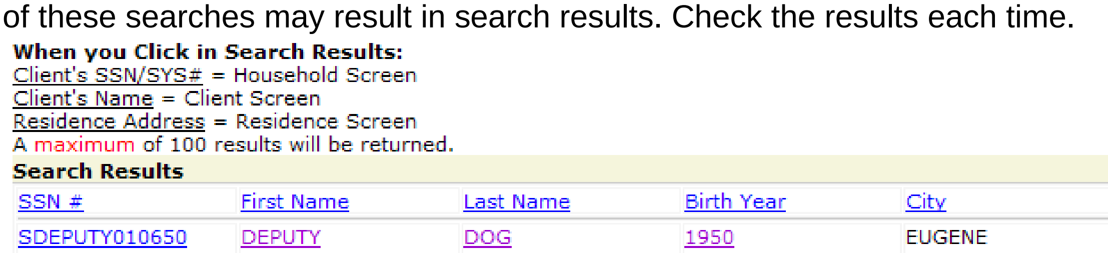
2. Search for the client using the first few letters of the first and last name. (ex: Deputy Dog)
   Make sure that you remove the SSN for this search.



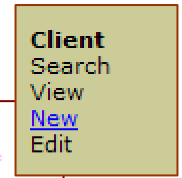
3. Search for other spellings in the same manner. Another agency may have entered a nickname or misspelled a name. If the client has two last names, try each one in a search.

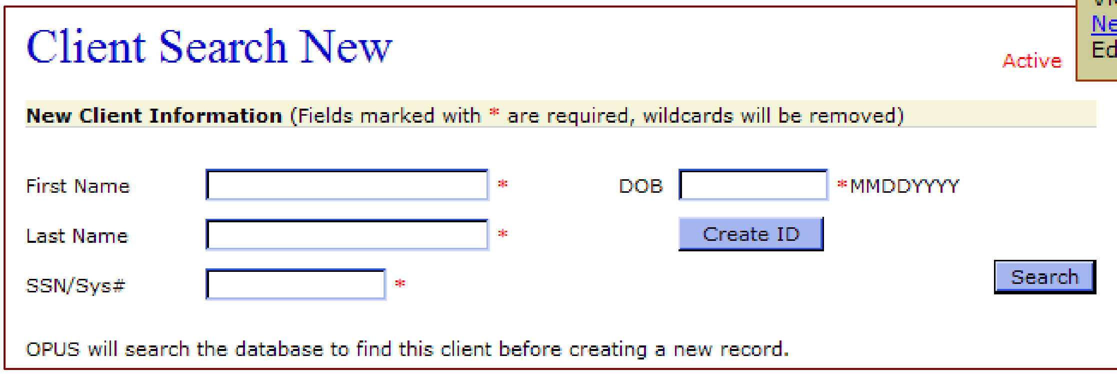


❒ Any of these searches may result in search results. Check the results each time.



❒ If your client is not among the Search Results then you will add a new client to the database using the New link on the left navigation panel.



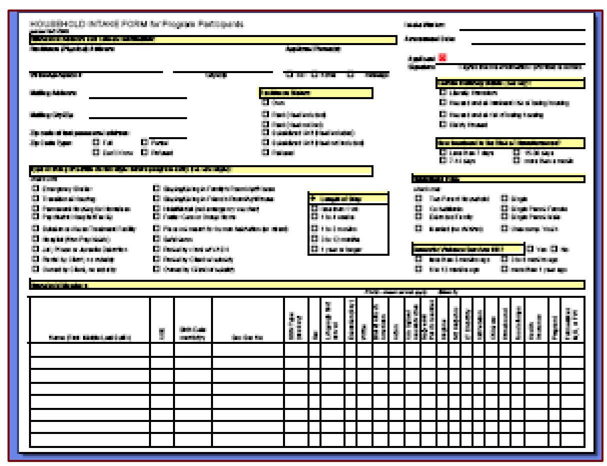


Complete all the fields.

- First Name
- Last Name
- Date of Birth
- SSN- if you have documentation of the social security number. If you do not have it then click the Create ID button. You can always update the record later with the SSN.
  a. You do need to ask for the SSN. If the client doesn't have one or doesn't have the SSN card or a document with the SSN, then use the Create ID button.
  b. You can update the record later with the SSN when the client brings in the documentation.

The System will do one more search for your client with this information. If you client is in the search results then click on the client's ID. If not, click the Add New Member button.

❒ The Client New screen collects much of the data you collected on the HH Intake form. Enter all the data you collected on the HH Intake form into the on-line form and click the Save button.



a. Mailing Address Tip: If your client is homeless and has no mailing address, click the Homeless checkbox and select the zipcode where your client usually spends the night.

b. Client Services/Benefits Tip: If you do not check a box then you are giving a "No" answer. Be sure you have asked the client all these questions.

❒ After you click save you are directed to the Client View screen. Complete the client income using the **Adding or Changing Income** instruction sheet.

❒ After you complete the income, click on the View Household button. To add additional members to the household, click on the New Client button under the HH Members section in the Household View.