

OPUS/HMIS Data Entry Check List

<https://opusprod.hcs.state.or.us>

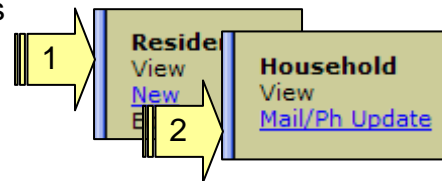
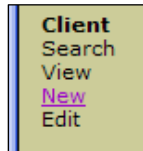
NEW PROGRAM ENROLLMENTS

1. Search for Client in OPUS database even if they are new to your program.



If client name is in Possible Matches (search results) then Skip to #11

2. If client is not in OPUS database, click the **New** link in the **Client** section of the left navigation area
3. Complete the **Client Search New** fields. You'll need First Name, Last Name, Date of Birth. If you have the SSN, enter it. If you don't have the SSN then click the **Create ID** button. (You can update the SYS-ID to the client's SSN in Client Edit.)
4. If client is not in the Possible Matches, then click **Add New Member** (Client) button.
5. Complete Client Information Screen using data on the HH Intake Form
6. Add Income to all adults in Household from the Client View screen
7. Go to Household View
8. If more than one person in the household, repeat steps 1-5
9. Add Household to Residence if Household not Homeless then update then mailing address
10. **Skip to #17**



11. Click on Client Name in Search Results
12. Update client information from the HH Intake Form
13. Update the income for all adults in the household
14. Add new Household members
15. Remove individuals no longer in the Household
16. Add or Update the residence and then the mailing address

17. Update Household Summary on the Household View and click the **Save Changes** button

Household Summary	
Total Income	\$4,728.00
% of Poverty	33%
% of OMI	22%
Total HH#	2
HH Type	Married
Household Subsidized	<input type="checkbox"/>
Residence Subsidized	N
Make any changes? <input type="button" value="Save Changes"/>	

18. Enroll Client in Program by clicking on the **New Enrollment** button then completing the form
19. If this is a CoC program then complete Entrance Assessment from the Program Transaction Summary Screen then return to the Household Summary Screen
20. If a HPRP or Home TBA program complete the Status Assessment then return to the Household Summary Screen
21. Give Transactions

NEW TRANSACTIONS for EXISTING ENROLLMENTS

1. Search for Client in OPUS using the **Search** function or the **Program Enrollment Search** function.



2. Update Client/Household information:
 - Update the client information on the client view screen including **Client Income** and client **Benefits** such as food stamps, veteran status, disabilities, and health insurance. Note: If you leave the benefit box unchecked then you are saying NO, not unknown.
 - Update the **Residence** and **Mailing Address** if necessary.
 - Remove any household members no longer living in this household. Add any new members. Update then **Household Summary** if necessary.

3. From the **Household View** click on the **Program Name** in the **Programs Enrolled** Section

Programs Enrolled	
Name	Entry Date
ARRA-HPRP	06-18-2009
C.A.R.S.	05-12-2009
HPN RENT EUGENE	07-29-2009

4. In the **Household Summary**, add your new transactions.

Housing Transactions (click APC housing label to view/edit)				
APC Housing Label - Housing Name	Start Date	End Date	Transaction Type	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="New Transaction"/>	

FHAT (click FHAT label to view/edit)				
FHAT Label	Date	Amount	Transaction Type	Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="New FHAT"/>				

Service Transactions (click service type to edit)					
Service Type	Intake Worker	Start Date	End Date	Service Name	# of Units
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="New Transaction"/>					

On http://www.lanecounty.org/HSC/OPUS_HMIS_Resources.htm you can find detailed instructions for every step.

ENROLLMENT:	TRANSACTIONS:	CASE MANAGEMENT TOOLS:
<ul style="list-style-type: none"> ▪ Add a client/household to OPUS ▪ Add or Update Household Income ▪ Add a Household to a Residence ▪ Enrolling a client in your program ▪ How to exit a client from your program ▪ Changing the address of a household ▪ Remove Individual from Household ▪ Trouble removing a client from a household 	<ul style="list-style-type: none"> ▪ Service Transactions ▪ Housing Transactions (rent or security deposits) ▪ Financial Housing Assistance Transactions (FHAT) ▪ Home TBA Transactions ▪ Permanent Housing Transactions 	<ul style="list-style-type: none"> ▪ Status Assessments (Required for HPRP and Home TBA; optional for others) ▪ HUD Entrance Assessments (Required for CoC programs) ▪ Case Plans ▪ Running Reports ▪ Computer Setup