

CREATING/EDITING PAYMENTS

Updated: 8/29/19

Client: MINNIE MOUSE

Residence: EUGENE, OR 97401

Client Program Fiscal

Payment New
Search Payment

When creating a NEW PAYMENT, select this option from PROGRAM drop box in the OPUS header bar.

Payment New

Fields marked * are required.

Client Name	Age	Income	SSN verified	Adult ID	Payment Other HH
MICKEY MOUSE	89	\$0.00	N	Y	N
MINNIE MOUSE	88	\$12,000.00	Y	Y	N

Hint – Check here to verify you have checked off adult ID and SSN

APC: LCHSD-LP17-LAN-LIHEAP 16-17 *

Applicant Information

Select Applicant: MINNIE MOUSE * Intake Date: 05-17-2017 (mm-dd-yyyy)*
 HH Income: \$12,000.00 Intake Worker: BNA *
 Eligible in HH: 1 Subsidized: N

Energy Type: ELECTRIC *
 Life Threatening Crisis: NONE *
 Refer for Weatherization
 Non Energy Services
 Energy Related Advocacy

Payment Eligibility Status: ACCEPTED

Payment Information

Type: Standard Min-250 Max-250 * Manual Auth#: D1812345

Vendor	Amount	Account Status	Primary	Name on Acct Acct #
EWEB	250.00 \$	CURRENT	YES	MICKEY MOUSE 123456-123456
Direct Pay	0.00 \$	CURRENT *		
Agency	0.00 \$	CURRENT *		
Total	\$250.00		Balance	\$0.00

Comments

2000 characters left (spaces count)

Deny Hold Save

1. Choose correct APC for the program
 2. Select the correct applicant
 3. Verify the Energy Type matches the utility the pledge will go to
- NOTE: Choosing wrong APC and ENERGY TYPE can affect pledge amount but (GOOD NEWS!) this can be edited!**

1. Choose correct payment type.
2. Enter pledge amount listed in payment type *
3. If there is a Balance Forward – select PAST DUE. Credit or no Balance Forward – select Current **
4. DO NOT leave blank. COPY and PASTE from log to avoid mistakes.
5. Save payment

* If splitting a payment between two utilities, at least HALF of payment must go to ENERGY TYPE listed in drop down box above.

** Select this option based off of what the utility bill states or what vendor employee states. This information is gathered by the state for statistics.

PAYMENT REPORTS

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

Print off **INTAKE REPORT** and **PAYMENT** receipt. Don't forget to gather signatures and all required documents.

If a mistake was made while creating a payment, **DO NOT DENY OR VOID** payment! Payments can be edited.

Payment View

APC: LCHSD-LP17-LAN-LIHEAP 16-17

PAYMENT REPORTS

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

Select EDIT PAYMENT option on payment screen. This will bring up the Payment View screen. From here, you can edit:

- APC (program)
- Applicant
- Intake date
- Energy Type
- Payment Information including Type, Auth #, Vendor, Account Status
- Comments (do not remove old comments from this screen!)

Once this portion has been edited, you **MUST** check the ***REQUALIFY HH*** box and load. **If you do not do this, changes will not be saved on database intake report.**

If changes need to be made to Payment Information, update and **SAVE**.

IMPORTANT: Make sure to add comments regarding changes made and make changes on paper application. **DO NOT print new application.** Attach NOA.

Payment Edit - Agency

Fields Marked * are required.

Client Name	Age	Income	SSN Verified	Adult ID	Payment Other HH
MICKEY MOUSE	89	\$0.00	N	Y	N
MINNIE MOUSE	88	\$12,000.00	Y	Y	N

APC: *

User Information

Select Applicant: * Intake Date: (mm-dd-yyyy) *
 HH Income: \$12,000.00 Intake Worker: *
 Subsidized: **N**

Household Count: 1

Energy Type: *
 Life Threatening Crisis: *
 Override Children Blocking
 Requalify household? (this will update all client, household and residence information including household count, income, subsidized status and heat type)

Payment Eligibility Status: **ACCEPTED**

Payment Information

Payment Type: * Auth #: *

Vendor	Amount	Account Status	Primary	Name on Acct
				Acct #
EWEB	250.00 \$	CURRENT	YES	MICKEY MOUSE
				123456-123456
Direct Pay	0.00 \$	CURRENT		
Agency	0.00 \$	CURRENT		
Total	\$250.00		Balance	\$0.00

Comments

2000 characters left (spaces count)