

INTAKE STEPS

Updated 8/29/19

1) Gather all client documents

- a) ID/SSN
- b) All income from previous month
 - i) Verify all documents have been received and HH is not over income PRIOR to starting intake and make copies
- c) Utility bill and bulk fuel statements

2) Search for client and residence

- a) If client is in OPUS (in correct residence), update/verify ALL client info
 - i) Birthdate, SSN/Adult ID, Email Address, Client Characteristics, Non-Cash Benefits
 - ii) Add ALL gross income
 - iii) Update Vendor Information
 - iv) Update and combine mailing address if applicable
 - (1) If mailing address is the same as physical, choose RES from mailing address drop down list in HH MAIL AND PHONE UPDATE
 - (2) If different from physical, update using correct data entry standards.
 - v) Update phone number
 - (1) Not needed for children or for multiple adults to list the same number
 - vi) Update HH Type –SAVE CHANGES
- b) If client/residence is NOT in OPUS, follow directions in manual to add/move clients/residences
 - i) Proceed to update/ add all information listed above

3) Select Payment New from Program dropdown after ALL client/hh info has been updated and verified

- a) Choose the correct APC for program
- b) Choose the correct Applicant
- c) Choose the correct Energy Type
 - i) LOAD
- d) Choose the correct Payment Type
- e) Apply pledge to the correct vendor
- f) Choose the correct Account Status based on utility bill/vendor form
- g) COPY and PASTE Authorization # from LOG to minimize mistakes
- h) Enter notes if applicable
- i) SAVE

4) Print Intake Report and Receipt

- a) Don't forget client/intake worker signature

5) Make sure all copies of documents are attached to voucher