

MOVING CLIENTS

Updated: 8/29/19

Search for the residence the HH is moving into. If the residence is in OPUS, make sure it has no other HH residing in it. If a HH is residing in this residence, see below on how to remove an entire household. **IMPORTANT**, remove all current HH members out before moving any new HH members in. *If you do not do this step, an applicant may no longer be eligible for energy assistance.* If the residence is empty, you can now move your HH into it using the following two options.

1. Use **REMOVE CLIENT(S)** option if only some members of the HH are moving into a new residence or being removed from the current HH. Select these HH members using the check box on the left of the SSN/SYSID box.

HH Members					Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SMICKEY051528	MICKEY MOUSE	89	M	DK	N	N	DK	DK	Y	ZIS
<input checked="" type="checkbox"/>	987-65-4321	MINNIE MOUSE	88	F	DK	N	N	DK	DK	Y	Y

New Client

To Remove a Client (one at a time):
Select client under the R column above, then Click this button

To Remove Household: Click this button

Remove Client(s) from Household

Move Entire Household to Unknown

2. Use **MOVE ENTIRE HOUSEHOLD** only use this option if the ENTIRE HH is moving, together, into a new residence or if you are moving them to Unknown. Unknown means address is Unknown.

HH Members					Bold Red elements indicate poor data quality						
R	SSN/SYSID	Name	Age	Gen	Educ	Vet	Disb	Ethn	Race	NCB	Income
<input type="checkbox"/>	SMICKEY051528	MICKEY MOUSE	89	M	DK	N	N	DK	DK	Y	ZIS
<input type="checkbox"/>	987-65-4321	MINNIE MOUSE	88	F	DK	N	N	DK	DK	Y	Y

New Client

To Remove a Client (one at a time):
Select client under the R column above, then Click this button

To Remove Household: Click this button

Remove Client(s) from Household

Move Entire Household to Unknown

You can now move either an entire HH into a new residence or move a client into an existing HH using the MOVE options on the left sidebar.

Moving an ENTIRE HH into a new residence - Search for a HH member and an address. If searching by name, there may be multiple people with the same name so choose the correct person. This goes for address as well. Choose the correct address and make sure it is EMPTY first. Once both have been selected, click the MOVE button to return to HH View Screen

Move
 Client to HH
 HH to Residence
 Merge HH

FROM Household			TO Residence		
SSN	<input type="text" value=""/>	e.g. 000-00-0000	Address	<input type="text" value="1234"/> # <input type="text" value=""/>	
First	<input type="text" value="MICK"/>	e.g. John	City	<input type="text" value=""/>	
Last	<input type="text" value="MOUSE"/>	e.g. Smith	Zip	<input type="text" value="97401"/>	
			<input type="button" value="Search"/>		
Select ONLY one HH, under the M column.			Select ONLY one Residence, under the M column.		
M	SSN	First	Last	M	Address
<input checked="" type="radio"/>	SMICKEY051528	MICKEY	MOUSE	<input type="radio"/>	1234 COBURG RD EUGENE, OR 97401
<input type="radio"/>				<input type="radio"/>	1234 HIGHWAY 99 N EUGENE, OR 97401
<input checked="" type="radio"/>				<input checked="" type="radio"/>	1234 NOWHERE ST EUGENE, OR 97401
<input type="radio"/>				<input type="radio"/>	12345 HIGHWAY 99 N EUGENE, OR 97401

Move Household to Residence

(Household View Screen will appear next)

Moving one or more clients into an already existing HH - Enter name or SSN of client being moved and same for HH being moved into. Verify that you are choosing the correct clients if there is more than one option. Once both have been selected, click the MOVE button to return to HH view screen. You will now see the existing HH has the new HH member included

Move
 Client to HH
 HH to Residence
 Merge HH

Client(s) FROM - Enter at least one			TO Household - Enter at least one				
SSN1	<input type="text" value=""/>		SSN	<input type="text" value=""/>			
SSN2	<input type="text" value=""/>		First	<input type="text" value="MIC"/>			
SSN3	<input type="text" value=""/>		Last	<input type="text" value="MOU"/>			
First	<input type="text" value="MIN"/>						
Last	<input type="text" value="MOU"/>						
			<input type="button" value="Search"/>				
Select M column to move (select one or more)			Select M column to move (select only one more)				
M	SSN	First	Last	M	SSN	First	Last
<input type="checkbox"/>	2572			<input checked="" type="radio"/>	SMICKEY051528	MICKEY	MOUSE
<input checked="" type="checkbox"/>	987654321	MINNIE	MOUSE				

Move Client(s) to Household

(Household View Screen will appear next)