

# Client Maintenance Unit (CMU)

Online Web Form  
Replaces the MSC 0148

June 2017

# Why did CMU move to an online web form?

- Paper forms are labor intensive for everyone.
- In the past, forms and templates were used and submitted by email or fax.
  - *Note: CMU's fax machine and email box has been disconnected on June 6, 2016.*
- Not enough key information was sent to CMU making it difficult for CMU to process requests.
- CMU needed a more effective process to track and process requests.

# Value of the web form

- Easy to access, easy to complete.
- Uses drop down menus to answer questions.
- Some fields are mandatory so CMU will receive information they must have to process requests.
- Submitter gets summary page of what they submit which can be saved on their computer or printed.
- Submitter gets an email with a confirmation number for tracking and to let them know the form was received and when it's completed.
- CMU can easily locate each request.
- Helps CMU process more quickly.

# Where to find the web form

We have an EASY URL to remember which takes you to the home page – [www.cmurequest.org](http://www.cmurequest.org). Click on the button at bottom of the page.

[Oregon Department of Human Services / Business Services / OPAR](#)

## Client Maintenance Unit Request System

<a href="#">OPAR (FINANCIAL RECOVERY)</a>
<b><a href="#">CLIENT MAINTENANCE UNIT REQUEST BY STEP</a></b>
<a href="#">MEDICAL PAYMENT RECOVERY UNIT FAQs</a>
<a href="#">OVERPAYMENT RECOVERY FAQs</a>
<a href="#">PERSONAL INJURY LIEN FAQs</a>
<a href="#">PAYMENT ERROR RATE MEASUREMENT</a>

All DHS/OHA staff should now submit requests for eligibility adjustments or coding corrections to the OPAR Client Maintenance Unit (CMU) using the secure online web form. This web form replaces the MSC 148 (Request for Retroactive Eligibility).

- Please read this page before using the web form.
- You will need a current internet browser (such as Chrome, Mozilla Firefox, or Internet Explorer 10 or higher).

### Who should submit requests?

All agencies who want to submit eligibility adjustments or coding corrections to CMU to ensure program benefits are coded properly. This includes, but is not limited to:

- DHS Aging and People with Disabilities, Child Welfare, and Self-Sufficiency offices
- Area Agencies on Aging and Northwest Senior and Disabled Services
- OHA Health Systems Division and Public Health Division
- Oregon Youth Authority

### What types of requests should be submitted online?

Submit all requests for eligibility adjustments or coding corrections using the web form. These include, but are not limited to:

- **MMIS changes:** Date of death, mid-month closure, newborn, PERC update, retroactive eligibility, tax credit closure, benefit level change, Former Foster Care Youth Medical, Hospital Presumptive, Inpatient Inmate
- **FIND changes:** Merge or split prime numbers; split adoptions
- **SNAP changes:** Delete cases that are closed, denied or expired
- **WLGR changes:** Correction to 512 Voucher

### What will CMU do?

CMU will process urgent requests within one business day, and process all other requests in the order received. Please allow up to five business days for processing all non-urgent requests.

### Is training available on how to use the web form?

The [CMU Web Form PowerPoint](#) includes step by step instructions, troubleshooting tips and other helpful information.

The [CMU Quick Reference Guide](#) will help you determine and select the correct Request Type. The guide provides descriptions for each Request Type and best practices for using the online form.

### Questions?

If you need technical assistance or have any questions, please contact CMU at 503-378-4369.

[Submit CMU Request Now](#)

# You are in the web form!

## Enter your contact information here

**Client Maintenance Unit Request**

Please enter your contact information below.

**Office or Branch \***

Please select your office or branch.

**First Name \***

Please enter your first name.

**Last Name \***

Please enter your last name.

**Email Address \***

Example: name@company.com

**Worker Load Code (ID) \***

**Phone Number**

Example: 123-456-7890

**Phone Extension**

Example: 123

**DONE**

Be sure your email address is entered correctly. This will ensure you receive the confirmation email when your request has been received and when it has been completed.

Office or Branch \*

- 5503
- AAA/NWSDS
- APD
- CW
- Health Systems - OHA
- OPAR
- OYA
- SSP
- Other

You will have the ability to edit your contact information or any other information in the web form up until you submit the request.

# Add the client

## Client Maintenance Unit Request

### Step 1. Enter Worker Contact Information

Worker info appears here

EDIT

First Name	Last Name	Branch or Office	Email Address	Worker Load Code	Phone Number
Worker	Name	5503	worker@state.or.us	ID	555-555-5555

### Step 2. Enter Household Information

Click the "ADD CLIENT" button to add each person that needs a correction. You can add as many people as needed as long as they are in the same household.

 ADD CLIENT

Click here to add the client. You can add as many people as needed as long as they are in the same household.

Client Name

 **Action Needed** - No clients or requests currently added

# Enter the client information

Add Client

## Client Information

First Name \*

Enter the client's first name.

Last Name \*

Enter the client's last name.

Prime numbers \*

Enter all primes associated with this individual.

Social Security

Example: 123-456-789, click box to reveal SSN.

Date of Birth \*

Enter the client's date of birth (MM/DD/YYYY).

ADD

CANCEL

**Note:** as you go through the form, fields that are mandatory have an asterisk \* and will highlight in red if left blank. You will need to complete each mandatory field before you can go to the next step.

# Add or edit client information

**Step 1. Enter Worker Contact Information** EDIT

First Name	Last Name	Branch or Office	Email Address	Worker Load Code	Phone Number
Carolyn	Thiebes	AAA/NWSDS	carolyn.thiebes@state.or.us	EE	444-444-4444

**Step 2. Enter Household Information**

Click the "ADD CLIENT" button to add each person that needs a correction. You can add as many people as needed as long as they are in the same household.

+ ADD CLIENT

Click on the blue pencil to edit the client information or the red "x" to delete the client

Client Name	Request Types
Walt Disney <span>✎</span> <span>✕</span>	<b>Action Needed</b> - No request types have been added to this client <span>+ ADD REQUEST TYPE</span>

After the client is added, you can edit or remove them if needed.

Click on the green "ADD REQUEST TYPE" button to tell CMU what actions are needed for that person.







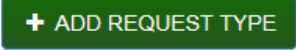
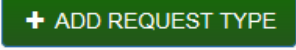
You can add as many clients as needed as long as they are in the same household. You must submit a new form for different households.

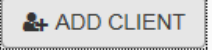
OREGON.GOV

Carolyn Thiebes APD carolyn.thiebes@state.or.us EE 555-555-5555

## Step 2. Enter Household Information

Click the "ADD CLIENT" button to add each person that needs a correction. You can add as many people as needed as long as they are in the same household

Client Name	Request Types
Walt Disney  	 <b>Action Needed</b> - No request types have been added to this client
Mickey Mouse  	 <b>Action Needed</b> - No request types have been added to this client
Minnie Mouse  	 <b>Action Needed</b> - No request types have been added to this client
Tinker Bell  	 <b>Action Needed</b> - No request types have been added to this client









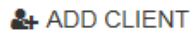





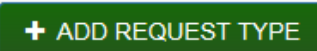
If you need technical assistance or have any questions about this form, please contact OPAR Client Maintenance Unit at 503 378-4369.

# Add Request Type(s) to tell CMU what action is needed

## Step 2. Enter Household Information

Click the "ADD CLIENT" button to add each person that needs a correction. You can add as many people as needed as long as they are in the same household.

 ADD CLIENT

Client Name	Request Types	
Walt Disney  	 <b>Action Needed</b> - No request types have been added to this client	

After the client is added, tell us what action is needed. To do this, click the green "ADD REQUEST TYPE" button. A box will open for you to select your Request Type.

## Select from the Request Type drop down

Add Request Type for GINNIE SMITH

Select Request Type:

Retroactive Medical

Please select the request you wish to file.

SELECT REQUEST →

CANCEL

### Add Request Type for GINNIE SMITH

#### Select Request Type:

Adoption  
Date of Death  
Dual Medical  
Former Foster Care  
HIX / Other Benefits Extension  
HIX, FST, MOD Closure  
Hospital Presumptive  
Inpatient Inmate  
Mid-month Closure  
Newborn  
PERC Code Change  
Prime Merge  
Retroactive Medical  
SNAP Delete  
Tax Credit Closure  
WLGR Correction-512 Voucher  
Other

Use the drop down to select the reason for your request.

If you don't see what you need on the list, select "Other" and provide details of what you are requesting.

**TIP:** you can use the up and down arrow keys on your keyboard to scroll through the list.

Some Request Types ask for more information compared to others depending on the Request Type.

Add Request Type for Walt Disney

### Date of Death

**Verified Date of Death \***

Date must be between 01/01/1900 and 05/12/2016. Please enter the actual verified date of death for the client.

CANCEL

Add Request Type for WALT DISNEY

### Prime Merge

**ⓘ** If there is more than one prime with open medical, please specify the preferred prime below.

**Preferred Prime**

Enter the preferred prime.

DONE CANCEL

# Complete the fields required for each Request Type

Add Request Type for GINNIE SMITH

## Retroactive Medical

**Add New Line**

<b>Case Number *</b> ABC123XX ✓ Enter the MMIS case number for this request.	<b>Requested Start Date *</b> 11/01/2016 ✓ Enter a date (MM/DD/YYYY). <a href="#">How to view current eligibility dates in MMIS</a>	<b>Requested End Date *</b> 12/31/2016 ✓ Enter a date (MM/DD/YYYY).
<b>Case Descriptors *</b> AMO ✓ Enter the case descriptors. <a href="#">Two character case descriptors?</a>	<b>Program Code *</b> PC ✓ Enter the Program Code.	<b>PERC Code *</b> M3 ✓ Enter the correct PERC Code. <a href="#">Determining PERC Codes</a>

SAVE LINE

CANCEL

Info bubbles provide additional guidance. To view the additional guidance, click on the info bubble links.



# Need to edit info or add line segments?

You can make a correction by clicking on the blue pencil or delete a request type by clicking on the red “x”.





To add a new line, click the “ADD NEW LINE FOR CLIENT” button. When finished adding lines, click “DONE”.

Add Request Type for GINNIE SMITH

## Retroactive Medical

Case Number	Requested Start Date	Requested End Date	Case Descriptors	Program Code	PERC Code			
ABC123XX	11/01/2016	12/31/2016	AMO	PC	M3			
							<input type="button" value="+ ADD NEW LINE FOR CLIENT"/>	
							<input type="button" value="DONE"/>	<input type="button" value="CANCEL"/>

## Step 3 – Comments and file attachments

Client Name	Request Types	
Walt Disney  	Date of Death  	<a href="#">+ ADD ADDITIONAL REQUEST TYPE</a>

### Step 3. Additional Information

Explain the reason for your request.

Client passed away and we need to close his case

File attachments (Optional)

You may upload multiple files by clicking in the white box below.

**12.9 KB**

Mickey Mou...

[Remove file](#)

A space is provided to add any additional information you may need to provide. There is a limit of 250 characters.

**TIP:** File types that can be attached are WORD, EXCEL, PDF, JPG, PNG (.doc, .docx, .xls, .xlsx, .jpg, .jpeg, .png, and .pdf). You cannot attach a saved email unless you PDF it first. To attach additional files, click inside the attachment box.

## Step 4 - Urgent Requests

There are times when you may need urgent processing such as when a client has been denied mediation or emergency treatment or has no current coverage and needs immediate access to benefits or services. In those instances CMU will expedite the request and process by next business day.

1. Check the Urgent box

Step 4. Urgent Processing

Check this box only if urgent processing is needed because the client has been denied medications or emergency treatment or has no current coverage and needs immediate access to benefits or services.

REVIEW

2. Open the drop down

Step 4. Urgent Processing

Check this box only if urgent processing is needed because the client has been denied medications or emergency treatment or has no current coverage and needs immediate access to benefits or services.

Tell us the reason urgent processing is needed. \*

This field is required. Please select what best describes your situation.

REVIEW

3. Select the reason

Step 4. Urgent Processing

Check this box only if urgent processing is needed because the client has been denied medications or emergency treatment or has no current coverage and needs immediate access to benefits or services.

Tell us the reason urgent processing is needed. \*

Access to medical  
Access to pharmacy  
Access to SNAP  
Child changing programs  
Other

Select reason from the drop down. If you select 'Other' another box will open where you can enter the reason for urgent if it does not meet the criteria above.



# Review your submission

## Client Maintenance Unit Request


### Step 1. Enter Worker Contact Information





 EDIT

First Name	Last Name	Branch or Office	Email Address	Worker Load Code	Phone Number
Barbara	Key	5503	barbara.key@state.or.us	BK	

### Step 2. Enter Household Information

Click the "ADD CLIENT" button to add each person that needs a correction. You can add as many people as needed as long as they are in the same household.

 ADD CLIENT

Client Name	Request Types
GINNIE SMITH  	Date of Death  

[+ ADD ADDITIONAL REQUEST TYPE](#)

### Step 3. Additional Information

Explain the reason for your request.



DOD needs to be corrected.

File attachments (Optional)

You may upload multiple files by clicking in the white box below.

Click here to upload file(s).

Click REVIEW when done entering all of the information.

### Step 4. Urgent Processing

Check this box only if urgent processing is needed because the client has been denied medications or emergency treatment or has no current coverage and needs immediate access to benefits or services.

REVIEW

# Review your submission

## Client Maintenance Unit Request

### Submission Review

First Name	Last Name	Branch or Office	Email Address	Worker Load Code	Phone Number
Barbara	Key	Other - CES	barbara.key@state.or.us	BK	503-378-3299 Ext. 83299

### WALT DISNEY

Client Name	Prime Numbers	SSN	Date of Birth
WALT DISNEY	<input type="button" value="CLICK"/>	***** <input type="checkbox"/> Show	12/12/1950

#### Date of Death

Verified Date of Death 08/02/2016

### Additional Information

#### General Comments

Client passed away and we need to close the case.

#### File attachment

##### Document name

CMU\_Submission 871306-23-16.pdf

### Urgent Processing

Urgent Processing: Yes  
Reason: Access to medical

If you need to make corrections, click **EDIT SUBMISSION**. If everything is correct, click **SUBMIT**.

EDIT SUBMISSION

SUBMIT

Be sure everything is correct before you click SUBMIT

### Confirm Submission

Please note that once you click "SUBMIT" you will not be able to retrieve the form for editing.

After submitting you will be able to print or save your submission information.

After you click SUBMIT, you will not be able to go back in to make changes so be sure you have everything correct. You will be able to print or save your submission information.

## Your submission has just been received by CMU

CMU receives requests in real time when you click SUBMIT.  
A staff person monitors submissions and assigns work to CMU staff.

### Client Maintenance Unit Request

#### Submission Sent!

Confirmation Number: 277

Date Received: 08/23/16 11:19 AM

Your submission has been received. If you wish to print a detailed summary of your submission, please click "PRINT OR SAVE" for a printable version.

Urgent requests will be processed within one business day. Please allow up to five business days for processing a

If you have questions about your submission, please contact the Client Maintenance Unit at 503-378-4389.

Please note that you will not be able to print or save the detailed summary after you leave this page.

This is the last opportunity  
to print or save the detailed  
information of your request.

PRINT OR SAVE

NEW SUBMISSION

This will be your last opportunity to print or save the detailed summary of your request. Once you leave this page, you will not be able to pull up your summary.

You will get an email confirmation that you submitted successfully.

stg.opar.cmu.notification@egov.com

#secure# CMU Request Confirmation Number: 277

11:20 AM

Your Client Maintenance Unit Request has been

# Print or save a copy

To save as pdf document, click PRINT OR SAVE button, then a Print window will open. Select **PDFCreator** as your printer then click Print. Another window (PDFCreator) will open, hit Save. Then browse in the 'Save as' window and select the folder you want to save the pdf in and hit Save. You will then see a summary page with all of your request details (example on next slide).

Client Maintenance Unit Request

Submission Sent!

Confidential Number: 377

Print

General Options

Select Printer

Add Printer

Adobe PDF

Fax

Microsoft XPS Document Writer

PDFCreator

RightFax Fax Printer

Status: Ready

Location:

Comment: PDFCreator Printer

Print to file

Preferences...

Find Printer...

Page Range

All

Selection

Current Page

Pages: 1

Enter either a single page number or a single page range. For example, 5-12.

Number of copies: 1

Collate

1 1 2 2 3 3

Print

Cancel

Apply

If you don't want to print or save and need to send a new request, click NEW SUBMISSION.

PRINT OR SAVE

NEW SUBMISSION

PDFCreator 1.7.1

Document Title

https://stage-apps.oregon.egov.com/DPAR/CMU/

Creation Date:

20160823115425

Now

Modify Date:

20160823115425

Now

Author:

DR0109614

Subject:

Keywords:

Profile

Default

After saving open output file

Edit PDF files with PDFArchitect

Cancel

Wait - Collect

Options

eMail

Save

# Summary page shows details of your submission

Page 1 of 2

Confirmation Id: 212  
Date Received: 05/05/16 04:41 PM

First Name	Last Name	Branch or Office	Email Address	Worker Load Code	Phone Number
Carolyn	Thiebes	AAA/NWSDS	carolyn.thiebes@aol.com	EE	555-555-5555

Walt Disney

Client Name	Prime Numbers	SSN (hover to reveal)	Date of Birth
Walt Disney	DISNEY01	*****	12/05/1901

Date of Death
Verified Date of Death: 12/15/1966

Additional Information

General Comments  
Client passed away and we need to close his case

File attachment

Document name
Mickey Mouse.jpg

Urgent Processing

Urgent Processing: Yes

# Best practices

- Have all of the client info ready before you start completing the web form.
- When considering what dates to enter into the form be sure that the dates you enter are the dates that you want CMU to enter into MMIS. This may or may not be dates that are already in MMIS.
- A comments box is provided in the web form. Be clear and concise about the reason for your request, keeping in mind that the more clear you are the more it helps CMU to process your request more quickly.
- Be sure you select the correct Request Type. If you select the wrong Request Type, it may be returned to you unprocessed. The Quick Reference Guide, available at [www.cmurequest.org](http://www.cmurequest.org), will help you determine and select the correct Request Type.
- Narrate (in ONE, TRACS, Oregon ACCESS, OR-KIDS, etc.) that the request has been sent to CMU and what was requested.

# Trouble shooting

- You must use a current browser such as Internet Explorer 10 or higher, Firefox or Chrome.
- It may be helpful to clear the cache on your browser occasionally. If you don't know how to do this, check with your office IT person.
- If documents won't upload, be sure you are using the right file versions. Acceptable formats are WORD, EXCEL, PDF, JPG, PNG (.doc, .docx, .xls, .xlsx, .jpg, .jpeg, .png, and .pdf). If you are using the right file type and it still won't load, either wait and try to submit at a later time or submit the form without the file upload. You can use the Snipping Tool, do Save As and select JPG or PNG file format.
- If you don't have all of the information that is required in the mandatory fields, use the tooltip links provided in the form to help you locate the needed information such as case descriptors and PERC codes. If you're still unsure of where to find information see your lead worker.



# Who to call

**\*To check on the status of your request, call CMU at 503-378-4369.**

*Note: CMU will notify you by email when the request has been completed or if they need additional information.*

**\* Questions about the web form (functionality or system issues)?**

Contact: Barbara Key, OPAR Policy Analyst

Email: [barbara.key@state.or.us](mailto:barbara.key@state.or.us)

Phone: 503-378-3299