

Client Maintenance Unit - CMU

NEW! Online Web Form
Replaces the MSC 0148

March 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 or when it's completed.
- CMU can easily locate each referral.
- Helps CMU process more quickly.

Where to find the web form

We have an EASY URL to remember – www.cmurequest.org

Oregon Department of Human Services / Business Services / OPAR

Client Maintenance Unit Request System

OPAR (FINANCIAL RECOVERY)
► CLIENT MAINTENANCE UNIT REQUEST SYSTEM
MEDICAL PAYMENT RECOVERY UNIT FAQs
OVERPAYMENT RECOVERY FAQs
PERSONAL INJURY LIEN FAQs
PAYMENT ERROR RATE MEASUREMENT

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:

- **MMI\$ 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 associated primes related to this request here.

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 a client

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 EDIT DELETE	Action Needed - No request types have been added to this client ADD REQUEST TYPE

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.





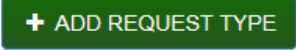
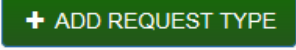
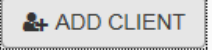
You can add as many clients as needed – as long as they are in the same household. You must submit a new form for different households.

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  	 Action Needed - No request types have been added to this client	
Mickey Mouse  	 Action Needed - No request types have been added to this client	
Minnie Mouse  	 Action Needed - No request types have been added to this client	
Tinker Bell  	 Action Needed - No request types have been added to this client	

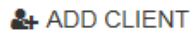
If you need technical assistance or have any questions about this form, please contact OPAR Client Maintenance Unit at 503 378-4369.




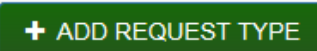
9

Add Request Type – Tell us what 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  	 Action Needed - 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 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 additional information.

Depending on the request type, information needed varies.

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

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

SAVE LINE

CANCEL



Note: Click on the info bubble “Determining PERC Codes” if you aren’t sure where to find PERC or Program Codes.

TIP: APD - If a case descriptor is only two characters the info bubble “Two character.....” explains how to enter the case descriptor.

Need to make a correction or add a new line?

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"/>	

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 new line, click “DONE”.

Step 3 – Comments and file attachments

Client Name	Request Types	
Walt Disney  	Date of Death  	+ ADD ADDITIONAL REQUEST TYPE

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 might 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	Other - CES	barbara.key@state.or.us	BK	503-378-3299 Ext. 63299

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 EDIT X	Date of Death EDIT X

[+ ADD ADDITIONAL REQUEST TYPE](#)

Step 3. Additional Information

Explain the reason for your request. ✓

Client passed away and we need to close the case.

File attachments (Optional)

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

77.3 KB

CMU_Submi...

[Remove file](#)

Step 4. Urgent Processing

Check if urgent processing needed.

Tell us the reason urgent processing is needed. *

Access to medical

Please select what best describes your situation.

Click REVIEW when done entering all of the information.

[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="text" value="KLIICKI"/>	***** <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

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

IMPORTANT: This is your only chance to Print or Save a copy of the details you are submitting.

The screenshot displays a web application interface for submitting a 'Client Maintenance Unit Request'. At the top, a dark grey bar contains the text 'Client Maintenance Unit Request'. Below this, a white box with a checkmark icon and the text 'Submission Sent!' is visible. The main interface shows a 'Print' dialog box with the 'General' tab selected. The 'Select Printer' section lists several printers, with 'PDFCreator' highlighted by a red box. Below the printer list, the 'Print' button is also highlighted with a red box. To the right of the 'Print' dialog, a red speech bubble contains the text: 'If you don't want to print or save and need to send a new request, click NEW SUBMISSION.' Below the speech bubble, there are two buttons: 'PRINT OR SAVE' and 'NEW SUBMISSION'. A red arrow points from the 'PRINT OR SAVE' button to the 'NEW SUBMISSION' button. Another red arrow points from the 'NEW SUBMISSION' button to the 'Save' button in the 'PDFCreator 1.7.1' dialog box. The 'PDFCreator 1.7.1' dialog box shows various fields for document metadata, including 'Document Title', 'Creation Date', 'Modify Date', 'Author', 'Subject', and 'Keywords'. The 'Save' button is highlighted with a red box.

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).

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
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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 reason type, it may be returned to you unprocessed. The Quick Reference Guide, available at 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 or follow your office procedures.

Trouble shooting

- Functionality problem – 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 required, we've provided 'Tooltips' in the form that helps you locate 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

Phone: 503-378-3299