

Client Maintenance Unit (CMU) Requests

Quick Reference Guide for Field Staff

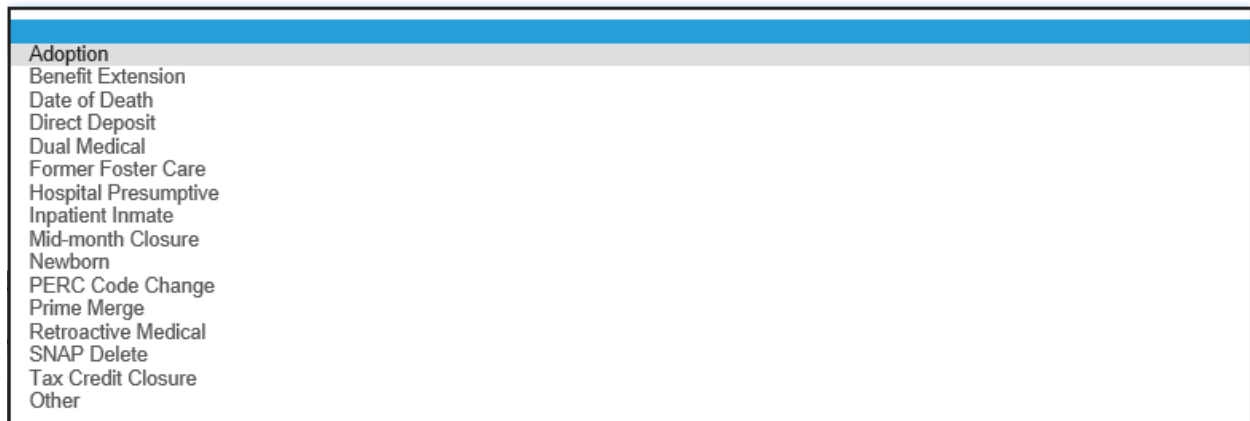
This guide is used to determine the correct Request Type when submitting a CMU request via the [CMU Request System](#).

The **Best Practices** section includes guidance for 'Urgent Processing' in addition to other helpful information.

CMU Request Types

The screenshot below lists all available Request Types. Select the Request Type that best matches your need – see description for each type below.

Select Request Type:



Adoption
Benefit Extension
Date of Death
Direct Deposit
Dual Medical
Former Foster Care
Hospital Presumptive
Inpatient Inmate
Mid-month Closure
Newborn
PERC Code Change
Prime Merge
Retroactive Medical
SNAP Delete
Tax Credit Closure
Other

Adoption

- Individual has been adopted and bio screen needs to be locked.
- Notes on F21 screen or other notification that adopted/bio primes have been merged and need to be split.

Benefits Extension

- Extend ended eligibility for Due Process, RFI, Hearings, etc. This request type is not to fill in gaps between a closed case and an ongoing case but rather to extend eligibility into the future. Extensions are typically for 1 to 2 months.

Date of Death

- System corrections or updates for a date of death that workers are not able to complete.

Client Maintenance Unit (CMU) Requests

Quick Reference Guide for Field Staff

Direct Deposit

- Set up client direct deposit for TANF, SIP, ICP, FSCO, etc. (**must** attach the AFS7262 or DHS7262i to the web form);
- Cancel direct deposit or update information; or
- Research payment issues.

Dual Medical

- Two cases with open medical on a **single** prime or the **same** case open on two primes.

Former Foster Care

- Not being used currently.

Hospital Presumptive Eligibility (HPE)

- Changes needed in MMIS that involve HPE cases.

Inpatient Inmate

- Add a segment of eligibility for a client who is currently incarcerated.

Mid-month Closure

- Closures with an end date other than the last day of the month with no ongoing medical (12/31/2299). Examples include, but not limited to, incarcerations (susmends/suspends), Child Welfare Programs, etc.

Newborn

- Add a segment of eligibility to MMIS due to death of infant or adding a segment of eligibility prior to Child Welfare medical.

Perc Code Change

- Corrections to change the PERC code ONLY.

Prime Merge

- Anytime the same client has two or more designated primes.
Note: If there's an open AFS case and it's not the preferred prime, the case must be closed by the caseworker before CMU can process the prime merge. CMU will close a HIX, FST or MOD case if there is active medical on both primes and when it's not the preferred prime.

Client Maintenance Unit (CMU) Requests

Quick Reference Guide for Field Staff

Retroactive Medical

- Changes to eligibility such as, but not limited to, backdating, WLGR corrections, limited retro and changing eligibility.

SNAP Delete

- Delete SNAP cases in DHR that are closed, denied or expired so a client can be opened on another SNAP case.

Tax Credit Closure

- Change/adjust End Date(s) in MMIS of ONE cases due to client tax credit.

Examples:

1. If in October medical is set to close end of November, a request can be submitted in October to adjust the end date for the end of October.
2. The agency sent the client a close notice, but eligibility erroneously continued beyond the designated closure date.
3. The agency approved eligibility for months in which the client should not have received benefits AND the error is not realized until after notices have been sent.

Name of approving lead worker or manager is required for 2 and 3 above.

Other

- Add MPR coding to MMIS
- Add segments of time for Child Welfare when case descriptors and PERC codes cannot be ascertained from MMIS
- Overrides
- Overlaps
- Anything else that does not fit with the above descriptions

Client Maintenance Unit (CMU) Requests

Quick Reference Guide for Field Staff

Best Practices

Urgent requests

Check the 'Urgent Processing' 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.**

If urgent processing is needed but your request does not meet the urgent criteria above, check the 'Urgent Processing' box, select 'Other' and provide a brief description explaining why an exception is needed in Step 3 'Additional Information' section.

Due to the volume of requests CMU receives, it's important that 'Urgent Processing' only be requested when the client has a true urgent need.

Trouble shooting

If you have technical problems with the form, check with coworkers to see if they are having the same issue. If they are not, you probably just need to clear the cache on your computer, restart your computer or switch browsers. If the problem still exists, contact CMU.

You can leave the CMU web form open during your work day (it does not time out), but it's best to logout at the end of your work day. Doing so ensures that any updates to the form are available to you the next time you use it.

Using correct email addresses

Be sure to enter your email address correctly on the web form in the 'Worker Contact Information' section. This will help ensure you receive the confirmation email when your request has been completed. The contact information you enter can be viewed in Step 1 at the top of the web form. If corrections are needed, click on the EDIT button to make the corrections.

The screenshot shows the 'Client Maintenance Unit Request' web form. It is divided into two main steps:

- Step 1. Enter Worker Contact Information**: This section contains a table with the following data:

First Name	Last Name	Branch or Office	Email Address	Worker Load Code	Phone Number
State	Worker	5503	state.worker@state.or.us	SW	503-555-5555

An 'EDIT' button is located to the right of the table.
- Step 2. Enter Household Information**: This section includes an 'ADD CLIENT' button and a text input field for 'Client Name'. Below the input field, a red warning message reads: 'Action Needed - No clients or requests currently added'.

Client Maintenance Unit (CMU) Requests

Quick Reference Guide for Field Staff

Duplicate submissions

The web form checks every new submission to see if the same request was submitted within a recent date range. If exact values match, a Potential Duplicate Submission warning message appears. The warning message includes the CMU ID # and the date the potential duplicate request was submitted.

If you get the warning message, check your narration system(s) to see if the same request has already been submitted and check MMIS to see if coverage has already been updated.

After checking narration and MMIS, if you are unable to confirm that your submission is a duplicate, call CMU to see if you should still submit the form. If you decide you need to continue submitting the form, click the CONTINUE button. If you do not want to continue, select EXIT FORM or NEW SUBMISSION.

If the request was submitted but has not yet been processed and there is an **urgent need, do not submit a second request. Instead, call CMU for urgent processing.**

Potential Duplicate Submission

Warning: Potential Duplicate – Based on what you've entered so far, someone has already submitted the same information on 08/20/2017, CMU ID: 119176. Please check your narration system(s) to see if the same request has already been submitted and check MMIS to see if coverage has already been updated.

After checking narration and MMIS, if you are not able to confirm that your submission is a duplicate, call CMU at 503-378-4369 to see if you should still submit this form. If you decide you want to continue, click the CONTINUE button. If you do not want to continue, select EXIT or NEW SUBMISSION.

EXIT FORM NEW SUBMISSION CONTINUE

Contacts

If you have questions about a specific request, contact CMU at 503-378-4369. For operational needs with the web form, contact Barbara Key at Barbara.key@state.or.us.