Client Maintenance Unit (CMU)

Online Web Form

Replaces the MSC 0148 and other processes administered by CMU

April 2018

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 and manage workload.
- 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 another confirmation 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. Click on the button at bottom of the page to begin your request.

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:

- **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

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.

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

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

Worker info appears here

Step 1. Enter Worker Contact Information

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 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

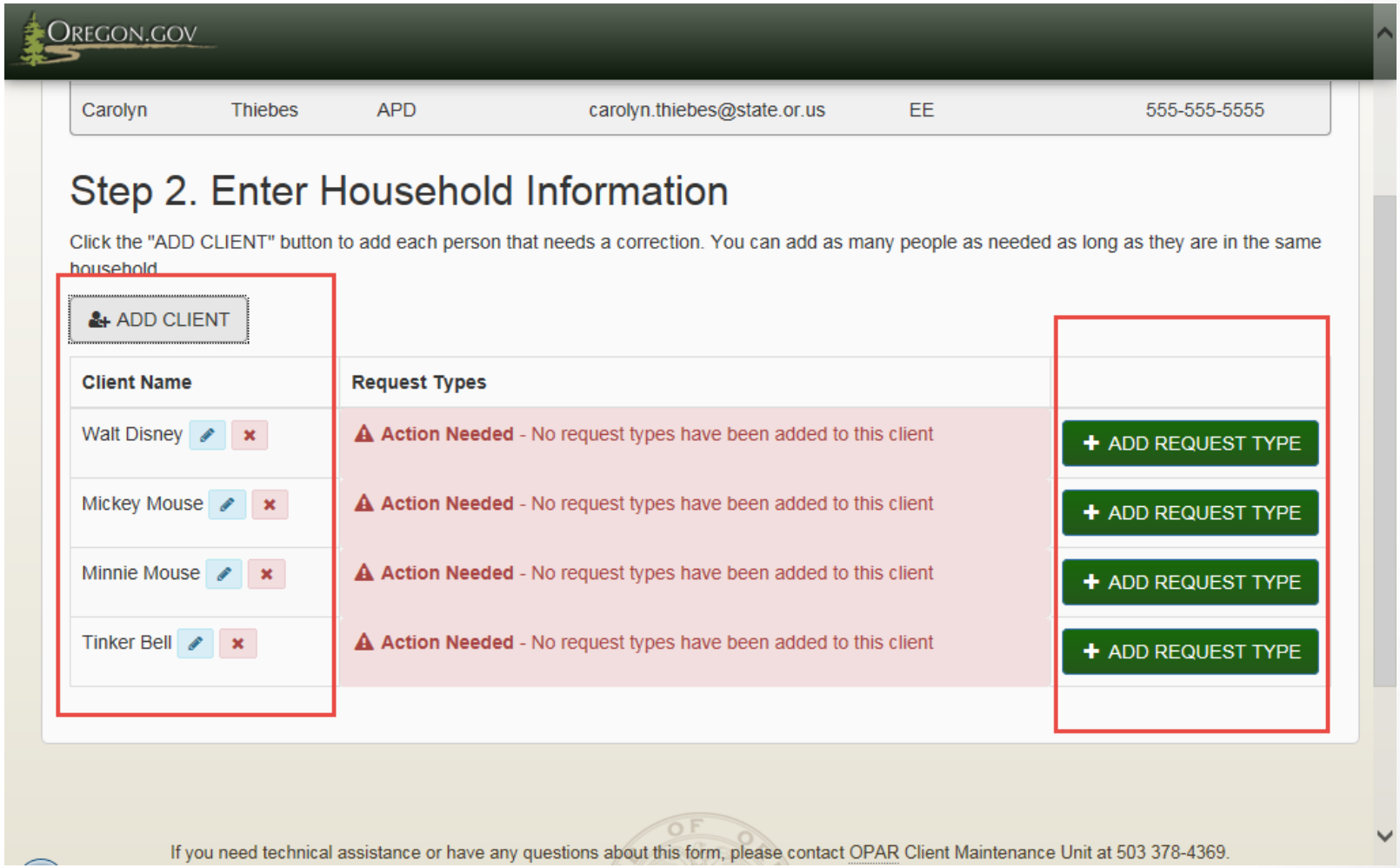
Click on the blue pencil to edit the client information or the red "x" to delete the client

Client Name	Request Types	
Walt Disney	**Action Needed** - No request types have been added to this client	ADD REQUEST TYPE

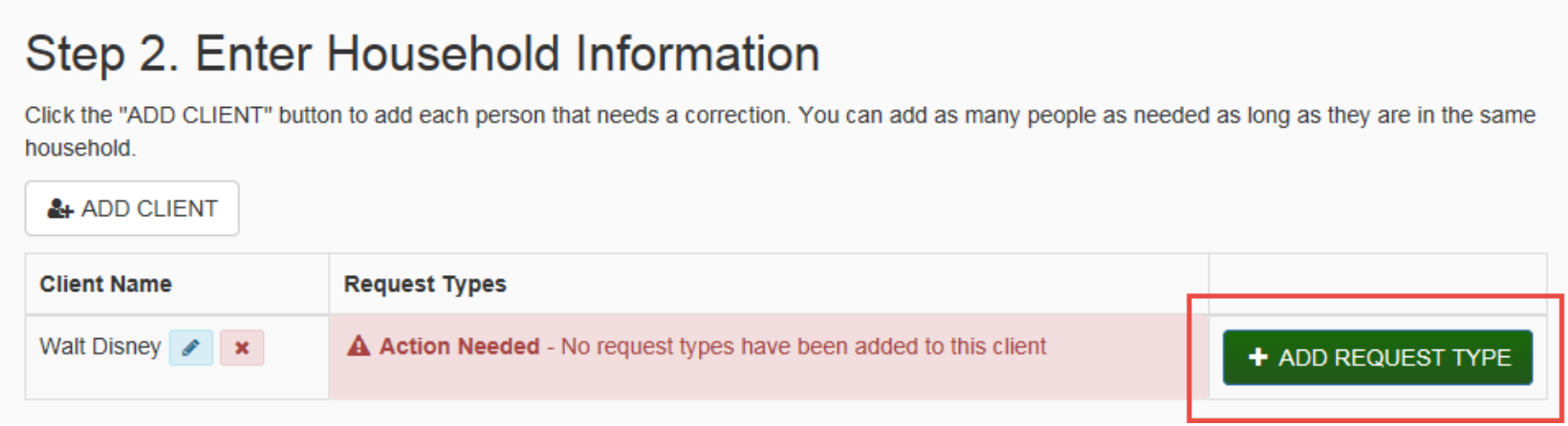
After the client is added, you can edit or remove them if needed.

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.

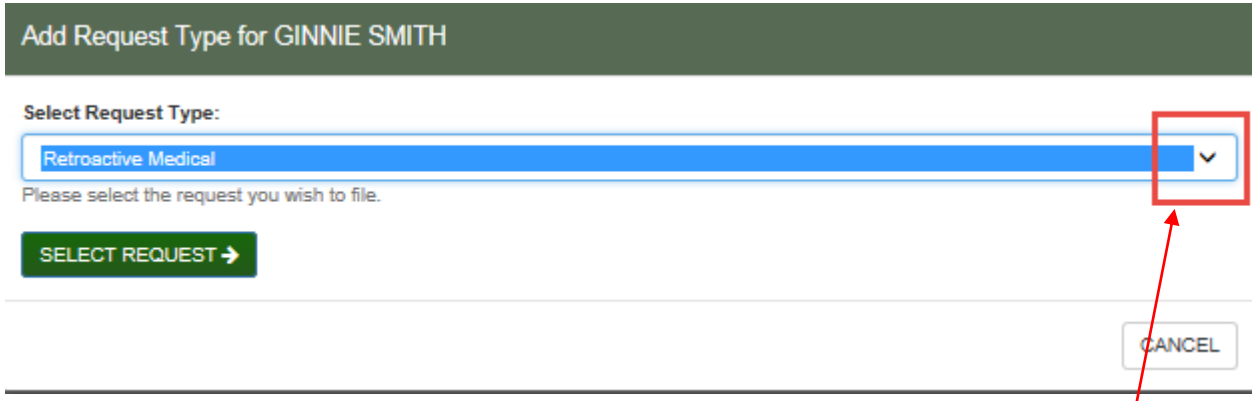


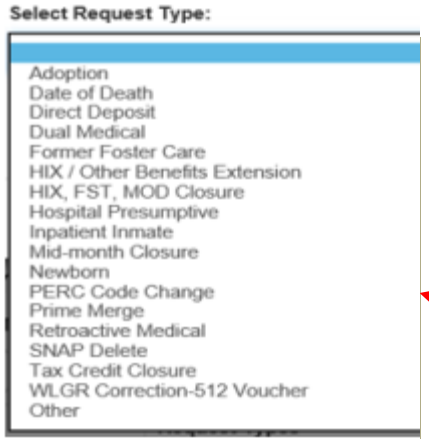
Add Request Type(s) to tell CMU what action is needed



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





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. The CMU Quick Reference Guide will help you determine and select the correct 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

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

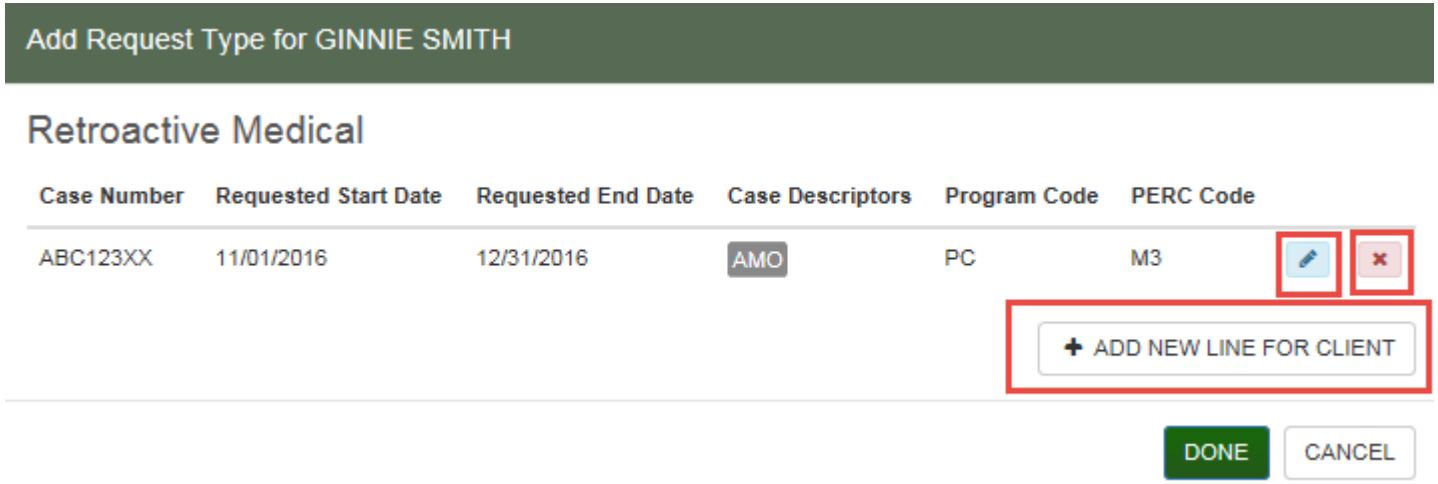
CANCEL

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

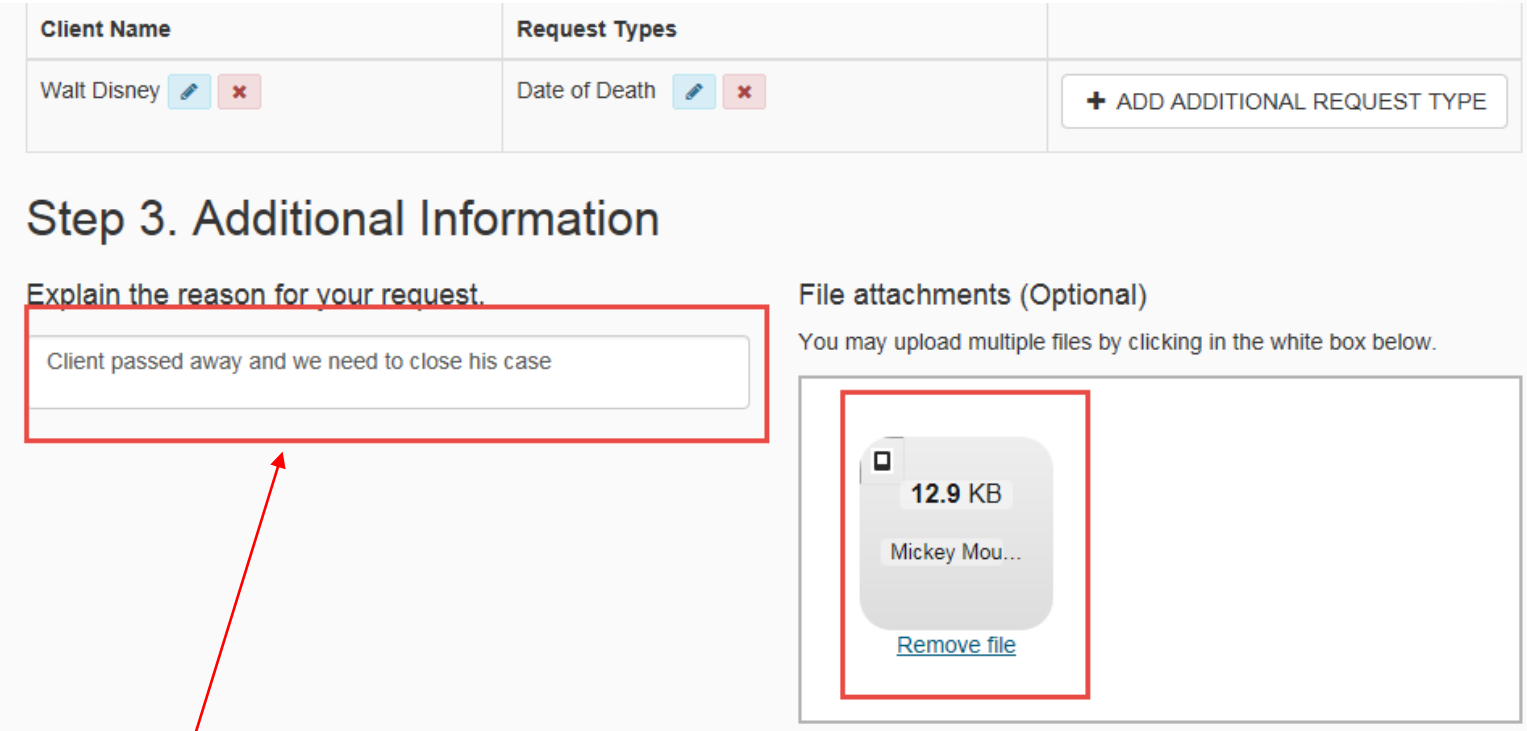
Need to edit info or add line segments?

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 of eligibility for the same client, click the “ADD NEW LINE FOR CLIENT” button. When finished adding lines, click “DONE”.



Step 3 – Comments and file attachments



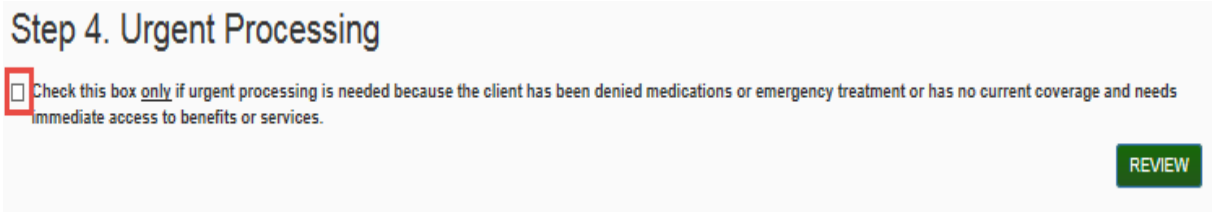
A space is provided to add any additional information you may need to provide. There is a limit of 250 characters.

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.

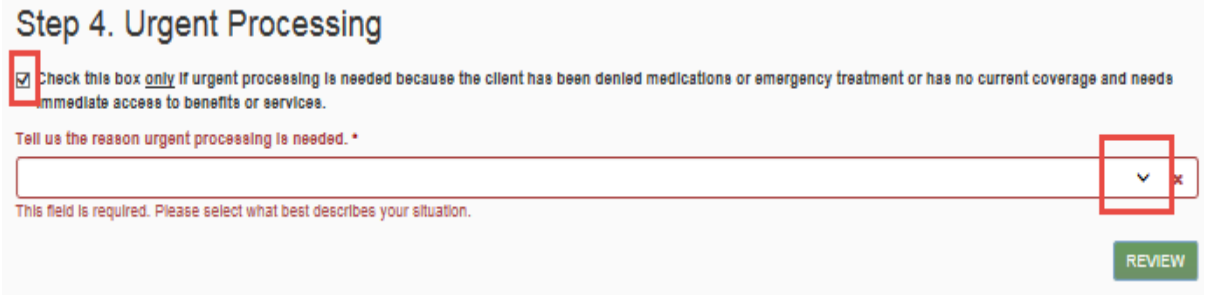
Step 4 - Urgent Requests

There are times when you may need urgent processing such as when a client has been denied medication 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.

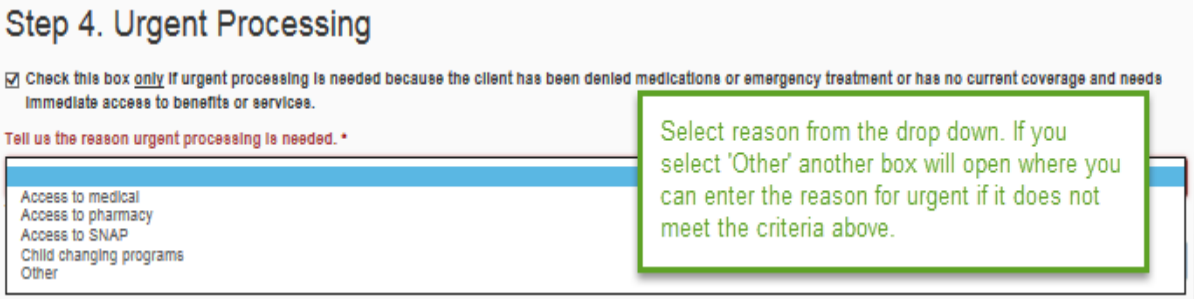
1. Check the Urgent box



2. Open the drop down



3. Select the reason



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 coverag 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	KILIIOKI	■■■■■■■■■■ ☐ 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

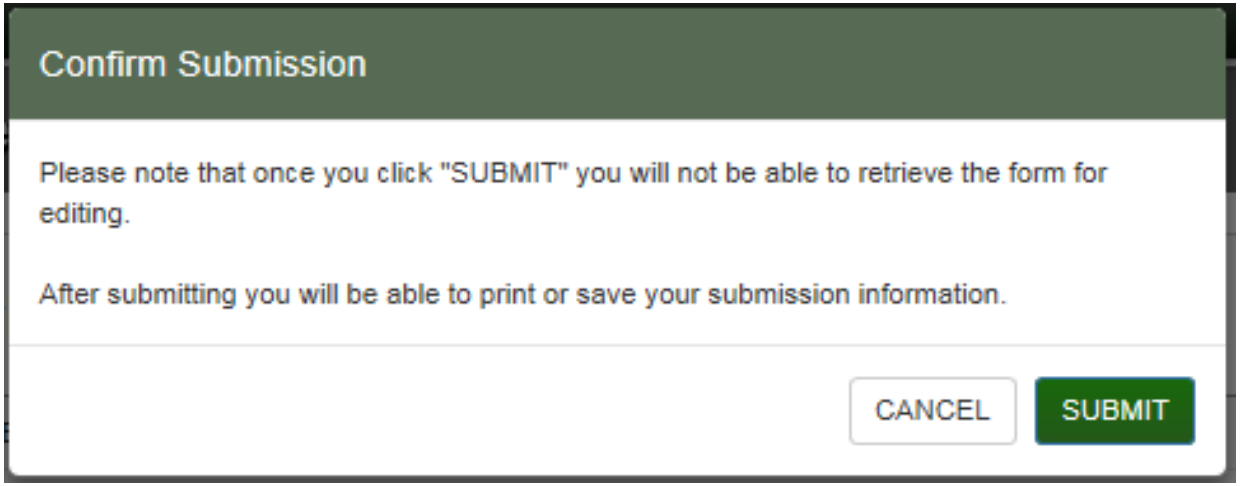
Urgent Processing

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

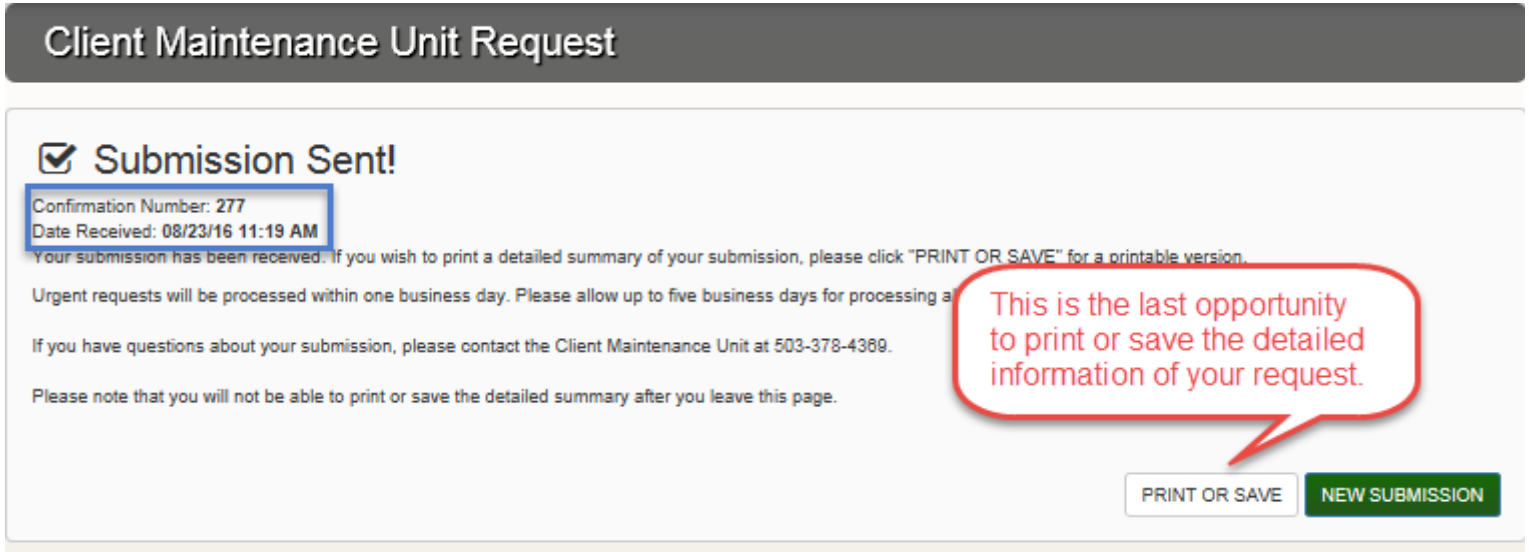
Be sure everything is correct before you click SUBMIT



After you click SUBMIT, you will not be able to go back to make changes so be sure everything is 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.

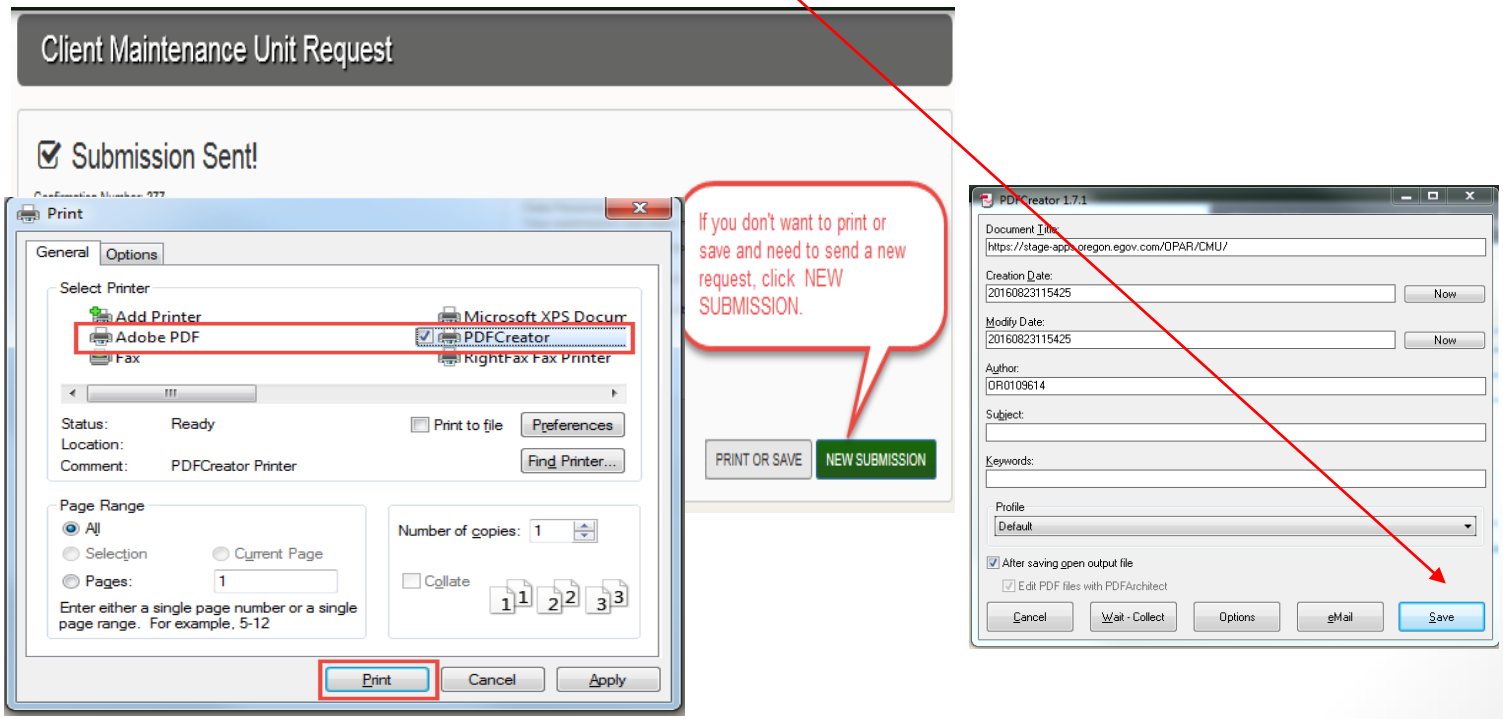


This will be your last opportunity to print or save the detailed summary of your request. Once you leave this page, you will not be able to pull up your summary.

After you hit SUBMIT, you will get an instant email confirmation letting you know your submission was successful – example below.

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).



Summary page shows details of your submission

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 clearer you are the quicker your request will be processed.

- 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, 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
Phone: 503-378-3299