

Client Maintenance Unit (CMU) Requests

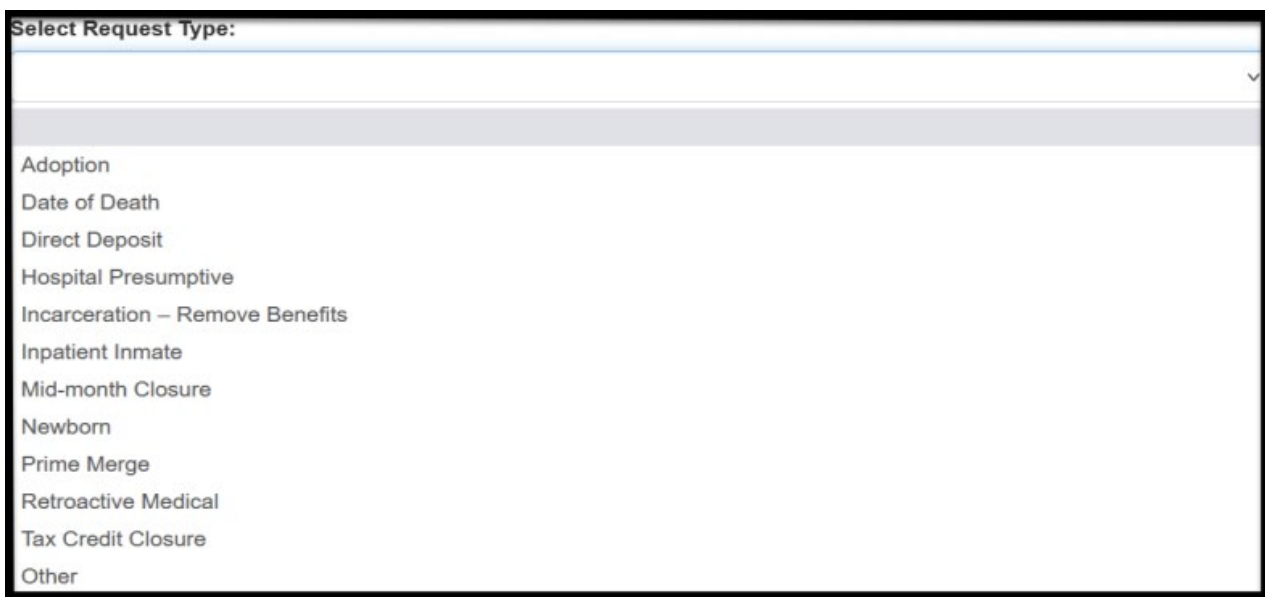
Quick Reference Guide for Field Staff

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.



The screenshot shows a dropdown menu titled "Select Request Type:". The menu is open, displaying a list of request types. The list includes: Adoption, Date of Death, Direct Deposit, Hospital Presumptive, Incarceration – Remove Benefits, Inpatient Inmate, Mid-month Closure, Newborn, Prime Merge, Retroactive Medical, Tax Credit Closure, and 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

Date of Death

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

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
- Research payment issues

Client Maintenance Unit (CMU) Requests

Quick Reference Guide for Field Staff

Hard-Closure

- Use “**Retroactive Medical**” Request Type for hard-closure requests. See “*Working with CMU to Hard-Close Medical Benefits*” guidance on page 4 below for additional instructions and examples.

Hospital Presumptive Eligibility (HPE)

- Changes needed in MMIS that involve HPE cases

Incarceration – Remove Benefits

- Remove medical for ineligible period(s) due to client incarceration

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

Prime Merge

- Anytime the same client has two or more designated primes
 - If open medical exists on more than one prime, please close medical on one of the primes prior to requesting the merge.
 - When case cleanup needs to occur due to duplicate ONE IDs (i.e. removing duplicate individuals and ensuring the changes have been fully authorized in ONE), please complete the cleanup prior to requesting the merge. Please refer to the [“ONE Duplicate ID Clean-Up – Quick Reference Guide”](#) for instructions.

Retroactive Medical

- Changes to eligibility such as, but not limited to, backdating, WLGR corrections, limited retro and changing eligibility
- Extend previously ended eligibility for Due Process, RFI, Hearings, etc.

Client Maintenance Unit (CMU) Requests Quick Reference Guide for Field Staff

- Hard-close (only when instructed by Help Desk staff to future close) – see page 4 below for more details

Note: For retroactive closure requests, see Tax Credit Closure below.

Tax Credit Closure

- Retroactive adjustments to MMIS End Date(s) for ONE cases due to situations outside scenarios 1 and 2 in [transmittal SS-AR-18-002](#)
 1. **Name of approving lead worker or manager is required for scenario 3 in transmittal SS-AR-18-002**
 2. **Name of the approving Medical Eligibility Policy Analyst is required for any other policy-approved scenario not specifically outlined in transmittal SS-AR-18-002**

Other

- Add MPR coding to MMIS (Non-HPE)
- 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 the above descriptions
- Open/ongoing medical on an alias prime

Client Maintenance Unit (CMU) Requests Quick Reference Guide for Field Staff

Working with CMU to Hard-Close Medical Benefits

When opening and closing a medical case in ONE, MMIS should always be checked to confirm the benefit start or closure date was 'pushed' to MMIS, the system of record. When a CA Ticket is submitted because a system issue is preventing a closure date from appropriately being sent to MMIS, Help Desk staff may provide guidance to work with the [CMU](#) to hard-close the benefits in MMIS. If this guidance is provided, it is important to include the correct closure date in the CMU request:

- When the benefit closure date in ONE has not already passed, provide CMU with that ONE closure date. The termination notice generated from ONE is still valid because we were able to close benefits in time.
Example: ONE shows the medical is closing 03/31/22, but the closure did not push to MMIS. The Help Desk instructs working with CMU to hard-close the benefits, and you complete the request on 03/25/22. Because the ONE closure date has not passed, provide CMU a closure date of 03/31/22.
- If the closure date in ONE has already passed, we should not provide CMU with the ONE closure date, as this would be a retroactive closure. Medical is only permitted to be retroactively closed in very specific situations (see [Retroactive Closures for Medical](#) QRG). The closure date to provide CMU must be a future close date and must follow timely notice requirements.
Example: ONE shows the medical closed 02/28/22, but the closure never pushed to MMIS. The Help Desk responds with direction on 03/10/22 to work with CMU to hard-close the benefits. The ONE closure date has already passed, but it's not a valid closure because their benefits remained open past that date. The closure date to provide CMU should be 03/31/22, so appropriate timely notice is provided. An updated [manual closure notice](#) should also be sent, with the corrected closure date.

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.

Troubleshooting

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 work email address and supervisor email address correctly on the web form in the 'Worker Contact Information' section. The work email address will help ensure you receive the confirmation email when your request has been completed. The supervisor email address will only be used on invalid, erroneous or incomplete requests. Managers are to review errors with staff, as necessary, and monitor trends for any training opportunities identified. 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.

First Name	Last Name	Branch or Office	Email Address	Your Supervisor's Email Address	Phone Number
State	Worker	5503	state.work@dhsoha.state.or.us	supervisor.lead@dhsoha.state.or.us	503-555-5555

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 06/20/2017, 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.

Contacts

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