

Oregon DHS

Transferring Cases in ACCESS

Mainframe Integration

Transferring CMS cases via Oregon ACCESS Integration

This is a technical guide and not intended to serve as policy. Follow your branch procedures regarding staff responsibility for case transfers. This pertains to medical cases only, SNAP cases must be transferred on the FSMIS system.

1. Open the case to be transferred in Oregon ACCESS.
2. Navigate to the **Benefits** section.

The screenshot shows the Oregon ACCESS software interface. The title bar reads "Oregon Access [Office : Hermiston MSO (3013) Profile Type :- Branch]". The menu bar includes File, Edit, Select, Status, Transfer, View, Mainframe, Windows, and Help. The toolbar contains various icons for file operations and navigation. The main window displays the "Case for JENNY ABELING / Case Nbr: NU44393 (Case Branch : Hermiston MSO)". Below the title bar, there are tabs for Person, Address, Vet/Nat Amer, Contacts, Prev Asst., and Education. The "Person" tab is selected, showing a "Person List" table with one entry: JENNY ABELING, Primary Applicant, Verified: No. Below the table is the "Person Detail" section, which includes fields for SSN, DOB, Prime Nbr, Citizenship, Sex, Disabled, Blind, Live in, Death Date, Stay in Oregon, Marital, Lang Spoken, Spouse is or was a vet, Race, Lang Read, Unpaid medical bills, Ethnicity, Alt Format, Initial Inq MMA?, and a list of phone numbers. A red arrow points from a text box to the "Benefits" tab.

From an open case, navigate to the benefits

3. Click on the **Medical Assistance** tab.

The screenshot shows the 'Oregon Access' application window. The title bar indicates 'Office : Hermiston MSO (3013) Profile Type :- Branch'. The menu bar includes File, Edit, Select, Status, Transfer, View, Mainframe, Windows, and Help. The toolbar contains various icons for file operations and navigation. The main window is titled 'Case for JENNY ABELING / Case Nbr: NU44393 (Case Branch : Hermiston MSO)'. It features five tabs: Case Overview, Medical Assistance, Foodstamps, Service, and General Assistance. The 'Medical Assistance' tab is selected. On the left, the 'Case' section contains fields for Initial Appl Date (11/01/2012), Signed Date (11/01/2012), Date of Request (11/01/2012), Case # (NU44393), Medical Prog (D4), FS Case #, FS Filing Date (00/00/0000), Total Income (718.00), and Branch Code (3013). On the right, the 'Workers' section has a table with columns 'Role' and 'Name'. The first row shows 'Eligibility' and 'MF TRAINING ID, MF TRAINING ID'. A red arrow points from a cloud-shaped callout box to the 'Medical Assistance' tab. The callout box contains the text 'Click the 'Medical Assistance' tab'.

4. In the **IncM** field drop-down menu, select **TRAN**.

5. In the **Eff Date** field, enter the current date.

This screenshot shows the same 'Oregon Access' application window, but with the 'Medical Assistance' tab selected. The 'Medical Benefit Detail' section is highlighted with a red oval. It contains the following fields: 'IncM' (a drop-down menu showing 'TRAN'), 'Eff Date' (05/17/2013), 'Elig Rvw Date' (11/2013), 'NFM' (checkbox), 'Med Rvw Date' (11/2013), 'Program' (D4), 'Med Prg #' (OSP 01), 'Spend Down Start Date' (00/00/0000), and 'Spend Down Minus Expenses' (NA). A red arrow points from a red callout box to the 'Eff Date' field. The callout box contains the text 'Use current date'. Below the 'Medical Benefit Detail' section is the 'Medical Benefit Applicant(s)' section, which includes fields for Person (ABELING, JENNY), Case Status (Approved), Med Elig Date (11/01/2012), Case Descriptors (NSS, NCP), and Admin Rule And.

6. Click **Mainframe** from the File menu.
7. Select **CMS** from the drop-down menu (it should be the only available choice).

The screenshot shows the Oregon Access software interface. The 'File' menu is open, and 'Mainframe' is selected. A dropdown menu is visible with 'CMS' as the only option. A callout bubble points to the 'Mainframe' menu item with the text: 'Click 'Mainframe' and then select 'CMS' from the dropdown menu'. The interface also shows fields for Case # (NU44393), Medical Assistance, and various dates and codes.

8. In the **Br** field, delete the current branch and enter the new branch number.
9. In the **Load** field, enter the load code of the new worker (if known); otherwise, enter **CT** for (Case Transfer).

10. When you are finished, click the **Save** icon



The screenshot shows the Oregon Access software interface with the UCMS/CMUP/PCMS form. The 'View' is set to 'ACCESS'. The 'Br' field is highlighted with a red circle and contains the value '3417'. The 'Load' field is also highlighted with a red circle and contains the value 'CT'. A callout bubble points to the 'Br' field with the text: 'Enter the new branch # and CT load code (unless you know the load code of the new worker)'. Another callout bubble points to the 'Save' icon (a floppy disk) with the text: 'Save your changes.'. The interface also shows fields for Case # (NU44393), Medical Assistance, and various dates and codes.

11. If you receive the following message, you have successfully transferred the CMS case. Don't forget to narrate before transferring the ACCESS case!

SCMS for JENNY ABELING / Case Nbr: NU44393

Case Status: #HPN - Prem: #Med Std:

HIP Need: HIP Chk:

Case Desc	Pgm Status	Adult Recip	CH

Std Need	Spl Need	Othr Need	Tot Need	Tot Adj Income	Ovr Rec	Ben Amount	Cr Deb	Ben Chk Amt

Earn Rpt	Cntbl Earn	Tot Ded	Ac Ea

INFORMATION

B6 EBT CASE INFORMATION SUCCESSFULLY UPDATED

OK

This is what you want to see!