

**Quick Reference Guide**  
**2009 CGMA Case Management Program**  
**(CGMA-CMP)**

The 2009 CMP application was developed to replace the original CMP application activated in 1999. The 2009 CMP application takes advantage of the latest technologies and increases security of information, while eliminating the need for downloading specialized controls to individual computer workstations. Printer controls now exist within the application and are controlled by the individual users. For information security purposes, each client will have a unique account number. Social security numbers will no longer be displayed, but are still necessary to create a new account, and the last four digits of the social security number will be used within the program for client verification.

The basic function of the application remains much the same, although the “look and feel” is quite different. There is the **Client & Case** information section, with two subsections for **Applicant** information and **Student** information, the **Check** information section, and finally the **Repayment** information section.

**Adding a New Case:**

1. Click “Add New Case.” Enter the client’s SSN and click “GO.”
2. The client’s information will display if they are already in the system; take a moment to verify that the address and other information is current.
  - a. If the client is new, you will receive a prompt “client record was not found in system.” Enter the Last Name, First Name and Middle Initial, and complete all applicable fields.
  - b. Select the client’s OPFAC from the drop down menu. If the OPFAC is not listed, enter the client’s correct OPFAC (active duty, civilians and reservists only). If you enter a non-existent OPFAC, you must begin again (this should be corrected in the future).
  - c. For members other than active duty, civilians, and reservists, enter five zeros (00000). Once this screen is complete click on the “Continue” button.
3. You should be brought to a screen for case data entry. Select the disbursement type, choose the appropriate initials under “approved by,” and click “save.”
4. You should now see the entire case vertically displayed.
  - a. If the scenario has an Applicant other than the client, click “Add Applicant,” complete the applicable fields and then click “continue.”
  - b. If issuing a SEG check, click “Add Student Information,” complete the applicable fields, and click “continue.” If the client is the student, you must still complete this step and check “client is the student.” (This applies to SEG’s only).

5. Next in the flow is the Check. Click “Add New Check,” complete the check information for the first check and click save. If you will be issuing more than one check, repeat the process for each additional check.
6. Once your check information has been entered you must complete the Repayment information. Click the “Modify” button under the Repayment section and complete the applicable fields and then click “save.”
7. Once the case information is complete you are ready to print the check(s).
  - a. Click the printer icon in the Checks section. You will be prompted for your check PIN. Type in your PIN and click “enter.”
  - b. The check information will display. Click the display’s printer button (in the upper left corner). This will bring up the print box where you can see or choose the printer you wish to use. Print the check.
  - c. Examine the check. If it printed correctly, click “confirm check printed” and the case will be closed, unless there are more checks to print. If the check does not print in the spaces on the check correctly you can cancel and go to Admin / Printer Configuration and adjust the information up/down, left/right for any of the five sections of the check.
8. Once all checks are printed, you will be brought back to the main screen.
  - a. Click each check number and a report will be brought to screen (similar to the yellow copy of the 52).

### **Voiding a Check:**

1. To void a check, click “case lookup” on the left hand menu. On the “search by” drop down screen, select “check #” and type in the check number you wish to void in “search for” box. Be sure to check the box “Lookup closed cases” and click “search.”
2. The case number will be brought up for the client. Verify that this is the correct person who received assistance, click the case number and you will be brought to the case detail screen for the client.
3. Go to the “checks” section on the case detail screen. You will see the check number, date, payee, amount and possible action. Under possible action, click “void.” The check data entry screen will appear. Click “Void” again. You will be brought back to the case detail screen and the check will be voided.
4. If you plan on reissuing the check, click “reissue” under possible action. Check will be brought to screen. Make any necessary changes to the check and click “reissue.” You will be brought back to the case detail screen. You must complete the Repayment information. Click the “Modify” button under the Repayment section and complete the applicable fields and then click “save.” Finally, follow the above steps for printing the reissued check.