

Provider Time Capture Winter 2024 Webinar Series

Unlinking and Relinking

Feb. 12, 2025



Agenda

- New linking basics
- Unlinking deep dive
- Unlinking “Fun Facts”
- Relinking deep dive
- Q&A



How are new consumer/provider pairs created in OR PTC DCI?

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- After receiving a 546, the voucher specialist creates a voucher.
 - If either the consumer or provider does not have a profile in OR PTC DCI, the pairing will show up in an error queue that is pulled by the PTC Support Team each morning.
 - The PTC Support Team creates any new profiles by pulling information from Mainframe and Oregon ACCESS (OA).
 - If **both** the consumer and provider already have a profile in OR PTC DCI, their funding and service accounts will be created automatically.
 - PTC Support sends a welcome email containing login information to any new users who have a valid email address in OA. The welcome email is only sent when a new profile is created.



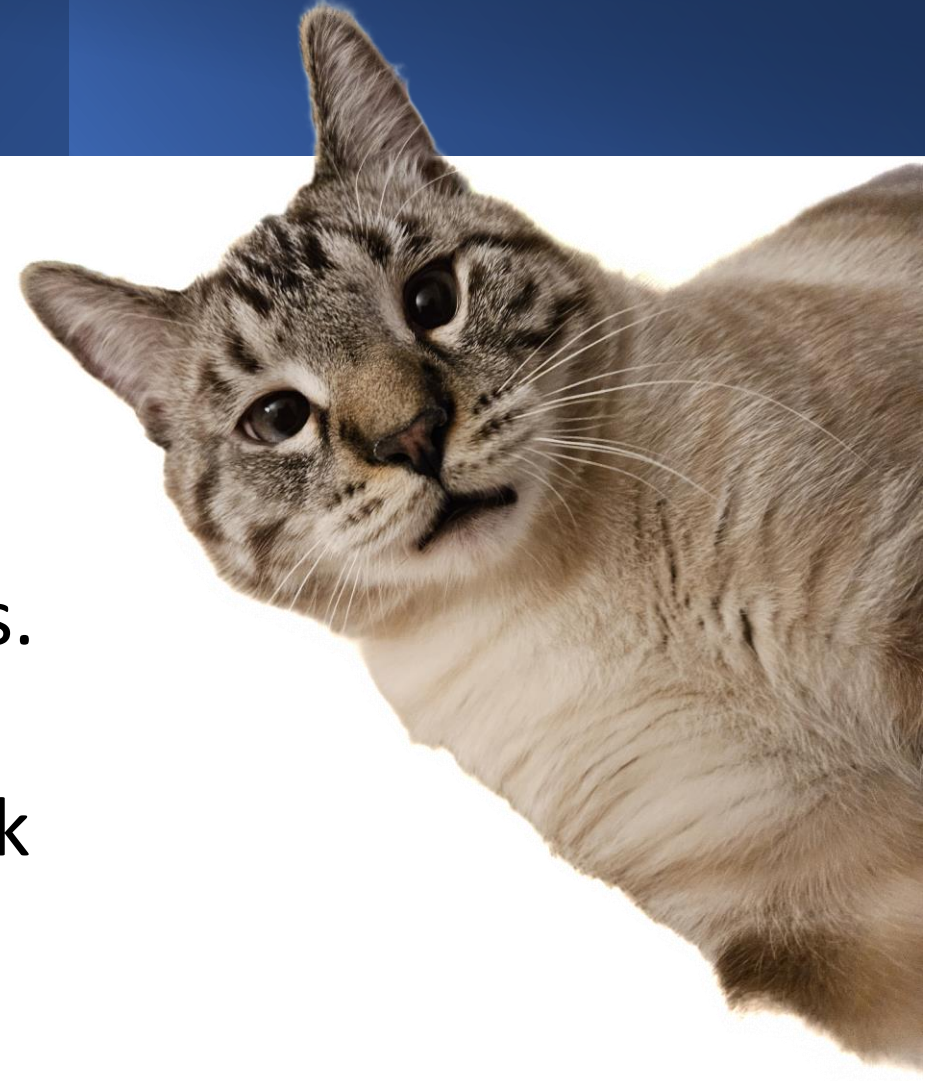
Reasons to Unlink

- Local office should request an unlink if a provider stops working for a consumer **for any reason**, including but not limited to:
 - Consumer passed away
 - Consumer moved to facility
 - Consumer stopped receiving services
 - Provider quit or moved away
- PTC Support may receive requests to unlink from Central Office if:
 - Provider number expired (We are NOT notified if the number is reactivated!)
 - There is an APS or fraud case
- PTC Support may unlink if it is discovered the provider is no longer working for the consumer



Local office steps to Unlink

- When a provider stops working for a consumer for any reason, they must be unlinked.
- End the ONGO and void any future vouchers.
- Reach out to the PTC Support Team at PTC.Support@odhsoha.Oregon.gov to unlink the pair.



Unlinking and Provider Terminated/Resigned

- If the provider stopped working permanently due to termination or resignation in the middle of a pay period, edit the voucher's end date via the UATH screen to match the last day of eligibility.
- If the final voucher is not edited, then any entries created for that pay period will not be processed in STIM and will end up in the STIQ screen as a "Provider ineligible on date of service" error. Edit the voucher to prevent or clear the STIQ error. See [Mainframe STIQ Screen Error Chart](#) for more information.
- The provider may be eligible for an emergency batch if they have stopped working permanently AND have not been paid for all their entries yet. We have more information on emergency batches in a few slides.

Unlinking and Consumer Passed Away

- If the consumer passes away, you must edit the final voucher's end date via the UATH screen to match the DOD.
- If the final voucher is not edited, then any entries created for that pay period will not be processed in STIM and will end up in the STIQ screen as a "Recipient ineligible on date of service" error. Edit the voucher to prevent or clear the STIQ error. See [Mainframe STIQ Screen Error Chart](#) for more information.
- If UATH shows the error "Service hours exceed allowed hours" when attempting to update the end date, then you will need to request an end of life care exception from mainframe.businessanalysts@odhsoha.oregon.gov so you can update the voucher.

Two Types of Unlinking



End date: PTC Support adds an end date to the service accounts matching the last day worked. Providers will be unable to claim time/mileage for after this date.

Inactive: PTC Support inactivates the funding and service accounts that link the consumer and provider. Typically happens one year after end date or one year of no time claimed.



Unlinking – End Date added to service accounts

An end date on the service accounts means the provider cannot claim time or mileage after this date.

If there is an end date on the service accounts, the provider will see the error “Employee Service Account End Date Punch Entry” when trying to claim time/mileage after that date.

End Date Error

Alert

×

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

Business Rule Name

Employee service account end date punch entry

Return

Unlinking - Inactivating the Accounts

- After about a year has passed from the end date, or by request, the PTC Support Team will inactivate the funding and service accounts.
- **Profiles are not usually inactivated** unless there is a specific request from policy or other reason for the profile to be inactivated (consumer or provider passed away, in a facility, using an agency only; or provider fraud/APS case).
- If funding and service accounts are inactivated, the provider will be unable to find the consumer when attempting to claim time or mileage.



Provider Terminated or Resigned?

Emergency payroll batches are rare. However, an emergency payroll batch may be needed if:

- The provider was terminated and will no longer be working as a provider, or
- The provider resigned and will no longer be working as a provider;

AND

- The provider has recently created time/mileage entries that have not been paid and will not be paid within the next business day.

Emergency Payroll Batch

- If an emergency payroll batch is needed, a staff member MUST email PTC Support immediately.
- The email must include “URGENT: Emergency Payroll Batch” in the subject line and be marked as important/urgent.
- The purpose of the emergency payroll batch is to ensure the provider receives their final paycheck in a timely manner, in compliance with Bureau of Labor & Industries (BOLI) laws.

Relinking

Is the provider
unable to claim
time/mileage?
Maybe they need to
be relinked!

If a consumer and provider have been previously unlinked (either an end-date added or inactivated accounts), they must be relinked if the provider starts working for the consumer again.

Staff must create vouchers first, and then check to see if the consumer and provider are linked.

If a relink is needed, then the staff member must send a relink request to the PTC Support Team.



Relinking “Fun Facts”

- Many relinks are done automatically when new vouchers are created.
- If the accounts are inactive and vouchers are created, the vouchers should come to an error queue that only the PTC Support Team can see. The team works this error queue daily.
- If the accounts have an end date and vouchers are created, the end dates are **usually** taken off automatically.
- These automated processes do not always happen! Staff should **always** check to make sure the consumer and provider have been relinked!



Checking the Link Status

Every time new vouchers are created, a staff member should check OR PTC DCI to see if the consumer and provider are:

- Currently linked,
- Never linked,
- Unlinked via an end date, or
- Unlinked via inactivated accounts.





Currently Linked or Never Linked

- If the consumer and provider are currently linked, they will have active accounts **and no end date on time/mileage service accounts**. Vouchers can be created, and the authorizations will automatically come to OR PTC DCI.
- If the consumer and provider have never been linked, there will be **no active or inactive service accounts** linking the consumer and provider. After vouchers are created, the authorizations will be sent to OR PTC DCI within 2 business days.
- **These scenarios are NOT examples of relinks! No relink request is needed.**

Currently Linked - Active Account with No End Date

Entries	Accounts	Certifications	EVV Locations	Diagnosis	Notes	Attachments	Events	Custom Fields	History
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-10	Peter Brady	Hourly	Active		

- Go to consumer's profile page
- Go to accounts
- Find an account with the provider's name
- Select anywhere on the account except the provider's name hyperlink
- This example shows an active service account with no end date
- The consumer and provider are linked
- **Vouchers should have been sent to OR PTC DCI automatically**

Account Details	
Account Type:	Employee Service
Client:	Carol Brady
Relationship Type:	None
Service Code:	Hourly ADL/IADL-10
Funding Source:	APD
Funding Type:	Units
Cost Center:	The Dalles APD-EU
Employee:	Peter Brady
Employee Number:	222111
Unit:	Hourly
Daily Pay Max:	0.00
Daily Rate:	0.00
Max Units Per Punch:	16.00
EVV Exempt:	No
Pay Rates:	+
Allows OverLapping	No
Pay Rates:	

No End Date is listed on this active account. Consumer and provider are linked.

Never Linked - No Accounts

Entries Accounts Certifications EVV Locations Notes Attachments Events Custom Fields History

Select Account Type ▼

Select Unit ▼

Select Profile Type ▼

Active ▼

Select Status

Active

Inactive

Type Client Name

Type Service Code

Reset Search

- Go to consumer's profile page
- Go to accounts
- Look in the active accounts for the provider's name
- If you don't find any, change the status from Active to Inactive
- If you still don't see the provider's name, this means the consumer and provider have never been linked
- **If either the consumer or provider does not have a profile, the profile will be created in OR PTC DCI within 2 business days and the authorizations will go through**



Importance of Relinking

- If there is an end date on the service accounts, the provider will see the error “Employee Service Account End Date Punch Entry” when attempting to claim time/mileage. **They will not be able to make any entries after the end date.**
- If the funding and service accounts were inactivated, the provider will be unable to find their consumer when attempting to claim time/mileage. **They will be not be able to make any entries.**
- Relink requests are needed when vouchers have been created, there are active service accounts, and there is an end date on the service accounts.

Any late payments caused by a delay in relinking will be eligible for late payment penalty fees. Relink requests (when needed) are the responsibility of local offices.

Relink Needed – End Date

- If a consumer and provider have an active service account, but there is an end date on the service account, **be sure to create their new vouchers in Mainframe!**
- Once vouchers are created, their end dates may be removed from the accounts automatically.
- Be sure to check the accounts in OR PTC DCI before sending a relink request.
- If a relink request is needed, send PTC Support a **relink request** with the following information:
 - Consumer name and Prime number
 - Provider name and provider number
 - First day of work

Relinks are usually completed within one business day.



Example – End Date on Accounts

Only the PTC Support Team should add or remove an end date!

Entries

Accounts

Certifications

EVV Locations

Diagnosis

Notes

Attachments

Events

Custom Fields

History

Employee Service

Employee

The Dalles APD-EU - 3311-EU

APD

Hourly ADL/IADL- 10

Joe Schmoe

Hourly

Active

Employee: Joe Schmoe

Employee Number: 222000

Unit: Hourly

Daily Pay Max: 0.00

Daily Rate: 0.00

Max Units Per Punch: 16.00

End Date: Sep 12, 2023

EVV Exempt: No

End Date: Sep 12, 2023

Allows Overlapping: No

Pay Rates:

Display Auth Widget: Yes

Created Date: Aug 26, 2021

Status: Active

- Go to consumer's profile page
- Go to accounts
- Find an account with the provider's name
- Select anywhere on the account except the provider's name hyperlink
- This example shows a service account with an end date of September 12, 2023
- The provider stopped working for the consumer on this date
- **If vouchers have already been created, email a relink request to the PTC Support Team**

Relink Needed - Inactive Accounts

- If you have created vouchers but you don't find the service accounts linking the consumer and provider in the list of accounts, change the filter from Active to Inactive.
- Once you are looking at Inactive accounts, you will look for one or more accounts that link the consumer and provider.
- If you find an Inactive account linking the consumer and provider, they need to be relinked.
- PTC Support is notified automatically when the vouchers are created in this situation. You do not need to request a relink unless there is a need for an urgent relink.



Example- Inactive Service Accounts

- Go to the consumer's profile page
- Go to accounts
- Change the status to inactive
- Look for an inactive account with the provider's name
- If you find an inactive account, email a relink request to the PTC Support Team

Only the PTC Support Team should deactivate or activate an account!

EntriesAccountsCertificationsEVV LocationsDiagnosisNotesAttachmentsEventsCustom FieldsHistory

Select Account Type▼

Type Service Code

Select Profile Type▼

Select Unit▼

Type Cost Center

Active▼

Select Status

Active

Inactive

Type Funding Source

Reset

Search

Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-2	Jane Doe	Miles	Inactive
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-2	Jane Doe	Hourly	Inactive



Develop a Process

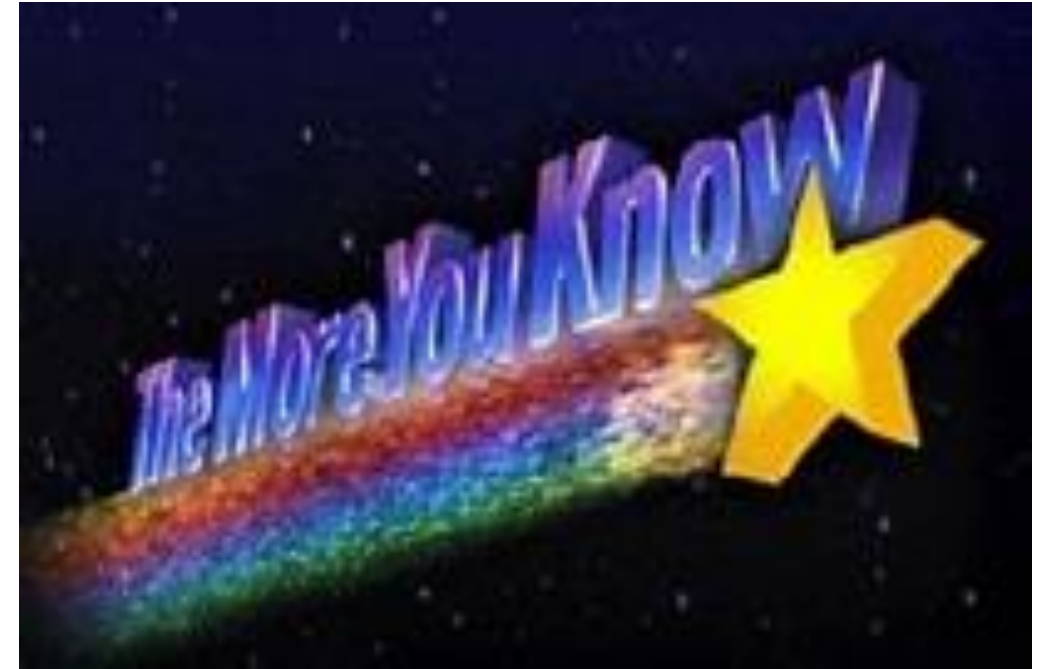
- Local offices should have a process for a staff member to check the link status of each new consumer/provider pair (i.e., new voucher).
- Which staff member(s) complete this step depends on what works best for your office. This may be the case manager, voucher specialist, support staff, or other staff member.
- Having a designated staff member or rotation ensures there is no duplicate work.

Remember that checking for a possible relink takes less than a minute, but handling complaints and late payments caused by a missed relink takes much longer!

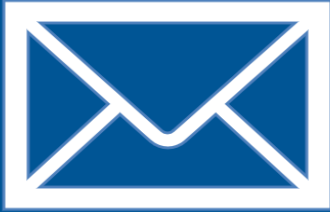


Knowledge is Power!

- Make sure all staff in your office know how to determine whether a consumer and provider are linked, unlinked, or have never been linked.
- This knowledge, plus an understanding of the steps to relink, will help prevent confusion, late payments, and complaints from providers.



Resources



PTC Project Email

- PTC.Support@odhsoha.oregon.gov
- The PTC Support Team monitors this inbox daily



PTC Project Website

- PTC.Oregon.gov
- Includes learning materials and project updates.