

# Action Request Transmittal Aging and People with Disabilities



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**Number:** APD-AR-23-029

**Issue date:** 10/18/2023

**Topic:** Other

**Due date:**

**Subject:** Provider Time Capture (PTC) - Relinking in OR PTC DCI

## **Applies to (check all that apply):**

- |                                                                           |                                                                               |
|---------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| <input type="checkbox"/> All DHS employees                                | <input type="checkbox"/> County Mental Health Directors                       |
| <input checked="" type="checkbox"/> Area Agencies on Aging: Types A and B | <input type="checkbox"/> Health Services                                      |
| <input checked="" type="checkbox"/> Aging and People with Disabilities    | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs                        | <input type="checkbox"/> ODDS Children's Intensive In Home Services           |
| <input type="checkbox"/> County DD program managers                       | <input type="checkbox"/> Stabilization and Crisis Unit (SACU)                 |
| <input type="checkbox"/> Support Service Brokerage Directors              | <input type="checkbox"/> Other ( <i>please specify</i> ):                     |
| <input type="checkbox"/> ODDS Children's Residential Services             |                                                                               |
| <input type="checkbox"/> Child Welfare Programs                           |                                                                               |

## **Reason for action:**

Requests for relinks are frequently not sent at all, delayed, duplicated, or sent for issues that are unrelated to relinking. This is leading to delayed payments, late payment penalty fees, frustration for HCWs and consumers, and wasted time and effort for local office staff and the PTC Support Team. Development of processes and role designations that work for each local office should significantly reduce these issues.

## **Action required:**

Local offices need to develop a process and designate a staff person(s) to check whether a relink is needed with the creation of every new service plan (i.e., new consumer/HCW pair). The appropriate person to check for a relink depends on the local office's processes and staffing, and this must be determined by each local office's management team.

Please follow this link to download a template for unlink and relink requests:

[Unlink/Relink Template](#)

## **What is a relink?**

A relink may be needed if a provider previously worked for a consumer but stopped working for them. If the provider stopped working for the consumer, the pair may have been unlinked in OR PTC DCI. "Unlinked" means that a stop date was added to their service accounts, or that their funding and service accounts were inactivated. If they were previously unlinked, then they must be relinked for the provider to claim time. Local offices must send relink requests to the PTC Support Team, as the PTC Support Team has no way of knowing that a relink will be needed. To relink a consumer and provider, the PTC Support Team removes the end date or re-activates the funding and service accounts.

## **Recommended process:**

The PTC Support Team recommends the following process as a way for offices to ensure relinking is completed correctly and timely:

- When a new service plan is created or a change to the service plan occurs, the case manager logs into OR PTC DCI and reviews the consumer's Accounts tab to determine if a relink is needed (see process and links below).
- If the consumer and provider need to be relinked, the case manager notes that on the 546 form and sends it to their voucher team.
- The voucher specialist receives the 546 and emails the PTC Support Team to relink the consumer and provider. The voucher specialist should not take action on the 546 form until the relink is completed.
- Once the relink has been completed, the voucher specialist processes the update requested on the 546 form in Mainframe.

Your office may choose a different process, but it is imperative that a staff member is checking OR PTC DCI to determine if a relink is needed and requesting them when needed before creating vouchers.

**Note:** Not relinking a consumer and HCW timely will result in delays in claiming time and may result in late payments. Late payments caused by delayed relinks may be eligible for late pay penalties.

Please review [Unlink and Relink Reminders for Staff \(dated June 13, 2023\)](#) with staff, along with the below reminders.

## **How to know if a relink is needed:**

When a new service plan is created, a staff member must check the consumer's service accounts to determine:

- if the consumer and HCW are linked and have a service account end date, or
- if they were previously linked and the account is in an inactive status.

Instructions for checking service accounts can be found in [Unlink and Relink Reminders for Staff \(dated June 13, 2023\)](#), [APD-IM-22-049 Relinking Consumers and Providers in OR PTC DCI](#), and [Employee Service Account End Date Punch Entry Error in OR PTC DCI](#).

**Timing of relink request:**

Relink requests must be sent to the PTC Support Team prior to voucher creation whenever possible. If vouchers were already created, please note this in the relink request so the PTC Support Team can take the additional action needed to send the authorizations to OR PTC DCI. Relinking after the vouchers are created, and not letting the PTC Support Team know that vouchers were created, will result in the vouchers being “stuck” in Mainframe. The HCW will not be able to claim time until the PTC Support Team resends the vouchers.

**Check before requesting a relink:**

Staff must always check that a relink is needed before requesting a relink. Sending unnecessary relink or unlink requests adds to the significant workload associated with relinks and unlinks, both for local offices and the PTC Support Team.

**Avoid sending duplicate requests:**

Having designated staff members check for relinks should cut back on duplicate requests. The same guidance applies to unlink requests, which are often duplicated.

**Ensure the request information is accurate:**

Staff members requesting unlinks or relinks must ensure the accuracy of the request. An inaccurate unlink request (such as incorrect prime number or incorrect provider number) may result in the wrong consumer and HCW pair being unlinked.

**Only PTC Support should relink/unlink:**

Local office staff with the supervisor role in OR PTC DCI have the ability to view both active and inactive funding and service accounts.

Staff should **NEVER** edit funding or service accounts as this may cause significant negative impacts. By “editing” a service account, we also mean changing, deleting, or adding end dates, all of which should ONLY be done by the PTC Support Team.

Staff members should continue to request unlinks, void future vouchers, reject future authorizations, and close the ONGO, whenever a HCW stops working for a consumer. As a reminder, staff members should never edit an existing authorization in PTC to be for a different provider as this can cause payment issues as well.

**Field/stakeholder review:**  Yes  No

**If yes, reviewed by:**

*If you have any questions about this action request, contact:*

Contact(s): PTC Support Team	
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Email: PTC.Support@odhsoha.Oregon.gov	