

# Information Memorandum Transmittal Aging and People with Disabilities



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**Topic:** Other

**Number:** APD-IM-22-021

**Issue date:** 3/8/2022

**Updated:** 2/27/2024

**Due date:**

**Subject:** Provider Time Capture (PTC) - Unlinking Consumers and Providers 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 checked="" 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 checked="" type="checkbox"/> Other ( <i>please specify</i> ): Comagine |
| <input type="checkbox"/> ODDS Children's Residential Services             |   |
| <input type="checkbox"/> Child Welfare Programs                           |   |

**Message:**

**\*\*\*Updated 2/27/2024\*\*\***

This transmittal outlines what must be completed when a provider stops working for a consumer for any reason.

Reasons may include:

- Consumer no longer receiving services (entered a facility, passed away, moved out of state, etc.)
- Provider no longer working for the consumer (resigned, terminated by the consumer or APD, moved out of state, etc.)

It is important to have the PTC Support Team unlink providers and consumers in OR PTC DCI whenever appropriate to avoid invalid time/mileage claims (whether accidental or purposeful) and to avoid a buildup of unused funding and service accounts.

NOTE: Local office staff should NOT unlink consumers and providers or inactivate profiles themselves. All requests must go through the PTC Support Team.



There are 3 main parts to this process:

### Part 1: Complete steps in DHR

- If the provider was terminated or has quit permanently, end the current voucher by voiding and reissuing the voucher, then entering the last day worked on the new voucher.
- Void any outstanding vouchers.
- End the ONGO.

### Part 2: Complete steps in OR PTC DCI. (Please note: Part 2 will go away with PTC Phase 2A: July 19, 2024)

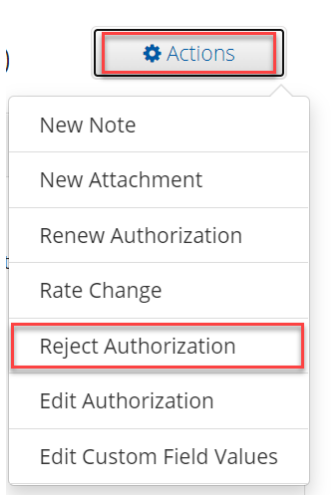
- Update the end date of the current authorization to the date the provider's last day worked (**only** if the provider was terminated or has quit permanently and this date was changed in Mainframe).
  - Navigate to the Authorization, click Actions, and click Edit Authorization. Change the end date to match the Mainframe voucher.
  - Also update the Authorization ID Reference to match the new voucher number.

Date:    

A red arrow points to the date input field containing 02/26/2022.

Note: Do not change the authorization expiration date, only the end date.

- Reject any future authorizations.
  - Navigate to each Authorization, click Actions, and click Reject Authorization.



Note: An authorization can only be rejected if no entries have been created against the authorization. If there are entries already created, you must cancel those entries, edit the authorization down to 0.01 hours, and change the authorization's end date to match the start date.

For more information about editing and rejecting authorizations, navigate to page 8 of the [Authorization Management Guide](#).

### **Part 3: Email the PTC Support team.**

The email must include the following information:

*Subject:* Unlink Consumer and Provider

*Body of email:*

- Consumer name and prime number
- Provider name and 6-digit Provider number
- Last day worked
- Reason for unlinking (i.e., stopped working, quit, DOD, moved)
- ONGO ended, future vouchers voided, and future authorizations rejected?
- Whether the provider is done claiming time and mileage and/or wants the consumer removed from their profile

Note: Before sending the email, make sure you completed Parts 1 and 2 first.

You can send a spreadsheet with multiple requests. However, please only send a spreadsheet if:

- Your office has high volumes of daily unlinks and it is impractical to send individual emails, OR
- If you use the spreadsheet for small numbers of requests at a time (i.e., approximately 5 or fewer) and have ensured the requests are needed before sending.

It is also important to ensure that multiple people are not sending requests for the same pairings.

Information to include in a spreadsheet:

Providers/Consumers to Unlink							
Consumer name	Consumer Prime	Provider name	Provider number	Last day worked	Reason for unlinking	ONGO ended, future vouchers voided, and auths rejected?	Remove consumer from provider profile now?

For more information on the PTC Project, please visit [PTC.Oregon.gov](http://PTC.Oregon.gov).

*If you have any questions about this information, contact:*

Contact(s): Provider Time Capture	
Phone:	Fax:
Email: <a href="mailto:PTC.Support@odhsoha.Oregon.gov">PTC.Support@odhsoha.Oregon.gov</a>	