

Information Memorandum Transmittal Aging and People with Disabilities



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Topic: Other

Subject: Provider Time Capture (PTC) - When a Consumer Changes Programs

Number: APD-IM-22-075

Issue date: 8/4/2022

Updated date: 1/28/2025

Due date:

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:

This transmittal explains what to do when a consumer changes programs.

All Program Changes

The information in this transmittal applies to all types of program changes.

A void and reissue is needed for any program change, including OPI to OPM/APD or vice versa, BPA to APD or vice versa, OPI pilot to regular OPI, etc. Remember that the ONGO also needs to be ended and a new ONGO started under the new program.

However, these actions MUST be taken before the provider is paid under the wrong program.

When a consumer is changing programs, the local office must take actions in Mainframe immediately to ensure the vouchers are under the correct program right away. This must be done before the provider is paid under the wrong program.

Local office staff should NEVER backdate a program change if entries have already been paid under the old program that should have been entered and paid under the new program.

If the Mainframe and PTC actions were not completed in a timely manner for the program change and the provider was already paid under the wrong program, OR if the entries have been pulled into a batch but not yet paid (entry is in a “processed” status in OR PTC DCI), the local office must reach out to PTC Support immediately with all pertinent information. **It is too late to make the changes without the assistance of PTC Support at this point.** PTC Support will need to work with OIS and PRU to ensure the provider is paid appropriately and timely.

Case Managers: Retroactive program changes which result in an increase in hours on previous vouchers must be approved by policy.

Example of a processed entry in OR PTC DCI (the entry will also be visible on the STIM screen) – these entries should not be canceled:

The screenshot shows the OR PTC DCI interface. At the top, there are tabs for 'Entries', 'Accounts', 'Certifications', 'EVV Locations', 'Notes', 'Attachments', 'Events', 'Custom Fields', and 'History'. Below the tabs are search filters: 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Punch ID', 'Type Client Name', 'Type Service Code', 'Select Account Type', and 'Select Status'. There are 'Reset' and 'Search' buttons. Below the filters, the 'Entries' section is displayed. A red banner at the top of the entries section says 'DO NOT cancel this entry*'. Below the banner, there is a table of entries. The first entry is highlighted with a red box around the 'Processed' status. The table has columns for 'ID', 'Date', 'Time', 'Rate', 'Location', 'Client', 'Service', 'Status', and 'Action'. The first entry has the following values: ID: 5758, Date: Jan 29, 2023, Time: 04:00 PM, Rate: 04:05 PM, Location: Hourly, Client: St Helens APD-EU, Service: Scooby Doo, Status: Processed, and Action: [icon].

ID	Date	Time	Rate	Location	Client	Service	Status	Action
5758	Jan 29, 2023	04:00 PM	04:05 PM	Hourly	St Helens APD-EU	Scooby Doo	Processed	[icon]

*In general, processed entries should not be canceled unless the provider did not work the time/mileage. If the time or mileage was not worked, then cancel the entry and submit an overpayment request to PRU.

When the program change is NOT retroactive

If there is a program change and there have been entries created on the voucher that must be changed, and the entries **have not been pulled into a batch yet (entries are in pending or approved status)**, then you must cancel the entries, void the voucher, and recreate the voucher under the correct program. It may take a 1-2 business days for the new voucher to come through to OR PTC DCI, and once the voucher comes through you must re-create the entry/entries under the new voucher. **Local office staff must take these actions immediately to ensure accurate and timely payment to the provider.**

For program changes that require re-creating any entries, staff should not require the provider to re-create the entries. **Staff should re-create the entries themselves** to ensure the entries will be input and paid on time. For any **new** authorized hours/miles that were not previously claimed, the local office should ask the provider to create these new entries themselves in OR PTC DCI as soon as possible.

Examples of entries that are not processed and can be canceled in OR PTC DCI (these entries will not be visible on the STIM screen):

Entries

Accounts

Certifications

EWV Locations

Notes

Attachments

Events

Custom Fields

History

From (MM/DD/YYYY)

To (MM/DD/YYYY)

Type Punch ID

Type Client Name

Type Service Code

Select Account Type

Select Status

Reset

Search

Entries

Export

Showing 30 out of 204 records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
6474	Jul 29, 2024	07:30 AM	03:40 PM	Hourly		St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	0:08:10	Pending
6191	Jan 16, 2024	04:00 PM	06:30 PM	Hourly		St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	0:02:30	Approved
6189	Jan 18, 2024	01:30 PM	03:30 PM	Hourly		St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	0:02:00	Approved
5773	Jan 29, 2023	04:00 PM	04:05 PM	Hourly	5758	St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	-0:00:05	Approved
5770	May 29, 2023	07:30 AM	08:05 AM	Hourly	3514	St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	0:00:35	Approved

Program and Service Code Changes

Sometimes a program change also results in a service code change. Changing service codes requires additional actions related to PTC. The below information only applies to program changes that also result in service code changes. See the end of this transmittal for a chart of all service codes.

A consumer changing programs and service codes, such as going from OPI to APD, may cause the provider to see more than one service code when they attempt to clock in or report time or miles for that consumer.

For example, if a consumer changes from an APD program to OPI the provider may see both:

Hourly ADL/IADL – 1

Hourly ADL/IADL – OPI - 1

This can result in confusion, reporting entries under the wrong service code, or being unable to clock in or report time or miles. If a provider tries to claim time under the wrong service code they will receive the “Employee Service Account Punch Date” error.

To remove the old service code, the corresponding service account must be inactivated by the PTC Support Team.

Please note: Local office staff should NOT be inactivating service accounts or funding accounts under any circumstances.

Summary: If a provider has more than one service code for a consumer visible, staff must tell the provider which code to use for which time frames. Staff should ask the provider to enter all their time right away under the old service code. Once the provider has entered all their time on the previous service code, they must notify staff. Then, staff will email the PTC Support Team to inactivate the old service account. Staff are also encouraged to be proactive when they know a consumer will be switching programs/service codes and keeping the same provider. Reach out to the provider and ask them to enter their time and mileage before the switch. This will help ease the transition and decrease the frequency of dual service codes.

Example 1:

Consumer switched from OPI to APD on 6/1.

Instructions:

1. Ensure there is no voucher overlap between the two service codes in Mainframe/DHR.
2. Inform the provider to go ahead and enter all their time worked before 6/1.
3. Instruct the provider to use the OPI service code for any time worked before 6/1.
4. The provider will notify staff they have entered all their time on the OPI service code.
5. Staff will send an email to the PTC support team asking to inactivate the old service account.
6. From 6/1 onward the provider should only be entering time for the APD service code. Once the email is received by PTC Support only the APD service code will be visible to the provider.

Include the following information in your request:

Subject: Inactivate Service Account

Body of email:

- *The following consumer and provider changed programs from (indicate prior program) to (indicate new program) as of (date).*
- *Consumer name and prime*
- *Provider name and provider number*
- *The provider has entered all their time under (prior program).*
- *Please inactivate the (prior program)'s service account.*

Example 2:

The consumer's program changed from OPI to APD, resulting in a change in service code.

Add New Entry ✕

Entry Type: Punch ▼

Employee Name: Blue Sky - UNIID896

Account Type: Hourly ▼

Client: Beautiful Day - BeautifulDay ✕

Service Code:

Hourly ADL/IADL-2

Hourly ADL/IADL-2

Hourly ADL/IADL-OPI-2

▼

Service Date:

In this example, the provider sees the provider/consumer pair default to the APD service code, but an OPI service code is also available in the drop-down box. Staff have checked Mainframe/DHR to make sure there is no overlap in the vouchers when moving from one service code to another. Consumer Beautiful Day was receiving OPI services until June 18. However, no matter which date the provider chooses, they will see two service codes. This is because both service accounts are still active.

To see the service accounts:

Go to the provider's profile and click on the Accounts tab. Here we can see that both the OPI and APD service accounts are Active.

↓

Entries
Accounts
Certifications
EVV Locations
Notes
Attachments
Events
Custom Fields
History

Select Account Type ▼

Select Profile Type ▼

Type Client Name

Type Service Code

Select Unit ▼

Active ▼

Reset
Search

Employee Service	Client	Hourly ADL/IADL-OPI-2	St Helens APD-EU - 0511-EU	Beautiful Day	Hourly	Active
Employee Service	Client	Hourly ADL/IADL-2	St Helens APD-EU - 0511-EU	Beautiful Day	Hourly	Active

The provider would need to use the OPI service code for entries through June 18, but since providers do not have access to this information, they may enter time on the wrong service code by mistake. A local office staff member or PCA program staff member **must** contact the provider to let them know which service code to choose for which dates.

Once provider Blue Sky has entered all their time for the OPI program, staff will need to send an email to the PTC support team asking to inactivate the OPI service account.

Once the OPI service account is inactivated, the provider will only have the APD service code as an option when claiming entries.

It is important to prevent providers from having more than one service code per consumer to avoid a variety of issues, including:

The provider reports time under the prior service code.

- The system may still allow time to be claimed under the wrong service code. However, this claimed time will not line up with what is in Mainframe/DHR.
- Any entries created under the wrong service code will need to be rejected, and new entries will need to be created in OR PTC DCI under the correct service code.

Authorizations may still be created under an old service account.

- Even if an end date was added to a service account due to the change in programs, authorizations may still be created under the ended service account.
- To avoid this, be sure to end the old ONGO under the previous service code.
- Make sure any authorizations are ended or rejected in OR PTC DCI as of the date of program change.

The provider attempts to report time but receives the “Employee Service Account Punch Date” error.

- This error means an end date was added to a service account that is still active and the provider attempted to claim time/miles after the end date. End dates are added per request from staff members or policy. If the provider attempts to claim entries while receiving this error, the entry will automatically reject upon saving.
- The provider will need to select the other service code in order to claim time/miles.
- If a consumer and provider started working together again under the same service code (i.e., the consumer did not change programs), please email the PTC team asking to remove the end date. The provider will then be able to make entries.

Situations that will cause a provider to have more than one service code:

- The consumer switched from one program to another and is working with the same provider.
- The consumer and provider stopped working together, then started working together again under a different program.
- There is more than one active service account for a provider/consumer pair for any reason.

List of service codes and their programs:

Service code in OR PTC DCI (followed by a number)	Service code in DHR/Mainframe	Type of service
Hourly ADL/IADL	OC111	APD services
Mileage	OT111	APD mileage
Hourly ADL/IADL-OPI	OP334	OPI services
Mileage-OPI	OP336	OPI mileage
Hourly ADL/IADL-OPI Pilot	OP332	OPI services - Pilot
Mileage-OPI Pilot	OP338	OPI mileage - Pilot
Spousal Hourly ADL/IADL	SP112	Spousal pay services
Mileage – Spousal Pay	SM111	Spousal pay mileage
Behavioral Health Personal Care	AMH20	HSD services
Mileage – Behavioral Health	AMH11	HSD mileage
1915(i) PCA Hourly	AMH30	HSD 1915(i) Hourly
1915(i) PCA Mileage	AMH12	HSD 1915(i) Mileage

For more information on the PTC Project, please visit PTC.Oregon.gov.

If you have any questions about this information, contact:

Contact(s): Provider Time Capture

Email: PTC.Support@odhsoha.oregon.gov