

Information Memorandum Transmittal Aging and People with Disabilities



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Number: APD-IM-22-075

Issue date: 8/4/2022

Topic: Other

Due date:

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

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 if multiple service codes are visible to a provider after a consumer changes programs.

A consumer changing programs, such as from APD to OPI, 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 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.

Additionally, whenever a consumer changes programs, staff must ensure there is no overlap in Mainframe/DHR and OR PTC DCI between the authorizations from the previous service code and the new service code. This means checking the end dates on the old service code in Mainframe/DHR and OR PTC DCI, and checking the begin dates for the new service code.

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 to 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 screenshot shows a web form titled "Add New Entry" with the following fields:

- Entry Type: Punch
- Employee Name: Blue Sky - UNIID896
- Account Type: Hourly
- Client: Beautiful Day - BeautifulDay
- Service Code: Hourly ADL/IADL-2 (dropdown menu)
- Service Date: (empty)

The dropdown menu for Service Code is open, showing three options: "Hourly ADL/IADL-2", "Hourly ADL/IADL-2", and "Hourly ADL/IADL-OPI-2". The "Hourly ADL/IADL-OPI-2" option is highlighted in grey, and two red arrows point to it from the right.

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.

The screenshot shows a software interface with a top navigation bar containing tabs: Entries, Accounts, Certifications, EVV Locations, Notes, Attachments, Events, Custom Fields, and History. A red arrow points to the 'Accounts' tab. Below the navigation bar are search filters: 'Select Account Type', 'Select Profile Type', 'Type Client Name', 'Type Service Code', 'Select Unit', and 'Active'. There are 'Reset' and 'Search' buttons. Below the filters is a table with two rows of data. The first row has columns: Employee Service, Client, Hourly ADL/IADL-OPI-2, St Helens APD-EU - 0511-EU, Beautiful Day, Hourly, and Active. The second row has columns: Employee Service, Client, Hourly ADL/IADL-2, St Helens APD-EU - 0511-EU, Beautiful Day, Hourly, and Active. Red boxes highlight the 'Hourly ADL/IADL-OPI-2' and 'Active' cells in the first row, and the 'Hourly ADL/IADL-2' and 'Active' cells in the second row. A red arrow points to the 'Active' cell in the second row.

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
Behavioral Health Personal Care	AMH20	HSD services

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	
Phone:	Fax:
Email: PTC.Support@odhsoha.oregon.gov	