Information Memorandum Transmittal Aging and People with Disabilities



Jason Pruett	<u>Number</u> : APD-IM-22-075
Authorized signature	<u>Issue date</u> : 8/4/2022
	Updated date: 1/28/2025
<u>Topic</u> : Other	<u>Due date</u> :
Subject: Provider Time Capture (PTC) - Whe	en a Consumer Changes Programs
Applies to (check all that apply):	
All DHS employees	☐ County Mental Health Directors
□ Aging and People with Disabilities	☐ Office of Developmental
Self Sufficiency Programs	Disabilities Services (ODDS)
County DD program managers	ODDS Children's Intensive In
Support Service Brokerage Directors	Home Services
ODDS Children's Residential Services	☐ Stabilization and Crisis Unit (SACU)
☐ Child Welfare Programs	Other (<i>please specify</i>): Comagine
Message:	
This transmittal explains what to do when a c	onsumer changes programs.

All Program Changes

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

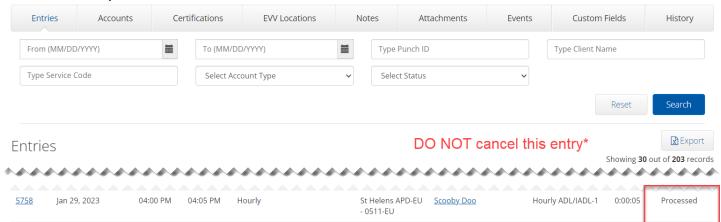
A void and reissue is needed for any program change, including OPI to OPM/APD or vice versa, BPA to APD or vice versa, OPI pilot to regular OPI, etc. Remember that the ONGO also needs to be ended and a new ONGO started under the new program. However, these actions MUST be taken before the provider is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

When a consumer is changing programs, the local office must take actions in Mainframe <u>immediately</u> 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:



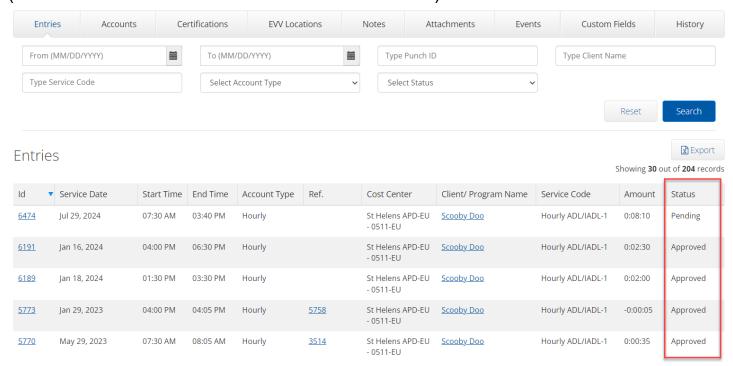
^{*}In general, processed entries should not be canceled unless the provider did not work the time/mileage. If the time or mileage was not worked, then cancel the entry and submit an overpayment request to PRU.

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):



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.

<u>Please note: Local office staff should NOT be inactivating service accounts or funding</u> 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.

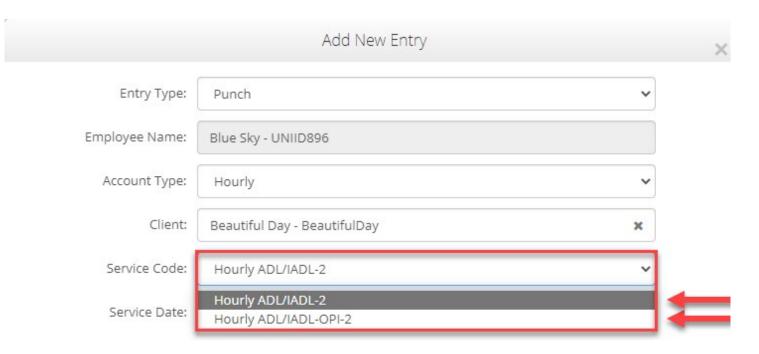
Include the following information in your request:

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.

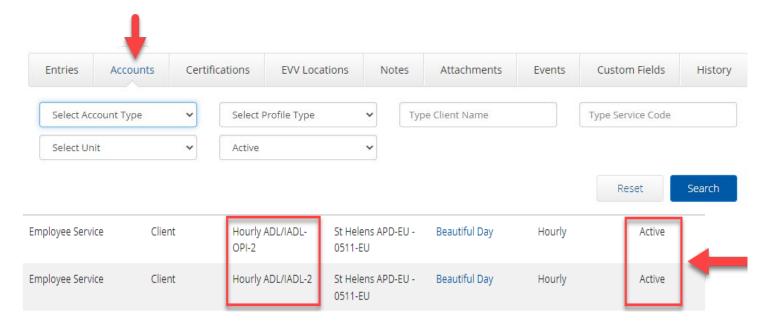


In this example, the provider sees the provider/consumer pair default to the APD service code, but an OPI service code is also available in the drop-down box. Staff have checked Mainframe/DHR to make sure there is no overlap in the vouchers when moving from one service code to another.

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 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:

Email: PTC.Support@odhsoha.oregon.gov