

Information Memorandum Transmittal Aging and People with Disabilities



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Topic: Other

Subject: Provider Time Capture (PTC) - When a Consumer Passes Away - OR PTC DCI

Number: APD-IM-23-006

Issue date: 1/24/2023

Updated date: 12/10/2024

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 has been updated to reflect the PTC Phase 2A changes.

The purpose of this transmittal is to emphasize the importance of notifying the PTC Support Team when a consumer passes away. This transmittal will serve as a repository of information related to when a consumer who is receiving in-home care from a HCW or PCA passes away.

Profiles, accounts, and vouchers must be kept as up-to-date and accurate as possible to ensure consistency across systems. The PTC Support Team is not notified of a consumer passing away unless local or program office staff reach out.

Below are links to helpful resources and an outline of the steps that must be completed when a consumer passes away.

Several steps of the below process are already part of the local office or program office process and are completed in Oregon Access (OA) and Mainframe. These may vary

slightly based on the office. **Please note that the process usually begins with the case manager completing a new 546/531 form.** Questions about these processes should be directed to a lead worker, leadership team, or to your policy team.

Questions about the PTC-related steps should be directed to PTC Support.

Steps to take when a consumer passes away:

1. Staff member learns that a consumer (who has a profile in OR PTC DCI) has passed away.
2. Case manager (CM) sends a 546/531 with prorated hours and adjusted end date to the voucher specialist requesting they edit the end date on the final voucher, end ONGOs, and void any outstanding vouchers.
3. Case manager notifies the office's eligibility team of consumer passing, per local or program office procedure.
4. Voucher specialist edits the final voucher in the UATH screen in Mainframe with the end date from the 546 form (i.e., the date of death). Adjust the hours if they were prorated on the 546 form.
 - a. If you receive the error "013 Service hours exceed allowed hrs," request an end of life care exception from mainframe.businessanalysts@odhsoha.oregon.gov so you can update the voucher.
5. Voucher specialist or support staff voids any outstanding vouchers and ends ONGO in Mainframe.
6. CM contacts provider and narrates in OA. The PTC Team recommends asking the provider to enter all their hours and mileage for the consumer.
7. CM closes all auxiliary services and informs the vendors, per policy.
8. CM closes Service Plan in OA, after date of death is added in ONE by eligibility, per normal policy.
10. CM narrates and transfers case to EAU 8606 in OA, if applicable.
11. Staff member emails PTC Support to let them know the consumer has passed away.

Email should include:

 - Consumer name,
 - Consumer prime number,
 - provider name,
 - provider number,
 - date of death, and
 - last date the provider worked (may be different than date of death, such as a hospital admission date).
12. PTC Support adds the end date to service accounts and inactivates the consumer's profile. Reminder: Staff members should never inactivate or make edits to funding accounts or service accounts.

- a. If the provider wishes to have the consumer removed from their profile immediately, the unlinking email must indicate this. Otherwise, the consumer and provider will be linked via funding and service accounts for 12 months (with end dates on the service accounts).

Note: Updating the final voucher via UATH to match the correct end date is extremely important since PTC Phase 2A Go-Live. If the final voucher is not edited to match the new end date before the payroll batch is pulled, then all entries from that pay period will go to the STIQ screen as errors. The error message in STIQ will be “Recipient Ineligible on Date of Service.” To see the error message(s), navigate to STIQ, type “s” next to the voucher, and hit enter. This error can be resolved immediately by editing the final voucher in UATH.

If you receive the error “Service hours exceed allowed hours” in UATH when attempting to move the end date, please request an end of life care exception from mainframe.businessanalysts@odhsoha.oregon.gov so you can complete the edit in UATH.

Important Reminder: If the STIQ error isn’t resolved timely, the provider will not be paid on and will cause the provider to be paid late.

Helpful resources:

[Case Management Death Checklist](#) – CM Staff Tools

[3.5 Consumer Passes Away](#) – PTC.Oregon.gov, AAA/APD Staff, Staff Learning Materials Catalog

If you have any questions about this information, contact:

Contact(s): Provider Time Capture	
Phone:	Fax:
Email: PTC.Support@odhsoha.oregon.gov	