Information Memorandum Transmittal
Aging and People with Disabilities

DHS | Oregon Department of Human Services

Bob Davis
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Number: APD-IM-24-115
Issue date: 11/14/2024

Topic: Other

Due date:

Subject: Provider Time Capture (PTC) - PTC Phase 2A Update to Relinking Process

Applies to (*check all that apply*):

- [ ] All DHS employees
- [x] Area Agencies on Aging: Types A and B
- [x] Aging and People with Disabilities
- [ ] Self Sufficiency Programs
- [ ] County DD program managers
- [ ] Support Service Brokerage Directors
- [ ] ODDS Children's Residential Services
- [ ] Child Welfare Programs
- [ ] County Mental Health Directors
- [x] Health Services
- [ ] Office of Developmental Disabilities Services (ODDS)
- [ ] ODDS Children's Intensive In Home Services
- [ ] Stabilization and Crisis Unit (SACU)
- [ ] Other (*please specify*):

Message:

PTC Phase 2A has resulted in automation of certain account updates that were not fully anticipated prior to go-live, including the automation of many relinks.

Please follow the below process for checking and requesting relinks in OR PTC DCI and pay special attention to the changes in **bold**.

The following process replaces the previously published relinking process. Staff training materials are being updated to include these updated instructions.

UPDATED Phase 2A relinking process:

Many relinks are automatically completed by the interface between Mainframe and OR PTC DCI. However, not all relinks are completed automatically and it is especially important for staff to check to make sure a relink was completed and does not need to be done manually by the PTC Support Team. If the relink was done automatically, there is no need to reach out to the PTC Support Team.

The local office should complete these steps for all new service plans and vouchers.
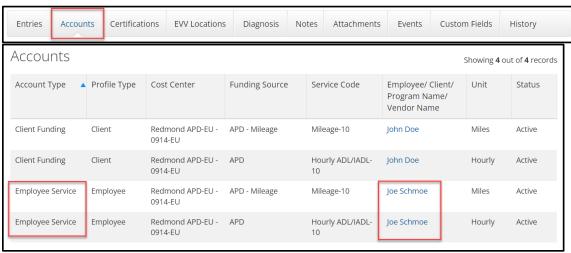
1. Case Manager creates 546N and makes a note if they are aware the consumer and provider were previously linked in OR PTC DCI.
2. **Voucher specialist creates vouchers in Mainframe. Vouchers must be created <u>before</u> checking whether a relink is needed.**
3. **After creating the vouchers, the voucher specialist checks the service accounts to see whether the consumer and provider are currently unlinked via end dates on their active service accounts.** This is especially important if the 546N indicates the consumer and provider may have been linked in the past. Steps to check for a relink are below. After creating the voucher, the PTC authorization creation and service account update should happen immediately if the accounts are active.
4. If the consumer and provider have active service accounts with end dates, send a relink request to the PTC Support Team.
   a. **If the accounts are inactive, a relink request is not required** and the relink will be completed within 2 business days.
   b. There is no need to send a relink request if there are no end dates on the service accounts in OR PTC DCI.

Comparison of previous steps and new steps for relinking:

Previous steps	New steps
1. Local office creates 546N 2. Local office checks the linking status to determine if a relink is needed 3. Local office emails PTC Support if relink is needed 4. PTC Support completes relink 5. Local office creates vouchers	1. Local office creates 546N 2. Local office creates vouchers 3. Local office checks to see if there are active service accounts with end dates 4. Local office email PTC Support if relink is needed (**if service accounts have end dates**) 5. PTC Support completes relink

How to check if a relink is needed (from the provider's profile):

1. After vouchers are created in Mainframe, log into OR PTC DCI.
2. Go to the provider's Employee Details Page.
3. Scroll down and select the Accounts tab. You will see the provider's active service accounts.
4. Look for the consumer's name on one or more of their service accounts.

Entries	**Accounts**	Certifications	EVV Locations	Diagnosis	Notes	Attachments	Events	Custom Fields	History

Accounts

Showing **4** out of **4** records

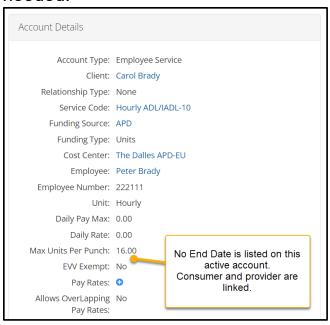| Account Type	Profile Type	Cost Center	Funding Source	Service Code	Employee/ Client/ Program Name/ Vendor Name	Unit	Status
Client Funding	Client	Redmond APD-EU - 0914-EU	APD - Mileage	Mileage-10	John Doe	Miles	Active
Client Funding	Client	Redmond APD-EU - 0914-EU	APD	Hourly ADL/IADL-10	John Doe	Hourly	Active
Employee Service	Employee	Redmond APD-EU - 0914-EU	APD - Mileage	Mileage-10	Joe Schmoe	Miles	Active
Employee Service	Employee	Redmond APD-EU - 0914-EU	APD	Hourly ADL/IADL-10	Joe Schmoe	Hourly	Active

5. If one or more of the service accounts has the consumer's name, you must check the service account(s) to see if there is an End Date listed on the account details.

    a. Click on a service account with the consumer's name to see the account details. If you see an **End Date,** they are unlinked and a relink is needed. **Send an email to PTC Support asking for a relink.**

Account Details

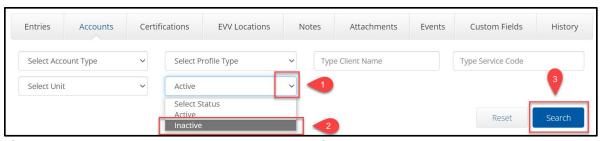|	
Account Type:	Employee Service
Client:	John Doe
Relationship Type:	None
Service Code:	Hourly ADL/IADL-10
Funding Source:	APD
Funding Type:	Units
Cost Center:	Redmond APD-EU
Employee:	Joe Schmoe
Employee Number:	222000
Unit:	Hourly
Daily Pay Max:	0.00
Daily Rate:	0.00
Max Units Per Punch:	16.00
End Date:	Sep 12, 2023
EVV Exempt:	No
Pay Rates:	➕
Allows OverLapping Pay Rates:	No

    b. If you do **not** see an end date, then the consumer and provider are linked. The provider should be able to claim time/mileage for this consumer

assuming the vouchers have been created in Mainframe. A relink is not needed.

Account Details

Account Type:	Employee Service
Client:	Carol Brady
Relationship Type:	None
Service Code:	Hourly ADL/IADL-10
Funding Source:	APD
Funding Type:	Units
Cost Center:	The Dalles APD-EU
Employee:	Peter Brady
Employee Number:	222111
Unit:	Hourly
Daily Pay Max:	0.00
Daily Rate:	0.00
Max Units Per Punch:	16.00
EVV Exempt:	No
Pay Rates:	⊕
Allows OverLapping Pay Rates:	No

No End Date is listed on this active account. Consumer and provider are linked.

Steps 6-8 are optional. If the accounts are inactive, the PTC Support Team will be alerted when the vouchers are created and will reactivate the accounts within 1-2 business days. You can still send a relink request email if the relinking is urgent.

6. If none of the service accounts show the consumer's name, change the filter on the status (defaulted to Active) to show Inactive accounts. Click Search.

7. If you see an inactive service account for the consumer, then the consumer and provider are unlinked and a relink is needed. Send an email to PTC Support asking for a relink.

Accounts Export

Showing **2** out of **2** records

Account Type	Profile Type	Service Code	Cost Center	Client/ Program Name/ Employee Name	Unit	Status
Employee Service	Client	Mileage-2	The Dalles APD-EU - 3311-EU	John Doe	Miles	Inactive
Employee Service	Client	Hourly ADL/IADL-2	The Dalles APD-EU - 3311-EU	John Doe	Hourly	Inactive

8. If you do not see any active or inactive accounts with the consumer's name, then this consumer and provider have never been linked. Creating vouchers in Mainframe will trigger the PTC Support Team to create any needed profiles, linking the consumer and provider within the next **two business days**. There is no need to reach out to the PTC Support Team.

Important:

Ending the ONGO is even more essential given this update. If the ONGO is still open when the accounts have end dates, and new vouchers come through during the next ONGO run, those accounts will likely be automatically edited to remove the end dates. This means if ONGO is not ended then the unlink will be undone and the provider will have active accounts and a valid authorization on file. The provider can then claim unauthorized time/mileage.

Helpful tips:

- Although creating a voucher will usually remove any end dates from the service accounts, this does not always occur. We've found that when vouchers are created but some are voided on the same day, this tends to cause the automatic removal of the end date to not occur. Other situations may also trigger the automated edit to fail. This is why checking the accounts is so important.

- If you check the events on a service account where the end date was removed automatically, you will see that the account was edited via the Web API, by the Mainframe Developer. Checking for this is not required but may be helpful to know in some situations.

Events

Date	Subject	Description	Input Type	Added By
Sep 27, 2024 08:51:23 AM	Account Edited	186361-Consumer Name - Hourly ADL/IADL-1 - Provider Name - Employee Service Account was edited.	Web API	Mainframe Developer

Please reach out to PTC.Support@odhsoha.oregon.gov with any questions about this process change.