

# Pre-Authorized Expenses

## Nintex Form Frequently Asked Questions

### **SUBMITTING A REQUEST**

1. **How and when do I backdate a request?**
  - On the final page of the PAE Nintex form, you will check “yes” to the question “Does this request need to be backdated”.
    - An additional box will pop up with a note asking you to provide justification.
    - In the signature section of the form, you will then select the earliest date of service in the “Effective Date” box.
    - When backdating a request, your submission/signature date should remain current. Only the effective date should be backdated.
2. **How do I request airfare, and can I book it myself?**
  - Airfare can be requested on the Long Form.
  - You must book airfare within 60 days of the approval date of your authorization.
    - If this is not done, you will need to email our department at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us) and ask to have the airfare reissued, otherwise you will not be able to book your flight.
  - Airfare must be pre-authorized and booked through Corporate Travel Management (CTM). Their contact information is printed in the travel section of the authorization.
    - If airfare is not booked through CTM and you purchase your own ticket, you will not be reimbursed.
3. **What should I do if I am unable to find the correct service type for my request?**
  - Select a service category, then select the specific service in the “Service Requested” drop down. This list is more expansive than the one found on our PDF forms, so most services will be listed here.
    - If you are not able to find an appropriate option, you may select “Miscellaneous Services” in the service category, and then “Other Services” in the service requested drop-down. A fillable box will pop up where you are able to describe the type of service you are requesting.
4. **When do I need to include travel time on a PAE request?**
  - Travel time must be pre-authorized for all providers except the following:
    - Case managers
    - Investigators
    - Mitigators
    - Attorneys
  - Travel time for Case managers, Investigators and Mitigators is included in their total authorized service hours.
  - Hourly attorney travel time should not be requested through PAE. Travel time is routine for hourly attorneys and should be included in the invoice for hourly services.
5. **Should I include mileage if I’m requesting travel time?**
  - Yes, if the provider is intending to bill mileage, it must be authorized on the PAE. Mileage will not be added automatically.
  - We will review and approve all travel expenses requested. If we receive a request listing travel time but no mileage, we presume the provider does not intend to bill their mileage.
6. **Do I need to submit a PAE request for each case my client has?**
  - No. If you are assigned to more than one case for a client, please determine the case number with the highest charge and submit under that one case number.

- Any other case numbers for the client should be listed in your answer to the question “What are the charges/allegations?”, that way we can take into account all the cases that may be involved.
  - If there are multiple cases with the same level of charges, please choose the oldest case that is still open.
- 7. **How do I submit my request if the submit button at the bottom of the form isn’t working?**
  - If you are still using our PDF forms and are having issues, please submit through our online Nintex form instead. This form is more user friendly, and typically does not have issues when submitting.
- 8. **How do I request services hours for a provider that is new to OPDC?**
  - To request services for a provider that is not yet approved with OPDC, please submit a Long Form request for the provider’s services and attach a copy of their CV/resume. New provider information will go through our qualification and rate review process.
    - A CV/resume is not needed for investigators new to OPDC. They simply need to be DPSST licensed, which will be verified upon review of the request.

### **AFTER YOU’VE SUBMITTED A REQUEST**

1. **How do I amend a request?**
  - If you need to make a change to a PAE authorization, email our department directly at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us) with “AMENDMENT” in the subject line, and in the body of your email provide the authorization number you would like amended, and a brief description of what you are needing changed and why.
    - Please note, we are unable to amend for a provider change unless they are working within the same company as the original provider.
      - If they are not within the same company, please have the current PAE authorization withdrawn and submit a new request form for the new provider.
2. **How do I withdraw a request?**
  - If you have a PAE authorization that needs to be withdrawn, email our department directly at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us).
    - Please provide the authorization number in the body of your email and indicate that the authorization will not be used or billed on, and that you would like it withdrawn.
  - If a PAE authorization is not going to be used, it should be withdrawn, so we can cancel the funding from the overall case costs.
3. **I submitted my request and just realized I made a mistake. What should I do?**
  - If after submitting your request you realize a correction needs to be made, please reply to the original email you submitted your request on and let us know what information needs to be updated.
    - The amended information will be sent to the reviewer and added to the original form, even if it is still pending review.
  - If you receive an authorization and a correction is needed, you may email our department at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us) to request an amendment. (Please see above, “How do I amend a request?”, for further instructions.)
4. **How do I have my request expedited?**
  - If you need a request expedited due to an impending trial or last-minute travel, please call our department directly at 503-378-2700, option 3 (Business Office), option 1 (Pre-Authorized Expenses), to explain the need for a rush approval.
    - Most often, Short Form requests will not be expedited, as they are typically processed within one business day.

5. **How do I ask for reconsideration of a denial?**
  - If you would like a denial reconsidered, please email our department directly at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us) with “RECONSIDERATION” in the subject line, along with the authorization number you would like reconsidered.
  - In the body of the email, provide any missing or additional justification based on the denial letter that you received.
  - Provide supporting documentation if applicable.
6. **What is the difference between an email returning my request and a PAE denial?**
  - When you receive an email from our intake staff stating we are unable to process your PAE request, typically it is not a denial of services; we simply need additional/corrected information in order to process your request.
    - This is considered to be a returned submission, as opposed to a formal denial of the request.
  - A denial is what you will receive instead of a PAE authorization, if it’s determined that your request is not able to be approved.
    - The notice will explain the reason for the denial and may indicate whether any missing information is needed for reconsideration.
7. **How do I check on the status of my request?**
  - Per PAE policy, our turnaround time for processing PAE requests is 5 business days. Short Form requests are typically processed within 1-2 business days.
    - If it has been less than 5 business days since you’ve submitted your request, we ask that you please wait to reach out regarding the status unless there is an immediate court matter.
    - If it has been 5 days or more since you’ve submitted your request, you may contact our department by email at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us), or by phone at 503-378-2700, option 3 (Business Office), option 1 (Pre-Authorized Expenses).
      - You will need to provide the case number, the type of service requested, and the approximate date and time of your submission.
8. **I submitted one request but got back multiple authorizations. Why?**
  - When our department receives a request for a large number of hours, we may split the hours between multiple authorizations.
    - Splitting hours this way allows the provider to bill as they complete their work.
    - Investigation Short Form requests exceeding 40 hours will be automatically split into multiple authorizations.
  - If you are submitting on the Long Form and do not want your hours split onto multiple authorizations, select “no” to the question, “Do you want to have this authorization split?”.
    - Please note, this question will only appear if you enter a quantity of 50 or more.
9. **Can I request additional hours for my provider if the first authorization wasn’t sufficient?**
  - Yes. Once the work on the first authorization has been completed, you may submit a new request for additional hours.
    - Please do not request an amendment in this situation; a new PAE request form is required.
    - The Long Form must be used for subsequent requests. You will need to list the work that has been completed on the previous authorization and the work that remains, to support the need for additional time.

## **ATTORNEYS**

1. **How do I update the email addresses for PAE authorization recipients?**

- To update the recipients for PAE authorizations, the attorney must email [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us) with their bar number, and the email addresses that need to be added/removed.
  - If an assistant is submitting this email, they must Cc the attorney to indicate their approval of the changes.
  - Please note, our system allows for up to two recipients.
- 2. **How do I update my contact information with your department?**
  - To update contact information, the attorney must email [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us) with their bar number, and the information they would like to be updated.
    - If an assistant is submitting this email, they must Cc the attorney to indicate their approval of the changes.
  - Please note, other departments may have their own databases where they keep attorney contact information. Please make sure you are informing all applicable departments.
- 3. **Do I need to use a PAE form to request co-counsel?**
  - No. Requests for co-counsel to provide direct client representation must be submitted to the OPDC Trial Support & Development division.
    - The Co-Counsel Request Form is located on the OPDC website.
      - From the main page, navigate to the Provider menu and select “Forms and Programs”.
      - You will find the form under the category “Special Request Forms”.
    - If approved, co-counsel will bill directly to Accounts Payable and does not need a PAE.
- 4. **Do you have a list of providers and the types of services they provide?**
  - Currently OPDC does not have a formal list of approved providers and their services that is available for distribution.
    - If you are having difficulty finding a specific type of provider, please email our department at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us) with information on the type of provider you are looking for.
    - We can do a search for OPDC providers that are already approved on file for the requested service.

## **PROVIDERS**

1. **How does a provider get set up with the PAE department?**
  - New providers may submit their CV/resume to our department via email at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us). Please include specific details about what service(s) you would like to be approved for.
  - Alternatively, an attorney may submit a PAE request for a new provider with a copy of the provider’s CV/resume attached. Please refer to “How do I request services hours for a provider that is new to OPDC?” under the FAQ tab titled “Submitting a Request”.
2. **Can PAE authorizations be sent directly to the provider?**
  - No. Per PAE policy, we can only send authorizations to the attorney, who then must forward them to the provider.
3. **What do I do if I have a question about my approved rate?**
  - If you have a question or are needing clarification on your OPDC approved rate, please email our department directly at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us) for assistance.

## **EXPIRATION DATES**

1. **What does the expiration date on the authorization mean?**

- The expiration date is the final date you may submit the PAE for payment prior to it being considered a late billing. This date refers to the services approved on that authorization specifically, not the provider's services for the life of the case.
  - If an authorization is coming close to expiring, the provider must bill out all completed services, and counsel will need to request a new authorization for any work that remains.
- 2. **Do I have to complete all the work on the case before the PAE expiration date?**
  - No. The expiration date only applies to the services approved on that authorization specifically. It does not apply to the provider's work on the case.
- 3. **What do I do if my authorization has already expired?**
  - If an authorization has expired, please note we are unable to extend the expiration date.
  - The provider should submit their bill to Accounts Payable immediately.
    - For instruction, please refer to the Billing and Invoice Submission policy, located on the Policy page of the OPDC website (Accounts Payable section).

## **OTHER**

1. **Who do I contact for billing or payment questions?**
  - Please contact Accounts Payable staff directly at [AccountsPayable@opds.state.or.us](mailto:AccountsPayable@opds.state.or.us) for any questions regarding billing or payments.
2. **Is there a way I can save these FAQs to my computer?**
  - Yes! Feel free to save the following PDF to your computer for quick and easy access to our frequently asked questions. *\*\*Insert link to FAQs PDF\*\**

**Thank you for taking the time to read our PAE Frequently Asked Questions! If you have any suggestions for improvement, please send us an email at [CSS@opds.state.or.us](mailto:CSS@opds.state.or.us).  
Your feedback is appreciated.**