



PTC Phase 2A Guidebook

*A compilation of emails and updates sent out by the PTC Team
about Phase 2A changes.*

Initial publication: 9/18/2024

Revision date: 9/18/2024

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Introduction

This document is a compilation of status report emails and transmittals sent out by the Provider Time Capture (PTC) Team around the implementation of Phase 2A of the project. PTC Phase 2A automated a few key processes that were previously manual and time-consuming. It is critical to understand and follow the new processes, as following pre-implementation processes may result in errors, delays, and late payments to providers.

How Entries are Processed in Phase 2A

With the implementation of Phase 2A on 7/19/24, local and program offices no longer run their own payroll batches. Beginning with pay period 7/28/24 – 8/10/24, payroll processing was automated. However, for the first year after Phase 2A go-live, historical entries for pay periods prior to 7/28/24 will need to be entered into STIM manually. The PTC Support Team will run payroll batches to capture historical entries for a service date of 7/27/24 or earlier. These batches will be sent to offices daily via their assigned payroll inbox.

Note: Batches that are received in the payroll inbox must be manually entered into STIM as soon as possible to ensure providers are paid accurately and timely.

Payroll Batch Email Set-up

In partnership with local office management and staff, OIS Collaborative Communications, and AAA IT departments, the PTC Project Team created new shared payroll email addresses for each APD, AAA, and OPI local office. These shared email addresses serve as the designated email for all OR PTC DCI payroll batches since PTC Phase 2A implementation.

- **For APD offices**, each manager should have been assigned owner rights for their branch's shared payroll email address. District Managers should also have been granted owner rights over each of their district's shared payroll boxes. Designated staff should have been given "send on behalf of" rights.
- **For AAA offices**, the IT department for your office is the owner of the inbox and will handle all access rights. Managers and designated staff should have been given access to send from the shared inbox depending on the office's typical process.

APD Managers should review [OIS Collaborative Communications - Shared Email/Calendars](#) if they have questions about assigning rights to staff, viewing who has access, changing access, etc. The PTC Support Team will only send payroll batches to these designated email inboxes.

For more information on the shared email addresses that were created, see [APD-IM-24-025](#).

Making Updates to Authorizations

With the implementation of Phase 2A, staff will use the UATH screen in Mainframe to update vouchers.

If a voucher is in 30 status, you can:

- Edit the begin date,
- Edit the end date,
- Increase or decrease hours,
- Increase, decrease, or add miles to the voucher,
- Rate change,
- Or branch change. Please keep in mind that the branch **MUST** match the service branch, which can be seen in the SELG screen.

If the voucher is in a 36 or 46 status, you can:

- Increase or decrease hours,
- Increase, decrease, or add miles to voucher,
- Rate change,
- End date

Note: Successful UATH edits should come through to PTC immediately!

Vouchers *cannot* be edited if they are in 35 (Ready to Pay) status. If a voucher is in 35 status and needs to be updated, it will need to be put back into 30 status to be edited in UATH. You can do this using the following steps:

- Navigate to HPAY/OPAY/MPAY
- Type the Voucher #
- Tab to Trans Type
- Enter “E” for Erase
- Press Enter
- Change “Erase Cancel Payment” to a “Y” for Yes
- Press Enter

No Need to Void and Reissue

Please DO NOT void and reissue vouchers to make changes unless there is a change in program, or if you need to remove mileage from a future authorization. If you receive an error when making the update, that means the change has not saved. For instructions on how to resolve the error, see the [“Errors Received on UATH”](#) section below.

Program Changes

The voucher must be voided and reissued 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 opened under the new program.

- If there are time/mileage entries already on the authorization, you will need to cancel those entries in OR PTC DCI before voiding the voucher.
- Once entries are canceled and the voucher voided, the voided voucher will move to 17 (voided) status.

- The voucher can then be recreated, and the entries will need to be recreated in OR PTC DCI under the new authorization.

Case Managers: When sending the Service Plan information to the Voucher Specialist, please note whether there is a program change in the comments, as this information is now essential to ensure the correct steps are completed in Mainframe. The program names can also be seen in Oregon Access on the Service Plan Summary.

Errors Received on UATH

It is extremely important for staff to watch for errors in UATH when they attempt to make an update. If an error occurs, then the update was not saved to the voucher. Additional actions must be taken by staff to resolve the error before the changes can be saved. The error will display on the lower part of the Mainframe payment screen immediately after pressing F9.

For detailed information on the errors that may occur and how to resolve them, see [Mainframe Changes for PTC Phase 2A Guide](#). If your error is not listed in the guide, please email PTC.Support@odhsoha.oregon.gov with details of the error. **DO NOT void and reissue!** Completing a void and reissue for simple hours/miles or date changes will cause backend errors that are complex to resolve.

If you get the “Canceled entries exist” error, but you have double checked OR PTC DCI and there are no canceled entries, please email PTC Support. This may be a different issue showing the wrong error code.

Pay Rate Error

Another error staff may receive when updating UATH is “The requested pay rate update overlaps with an existing pay rate.” This error is related to the step wage increases providers receive based on the number of hours they have worked. An error occurs because the pay rate for the provider recently changed, but the update has not yet come through to the PTC service accounts. If this error is received, staff must email PTC Support with a request to update the pay rate. Include the:

- consumer information,
- provider information,
- new pay rate, and
- the pay period the change is effective.

For information on provider step increases, see the transmittal [APD-IM-24-074](#).

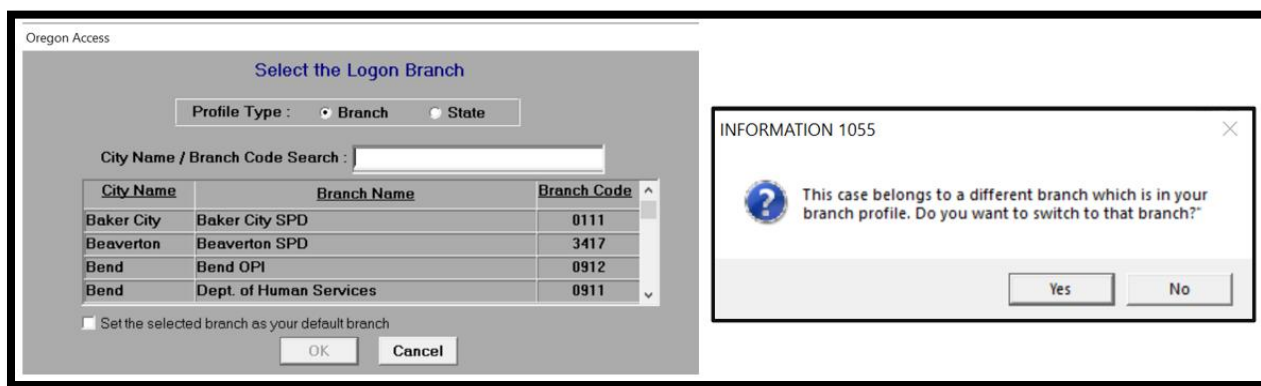
SELG Branch Updates

An error staff may see when updating a voucher in UATH is “Branch must match service eligibility.” This error is caused when the service eligibility branch on the SELG screen in Mainframe and the service plan in Oregon Access do not match.

Think of the SELG branch as the branch that was “stamped” onto the benefit plan in Oregon Access when it was approved. When you log into Oregon Access,

1. If you have rights over one branch, OA will use this branch are assigned in your security profile, or
2. If you have assigned rights over more than one branch in your security profile, you will choose a branch and then navigate to the case.

If you have access to multiple branches, you will be able to change your assigned branch by going to Select, then Switch Branch and selecting the new branch you want to view. This only works if you have been assigned access over multiple branches.



When you approve a benefit plan, your branch number is stamped onto the plan. The stamp determines the SELG branch. The stamped branch cannot be removed or changed without starting a brand-new benefit plan. To create a brand-new benefit plan, you must end the current Service Category/Benefit and approve a new Service Category/Benefit. You can then edit the branch in ONGO to the new SELG branch.

Do not **invalidate** a service plan that a provider is claiming time on because this will erase the whole SELG record. You should only invalidate a service plan if the provider has not claimed any time on the plan yet.

See the [Updating the SELG Branch in Mainframe](#) QRG for more information about ending the Service Category/Benefit in Oregon Access.

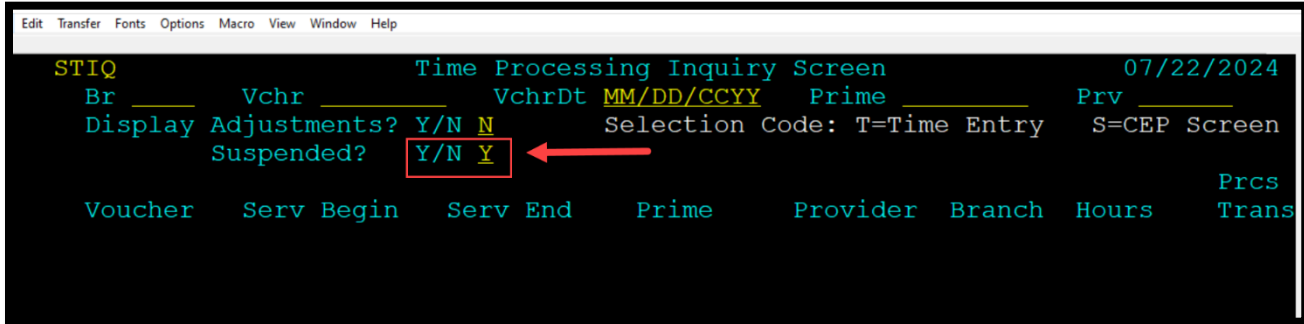
STIQ Screen Updates

How to see suspensions in STIQ:

1. Navigate to STIQ and enter your branch if it's not already there.

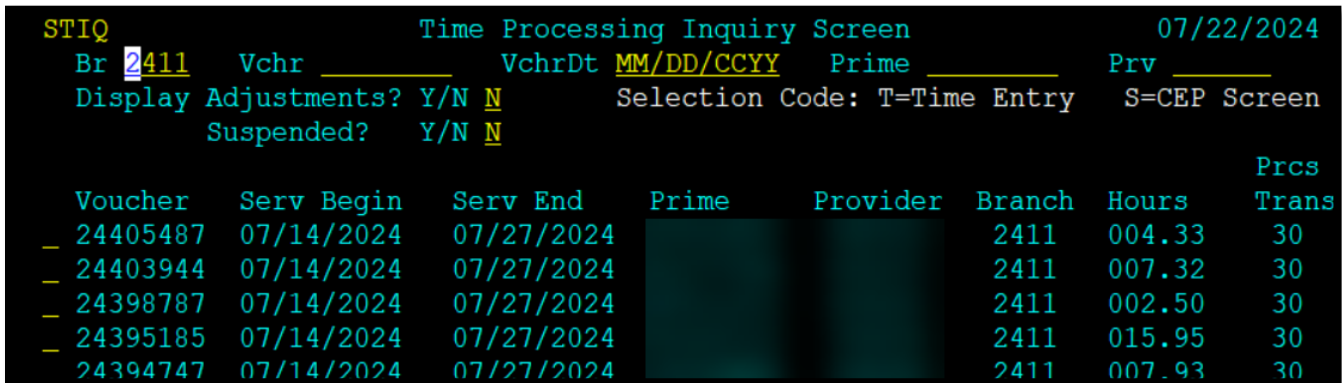
2. Make sure there is an N for adjustments and Y for suspensions.
3. To view the error on an entry, move your cursor to the line next to the voucher number and press any key, then press enter.
4. The reason for the suspension is visible under "Error Msg".
5. F12 will bring you back to the STIQ screen.

The STIQ screen suspended field currently defaults to Y.



To see adjustments, enter a Y in the adjustments field and an N in the suspended field.

If both fields have an N, you will see vouchers in a 30 status with time entered in STIM. Type T next to the voucher number to go to the STIM screen for the selected voucher.



Entering a Y in both fields will not bring up any results.

30 Status Vouchers in STIQ

In the STIQ screen, if both adjustments and suspensions are set to N, then it will show all vouchers in 30 status. All vouchers with time entered automatically for 7/28-8/10 will stay in a 30 status until the night they are paid. This means your STIQ screen is showing **all vouchers from 7/28-8/10**, as well as any old vouchers that are still in a 30 status.

How to narrow down the search:

- Search by date (this only allows you to view one pay period at a time)
- Search by voucher number, provider number, or prime number

Otherwise, you will need to page down to see any vouchers from before the 7/28-8/10 pay period. This should be less of an issue as we get further away from pre-Phase 2A pay periods and manual entry decreases.

Voucher	Serv Begin	Serv End	Prime	Provider	Branch	Hours	Prcs
-	08/09/2024	08/10/2024			2411	005.98	30
-	08/07/2024	08/10/2024			2411	011.80	30
-	08/06/2024	08/10/2024			2411	002.00	30

STIQ Screen Errors

There are several reasons an entry will suspend. The below chart lists the STIQ errors, what causes them, and how to resolve/avoid them.

STIQ Error	Cause of Error	How to Resolve/Avoid
<i>E006 - Provider ineligible on date of service</i>	<ol style="list-style-type: none"> 1. Provider was terminated or otherwise ineligible to work during the pay period, but the end date was not changed on the voucher to reflect the dates of eligibility. 2. Provider was not reinstated timely. 	<ol style="list-style-type: none"> 1. Edit the voucher via UATH to have the correct end date. The STIQ error will clear immediately. To avoid this issue, the voucher must be edited to include the correct end date before the batch is pulled for the pay period. 2. Correct the provider record in OA to make the provider eligible for the entire pay period. If this does not clear the error, then make some type of update in UATH– for example, you can make an edit to hours and then change it back to the original hours.
<i>E002 - Recipient ineligible on date of service</i>	<ol style="list-style-type: none"> 1. Consumer was ineligible to receive services during the pay period, but the end date was not changed on the voucher to reflect the dates of eligibility. 2. Consumer had ONE system eligibility issues which caused a lapse in eligibility. 	<ol style="list-style-type: none"> 1. Edit the voucher via UATH to have the correct end date. The STIQ error will clear immediately. To avoid this issue, the voucher must be edited to include the correct end date before the batch is pulled for the pay period. 2. Fix the ONE system eligibility issue to reflect that they are eligible for the entire pay period. If this does not clear the error, then make some type of update in UATH– for example, you can make an edit to hours and then change it back to the original hours.

<p><i>P350 - Miles without hours</i></p>	<ol style="list-style-type: none"> 1. The mileage entry was created for a pay period with no hourly entries, or 2. If all hourly entries on the voucher have been suspended due to a different error, any mileage entries will be suspended until the suspension of the hourly entry/entries is resolved. 	<ol style="list-style-type: none"> 1. If hourly entries were added after the batch was already pulled, then those suspensions should be left in STIQ and they will disappear after the hourly entries are processed. If no hourly entries are added, and will not be added, then the mileage entry/entries must be canceled by staff. 2. The error suspending the hourly entries must be resolved. The STIQ error will disappear from STIQ the day following the next batch pull date for the relevant pay period.
<p><i>P351 - Miles field has decimals/non - numeric</i></p>	<p>The mileage entry created in OR PTC DCI has a decimal.</p>	<p>The entry must be canceled by staff and recreated by the provider or staff member in whole numbers, or staff can edit the entry to round up to the nearest whole number.</p>
<p><i>P285 - ADL time entered is more than auth</i></p>	<ol style="list-style-type: none"> 1. The provider was able to exceed their authorized hours because a staff member was reducing the hours/miles on a voucher after one or more entries that exceeded the new authorized hours were actively being pulled into a batch, or 2. There are entries that cross over midnight, and the provider is entering an extra minute to their shifts in an attempt to avoid being shorted by one minute. Mainframe then rounds up by one minute. This may result in the provider claiming more than their authorized hours, but it is not caught until it comes to Mainframe. 3. Unauthorized entries were claimed because a provider or consumer were ineligible to work/receive services, but the 	<ol style="list-style-type: none"> 1. Cancel or edit entries in OR PTC DCI to be within the new authorized hours. Always make as few edits to processed entries as possible and avoid editing a processed entry if you can. Also avoid editing EVV compliant entries whenever possible. 2. Do not instruct providers to add an extra minute to their shift if they work overnight shifts. In addition, providers who claim overnight shifts should make one continuous entry for their shift, as this ensures the minute between 11:59 p.m. and 12 a.m. is paid. 3. Any unauthorized entries must be canceled by staff. These suspensions will be removed from STIQ once the canceled entries are processed. To prevent the issue from occurring, vouchers must always be edited or voided when the provider or consumer become ineligible to work/receive services.

	voucher was not edited to reflect the end in eligibility.	
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The [Mainframe STIQ Screen Error Chart](#) is posted to PTC Staff Tools. If you see a STIQ error not included in this chart, please contact the PTC Support Team at PTC.Support@odhsoha.oregon.gov.

Pay Processing Dates

Entries submitted correctly in OR PTC DCI by the provider’s submission deadline (the “Submit All Time Entries Correctly by this Date” column on the [HCW Payroll Calendar](#)) will be pulled into a payroll batch on the business day after the submission deadline.

Staff will have until end of day on the “Last Day for Local Office to Enter Time” as noted on the HCW Payroll Calendar to resolve any STIQ suspensions.

When the payroll batch is pulled, it will then be processed for payment that night and the check date will show as the following business day (the “Pay Processing Date” on the HCW Payroll Calendar).

Any entries submitted or corrected in OR PTC DCI after the deadline will be pulled into a payroll batch on the following processing day but will not be processed for payment **until the following night**. Staff will have one business day (the day after the payroll batch pull for late entries) to resolve any new STIQ suspensions. **This means any late entries will be paid two business days after the timely entries are paid.**

Since many types of entries are being processed automatically, there may be a time when you need to determine what entries are being pulled into payroll batches on a specific date. The [Batch Pull Calendar](#) on the [PTC Staff Tools](#) page is a resource you can use to find this information.

	A	B	C
1	Date	9/12/2024	<----- Enter date here
2			
3	1. Historical entries up to this date - entered manually by staff for payment	7/27/2024	1
4	2. Historical entries - entered automatically for payment	7/28-8/24	2
5	3. Timely entries for whole pay period - entered automatically for payment	8/25-9/7	3
6			

When you enter a date in the Date cell (B1), cells B3-B5 will populate with the payroll batches that are being processed that date.

1. The first date listed is the "up to" date, meaning all historical entries worked up to this date will be pulled into a payroll batch. These entries are emailed to local offices and entered manually into STIM by local office staff.

2. The second date range is for historical entries that are worked after 7/27/24. These are processed automatically after the payroll batch is pulled.
3. The third date range (if applicable) is for the most current pay period. This batch is only pulled once on the day after the grace period ends (three business days after the pay period ends) for providers to enter timely entries.

For a snapshot of payment information, check out this handy reference guide for the 8/11-8/24/24 pay period:

Pay period 8/11-8/24/2024	
Last day for providers to enter their time before payroll batch is run	8/28/2024
PTC Team runs payroll batch	8/29/2024
Entries go to STIM or STIQ/STSS	8/30/2024
Providers continue to enter time for pay period and staff continue to work STIQ/STSS	8/30-9/9/2024
Payment processing for 8/11-8/24/2024*	9/6/2024
PTC Team runs payroll batch for entries entered past submission deadline	9/9/2024
Overtime pay processing for 07/28-08/10 pay period*	9/9/2024
Entries go to STIM and staff work STIQ/STSS errors	9/10/2024
Nightly payment processing for entries providers entered from 8/30-9/9/2024 for the 8/11-8/24/2024 pay period as well as entries from previous pay period. PTC Team runs batch with dates of 7/28-8/24/2024.*	9/10/2024-ongoing
*Pay processing is run overnight	

Pay Processing and Holidays

For pay processing where there are holidays, we will be reverting to normal payment processing (processing on Friday instead of the following Monday) as an ongoing change through January 2025. Providers who receive a paper check should not notice any difference when receiving their check, while those who receive payments by EFT may see it a day earlier. The check dates will not match the HCW Payroll Calendar.

Tips for Editing Entries Post Phase 2A

Try to avoid editing **processed** entries as much as possible! If any entries from the pay period in question have been paid, or have been pulled into a payroll batch, and must be edited, make as few changes as possible to get the needed result. Doing so will prevent issues on the backend, unnecessary STIQ suspensions, overpayments, and even late payments.

Be especially careful of editing EVV compliant entries (mobile app, EVV phone, or fob entries). If all the provider's entries are in processed status and are EVV compliant, please reach out to the PTC Support Team for guidance.

Example 1:

For the prior pay period, there is one pending entry for 15 hours and 51 minutes, and one processed entry for 2 hours. The voucher needs to be reduced by 2 hours. Do not cancel the 2 hour **processed** entry. Instead, edit (or ask the provider to edit) the **pending** entry to reduce it by 2 hours. The voucher can then be edited in UATH immediately.

If staff edits or cancels the processed entry, then the entry for -2.00 hours must be pulled in the following payroll batch and then processed into STIM overnight before the voucher can be edited down in UATH.

Example 2:

There are two processed hourly entries, one for 4 hours and 37 minutes, and one for 5 hours and 15 minutes (totaling 9 hours and 52 minutes). The authorization needs to be edited down to an even 9 hours. Do not edit or cancel both entries. Instead, edit only one entry to reduce it by 52 minutes.

If there were any mileage entries created in this scenario, and both hourly entries were canceled or edited, the mileage entry/entries will be stuck in the STIQ screen until the issue can be resolved on the backend **and** an overpayment processed. If only one entry is edited, there will be an overpayment of 52 minutes that must be requested by staff and processed by PRU, but no entries will end up in the STIQ screen. Keep in mind that the overpayment will need to be processed first before the voucher can be edited down.

Troubleshooting Tips When a Provider Says They Haven't Been Paid

The most frequent reason for late/partial payment is that entries were entered after the provider's submission deadline. Run a Punch Entry Details report to see when the time/mileage was submitted and compare the created date to the submission deadline.

Helpful resources:

- [PTC Batch Pull Calendar](#) and [HCW Payroll Calendar](#)
- [Provider Cannot Claim Time or Reports Incorrect Payment](#)
- [Punch Entry Details Report Guide for Staff](#)

Another possible reason for late pay for the 7/28-8/10 pay period

If the provider was not paid for the 7/28-8/10 pay period, check HINQ to see if the voucher was voided and recreated but the OR PTC DCI authorization wasn't edited. If the authorization was not edited to match the Mainframe voucher, those entries cannot come over to STIM after the payroll batch is run. To find out if this is the case, find the voucher numbers in HINQ and OR PTC DCI and see

if they match. If they do not match, reach out to the PTC Support Team for assistance. This issue only occurs with pay periods prior to 7/28/24.

Payment Adjustments with Phase 2A

There have been changes to the process of making payment adjustments with Phase 2A. See also the [Over and Underpayments QRG](#).

How Staff will be Informed of an Overpayment

Staff will usually be notified of the need for an overpayment when:

- a provider or consumer notifies the local office that a provider was overpaid,
- a provider needs help editing or canceling an entry that was already paid, or
- there is a change in hours for a pay period that already ended.

Providers and consumers cannot cancel an entry that was already paid, which is why this process will usually start with a local office staff member being made aware of an overpayment.

Staff can also use CA View in Mainframe to check for overpayments. See [CA View](#) section below for more information. NOTE: this report is only available for pay periods starting 7/28/24 forward.

How to Complete an Overpayment

Overpayments for entries worked **before 7/28/24** and received in a payroll batch via email from PTC Support:

1. Cancel or edit the entry in OR PTC DCI.
2. **Correct the entry in STIM based on the new payroll batch sent by PTC Support.**
3. Before the voucher can be edited in UATH, staff must make the entry changes in OR PTC DCI.
4. Report the overpayment to PRU by completing a 287B (APD) or 287H (OPI) and sending to APD.CEPpayments@odhsoha.oregon.gov (APD) or SPD.Provideradjustment@odhsoha.oregon.gov (OPI).
5. Once the overpayment is processed, edit the voucher down to the approved authorized hours/miles.

Overpayments for entries worked **on or after 7/28/24**:

1. Cancel or edit the entry in OR PTC DCI. The time/mileage will be backed out of STIM through automated processes (this happens overnight after the entries in question are pulled into a batch). If the voucher must be voided, the entries must be canceled in OR PTC DCI first.
2. Report the overpayment to PRU by completing a 287B (APD) or 287H (OPI) and sending to APD.CEPpayments@odhsoha.oregon.gov (APD) or SPD.Provideradjustment@odhsoha.oregon.gov (OPI).
3. Once the overpayment is processed, edit the voucher down to the approved authorized hours/miles in UATH.

How to Complete an Underpayment

Underpayments for entries worked **before 7/28/24**:

1. The provider creates a historical entry for the unpaid time or miles.
2. The PTC Support Team emails the local office the payroll batch data related to historical entries needing under or overpayment requests.
3. A local office staff member edits STIM data entries and deletes or adds shift(s) in Mainframe to correct the time.
4. A local office staff member completes the applicable underpayment form or spreadsheet and submits to the Provider Relations Unit.
5. The Provider Relations Unit issues payment.

Underpayments for entries worked **on or after 7/28/24**:

1. The provider creates a historical entry for the unpaid time or miles.
2. If the entry is within the authorized hours and/or miles, then the underpayment will process automatically.
3. Payment is issued to the provider automatically.

A Note About Payroll Batch Pulls and Entry Processing

Staff should keep the batch processing dates in mind when entries are being adjusted. Entries submitted timely by providers are pulled into a payroll batch the day after the provider's deadline to submit time. After this batch of timely entries has been pulled, any edits made to UATH and entry adjustments in OR PTC DCI (including entries that are canceled, edited, or added) will not be sent to Mainframe until another batch is pulled. The next batch for that pay period is pulled after the pay processing date. These entries are not being pushed to STIM nightly. Therefore, during this window of time between batch pulls, staff will see a delay between when a change is made to an entry or voucher in OR PTC DCI and when the change is reflected in Mainframe.

Example: Pay Period 8/11/24 to 8/24/24

- The last day the provider has to submit entries in OR PTC DCI for timely payment is 8/28/24.
- The initial payroll batch is pulled 8/29/24 and reflects in STIM on 8/30/24.
- On 9/1/24, a staff member makes an edit to the voucher for this pay period to either reduce hours (and cancels a time punch in PTC) or to increase hours (and provider adds time punches into PTC up to 9/9/24).
- The updated entries for this pay period will not reflect in STIM until the payroll batch is run on 9/10/24.
- That means:
 - 1) The provider will not be paid for the new or edited entries on the initial pay processing date of 9/10/24. Instead, they will have an underpayment processed on 9/12/24.
 - 2) And if the change results in overpayment, the overpayment cannot be submitted until 9/11/24 (or once they see the update in STIM).

- Once the above process is completed, if a provider continues to claim time for this pay period after 9/10/24, those entries will be pushed into STIM nightly. The only exception is on the night overtime pay is processed. On that night, no other entries will be processed.

Increased overpayments

Since an edit in OR PTC DCI is not reflected until the next pay processing day, we are seeing an increased frequency of overpayments. To avoid overpayments, be sure to make changes to OR PTC DCI entries as soon as possible. For example, if there is a need to decrease the hours on a voucher, staff should cancel the entries and edit the voucher as soon as possible to prevent the provider from being overpaid. If an overpayment is needed, the voucher will need to be edited after the overpayment is processed by PRU.

STIQ errors

If you have a STIQ error requiring a cancel or edit to one or more entries, the entries will stay in STIQ until another batch is pulled and the entries are processed into STIM.

STIQ and STIM do not “talk” to OR PTC DCI in real-time. Instead, updates are based on batch pulls which automatically pull in entries from the batch file (for entries on or after 7/28/24) which is pulled according to the [PTC Batch Pull Calendar](#).

If entries are suspended in STIQ and require canceling OR PTC DCI entries, you should only cancel the entries that are suspended in STIQ (viewable in STSS by typing an S next to the voucher). If entries are canceled that already went to STIM, the system will need to wait until there is another batch pull for that pay period and those entries are processed into STIM before any changes you make in OR PTC DCI will show up in Mainframe.

[Editing in UATH After an Overpayment](#)

When you have an overpayment and need to edit the voucher (i.e., reducing the hours) in UATH, you will need to wait until after the overpayment is processed by PRU to make the UATH edit.

Once PRU receives the overpayment request, they typically process it within one or two business days. When you get confirmation the overpayment adjustment has been processed, there will be a “46” record and you can update this voucher via UATH to reduce the hours.

[Underpayment / Overpayment Request Spreadsheet](#)

The PTC Team has updated the Underpayment/Overpayment Request Spreadsheet on behalf of PRU to include the new Spousal Pay Mileage service code and Behavioral Health Mileage service code. This spreadsheet is available on the [CM Tools](#) website.

[CEP Underpayment / Overpayment Request Spreadsheet \(Updated Aug. 07, 2024\)](#)

Reminder: All underpayment and overpayment requests must still go through PRU and are not processed by PTC Support.

CA View

As a backup method of checking for overpayments, staff will also be able to use the overpayment report (SJH0303U-A -- Overpayment Voucher Report) in CA view. This report is only for entries worked on or after the 7/28/24 pay period. To access CA view, sign into Mainframe and navigate to the VWHR screen. From CA view, enter a report name or * for all reports and select from R (Report). You can then narrow down the timeframe by entering dates in the Selection By Date fields. See the [CA View Reports guide](#) for more information.

```
CA View EXP -- Primary Selection for SYSZN.CVDG.OEDR -----
Command ==>  MODE HXXXXX

Distribution ID --> HXXXXX

Report ID  ==> *
Select By  ==> R          (R, I, IL, or IR)
Index Name ==>          Value ==>
    ==>                ==>
    ==>                ==>
    ==>                ==>

Selection By Copy:
Previous Copy No. ==> ALL      (Enter 0 or blank for
                               most recent copy, 1 for next
                               most recent copy, etc., or
                               ALL for all copies.)

Selection By Date:
From        ==>              ( mm/dd/yyyy )
To / No. of Days ==>        ( mm/dd/yyyy or nnn )

Enter END command to terminate this CA View session.
```

Once you have made your selections, press Enter to go to the Report Selection List. Asterisks appear as fields where you can enter additional search criteria. There are additional columns that appear off to the right side of the screen, press F11 to scroll right and F10 to scroll left.

```
CA View EXPO ----- Report Selection List -----
Command ==>          Scroll ==> PAGE

Sel Report ID  Description          Arch Date Time Loc  Lines Pages
==> *          *                    *      *      *
WCM0086R-B    CMS CHECK REGISTER BY CH 05/19/2017 22:40 PTAP   19    1
WCM0125R-A    DHR EB DAILY CHECK REGIS 05/19/2017 22:40 PTAP   73    5
WCM0125R-B    CMS DAILY CHECK REGISTER 05/19/2017 22:40 PTAP  862   56
WCM0125R-C    CMS MONTHLY CHECK REGIST 04/25/2017 22:38 PTAP 788962 13593
```

You can browse a selected report by entering an S in the SEL Column; you then select a branch (if needed) and the report contents then displays on your screen. If the branch you are in is not listed, it means there is no data for your branch in the requested report. You can use F7 (Scroll Up) and F8 (Scroll Down) keys and F10 (Scroll Right) and F11 (Scroll Left) to navigate the report.

Please see the [Over and Underpayments Business Process](#) and the PTC Phase 2A Workshop [PowerPoint](#) or [video](#) for more information.

Emergency batch / last paycheck:

If a provider has permanently quit or has been terminated AND has entries in OR PTC DCI that have not yet been paid (and will not be paid within one business day), then this provider may be eligible for an emergency batch pull.

If a provider may be eligible for an emergency batch pull, a staff member MUST request an emergency batch pull from the PTC Support Team at PTC.Support@odhsoha.oregon.gov. Please mark your email as high priority and include “URGENT” in the subject line.

Overnight entries for time worked on or after 7/28/24

An unexpected STIQ error has revealed that some providers are adding an extra minute to their shift when they work an overnight shift. This is especially common in the web portal and mobile web. Since Mainframe now rounds up for overnight entries, when an extra minute is claimed, the provider may end up exceeding their authorized hours. Exceeding the hours in this way results in the STIQ error P285 – ADL time entered is more than auth.

We’ve also noticed that some providers are clocking out at 11:59 p.m. and clocking in at 12 a.m. (or creating equivalent web portal/mobile web entries). Reporting their time in this way means the system will not pay the minute between 11:59 p.m. and 12 a.m. Providers should simply make a continuous entry for their whole shift to make sure the minute between 11:59 p.m. and 12 a.m. is paid, regardless of which EVV option they use.

If a provider makes two entries for an overnight shift, they must create it in the following way to ensure the minute between 11:59 p.m. and 12 a.m. is paid:

- Check out time is 12 a.m. on day 1
- Check in time is 12 a.m. on day 2

Remember: Providers should use an EVV compliant method to report their time whenever possible. Using the web portal or mobile web is not EVV compliant.

Contacting PTC Support with Urgent Requests

PTC Support may take up to 2 business days to respond to a question or request. If you have an urgent need that requires assistance in one business day or less, AND it may impact timely payment for a provider, then please mark your email as *! High Importance* and include the word “URGENT” in the subject line.

Marking the email as urgent is helpful in situations such as:

- STIQ errors requiring resolution within one business day,
- emergency batch pull requests due to provider termination/resignation,

- a missed payroll batch in your shared payroll inbox due to a technical issue,
- a relink being needed when the provider entry deadline is the next day, etc.

Resources

Below is a list of resources that pertain to the topics discussed in this guide.

Resource Title	What it is	Link
<i>CEP Specialist Training Manual (aka CEP Manual)</i>	Guide that covers common OA and Mainframe actions for cases in the Consumer-Employed Provider program	http://www.dhs.state.or.us/spd/tools/cm/homecare/CEP_Guide7-9-24.pdf
<i>CEP Underpayment / Overpayment Request Spreadsheet</i>	Link to the spreadsheet which staff can use to submit overpayments and underpayments to PRU	http://www.dhs.state.or.us/spd/tools/cm/provovp/Underpayment_Request_Spreadsheet_8-7-24.xlsx
<i>Homecare Worker (HCW) Staff Tools page</i>	Staff tools page that includes links to resources like the HCW Payroll Calendars, application forms, and other HCW materials	http://www.dhs.state.or.us/spd/tools/cm/homecare/index.htm
<i>Mainframe Changes for PTC Phase 2A Guide</i>	Guide detailing the new Mainframe processes that were implemented with Phase 2A	http://www.dhs.state.or.us/spd/tools/cm/PTC/Mainframe_Changes_for_PTC_Phase_2A_Guide9-10-24.pdf
<i>Overpayment and Underpayment QRG</i>	Guide explaining the process of completing overpayments and underpayments, since the implementation of Phase 2A	https://dciconfluenceprod.dcisoftware.com/display/ORPD/QRG+-+Over+and+Underpayments
<i>PTC Staff Tools page</i>	Staff Tools page where PTC documents and transmittals are posted	http://www.dhs.state.or.us/spd/tools/cm/PTC/index.htm
<i>Unlinking and Relinking Guide</i>	Comprehensive guide on how to complete unlinks and relinks	https://dciconfluenceprod.dcisoftware.com/display/ORPD/Guide+-+Unlinking+and+Relinking
<i>Updating the SELG Branch in Mainframe</i>	A QRG with instructions on how to update the SELG branch to match Mainframe	https://dciconfluenceprod.dcisoftware.com/pages/viewpage.action?pageId=102137862