PTC Phase 2A Workshop Series

FAQ (Frequently Asked Questions)

Contents

Mainframe screens

Q: Do we still need to use OPAY?

A: You will still need to use OPAY and HPAY for any entries submitted that are worked prior to July 28, 2024.

Q: What is the CA view?

A: CA view is the Mainframe Report Viewer which is accessible through the Mainframe screen VWHR.

Q: What is the SELG screen? How can we make sure the SELG branch is correct?

A: SELG is the Service Eligibility Screen that displays the service plan information that has been entered in Oregon Access and is sent to Mainframe. It displays the Service Category, Service Setting, Service Eligibility Start and End date, and Branch. Mainframe uses this information to validate information when creating vouchers.

If the SELG branch needs to be changed, the service eligibility worker or case manager should be able to update the service branch in the Oregon Access (OA) service plan. SELG is based off what is in OA.

If there is an issue with your rights/permissions in Mainframe, you should reach out to the OIS Service Desk.

Q: ONGO will need to be manually ended and then re-created if miles need to be removed or added. Can we clarify whether this solution applies to any other situations?

A: This is one of two situations where the ONGO must be ended and recreated for a change. Otherwise, ONGO can be edited using the ONIQ screen if the changes are going to be ongoing. Note, if the change only applies to one or two pay periods, you can add miles to a voucher using UATH. This is even if the voucher did not originally have mileage authorized.

The other situation that would require ending and recreating ONGO would be a service code change. A service code change would also require voiding and reissuing the current voucher(s).

Q: What if there is a 546SF needing to add miles to only a couple of vouchers?

A: If this is a temporary change and ONGO does not need to be updated, you can simply edit the vouchers in UATH to add the miles. You can add miles to a voucher in UATH even if the original voucher did not have miles authorized.

Q: There is an option for rate change in UATH. Will rate changes ever fall on the local offices?

A: No, this field will only be updated by central office.

Q: What if there was a change to Mainframe where all vouchers were automatically created to include 1 mile? Wouldn't this make things easier?

A: There are concerns with thousands of providers potentially claiming a mile they are not authorized for. This would add up over multiple pay periods. Any

Mainframe changes have to be carefully evaluated for potential risks. Changes also require time and resources that are already dedicated to other important efforts.

Payroll batches and STIM entry

Q: Do you know when the pulled batches will hit our email inbox?

A: The first batches will go to inboxes on July 19th. We do not have a timeframe during the day, as the statewide batch report has to be pulled first before being emailed.

Q: Could you clarify what you mean by "batches will include entries from multiple branches"?

A: Batch files will usually be separated by program rather than by branch. You will receive an Excel batch file that has multiple tabs that are identified by branch number. The tabs are located on the bottom of the file where you can navigate and click through. Sending the batches by program ensures the PTC Support Team can efficiently get the batches out to everybody as soon possible. This allows staff to have time to enter the batches into STIM.

You will still only enter time/mileage entries from the branch or branches you normally enter time/mileage for. Nothing about which branches you enter time/mileage for will change.

Q: Once this goes live will we have to do payroll each day or can we still process it like we do with the payroll calendar timelines?

A: The same processing deadlines will apply for the pay periods of 6/30/24 - 7/13/24 and 7/14/24 - 7/27/24. Otherwise, all the entries you get via email will be historical and will typically involve underpayments. They will require daily processing as late payment fees can still apply.

Underpayments and overpayments

Q: How will we be made aware when an overpayment request is needed?

A: Providers or consumers will still need to reach out to the local office if a paid entry needs to be canceled. This means local office staff should be the first to

know that an overpayment will be needed. There is an overpayment report that the local offices will have access to through CA view. CA view is the Mainframe Report Viewer which is accessible through the Mainframe screen VWHR.

Q: To clarify for under/over payments, we'll still follow our current process for entries that are emailed, correct?

A: If you receive the entry via an emailed payroll batch from PTC Support, then yes, you will follow the current process for under/overpayments. All other entries will follow the new processes.

PTC processes

Q: Will we still be emailing PTC Support about updates to cost center change for case transfers?

A: Yes. The cost center transfers process will not be changing. You will also need to make sure that the branch number on the voucher and ONGO matches the SELG branch.

Q: How do we know if we have a supervisor role in PTC? Do leads and management need to request that?

A: If you log into OR PTC DCI and you have a Payroll tab at the top of your screen, then you do not have a supervisor role, you have a Payroll Team role. If you have other tabs and are able to edit/add/reject entries, edit profile information, etc., then you have a Supervisor role. If you are able to view profiles and entries but are unable to edit, then you have an Auditor role.

Payroll role profiles will be inactivated on 7/19/24 unless there has been a request to change your access. If you currently only have a Payroll Team role but need a Supervisor or Auditor Role, reach out to your manager. They will need to submit a [Staff Profile Maintenance Form](#) to the PTC Support Team requesting the type of role you need. The request should also indicate that this is a change in access due to Phase 2A.

Q: Do we still need to check if authorizations and profiles are set up after vouchers are created within two business days?

A: Yes, profile creation will work the same way after Phase 2A Go-Live. If you are creating a new voucher for a consumer or provider who doesn't have a profile yet

in OR PTC DCI, it will take up to two business days to set up the profile. If they both already have profiles and only need to be linked in OR PTC DCI, this will be completed more quickly. This is because of new automation for creating new funding and service accounts.

The process of setting up new vouchers will be the same. Checking the accounts in OR PTC DCI to see if a relink is needed will still be extremely important. Please see APD-AR-23-029 Relinking in OR PTC DCI for more information on relinking.

Q: How will splitting vouchers change?

A: Situations that require a split voucher will still require a split voucher after Phase 2A. However, the process will be easier Updates to the splitting vouchers transmittal will be published around July 28, when the Phase 2A changes are fully in effect (for authorization updates and STIM entry automation).

The basic steps will include:

- Editing the current voucher in the UATH screen to have a new end date, and prorating hours/miles.
- Creating a new voucher with a start date one day after the end date of the previous voucher, and prorating hours/miles.

Q: If the provider stops working for the consumer, do we still need to end the ONGO and notify the PTC Support Team of the need for an unlink?

A: Yes. The unlinking process will not change.

Q: I'm worried about how some of these new processes will work for my office. What should I do?

A: Please feel free to reach out to the PTC Support Team at PTC.Support@odhsoha.oregon.gov with specific concerns you have. You may also wish to come to the Phase 2A Command Center between July 22 and August 16 to discuss your concerns with the PTC Team. Find more information about the Command Center in APD-IM-24-053 Phase 2A Go Live Information.

Other

Q: If staff cancels an entry because it went outside the new end date when attempting to edit the voucher in UATH, how will the provider be notified?

A: That process will still be the same as it is now. You should notify the provider of any changes made to their entries.

Q: If a provider does not work for a certain pay period and there is an ONGO, will deleting a voucher automatically reject the authorizations in PTC so they cannot claim time for that pay period?

A: Yes, it will reject that authorization in PTC.

Q: Has anything changed with the provider's ability to enter more time than authorized?

A: The hard stop is still in place and providers cannot enter more time or mileage than authorized. However, if the voucher is edited in UATH at the same time as the provider is creating an entry, then potentially the provider could claim more time/mileage than what is authorized. However, this will be **extremely** rare.

Q: Will there be updates to the OR PTC DCI Staff Profile Maintenance Form?

A: Yes, there will be updates which will be posted around Phase 2A Go-Live.

Resources

[PTC Phase 2A Workshop PowerPoint Presentation (includes videos of the Mainframe changes)](#)

[PTC Phase 2A Workshop Video](#)

[APD-IM-24-053 Phase 2A Go Live Information](#)

[PTC Batch Pull Calendar](#)

[Punch Entry Details Report Guide for Staff](#)

[Authorization Widget Guide for Staff](#)