

# PTC December 2023 Webinar and Learning Lab

## FAQ (Frequently Asked Questions)

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### Branch Transfers

[Q: Will the branch transfer process change after Phase 2A go-live?](#)

**A:** The branch transfer process, for the most part, will not change after Phase 2A.

The branch number will be editable on the Mainframe voucher; however, this will not trigger the necessary updates in OR PTC DCI to transfer the accounts and consumer profile. We hope this process may become automated in a future phase of the project. The one part of this process that will change is the batch processing and time entry, since those processes will change significantly with Phase 2A. More info about Phase 2A changes will be coming soon.

Q: When transferring a case, why do we need to end ONGO and void vouchers?

A: The ONGO must be ended and vouchers voided by the sending branch to allow the new branch to create and manage the provider's ONGO and vouchers going forward. This is due to limitations of the Mainframe system.

## Authorization Changes

Q: What happens if the start or end date on an authorization doesn't match the Mainframe voucher?

A: If the start or end date doesn't match, then vouchers may not come through automatically. If, for example, an end date is extended out into the next pay period, then the voucher for that next pay period will not come through. This means the provider may still be able to input entries, but none of that time or mileage will be authorized because there is no corresponding Mainframe voucher with the hours or miles. Always make sure the OR PTC DCI authorization matches the corresponding Mainframe voucher.

Q: What happens if an authorization is updated but the voucher number is input incorrectly?

A: It's extremely important to make sure the Authorization Reference ID matches the correct voucher number (including a 20 before the voucher number). We suggest using copy and paste from Mainframe if your settings will allow this to make sure the correct voucher number is being used.

Not having the numbers match means the provider may end up being paid late, since the voucher number shown in the payroll batch will not exist in Mainframe. If the provider is paid late for this reason, they will be eligible for late payment penalties.

If a voucher number was entered incorrectly but matches a different voucher, or if two voucher numbers are switched, then two different providers may have their payment switched. Solving this type of issue is extremely time consuming

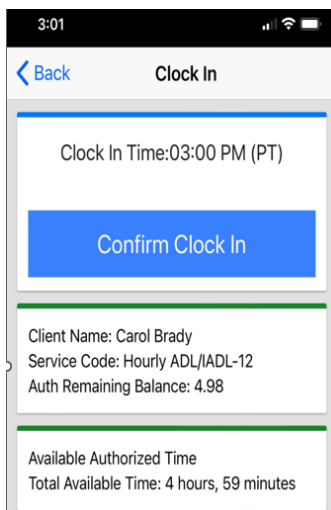
and must be avoided. Again, the provider will be eligible for late payment penalties if any of the payments are late or incorrect for this reason.

## Other

Q: When will providers be able to see their remaining hours in hours:minutes instead of decimal hours

A: Providers can see their remaining balance in hours and minutes when making an entry in the mobile app, and when looking up their authorization information in the authorization widget on the dashboard. However, they will only see the remaining balance in decimal hours when entering time or mileage via the web portal (historical entry or fob entry). Currently there is no plan for this to change due to base system limitations. The below screenshots show what the provider will see depending on which screen they are accessing.


### Mobile App Clock In Screen:



### Authorizations Widget on Dashboard:

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
Hourly ADL/IADL-10	12/03/2023	12/16/2023	23 Hours, 0 Minutes	20 Hours, 48 Minutes	0 Hours, 0 Minutes	20 Hours, 48 Minutes	23 Hours, 0 Minutes	23 Hours, 0 Minutes	23 Hours, 0 Minutes

### Punch Entry Creation or Editing in Web Portal:

Entry Type:	Punch	▼
Employee Name :	John Lennon - J0HNL3NN0N	
Account Type:	Hourly	▼
Client Name:	Sir Paul McCartney - PAUL4EVA	
Service Code:	Hourly ADL/IADL-3	
Service Date:	11/22/2023	
Remaining Balance:	0.75	

Q: How can we add hours/miles to an already paid voucher?

A: Please refer to the CEP Specialist Manual for Mainframe entry instructions: <http://www.dhs.state.or.us/spd/tools/cm/homecare/CEP%20Guide%207-11-22.pdf> or [PTC Business Process - Over and Underpayments](#).

## Additional Resources

[PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov)

[PTC Staff Tools](#) - PTC resources, including Webinar and Learning Lab materials, as well as transmittals and other published communications - [PTC Staff Tools](#)

[Workday Learning Lab Course](#)- Go here to register for Learning Labs. You only need to register once to be signed up for all Learning Lab sessions.

[Business Process – Consumer Transfers to a New Branch](#) – Process for completing branch transfers in the local office.

[Updating an Authorization Quick Reference Guide](#) – This guide includes the steps for updating an OR PTC DCI authorization.

[APD-IM-23-102 PTC Process for Splitting Vouchers](#) - APD-IM-23-102 PTC Process for Splitting Vouchers