



Provider Time Capture

Fall 2023-Winter 2024 Webinar Series

Branch Transfers and
Authorization Updates

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Sponsor video!





Agenda

Branch Transfer Basics

Branch Transfer "Fun Facts"

Authorization Update Basics

Authorization Update "Fun Facts"

Q&A

Branch Transfer Basics

When a consumer changes branches (cost centers), the local office informs PTC Support of the transfer.

Entries moving forward are housed in the new cost center, but any prior entries are still housed in the old cost center.

Branches must coordinate to ensure all entries are paid. Historical entries worked before the transfer will appear on the batch report of the old branch. Those entries must be sent to the new branch to be paid.



[Business Process - Consumer Transfers to a New Branch or Program](#)

Fun Facts



with Scruffy

Branch Transfer “Fun Facts”

- The PTC Support Team must research every branch transfer request, and this takes time.
 - If the consumer and their accounts are already in the right cost center in OR PTC DCI, they don't need a transfer email.
- Providers are all in a generic cost center, so they never need to be “transferred” even if their consumer does.
- To transfer the case in OR PTC DCI, PTC Support updates the cost center for all funding and service accounts, and then the consumer's profile.
 - This makes all future entries, account information, and profile information viewable for the new cost center.

Heads up! Authorization Changes in Phase 2A



- Authorizations will no longer need to be edited manually in OR PTC DCI after Phase 2A go-live in late July 2024.
- Edits to vouchers will be done in Mainframe, and these will come through to OR PTC DCI automatically.
- See our Session 1 Webinar materials on [PTC Staff Tools](#) for more information.
- Until Phase 2A go-live, OR PTC DCI authorizations must still be updated manually to match voucher changes.

Authorization Update Basics

All voids and reissues (i.e., changes to a voucher in Mainframe) must have a corresponding update to the OR PTC DCI Authorization. This is done manually by staff.



The Authorization ID Reference number in OR PTC DCI must be changed to reflect the new voucher number in Mainframe. The hours, start date and end date must be updated to match the new voucher.

Don't forget
the mileage
authorization!

Id	Service Date	Type	Service Code	Cost Center	Employee /Program Name	Ref.	Amount	Unit Type	Status	EVV
5095	Nov 12, 2023	Authorization	Mileage-12	The Dalles APD-EU - 3311-EU			0.00	Miles	Approved	N/A
5094	Nov 12, 2023	Authorization	Hourly ADL/IADL-12	The Dalles APD-EU - 3311-EU			0.00	Hourly	Approved	N/A

- If there is a corresponding mileage authorization in OR PTC DCI, make sure it matches the new voucher as well!
- The start and end dates must match the Mainframe voucher.
- DO NOT change the expiration date.



What if an authorization is not updated?

If an authorization is NOT updated:

- Authorized hours and/or mileage may be incorrect. This may either prevent the provider from claiming all hours/miles or allow them to claim more than what was originally authorized.
- If an end date or start date needed to be edited but was not, the provider may be able to claim time/miles for a time period when they were not authorized to claim time/miles.
- The Mainframe voucher number will not match the OR PTC DCI authorization, causing confusion, extra work, and potential errors when entering time into STIM.



Ending Authorizations

- If the provider stopped working:
 - Email an unlink request to PTC Support,
 - void vouchers,
 - close ONGO, and
 - reject any future authorizations.
- If there is time already on an authorization but the authorization needs to be rejected:
 - Reject/cancel any entries that were created.
 - On the authorization, edit the hours to 0.01.
 - Change the end date to match the start date.



Tip:
Authorization
change

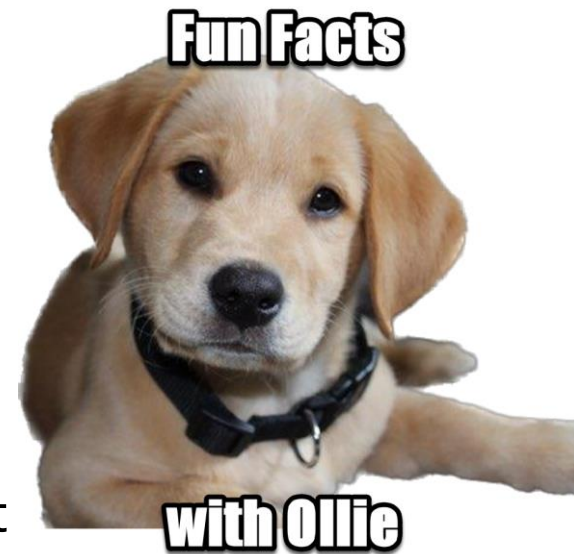
An updated authorization will go through to OR PTC DCI automatically if you follow **these steps in this order***:

1. Void the voucher in Mainframe
2. Reject the authorization in OR PTC DCI
3. Reissue the voucher in Mainframe

*This will only work if there are no entries made against the OR PTC DCI authorization! We suggest using this method for future authorizations.

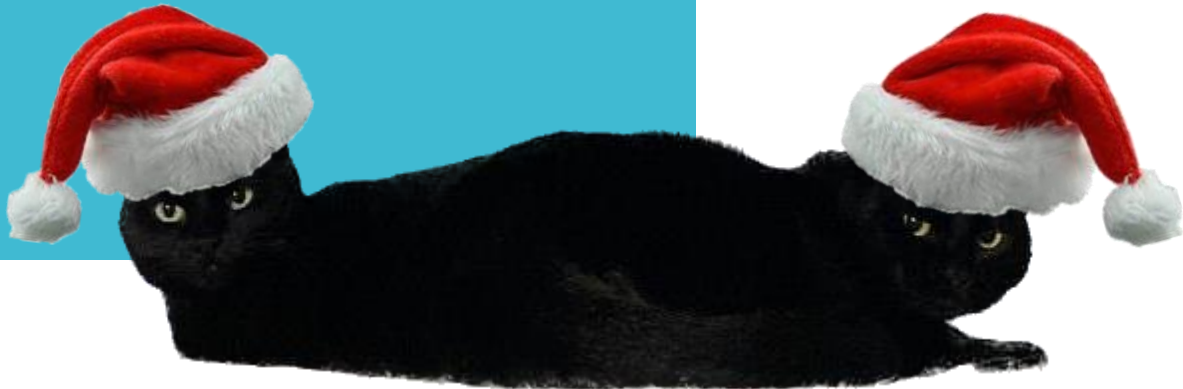
Authorization Update “Fun Facts”

- Every void and reissue ends up in the SPTC screen (viewable by the PTC Support Team)! However, they all show as duplicates. Duplicates pile up in the hundreds to thousands per week and PTC Support does not take action on these.
- Currently, only the first voucher created for a pay period for a specific consumer/provider pair will automatically go to OR PTC DCI. Once that voucher is voided, the reissued voucher does not go to OR PTC DCI unless the original authorization is rejected in OR PTC DCI before re-issuing the voucher.



Split Vouchers

- The need to “split vouchers” occurs when a change is occurring mid pay period, such as a change in programs.
- Actions must be taken in a specific order to make sure the provider is able to claim their time/miles correctly and timely.
- Please review [APD-IM-23-102 Process for Splitting Vouchers](#) and email PTC Support if you have any questions!



Enroll in the Learning Lab series!
Only one registration is required for the series

Register for the Learning Lab series.

Next Learning Lab:

December 13th

2:05-2:55 PM

- Branch transfers
- Authorization updates

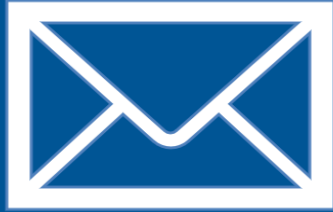
[Link to Workday Course](#)





Questions?

Resources



PTC Support Email

- PTC.Support@odhsoha.oregon.gov
- The PTC Support Team monitors this inbox daily



PTC Project Website

- PTC.Oregon.gov
- Includes learning materials and project updates.

