Provider Time Capture
Winter 2024 Webinar Series

Unlinking and Relinking

Agenda

- New linking basics
- Unlinking deep dive
- Unlinking "Fun Facts"
- Relinking deep dive
- Q&A

How are new consumer/provider pairs created in OR PTC DCI?

- After receiving a 546, the voucher specialist creates a voucher.

- If the provider has not worked for the consumer since Sept 2021, this new voucher will trigger a PTC error. PTC errors go to a daily queue that the PTC Support Team can see.

- PTC Support creates new profiles by pulling information from Mainframe and Oregon ACCESS (OA).

- PTC Support creates new funding and service accounts for all new consumer/provider pairs.

- PTC Support sends a welcome email containing login information to new users who have a valid email address in OA.

Reasons to Unlink

- Local office should request an unlink if a provider stops working for a consumer **for any reason**, including but not limited to:
  - Consumer passed away
  - Consumer moved to facility
  - Consumer stopped receiving services
  - Provider quit or moved away
- PTC Support may receive requests to unlink from Central Office if:
  - Provider number expired (We are NOT notified if the number is reactivated!)
  - There is an APS or fraud case
- PTC Support may unlink if it is discovered the provider is no longer working for the consumer

Local office steps to Unlink

- When a provider stops working for a consumer for any reason, they must be unlinked.
- End the ONGO and void any future vouchers.
- Reach out to the PTC Support Team at PTC.Support@odhsoha.Oregon.gov to unlink the pair.
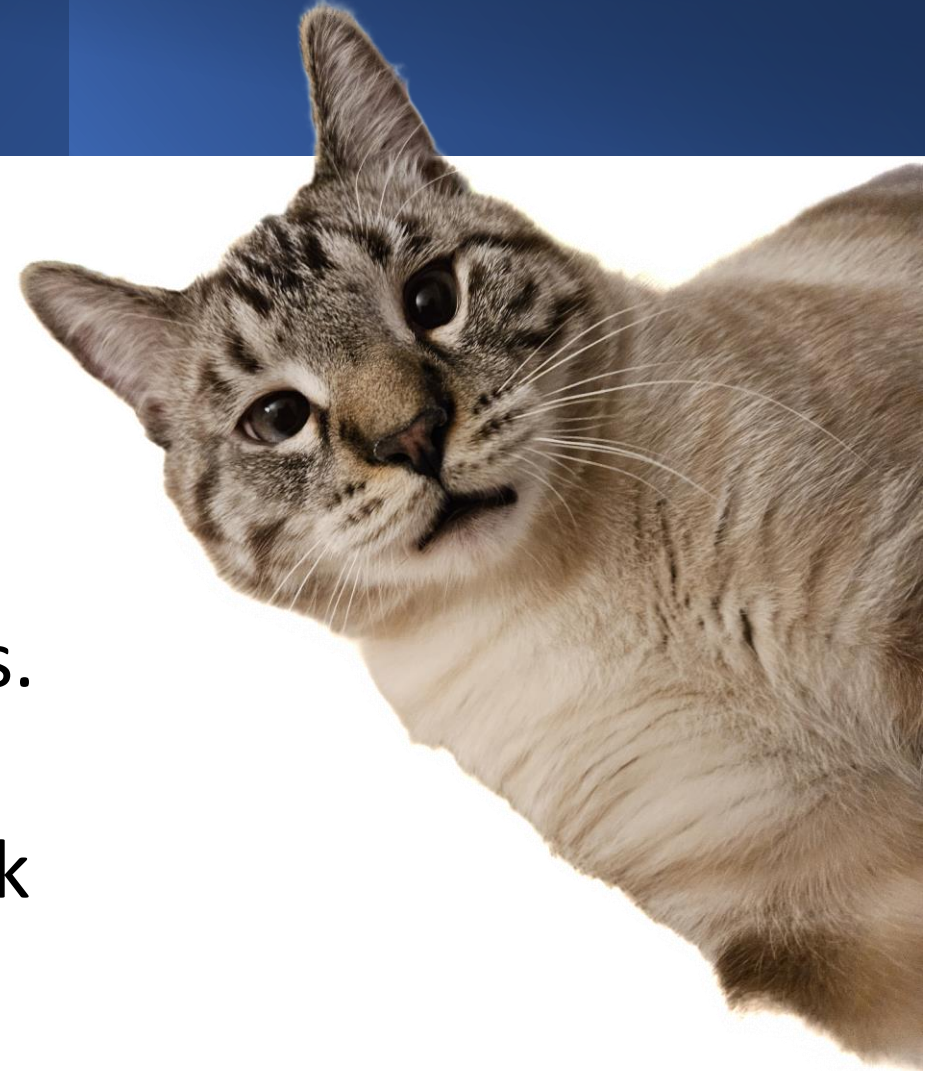
Two Types of Unlinking

End date: PTC Support adds an end date to the service accounts matching the last day worked. Providers will be unable to claim time/mileage for after this date.

Inactive: PTC Support inactivates the funding and service accounts that link the consumer and provider. Typically happens one year after end date or one year of no time claimed.

Unlinking – End Date added to service accounts

An end date on the service accounts means the provider cannot claim time or mileage after this date.

If there is an end date on the service accounts, the provider will see the error "Employee Service Account End Date Punch Entry" when trying to claim time/mileage after that date.

This end date will stay on the accounts unless they are removed by the PTC Support Team!

End Date Error

Alert ×

Your punch has one or more violations and cannot be saved. Please review the violations below and click Return to make edits or cancel the entry.

Business Rule Name

Employee service account end date punch entry

Return

Unlinking - Inactivating the Accounts

- After about a year has passed from the end date, or by request, the PTC Support Team will inactivate the funding and service accounts.

- **Profiles are not usually inactivated** unless there is a specific request from policy or other reason for the profile to be inactivated (consumer or provider passed away, in a facility, using an agency only; or provider fraud/APS case).

- If funding and service accounts are inactivated, the provider will be unable to find the consumer when attempting to claim time or mileage.

Unlinking "Fun Facts"

- If a consumer remains linked to the provider, even if there is an end date, the provider will be able to see the consumer as an option to claim time or mileage. They may even be able to claim time or mileage that is not authorized.

- If a provider no longer wants to see the consumer's name listed, the provider or staff can ask the PTC Support Team to have the accounts inactivated.

Fun Facts with Scruffy

Relinking

If a consumer and provider have been previously unlinked (either an end-date added, or inactivated accounts), they must be relinked if the provider starts working for the consumer again.

Relink requests must be sent to the PTC Support Team at PTC.Support@odhsoha.Oregon.gov.

If a previously unlinked pair has new vouchers but are not relinked, then the provider will not be able to claim time for after the previously reported last day worked.

Checking the Link Status

Every time a new service plan is created, a staff member must check OR PTC DCI to see if the consumer and provider are:

- Currently linked,
- Never linked,
- Unlinked via an end date, or
- Unlinked via inactivated accounts.

Currently Linked or Never Linked

- If the consumer and provider are currently linked, they will have active accounts **and no end date on time/mileage service accounts**. Vouchers can be created, and the authorizations will automatically be in OR PTC DCI.

- If the consumer and provider have never been linked, there will be **no active or inactive service accounts** linking the consumer and provider. Vouchers can be created, and the authorizations will be sent to OR PTC DCI within 2 business days.

- **These scenarios are NOT examples of relinks! No relink request is needed.**

Currently Linked - Active Account with No End Date

Entries	**Accounts**	Certifications	EVV Locations	Diagnosis	Notes	Attachments	Events	Custom Fields	History

Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-10	Peter Brady	Hourly	Active

- Go to consumer's profile page
- Go to accounts
- Find an account with the provider's name
- Select anywhere on the account except the provider's name hyperlink
- This example shows an active service account with no end date
- The consumer and provider are linked
- **Once Mainframe vouchers are created, they will be sent to OR PTC DCI automatically**

Account Details

Account Type:	Employee Service
Client:	Carol Brady
Relationship Type:	None
Service Code:	Hourly ADL/IADL-10
Funding Source:	APD
Funding Type:	Units
Cost Center:	The Dalles APD-EU
Employee:	Peter Brady
Employee Number:	222111
Unit:	Hourly
Daily Pay Max:	0.00
Daily Rate:	0.00
Max Units Per Punch:	16.00
EVV Exempt:	No
Pay Rates:	➕
Allows OverLapping Pay Rates:	No

> No End Date is listed on this active account. Consumer and provider are linked.

Never Linked - No Accounts

- Go to consumer's profile page
- Go to accounts
- Look in the active accounts for the provider's name
- If you don't find any, change the status from Active to Inactive
- If you still don't see the provider's name, this means the consumer and provider have never been linked
- **Once Mainframe vouchers are created, they will be sent to OR PTC DCI within 2 business days**

Importance of Relinking

- If there is an end date on the service accounts, the provider will see the error "Employee Service Account End Date Punch Entry" when attempting to claim time/mileage. **They will not be able to make any entries after the end date.**

- If the funding and service accounts were inactivated, the provider will be unable to find their consumer when attempting to claim time/mileage. **They will be not be able to make any entries.**

In both scenarios – the consumer and provider should have been relinked before the vouchers were created! Their ability to claim time/mileage for their consumer has now been delayed.

Any late payments caused by a delay in relinking will be eligible for late payment penalty fees. Relink requests are the responsibility of local offices.

APD-AR-23-029 Relinking in OR PTC DCI

Relink Needed – End Date

- If a consumer and provider have an active service account, but there is an end date on the service account, **they must be relinked**!

- Authorizations will come through when vouchers are created, BUT the provider will not be able to claim any time or mileage after the end date.

- Send PTC Support a **relink request** with the following information:
  - Consumer name and Prime number
  - Provider name and provider number
  - First day of work

Relinks are usually completed within one business day.

Relink Needed – End Date

| Entries | Accounts | Certifications | EVV Locations | Diagnosis | Notes | Attachments | Events | Custom Fields | History |

| Employee Service | Employee | The Dalles APD-EU - 3311-EU | APD | | Hourly ADL/IADL-10 | Joe Schmoe | Hourly | Active |

Employee: Joe Schmoe
Employee Number: 222000
Unit: Hourly
Daily Pay Max: 0.00
Daily Rate: 0.00
Max Units Per Punch: 16.00
End Date: Sep 12, 2023
EVV Exempt: No

End Date: Sep 12, 2023

Allows Over Lapping No
Pay Rates:
Display Auth Widget: Yes
Created Date: Aug 26, 2021
Status: Active

- Go to consumer's profile page
- Go to accounts
- Find an account with the provider's name
- Select anywhere on the account except the provider's name hyperlink
- This example shows a service account with an end date of September 12, 2023
- The provider stopped working for the consumer on this date
- **Email a relink request to the PTC Support Team**

Relink Needed - Inactive Accounts

- If you don't find the service accounts linking the consumer and provider in the list of accounts, change the filter from Active to Inactive.

- Once you are looking at Inactive accounts, you will look for one or more accounts that links the consumer and provider.

- If you find an Inactive account linking the consumer and provider, they need to be relinked. Vouchers will NOT go through until they are relinked!

- Send PTC Support a relink request with the following information:
  - Consumer name and Prime number
  - Provider name and provider number
  - First day of work
  - Whether vouchers have already been created or not

Relink BEFORE creating vouchers to prevent errors and delays.

Relink Needed - Inactive Service Accounts

- Go to the consumer's profile page
- Go to accounts
- Change the status to inactive
- Look for an inactive account with the provider's name
- If you find an inactive account, email a relink request to the PTC Support Team

Entries	Accounts	Certifications	EVV Locations	Diagnosis	Notes	Attachments	Events	Custom Fields	History

Select Account Type ▾	Select Profile Type ▾	Type Cost Center	Type Funding Source
Type Service Code	Select Unit ▾	Active ▾	

Select Status
Active
Inactive

Reset   Search

Only the PTC Support Team should inactivate or activate an account!

Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-2	Jane Doe	Miles	Inactive
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-2	Jane Doe	Hourly	Inactive

Develop a Process

- Local offices should have a process for a staff member to check the link status of each new consumer/provider pair (i.e., service plan or new voucher).

- Which staff member(s) complete this step depends on what works best for your office. This may be the case manager, voucher specialist, support staff, or other staff member.

- Having a designated staff member or rotation ensures there is no duplicate work.

Remember that checking for a possible relink takes less than a minute, but handling complaints and late payments caused by a missed relink takes much longer!
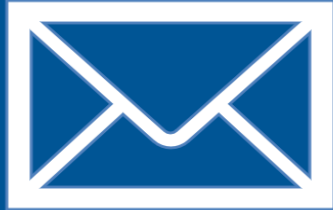
[APD-AR-23-029 Relinking in OR PTC DCI](#)

Knowledge is Power!

- Make sure all staff in your office know how to determine whether a consumer and provider are linked, unlinked, or have never been linked.

- This knowledge, plus an understanding of the steps to relink, will help prevent confusion, late payments, and complaints from providers.
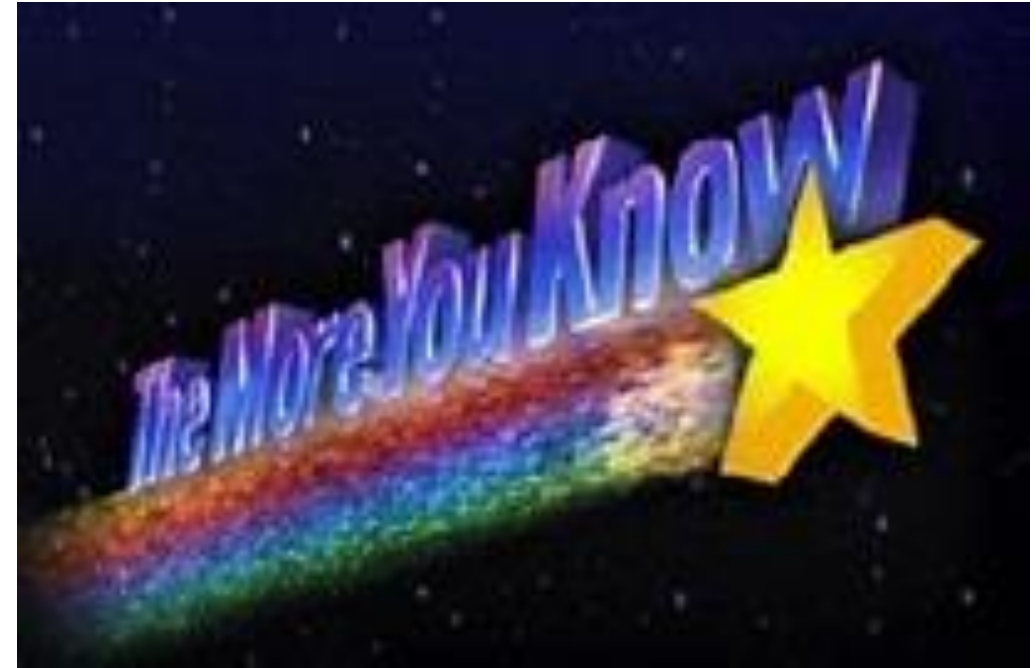
Resources

PTC Project 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.