OR PTC DCI Troubleshooting: Provider Cannot Claim Time or Provider Reports Incorrect Pay

Contents

There are many possible reasons for a provider to have trouble claiming time or to receive an incorrect payment. The below guidance outlines the most common issues that lead to a provider’s inability to claim time, or for a provider to receive an incorrect payment, as well as instructions for identifying the issue to resolve it efficiently.

These are the most common issues causing missing time entries or payments seen by the PTC Support Team:

- The provider’s profile has not been created yet (vouchers must be created first)
- Vouchers have not been created or were voided
- The consumer and provider have been previously unlinked and need to be relinked – including when there is an end date on the service account (local office must send an email request to PTC Support to relink)
- The provider claimed all their authorized hours for the pay period and is unable to claim additional time

- Provider input entries after the time entry deadline (3 business days after the end of the pay period), causing the payment to the provider to be processed for payment the next pay processing date
- The local office input entries into STIM after the local office deadline, or some entries were not entered into STIM at all (for entries worked prior to July 28, 2024)

For more in-depth information on these common issues, review the below instructions for checking why a provider may be having difficulty claiming time/mileage or why they may have received incorrect payment. Once you have found the issue and the solution, you can stop working through the troubleshooting steps (unless otherwise specified). If you have worked through the steps and cannot find the answer or are having trouble completing any of the steps, please reach out to PTC.Support@odhsoha.oregon.gov with as much information as you can about the situation. You may also wish to review the PTC Troubleshooting Guide which explains additional scenarios not included in this guide.

No vouchers created

If vouchers have not been created in Mainframe for the pay period in question, then the provider will not be able to claim time or mileage. Time and mileage are authorized through Mainframe, and then information comes through to OR PTC DCI. If vouchers are not in Mainframe, please reach out to the voucher specialist (or person who creates vouchers in your office) to have vouchers created. There is no need to reach out to PTC Support until this step is completed. In the meantime, you should check OR PTC DCI to see whether the consumer and provider are actively linked, unlinked, or have never been linked, to know which steps to take next.

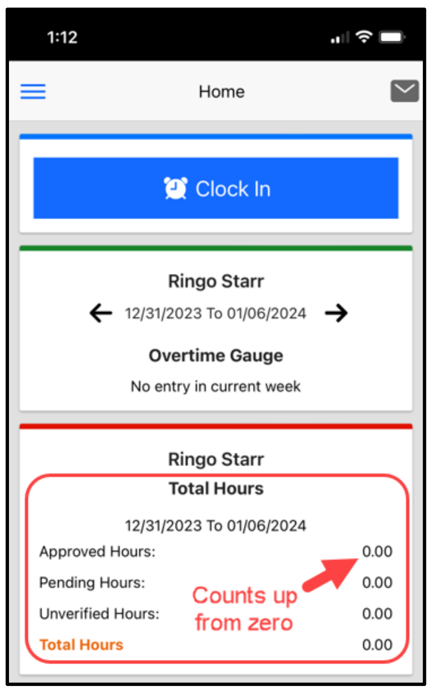
If the provider has not worked for the consumer before and new vouchers are created, then it will take up to two business days for the profiles, accounts, and authorizations to be created in OR PTC DCI.

See below troubleshooting instructions or jump to

How to check if a relink is needed (from the provider's profile) by holding the Ctrl key and clicking to follow the link.

"Zero authorized hours"

If a new provider says they are seeing "Zero authorized hours" when they log in, they may be looking at the 'Total Hours' section of the dashboard. This part of the dashboard counts the number of hours they have claimed for the week selected. If they have not claimed any time for the week yet, their dashboard will show they have zero hours approved for payment.



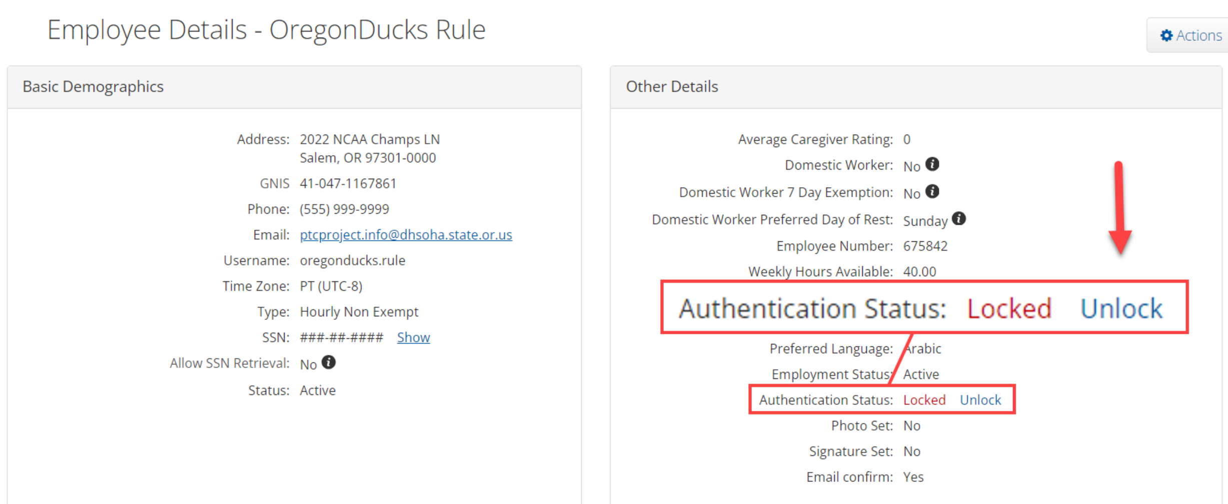
Instructions to troubleshoot "cannot claim time" or "payment was incorrect"

A provider may contact you to say they cannot claim time or that they received an incorrect payment. Below are steps to research these issues.

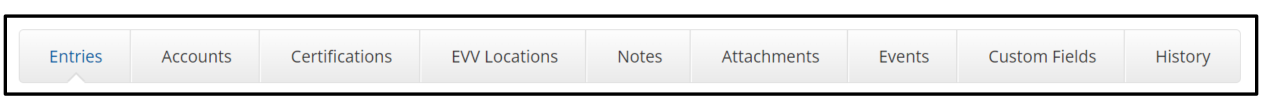
1. Log into OR PTC DCI.
2. Search for the provider's name or UNI ID to ensure **they have a profile**.

   a. If there is no profile, ensure vouchers were created in Mainframe. It then takes up to two business days for profiles to be created after the vouchers are created.

3. Check that their profile is in an **Active status**.
4. If the profile page shows an Inactive status, you will need to check their accounts to see if a relink request is needed as well. If they need to be relinked to one or more consumers, include a request to reactivate the profile in your relink request. If they do not need to be relinked, you can send an email request to reactivate the profile to PTC Support. Jump to
5.
6. **How to check if a relink is needed (from the provider's profile).**
7. Check that their profile is not locked.
   a. If it is locked, there should be an "Unlock" hyperlink which you can click to unlock their profile.



8. Scroll down to find a series of tabs including Entries, Accounts, Events, and History.



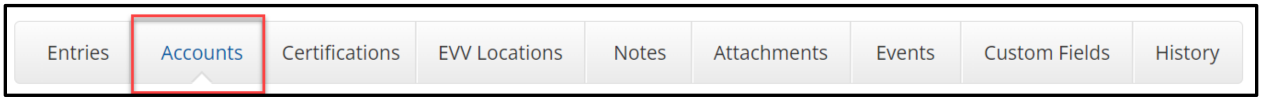
9. Entries will show any time or mileage entries that have been created. You may be able to use this tab to identify entries that are missing or were created after the deadline. However, a report may be easier to use. Jump

to **How to run a punch entry details report** for instructions on how to run this report.

a. **If entries were input after the provider deadline for entering time, these entries were not pulled into a payroll batch at the same time as entries submitted by the deadline**. See the ODHS payroll calendar for more information on deadlines. If entries are input after the deadline but before the payment processing day, these will be paid two business days after the timely entries are paid.
b. If a real-time entry exceeds the authorized hours for the pay period, it will be automatically rejected. Rejected entries cannot be edited and the provider will need to create a historical entry that does not exceed the authorized hours by any amount.
c. If a provider attempts to make a historical or fob entry that would exceed the authorized hours for the pay period, the system will not allow this entry to be saved. The entry must not exceed the authorized hours by any amount.
d. See the Over Authorized Hours Quick Reference Guide.
e. To see a comprehensive report of the provider's entries, you can run a Punch Entry Details Report. Jump to **How to run a punch entry details report** for instructions.
f. Go to the consumer's profile detail page to check for authorizations in the Entries tab. You will not be able to view details of the authorizations from this screen, but you may be able to identify what you need by finding the authorization listed. You can also use the authorizations widget to check for current authorizations in OR PTC DCI. For more detailed information about an authorization (including the voucher number and entries created on the authorization), you can run an Authorization Entries Report (Navigate to Reports tab, Authorization Reports, Authorization Entries Report).
    i. Ensure there are active authorizations in OR PTC DCI. If there are no active authorizations in OR PTC DCI for the pay period in question, make sure the vouchers were created in Mainframe.
    ii. If there are no active authorizations, ensure the consumer and provider are currently linked (more in the next section). If they need to be relinked, or if they are linked but the Mainframe

vouchers are not showing in OR PTC DCI, send an email to the PTC Support Team.

10. The Accounts tab will show all consumers the provider has ever been linked to. **One of the most common reasons for a provider not being able to claim time is that they have been unlinked from their consumer!**



a. If a consumer and provider have been unlinked but the provider needs to claim time/mileage, they must be relinked by the PTC Support Team in order to do so. You, as a local office staff member, must request the relink. First, you will need to know how to identify whether a relink is needed. Please do not request a relink until you have confirmed that the consumer and provider are unlinked! Please see

b.

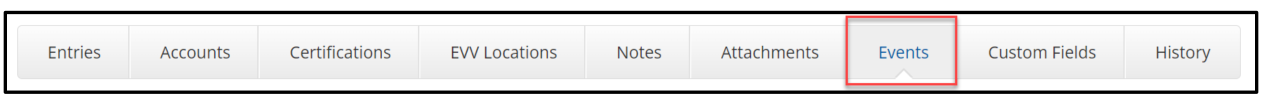
c. **How to check if a relink is needed (from the provider's profile)** for instructions on this process.

d. If a provider's provider number has recently been reactivated, they may currently be unlinked in OR PTC DCI.

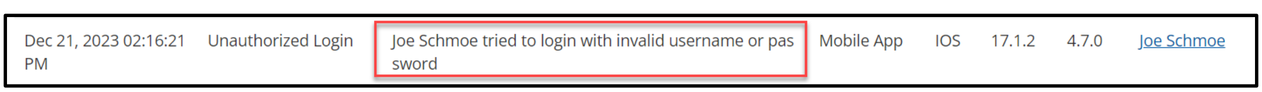
e.

f. **How to check if a relink is needed (from the provider's profile).**

11. Login problems - If the provider is having login problems, check the Events tab to see if they have been able to log in successfully.



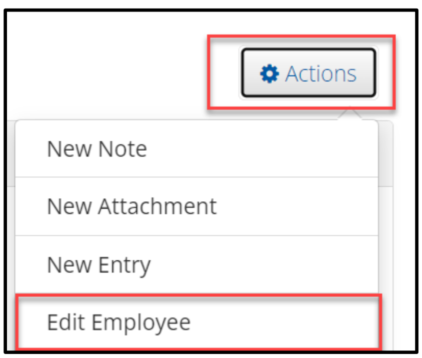
a. If you see unsuccessful login attempts in the Events tab, this means they are entering their password incorrectly.

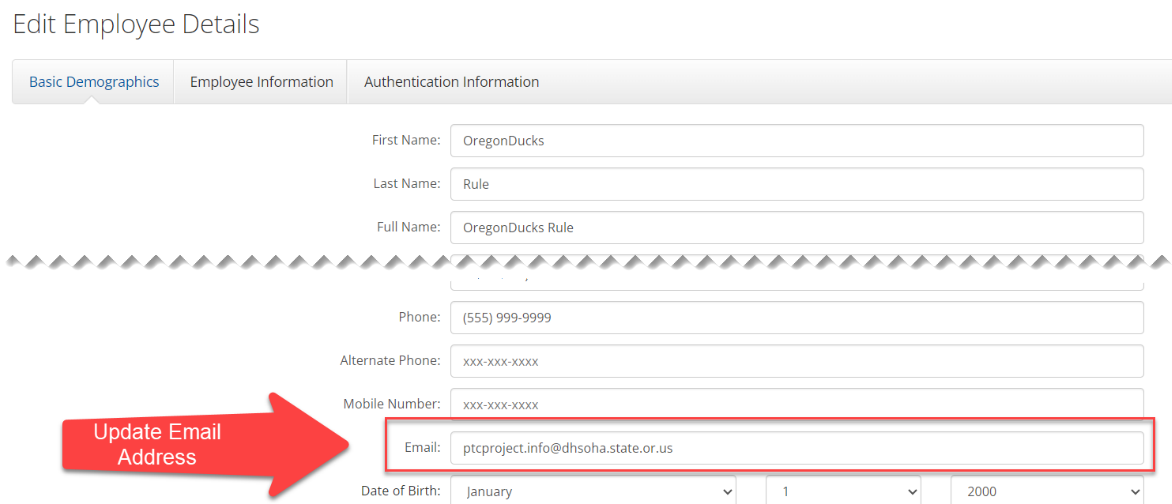


b. If they cannot remember their password, make sure the email address listed on their profile is correct and ask them to use the "Forgot Password" hyperlink on their login screen. They will receive an email to reset their password.

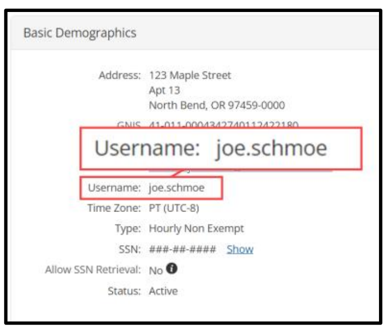
c. A recent password or PIN change can be found in the Events tab. A common issue is that a provider changed their login information recently but is attempting to use their old login information.

d. If their email address needs to be updated, you can make this change for them. Go to the provider's profile, click Actions, edit employee, and edit the email address on file.





e. If you do not see any login attempts in the Events tab, this means they are entering their username incorrectly. Make sure they are typing in their username as shown on their profile page.



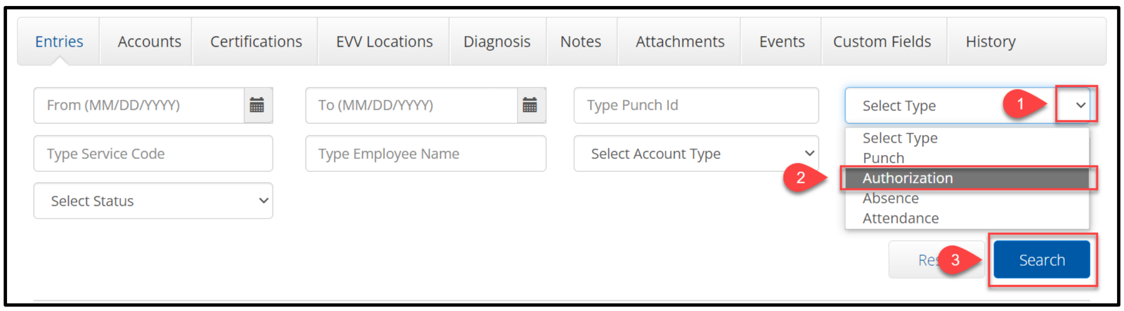
f. If a provider claims they are having issues using their mobile app, but the Events tab shows they have only logged into the web portal/mobile web, or vice versa, you can let them know that they must download the OR PTC DCI Mobile App to their mobile device to get started.

    i. Check out this helpful video on how to download and log into the OR PTC DCI Mobile App: OR PTC DCI Mobile App for Providers

Instructions did not solve issue and vouchers were created

If vouchers have been created but you cannot find a solution in the provider's profile (Entries, Accounts, Events, and History), or by running a punch entry details report (**How to run a punch entry details report**), you may need to check the consumer's authorizations in OR PTC DCI.

1. Log into OR PTC DCI.
2. Navigate to the consumer's profile.
3. Scroll down to find a series of tabs including Entries, Accounts, Events, and History.
4. In Entries, you can filter the type by clicking the Select Type drop down and selecting Authorization, then Search.
    a. You can also narrow it down by Employee Name, date range, status, etc.



5. You will now see authorizations within your search parameters. You will not be able to view any details by clicking the authorization, but the Service Date will be the authorization start date, which is normally the first day of the pay period. Also check the service code to ensure you are looking at the authorization for the correct provider. For example, Provider A may have service codes of Hourly ADL/IADL-1 and Mileage-1 (as shown in the below example), while Provider B may have service codes of Hourly ADL/IADL-2 and Mileage-2. You can find the correct service codes by checking the service accounts under the Accounts tab.

Entries

Export

Showing **6** out of **6** records

Id	Service Date	Type	Service Code	Cost Center	Employee /Program Name	Ref.	Amount	Unit Type	Status	EVV
49106725	Jun 30, 2024	Authorization	Hourly ADL/IADL-1	Portland SE ASO/DSO-EU - 1418-EU			0.00	Hourly	Approved	N/A
49106723	Jun 30, 2024	Authorization	Mileage-1	Portland SE ASO/DSO-EU - 1418-EU			0.00	Miles	Approved	N/A

6. If you don’t see an authorization for the pay period in question, then a voucher may not have been created in Mainframe.
7. If a voucher was created in Mainframe, but the corresponding authorization is not in OR PTC DCI, make sure the consumer and provider are currently linked. Jump to
8.
9. **How to check if a relink is needed (from the provider’s profile)** for instructions.
10. If the consumer and provider are actively linked and vouchers were created, you should check the most recent authorization for this consumer and provider.
    a. Check either the Mainframe voucher or the authorizations widget to ensure the provider has enough hours/miles remaining for the provider to claim the hours/miles they are attempting to claim.
    b. You can create an Authorization Entries Report for a detailed list of all entries created for a certain authorization period, including the voucher number. See the Authorization Management Guide for instructions on how to create this report.
    c. Make sure the authorization in OR PTC DCI is for the correct consumer and provider pair. If the provider is not on the authorization, they will not be able to claim time/miles.
11. A common reason for a provider to claim they were paid late or incorrectly is that they submitted entries after the submission deadline. Hours and miles must be entered correctly in OR PTC DCI by the HCW/PCA submission deadline to be paid on the normal pay processing day. The deadline is 3 business days after the last day of the pay period. Entries made after this date will be paid on the next pay processing day, which is two business days

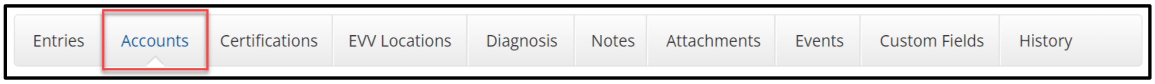
after the normal pay processing day for the pay period. Ensure the provider is always checking the HCW Payroll Calendar for entry deadlines and pay processing dates.

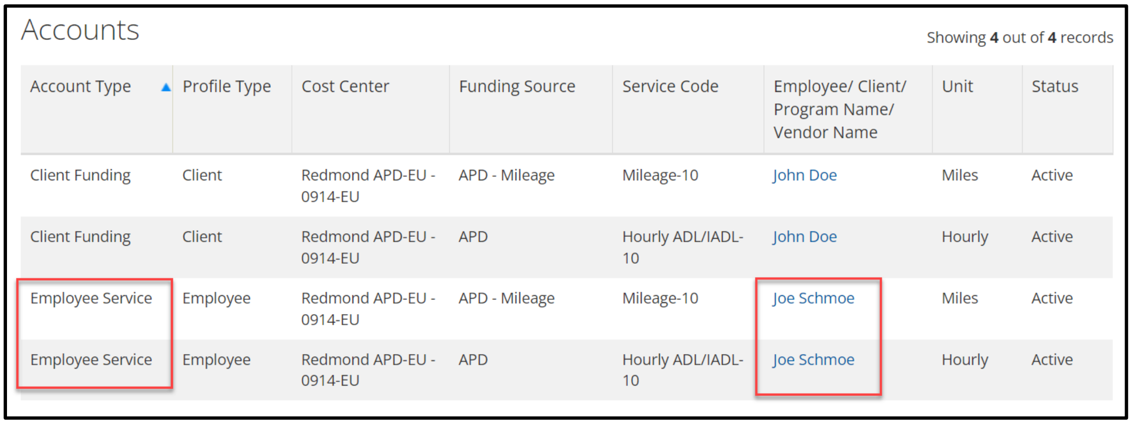
12. If authorizations and vouchers are correct, and all time was entered by the provider by the deadline, then it is possible that some entries were not entered into STIM to be paid by the deadline. These instructions apply to any time/mileage worked prior to 7/28/24.
    a. Recheck batch spreadsheets emailed by the PTC Support Team and make sure no entries were missed when entering them into STIM. If some entries were not entered into STIM, staff will need to add any missing entries. This may result in an underpayment.
    b. On the STIM screen, once all the time/mileage has been entered, press enter and then F9 to save.
    c. If you are ready to pay the voucher, you can press F10 and this will take you to the HPAY/OPAY/MPAY screen where you can complete the process.
    d. If entries were worked on or after 7/28/24 and you have confirmed they were entered in OR PTC DCI, consult the PTC Batch Pull Calendar to ensure they would have already been pulled into a batch for payment. If the entries should have been paid already based on the Batch Pull Calendar, then please reach out to the PTC Support Team for additional assistance.

If none of these steps have solved the issue, please refer to the PTC Troubleshooting Guide for additional guidance. If you need further assistance, please reach out to PTC.Support@odhsoha.oregon.gov.

How to check if a relink is needed (from the provider’s profile)

1. Log into OR PTC DCI.
2. Go to the provider’s Employee Details Page.
3. Scroll down and select the Accounts tab. You will see the provider’s active service accounts.
4. Look for the consumer’s name on one or more of their service accounts.

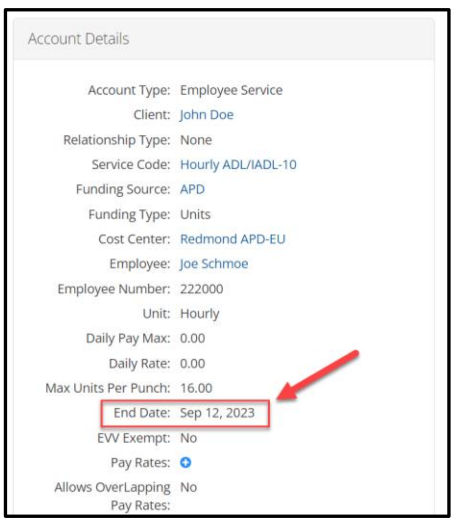



Accounts

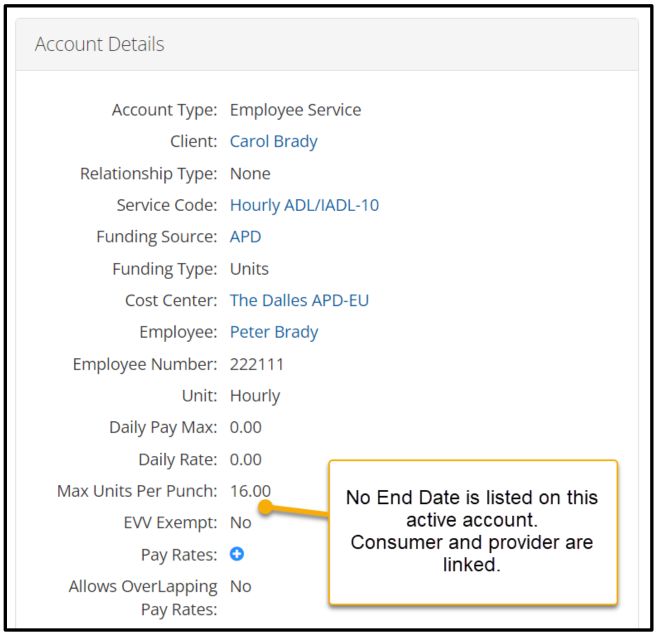
Showing **4** out of **4** records

Account Type	Profile Type	Cost Center	Funding Source	Service Code	Employee/ Client/ Program Name/ Vendor Name	Unit	Status
Client Funding	Client	Redmond APD-EU - 0914-EU	APD - Mileage	Mileage-10	John Doe	Miles	Active
Client Funding	Client	Redmond APD-EU - 0914-EU	APD	Hourly ADL/IADL-10	John Doe	Hourly	Active
Employee Service	Employee	Redmond APD-EU - 0914-EU	APD - Mileage	Mileage-10	Joe Schmoe	Miles	Active
Employee Service	Employee	Redmond APD-EU - 0914-EU	APD	Hourly ADL/IADL-10	Joe Schmoe	Hourly	Active

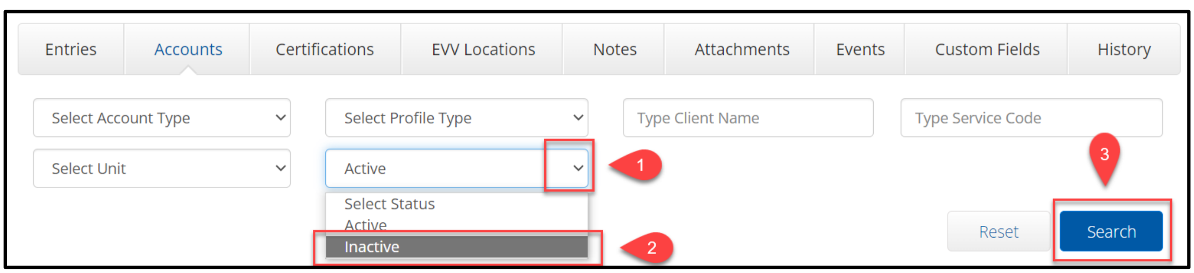
5. If one or more of the service accounts has the consumer's name, you must check the service account(s) to see if there is an End Date listed on the account details.
   a. Click on a service account with the consumer's name to see the account details. If you see an **End Date,** they are unlinked and a relink is needed. **Send an email to PTC Support asking for a relink.**



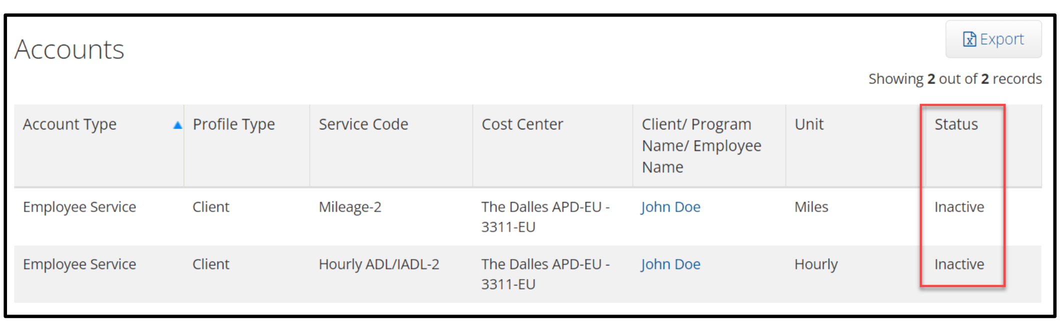
   b. If you do **not** see an end date, then the consumer and provider are linked. The provider should be able to claim time/mileage for this consumer once the vouchers have been created in Mainframe. A relink is not needed.



6. If none of the service accounts show the consumer's name, change the filter on the status (defaulted to Active) to show Inactive accounts. Click Search.



7. If you see an inactive service account for the consumer, then the consumer and provider have been unlinked and a relink is needed. Send an email to PTC Support asking for a relink.



Account Type	Profile Type	Service Code	Cost Center	Client/ Program Name/ Employee Name	Unit	Status
Employee Service	Client	Mileage-2	The Dalles APD-EU - 3311-EU	John Doe	Miles	Inactive
Employee Service	Client	Hourly ADL/IADL-2	The Dalles APD-EU - 3311-EU	John Doe	Hourly	Inactive

8. If you do not see any active or inactive accounts with the consumer's name, then this consumer and provider have never been linked. Create vouchers

in Mainframe and this will trigger the PTC Support Team to create any needed profiles, linking the consumer and provider within the next **two business days**. A relink is not needed.

9. If there are two different sets of service accounts with the consumer's name (for example, an APD hourly and mileage and an OPI hourly and mileage), then they may have changed service codes/programs. One set of service accounts may have an end date, while another does not. Make sure the provider is selecting the correct service code when claiming time/mileage. If the provider has already claimed all time/mileage for the previous service code/program, email PTC Support to request inactivation of the old accounts.

How to request a relink

Whenever possible, **please request the relink <u>before</u> creating vouchers** in Mainframe. If vouchers were created before the relink request, please indicate this in the relink request email so the PTC Support Team knows to resend the vouchers to OR PTC DCI.

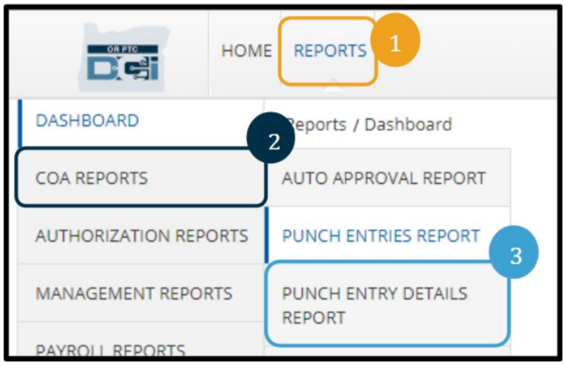
Email PTC Support at PTC.Support@odhsoha.Oregon.gov with the following information:

Subject:	Relink needed
Body of email:	Please relink this consumer and provider. Consumer name: Prime number: Provider name: Provider number: Start work date: Vouchers created: (yes/no)

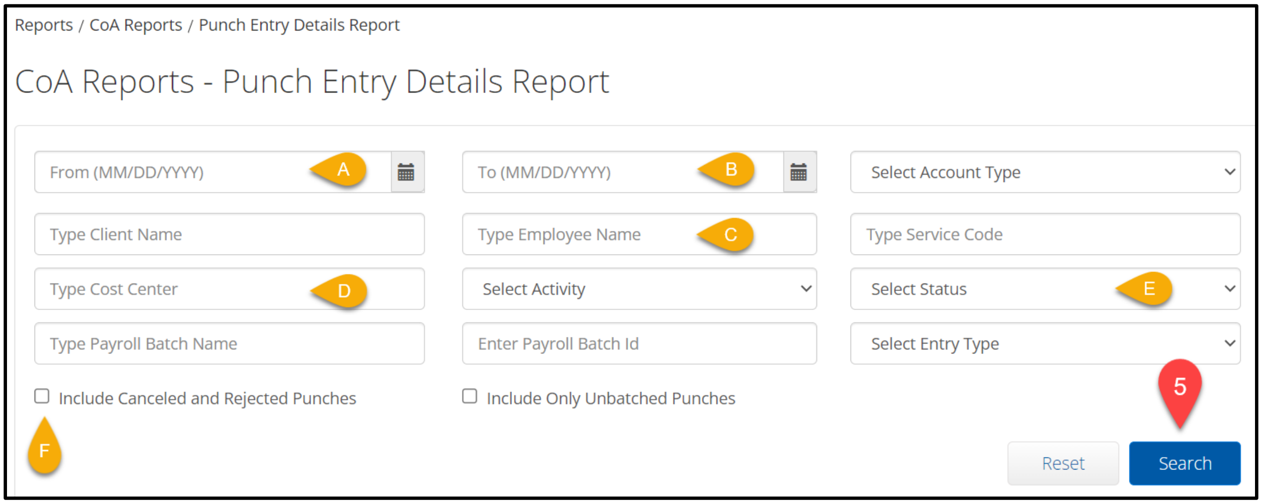
Relinks are completed within 1-2 business days.

How to run a punch entry details report

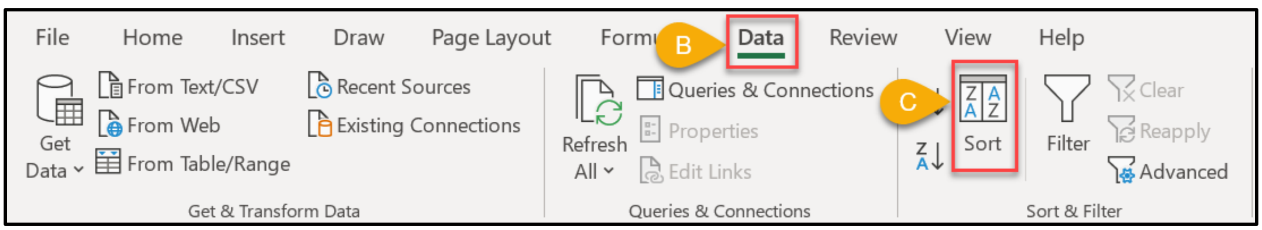
1. A punch entry details report may make it easier to identify entries that may not have been paid for a variety of reasons. For example, a report can be easier to find entries in when the provider has a long list of entries in their Entries tab. Select the Reports tab.
2. On the left sidebar, select COA Reports.
3. Select Punch Entry Details Report.



4. Enter your search criteria.
    a. From (MM/DD/YYYY): this should be the start date of a pay period, or the first date of the time period in question.
    b. To (MM/DD/YYYY): this should be the end date of the pay period, or the last date of the time period in question.
    c. Type the provider's name in **Employee Name**.
    d. Cost Center: select the **XXXX-EU** version of the Cost Center (optional).
    e. Status: select the status type you are interested in learning more about. If you want to see all entries made by a specific provider, you may leave the status blank.
    f. To include any entries that were manually canceled or rejected, or auto rejected, be sure to select Include Canceled and Rejected Punches.
5. Click Search.



6. Download the report.
7. Sort the report by start date to make research easier.
    a. Select all data on the spreadsheet.
    b. Navigate to the Data tab.
    c. Select sort and select sorting criteria.



8. On the spreadsheet, look for any missing entries, entries that are in a pending status or are unverified, entries that were input after the deadline (and therefore not paid with other entries from that pay period), entries that were rejected (either manually or automatically), etc.
    a. If an entry is missing, the provider must create a historical entry in OR PTC DCI to be paid for this time/mileage after it is pulled into a payroll batch and entered into STIM.
    b. Pending entries should be auto approved by 4am the day after the entry was created. You can also manually approve the entry by going to the entry details page, clicking Actions, and Approve.
    c. If an entry is in an unverified status, this means a staff member created or modified this entry. Another staff member must navigate to the entry details page and select Verify.

d. Compare the created date to the provider entry deadline. If an entry was created after the deadline, let the provider know that any time/mileage entered after the deadline may not be paid at the same time as other entries from the same pay period.
e. If an entry was rejected for any reason, the provider must create a new historical entry that does not exceed the authorized hours by any amount.

Keep in mind that a rejected entry may have been rejected by the system automatically if the provider exceeded their authorized hours. These entries will usually, but not always, show an amount of 0.0.

For any questions, please email PTC support at PTC.Support@odhs.oregon.gov.