

Information Memorandum Transmittal Aging and People with Disabilities



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Topic: Other

Subject: Provider Time Capture (PTC) - Phase 2A Go Live Information

Number: APD-IM-24-053

Issue date: 5/29/2024

Updated: 7/16/2024

Due date:

Applies to (check all that apply):

- | | |
|---|---|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging: Types A and B | <input checked="" type="checkbox"/> Health Services |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs | <input type="checkbox"/> ODDS Children's Intensive In Home Services |
| <input type="checkbox"/> County DD program managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> Support Service Brokerage Directors | <input checked="" type="checkbox"/> Other (<i>please specify</i>): Comagine |
| <input type="checkbox"/> ODDS Children's Residential Services | |
| <input type="checkbox"/> Child Welfare Programs | |

Message:

Updated 7/16/2024

PTC Phase 2A officially goes live on **July 19, 2024**. Phase 2A will bring changes to Mainframe and OR PTC DCI with the goal of streamlining certain processes and reducing manual data entry for local office and PCA program staff.

Staff members and leadership must become familiar with the upcoming changes, including:

- Removal of authorization permissions and payroll role for staff in OR PTC DCI
- Payroll batch changes
- Payroll entry (STIM) changes
- New shared payroll inboxes
- STIQ screen changes and new STSS screen
- New UATH screen for editing authorizations in Mainframe

Workshops:

The PTC and Mainframe changes were discussed in detail during the PTC Phase 2A Workshop sessions in June 2024.

Please reference these Workshop materials:

[PowerPoint Presentation](#)

[Video Recording](#)

[Frequently Asked Questions \(FAQ\)](#)

Mainframe Changes Guide:

The Mainframe changes related to PTC Phase 2A are described in the [Mainframe Changes for PTC Phase 2A Guide](#). The changes are also included in the [CEP Manual](#).

Chart of Phase 2A changes and when they will be implemented:

Change implemented	Description of change
July 19, 2024	Payroll role profiles in OR PTC DCI will be inactivated. Staff can no longer run payroll batches and no longer have access to the Payroll Role in OR PTC DCI. If staff need to view a report of entries, they should use a punch entry details report .
July 19, 2024	Staff will receive emailed payroll batches at their new HCW Payroll inboxes. The PTC Support Team will begin running daily payroll batches for time/mileage worked on or before July 13 th . The PTC Support Team will send batches to offices at designated email addresses. Please see below for more information about the payroll batches.
July 19-21, 2024	Starting 9 p.m. PST – Mainframe downtime Changes will be made to STIM, STSS, STIQ, and UATH screens. Staff should not attempt to use these screens over the weekend, beginning Friday at 9 p.m.
July 22, 2024	Staff who were previously determined to need access are granted access to UATH and STSS Mainframe screens. Staff can edit vouchers in UATH and view any time/mileage entry suspensions/errors in STIQ/STSS.

	Change will be made on 7/19 at 9 p.m. This change to Mainframe will result in scheduled downtime over the weekend starting 9 p.m. Friday.
July 22, 2024	Authorization permissions will be removed in OR PTC DCI. Staff can no longer access authorization details directly in OR PTC DCI and will need to view authorization information in an Authorization Entries Report (instructions are in the Authorization Management Guide) or in the Authorizations Widget .
July 28, 2024	First day of first full pay period that will be included in automated processing in STIM. Staff will no longer be able to add or edit entries in STIM for time/mileage worked starting on this date.

Schedule of payroll batch pulls:

The PTC Support team will pull batches using the below schedule. This [Batch Pull Calendar](#) allows staff to look up which entries will be pulled into batches on the date entered.

Frequency/Timeframe	Entry type	How entries go to Mainframe
Daily (M-F) from 7/19/24-7/26/24	Entries worked up until 7/13/24.	Batches emailed by PTC Support Team to offices. Staff manually enter into STIM.
Daily (M-F), starting 7/29/24	Entries worked up until 7/27/24.	Batches emailed by PTC Support Team to offices. Staff manually enter into STIM.
Daily (M-F), starting 8/27/24	Entries worked from 7/28 through the last day of the previous pay period.	Entries are processed in Mainframe using new automation. Any errors will be suspended in the STIQ screen in Mainframe.
Once per pay period, one business day after the provider submission deadline for the pay period (four business days after end of pay period)	Timely entries (entries entered by the provider entry deadline) worked on or after 7/28/2024.	Entries are processed in Mainframe on the pay processing date using new automation. Any errors will be suspended in the STIQ screen in Mainframe.

As needed	Emergency batches: For permanently terminated/resigned provider number or APS suspensions only. Only needed when the provider has recent time/mileage entries.*	Entries are processed in Mainframe using new automation. Any errors will be suspended in the STIQ screen in Mainframe.
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*Please note that emergency batches will not be pulled due to local office error or delay, when a provider stops working for a consumer, the consumer passed away, or other situations where some entries may be paid late, or if the termination is not necessarily permanent. Providers do not need to be paid within a certain timeframe when they stop working for a specific consumer; this only applies when the provider stops working completely. Any late payments caused by local office delay or error could be eligible for late payment penalty fees.

Payroll role and authorization permissions:

Staff who currently have ONLY a payroll role profile in OR PTC DCI, who will need access to OR PTC DCI after July 19th, **MUST** have their manager request new access for them. **Payroll profiles will be inactivated on July 19th.**

- Managers must complete and submit a new [Staff Profile Maintenance Form](#) to the PTC Support Team.
- Managers should indicate in the notes section at the bottom of the form that the staff member already has a payroll role but will need access after Phase 2A.

Staff who currently have authorization permissions in OR PTC DCI will no longer have these permissions starting July 22nd.

- The authorization tab will no longer appear, and authorization details will not be visible through the provider entries.
- Staff should use the [Authorizations Widget](#) or run an Authorization Entries report (instructions are in the [Authorization Management Guide](#)) in OR PTC DCI to view authorization details.
- Edits to vouchers will be done directly in the UATH screen in Mainframe.

STIQ screen errors:

The STIQ screen must be monitored for the following entry errors/suspensions. The issue causing the suspension must be resolved in OR PTC DCI. When a new payroll batch is processed with the corrected entry/entries, the suspension will be removed from STIQ.

- Mileage entries entered in decimals instead of whole numbers. See [APD-IM-24-027 Miles in Whole Numbers in OR PTC DCI](#) for more information.
- Mileage entries were entered, but no hourly entries were entered for the same pay period. Per policy, mileage cannot be claimed unless the provider provides in-home services for the consumer within the same pay period.
- If a provider makes an entry for more than the remaining balance on the authorization, it will go to the STIQ screen as an error. The system should not allow this to occur, but a bug or rare issue with timing in editing an authorization could allow this error to occur. This should be rare.

Emergency batches:

Emergency batch pulls can ONLY be completed in the following situations:

- A provider has been completely terminated and their provider number has been inactivated, and this will be their last paycheck, or
- There was an APS suspension, and the provider has entries in the same pay period of that suspension date, AND
- The provider has entries for time/mileage worked during the most recent pay period.

The provider MUST claim their remaining time/mileage in PTC before an emergency batch is pulled to ensure all their time/mileage is included in the final paycheck.

Late entry due to local office staff error, delay in creating a new service plan or voucher/ONGO, delayed eligibility determination, etc. are NOT criteria for an emergency batch pull. Please keep in mind that historical entries worked before the most recent pay period are pulled into batches daily, so at least some late entries may be captured in daily batch pulls. Any late payments caused by local office delay or error could be eligible for late payment penalty fees.

Shared inbox access:

Management at each local office must grant access to staff who will check the shared payroll email inbox. If your office has a shared email address for your PTC Payroll role in OR PTC DCI, this is **NOT** the same as the new shared payroll email address. **The PTC Support Team will only send payroll batches to the newly created payroll email addresses.** Please see [APD-IM-24-025 New Shared Payroll Email Addresses](#) for more information.

APD managers should review [OIS Collaborative Communications Shared Email/Calendars site](#) for general information about shared inboxes. The [OIS Collaborative Communications Shared Email/Calendars Administration site](#) contains the links to request forms where you can add users, assign a new owner, etc.

When a user has been granted access to the inbox, they should follow these steps to have the shared inbox added to Outlook:

- Go to Outlook email
- Select the File tab
- Select Account Settings
- Select Data Files
- Select Settings
- Select the Advanced tab
- Select Add next to the inbox name(s) listed
- Type: Yourbranchnumber HCW Payroll, for example: 0911 HCW Payroll (make sure it's typed with this exact formatting)
- Select OK
- Select Apply

You may need to close out and reopen your Outlook for the change to be applied.

How to find a shared payroll inbox name:

Go to Outlook, create a new email, select To, and type the branch number into the search bar. Select the search arrow next to the search bar. The shared inbox used for payroll batches will have the naming convention of BranchNumber HCW Payroll. The PTC Support Team will ONLY send payroll batches to this shared inbox.

Payroll batch files:

Remember: Only historical entries worked before 7/28/24 will be sent in payroll batches for manual entry into STIM. Entries worked on 7/28/24 or after will be entered in Mainframe using a new automated process, and local office staff will not see these batches.

- Staff who check their shared HCW payroll inbox must check the inbox daily from 7/19-8/31/24.
- From 9/1/24-7/28/25 staff who check their shared HCW payroll inbox must check the inbox regularly to ensure all entries are input into STIM as soon as possible.
- PTC Support will send the emails with attached Excel batch files based on program (APD/AAA, OPI, HSD) rather than by branch. Rarely, an individual batch may be sent to only your branch (emergency batches, large file size batches, etc.). Some offices who enter batches for multiple branches will receive only batch files for those branches.
- Batch files sent by program (or otherwise with multiple branches) will have branches separated by tab.
- Branch file names will usually follow the naming convention of ProgramName_DD.MM.YYYY, for example, APDAAA_07.19.2024.

13	3412-EU	2023000000	P0010	D3ATL351		10	6/17/20
14	3415-EU	20230000047	P0010	D3ATL351		1	6/6/20
15	3415-EU	20230000047	P0010	E3ATL351		1	6/6/20
16	3415-EU	20230000048	PAUL4EVA	E3ATL351			6/8/20
17	3415-EU		P0010	B3ATL351			6/19/20
18	3311-EU		P0010	B3ATL351			6/20/20
19	3311-EU		P0010	B3ATL351			6/22/20
20	3311-EU		P0010	B3ATL351			6/22/20
21	3311-EU		P0010	B3ATL351			6/22/20
22	2911-EU		P0010	B3ATL351		40	6/22/20
23	2911-EU	voucher8745	P0010	B3ATL351		40	6/22/20
24	2911-EU	voucher8745	P0010	B3ATL351		30	6/23/20
25	0411-EU	voucher8745	P0010	B3ATL351		40	6/24/20
26	0411-EU	voucher8745	P0010	B3ATL351		40	6/24/20

Use arrows to help navigate through tabs

Branches separated by tabs

040924 Demo Payroll Batch | 7810-EU | 1015-EU | 3412-EU | 3415-EU | 3311-EU | 2911-EU | 0 ... (+)

PTC Phase 2A Command Center:

The Command Center will be on an open Zoom meeting staff can join during the Command Center hours noted below to ask questions or get help with the Phase 2A changes. Members of the PTC Team will be in the Zoom meeting during the designated hours, ready to assist staff members who need to troubleshoot an issue or ask a question.

Command Center dates and hours-

July 22-July 26: Monday through Friday, 7 a.m. to 5 p.m.

July 29-August 16: Monday, Wednesday, Friday, 8 a.m. to 12 p.m.

July 29-August 16: Tuesday and Thursday 1 p.m. to 5 p.m.

This link brings you directly to the Command Center Zoom meeting:

***Only click the link when you are ready to join the Command Center with a question or issue to resolve during Command Center hours ***

[Command Center Zoom Link](#)

Please direct any questions about this transmittal to the PTC Support Team at PTC.Support@odhsoha.oregon.gov.

If you have any questions about this information, contact:

Contact(s): Provider Time Capture	
Phone:	Fax:
Email: PTC.Support@odhsoha.oregon.gov	