Pre-Authorized Expenses
Frequently Asked Questions

SUBMITTING A REQUEST

1. **How and when do I backdate a request?**
    - Requests should be submitted prior to work beginning on a case or travel occurring, however when this is not possible you may backdate your request to cover earlier service/travel dates.
    - Only the Long Form and the Aid and Assist Short Form may be backdated.
        - To backdate the Long Form: At the bottom of the form, you will see the question "Does this request need to be backdated?". Select "yes" in the drop down and then you may enter the earliest date of service in the ***Effective Date*** box.
            - An additional box will pop up with a note asking you to provide justification. Please provide an answer to this question, otherwise our Review staff will not be able to approve an earlier effective date.
        - To backdate the Aid and Assist Short Form: You simply need to enter the earliest date of service in the ***Effective Date*** box.
    - When backdating a request, your submission/signature date should remain current. Only the effective date should be backdated.

2. **How do I request airfare, and can I book it myself?**
    - Airfare can be requested on the Long Form.
    - You must book airfare within 60 days of the approval date of your authorization.
        - If this is not done, you will need to email our department and ask to have the airfare reissued, otherwise you will not be able to book your flight.
    - Airfare must be pre-authorized and booked through Corporate Travel Management (CTM). Their contact information is printed in the travel section of the authorization.
        - If airfare is not booked through CTM and you purchase your own ticket, you will not be reimbursed.

3. **What should I do if I am unable to find a service type in the drop-down menu that closely aligns with my request?**
    - We've tried to capture the most commonly requested services in our drop downs, however if you are not able to find an appropriate option you may select ***Other***, and in the fillable box that pops up, provide a brief description of the type of services that will be provided.

4. **When do I need to include travel time on a PAE request?**
    - Travel time must be pre-authorized for all providers except the following:
        - Case managers
        - Investigators
        - Mitigators
        - Attorneys appointed on the case
    - Travel time for Case managers, Investigators and Mitigators is included in their total authorized service hours.
        - They may bill for travel time up to the total number of hours authorized, but it should not be requested separately on the PAE request.
    - Please see the Pre-Authorized Expenses policy section 3.22 for information on when travel time is not compensable.

5. **Should I include mileage if I'm requesting travel time?**
    - Yes. We will review and approve the specific travel expenses requested. If we receive a request listing travel time but no mileage, we presume the provider does not intend to bill their mileage. Mileage will not be added automatically.
    - Please include the estimated number of miles the provider will need to reach their destination. This way we are able provide a more accurate total of authorized costs on the authorization.

6. **Do I need to submit a PAE request for each case my client has?**
    - No. If you are assigned to more than one case for a client, please determine the case number with the highest charge, consolidate all cases for the client, and submit under that one case number.
        - Please <u>do not</u> submit a separate request for each case number your client has, and <u>do not</u> list all case numbers in the ***Case Number*** box at the top of the form.
        - Any other case numbers for the client should be listed under Question 4 of the Long Form, that way when we are reviewing your request, we can take into account all the cases that may be involved.
        - If there are multiple cases with the same level of charges, please choose the oldest case that is still open.

7. **How do I submit my request if the submit button at the bottom of the form isn't working?**
    - If after following our Form Instructions, you continue to have issues with the submit button on the forms, please attach your completed form to an email and list the following information in your subject line.
        - Case number
        - Type of service (expert, psychological, investigation, travel, etc.)
        - Client name
        - Attorney name
    - This information auto-populates into the subject line when you click the submit button, so please include this information when submitting manually.
    - When submitting manually, please keep in mind that Long Form requests must be submitted to CSS@opds.state.or.us, however all Short Form requests must be submitted to CSSFasttrack@opds.state.or.us.

8. **How do I request services hours for a provider that is new to OPDC?**
    - To request services for a provider that is not yet approved with OPDC, please submit a Long Form request for the provider's services and attach a copy of their CV/resume.
        - A CV/resume is not needed for Investigators new to OPDC. They simply need to be DPSST licensed.
        - New provider information will be submitted to management for qualification and rate review.

<u>AFTER YOU'VE SUBMITTED A REQUEST</u>

1. **How do I amend a request?**
    - If you need to make a change to a PAE authorization, please email our department directly at CSS@opds.state.or.us with "AMENDMENT" in the subject line, and in the body of your email provide the authorization number you would like amended, and a brief description of what you are needing changed and why.
        - Please <u>do not</u> submit a new request form when seeking an amendment, as this can cause duplicate authorizations. You simply need to email the PAE department.
        - We cannot amend a request for a provider change from one company to another. You will need to withdraw the authorization and submit a new request for the new provider.

        - We cannot amend a request once the authorization has been paid on, even if it was a partial payment. Once a payment has been processed, the authorization is closed out and a new request form must be submitted for any services or expenses that remain.

2. **How do I withdraw a request?**
    - If you've received an authorization that is no longer needed, and that will not be submitted to Accounts Payable for payment, you may have the authorization withdrawn by emailing the PAE department directly.
        - Please provide the authorization number in the body of your email and indicate that the authorization will not be used or billed on, and that you would like it withdrawn.

3. **I submitted my request and just realized I made a mistake. What should I do?**
    - If you submitted a request and later **that same day** realized you made a mistake, you may email our department directly with the corrected information.
        - Please make sure to reference the request you are correcting and include the case number and time of day you submitted the request.
        - **Please do not submit a new request**. Once we've seen your correction email, we will let you know if it is necessary for you to resubmit your request.
    - If you submitted your request **one or more days prior** to realizing you made a mistake, please wait until our department reaches out to you, or when you receive an authorization.
        - Our Intake staff is able to correct verifiable information while entering your request into the system. We will reach out to you for clarification when necessary.
        - **Please do not submit a new request**. When you resubmit your request it can cause confusion, which may result in duplicate entries or authorizations.
        - If you receive an authorization and still need to make a correction, you may email our department and request an amendment. (Please see "How do I amend a request?" for further instructions.)

4. **How do I have my request expedited and what types of requests can be expedited?**
    - If you need a request expedited due to an impending trial or last-minute travel, please call our department directly at 503-378-3349 ext. 25231 to explain the need for an expedited approval.
        - Typically, Short Form requests will not be expedited, as they are already processed within 1-2 business days.

5. **How do I ask for reconsideration of a denial?**
    - If you would like a denial reconsidered, please email our department directly at CSS@opds.state.or.us with "RECONSIDERATION" in the subject line, along with the authorization number you would like reconsidered.
    - In the body of the email, please be sure to provide any additional justification that may be applicable or helpful in reviewing the reconsideration, based on the information provided in the Denial Letter.
    - Please make sure to provide supporting documentation if necessary.

6. **What is the difference between a Denial Letter and an email returning my request?**
    - A Denial Letter is what you will receive if the Reviewer has determined that your request has not sufficiently explained why the services are not able to be approved by OPDC.
    - When you receive an email from our department stating we are unable to process your PAE request, typically it is not a denial of services; we simply need additional/corrected information in order to process your request.
        - This is considered to be a returned submission, as opposed to a formal denial of the request.

7. **How do I check on the status of my request?**
    - Our turnaround time for processing PAE requests is typically 3-5 business days. If it has been less than 5 business days since you've submitted your request, we ask that you please wait to reach out regarding the status unless there is an immediate court matter.
    - If it has been 5 days or more since you've submitted your request, you may contact our department by email at CSS@opds.state.or.us, or by phone at 503-378-3349 ext. 25231.
        - You will need to provide the case number, the type of service you were requesting, and the approximate date and time you submitted your request.
        - Please check both the attorney and assistant's inboxes and spam folders prior to reaching out for a status update.

8. **I submitted one request but got back multiple authorizations. Why?**
    - When our department receives a request for a large number of hours, we may split the hours between multiple authorizations so the provider can bill intermittently.
        - Investigation Short Form requests exceeding 40 hours will be automatically split into multiple authorizations.
        - If you are submitting on the Long Form and do not want your hours split onto multiple authorizations, select "no" to the question, "Do you want to have this authorization split?".
            - Please note, this question will only appear if you enter a quantity of 50 or more.

9. **Can I request additional hours for my provider if the first authorization wasn't sufficient?**
    - Yes. If your provider needs additional service time to complete their work, you may submit an additional request for the remaining hours needed.
        - Please be sure to use the long form for subsequent requests.
        - Indicate in your request that the hours are a continuation of services from a previous authorization.
            - You will need to list the work that has been completed on the previous authorization, and the work that remains, to support the need for additional time.
        - Please do not submit an amendment request in this situation; a new request is required.

ATTORNEYS

1. **How do I update the email addresses for PAE authorization recipients?**
    - To update the recipients for PAE authorizations, the attorney must email CSS@opds.state.or.us with their bar number, and the email addresses that need to be added/removed.
        - If an assistant is submitting this email, they must Cc the attorney to indicate their approval of the changes.

2. **How do I update my contact information with your department?**
    - To update contact information, the attorney must email CSS@opds.state.or.us with their bar number, and the information they would like to be updated.
        - If an assistant is submitting this email, they must Cc the attorney to indicate their approval of the changes.
    - Please note, other departments may have their own databases where they keep attorney contact information. Please make sure you are informing all applicable departments.

3. **Do I need to use a PAE form to request co-counsel?**
    - No. Requests for co-counsel to provide direct client representation must be made in writing to the analyst assigned to the county in which those services are sought.

        - If approved, co-counsel will bill directly to Accounts Payable and does not need a PAE.
    - Please note, this does not apply to requests for Associate/Research counsel.
        - Associate/Research counsel can be used to assist with legal research or case preparation. They are not appointed to the case and do not provide direct client representation.

4. **Do you have a list of providers and the types of services they provide?**
    - Currently OPDC does not have a formal list of approved providers and their services that is available for distribution, however, we can generate a list for you if you are having difficulty finding a specific type of provider.
        - Please email our department with information on the type of provider you are looking for, and we can do a search for OPDC approved providers that offer that service.

PROVIDERS

1. **How does a provider get set up with the PAE department?**
    - New providers may submit their CV/resume to our department, along with specific details about what service(s) they would like to be approved for.
    - Alternatively, an attorney may submit a PAE request for a new provider with a copy of the provider's CV/resume attached.
        - Once received, the provider's CV/resume will be submitted to management for review.
        - When the review is complete, a staff member from the PAE department will reach out to the provider to confirm whether or not they were approved, and if so, what the approved rate will be.
2. **Can PAE authorizations be sent directly to the provider?**
    - No. Unfortunately, we can only send authorizations to the attorney, who then must forward them to the provider.
3. **How do I request a rate increase?**
    - To request a rate increase, a provider simply needs to email the PAE department a copy of their current or updated CV/resume, indicate they would like to request an increase to their approved rate, and provide the rate they desire.
        - This will be reviewed by management, and a staff member will reach out when a decision has been made.

EXPIRATION DATES

1. **What does the expiration date on the authorization mean?**
    - Any PAE authorizations approved with an effective date in 2024 will have an expiration date printed on the authorization. This date refers to the services approved on that authorization specifically, <u>not</u> the providers services for the life of the case.
    - Authorizations will expire 180 days from the effective <u>or</u> approval/processed date, whichever is greater, and cannot be extended. The purpose of the 180 days is to keep all authorizations current.
        - If an authorization is coming close to expiring, the provider must bill out all completed services, and counsel will need to request a new authorization for any work that remains.
2. **Do I have to complete all the work on the case before the expiration date of 180 days?**
    - No. The expiration date only applies to the services approved on that authorization specifically. It does not apply to the provider's work on the case.

3. **What do I do if my authorization has already expired?**
   - If a provider has realized an authorization has expired before they've had a chance to bill for their services, they should submit their bill to Accounts Payable immediately.
     - This will be considered a late billing; therefore, a letter must be included to specifically request an exception. Please be sure to include any relevant circumstances that contributed to the delay.
     - These submissions will be reviewed on a case-by-case basis by the Accounts Payable manager.
   - If an authorization has expired, counsel should not submit a new request for those services or any requests to extend the expiration date. Counsel should inform the provider to follow the above instruction to submit a letter of justification with their bill.

OTHER

1. **Who do I contact for billing or payment questions?**
   - Please contact Accounts Payable staff directly at AccountsPayable@opds.state.or.us for any questions regarding billing or payments.

Thank you for taking the time to read our PAE Frequently Asked Questions! If you have any suggestions for improvement, please send us an email at CSS@opds.state.or.us.
Your feedback is appreciated.