

Information Memorandum Transmittal Aging and People with Disabilities



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Number: APD-IM-22-049

Issue date: 6/1/2022

Topic: Other

Due date:

Subject: Provider Time Capture (PTC) - Relinking Consumers and Providers in OR PTC DCI

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:

This transmittal describes the new business processes for relinking consumers and providers in OR PTC DCI. When a consumer and provider had previously been unlinked in OR PTC DCI and starts working together again, certain steps must be taken to relink them. The consumer and provider must be relinked in order for the provider to be able to log time with their consumer.

[Business Process 1.1.5 Process for Staff: Relinking a Provider and Consumer](#)

Scenario: A consumer and provider start working together again after they previously stopped working together.

Steps to complete:

1. Local office staff create vouchers and set up ONGO in Mainframe/DHR.
2. Local office staff check the consumer and provider's service account to see if there is an end date on the account.

How to check a service account for an end date:

- Navigate to the consumer’s profile and scroll down, then select Accounts.
- Change the status from “Active” to “Select Status” to see both active and inactive accounts since the default is “Active” status.
- Click Search

Accounts

Showing 8 out of 8 records

Account Type	Profile Type	Cost Center	Funding Source	Service Code	Employee/ Client/ Program Name/ Vendor Name	Unit	Status
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- Find the provider’s name. If the status is “Inactive,” you do not need to check for an end date and can notify the PTC team of the inactive account.
- If the account status is “Active,” click on this service account.

Employee Service	Employee	Eugene LCOG-EU - 2011-EU	APD	Hourly ADL/IADL- 1	Crystal Smith	Hourly	Active
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- If there is an end date on the service account, you will see it on the account details. If there is no end date, the End Date field will not be there. No further action is needed to relink the consumer and provider if there is no end date and the account status is Active.

Daily Pay Max: 0.00
 Daily Rate: 0.00
 Max Units Per 23.99
 Punch:
 End Date: Mar 11, 2022
 EVV Exempt: No
 Pay Rates: +
 Allows OverLapping No
 Pay Rates:
 Created Date: Aug 18, 2021
 Status: Active

3. If there is an end date, or if the status is Inactive, send an email to the PTC Support team with the following information:

Send to PTC.Support@dhsoha.state.or.us

Subject - Relink consumer and provider

Body of email -

Consumer name:

Prime number:

Provider name:

Provider number:

Date provider began working with consumer again:

Service account active or inactive:

Note: If a provider's service account has an end date and they attempt to clock in after that date, the entry will automatically reject with the business rule failure "Employee service account end date punch entry."

If the service account is inactive, the provider will be unable to find the consumer's name when attempting to clock in or create a historical time entry.

Business Process 1.2.4 Process for Staff: Relinking a Provider - Number Reinstated

Scenario: Provider number is reinstated after being terminated.

Steps to complete:

1. Local office staff changes provider's status in Oregon ACCESS to "Approved to Work."
2. Local office staff check in OR PTC DCI to see if the provider's status is "Active" and there are service accounts set up for the consumer(s) they are working for.

How to check a provider status:

- Search for the provider under the Employees tab and select the provider you are looking for.
- Under Basic Demographics, the status should say "Active." Under Other Details, the Employment Status should say "Active" and Authentication status should say "Active."

Employee Details - Crystal Smith

Basic Demographics	Other Details
Address: 562 Cheesey Dr Woodburn, OR 97071-0000	Average Caregiver Rating: 0
GNIS: 41-047-1163363	Domestic Worker: No ⓘ
Phone: (503) 984-5565	Domestic Worker 7 Day Exemption: No ⓘ
Email: CrystalSprings@gmail.com	Domestic Worker Preferred Day of Rest: Sunday ⓘ
Username: crystal.smith	Employee Number: HCW1234
Time Zone: PT (UTC-8)	Weekly Hours: 40.00
Type: Hourly Non Exempt	Available:
SSN: ###-##-#### Show	Holiday Schedule: OR PTC Default Schedule - 2
Allow SSN Retrieval: No ⓘ	Cost Center: St Helens APD-EU
Status: Active	Preferred Language: English
	Employment Status: Active
	Authentication Status: Active

3. Follow the instructions outlined in Business Process 1.1.5 Process for Staff: Relinking a Provider and Consumer for **How to check a service account for an end date**. If the provider is active, there is an active service account for the consumer and provider, and there is no end date on the service account, then no further action is needed to relink the consumer and provider.
4. If there is an end date on the service account, there is no service account, the service account is inactive, or the provider is inactive, then send an email to the PTC Support team with the following information:
 - Send to PTC.Support@dhsosha.state.or.us
 - Subject* - Relink consumer and provider
 - Body of email* -
 - Consumer name:
 - Prime number:
 - Provider name:
 - Provider number:
 - Date provider began working with consumer again:

Please send any questions about these business processes to the PTC Support team at PTC.Support@dhsosha.state.or.us. For more information on the PTC Project, please visit PTC.Oregon.gov.

If you have any questions about this information, contact:

Contact(s): Provider Time Capture

Email: PTC.Support@dhsosha.state.or.us