PTC January 2024 Webinar and Learning Lab

Unlinking and Relinking

FAQ (Frequently Asked Questions)

Contents

Unlinking and Relinking

Q: What should be in the relink request email to the PTC Support Team?

Important: Always check the accounts to see if a relink is needed before requesting a relink. A relink is only needed if the consumer and provider are currently unlinked (via end dates on the service account OR inactive accounts).

A: Subject line: Relink consumer and provider

Body of the email should have the following information:

- Consumer Name

- Consumer's Prime Number

- Provider Name

- Provider Number

- Start date

- Have vouchers been created?

Q: What should be in the unlink request email to the PTC Support Team?

A: Subject line: Unlink consumer and provider

Body of the email should have the following information:

- Consumer Name

- Consumer's Prime Number

- Provider Name

- Provider Number

- Last day worked

- Was the ONGO ended, future vouchers voided and Authorizations rejected?

- Reason for unlink. For example:

  - Consumer or provider passed with date of death noted

  - Consumer's services closed

  - Consumer moved into a care facility

  - Provider quit or was terminated by the consumer

Q: Will the unlinking and relinking processes be automated with Phase 2A?

A: No. We've found some strategies to identify needed unlinks, but there is no way for the PTC Support Team to identify which consumer/provider pairs need to be relinked. We will continue to look for strategies to reduce this workload, but currently there is nothing that will change about these processes in the foreseeable future.

The only thing that will change about unlinking with Phase 2A is the elimination of manual edits to OR PTC DCI authorizations. Voiding vouchers in Mainframe will cause the authorization in OR PTC DCI to go into a "rejected" status. Also, you will be able to edit the end date on a voucher, which will automatically update the OR PTC DCI authorization.

Q: Why should we unlink people at all when this results in needing to relink people who are unlinked?

A: We understand that unlinking and relinking are an additional workload. However, even with unlinks being requested, we have discovered over 20,000 different funding/service account pairs that have had no time claimed against them in over a year. There must be a balance in the process of unlinking pairs to ensure these accounts do not continue to build up without being used. There are several reasons to unlink:

- Potential fraud issues with purposely claiming unauthorized time/mileage.
- Errors due to accidentally claiming unauthorized time or mileage.
- Consumers who have had many providers, or providers who have worked for many consumers, end up with long lists of accounts which is difficult to navigate when trying to troubleshoot.

- When a provider is attempting to clock in using the mobile app, they must scroll through a list of all the consumers they are linked to. Unlinking the consumers they no longer work for makes clocking in easier for them.

Q: What about if the consumer changes from OPI services to APD services? Or from APD to Spousal pay? Do those require unlinks?
A: Yes. The service accounts for the previous program must have an end date entered by the PTC Support Team so the provider cannot accidentally claim time/mileage under the wrong service code. It is highly recommended that you ask the provider to enter all their remaining time/mileage for the old service code, and then ask the PTC Support Team to inactivate their accounts. By having the old accounts inactivated, the provider will no longer see both service codes as options when trying to claim time/mileage. Learn more here: APD-IM-22-075 When a Consumer Changes Programs.

Q: Are we supposed to send an unlink request every time a provider stops working for the consumer?
A: Yes.

Q: Sometimes the case manager does not put down the last day worked for providers, which makes it difficult to know what date to put on the unlink request. What should I do?
A: It is important for the case manager to note the last day worked when passing the information along to the voucher specialist. It is the provider's responsibility to report their last day worked to the case manager, and the case manager's responsibility to confirm the last day worked with the consumer, share the information with voucher staff, and narrate this information in Oregon ACCESS.

Q: When a HCW's provider number expires, are PTC staff unlinking the consumer and provider?
A: Yes. Central Office notifies PTC Support when the provider number expires and the provider does not take the necessary steps to keep their provider number active. At that time, the PTC Support Team will unlink the provider from their

consumer(s). However, if the provider's number becomes active again, Central Office does not notify PTC Support. If they were previously unlinked from their consumer(s) via a request from Central Office, the local office will need to request a relink.

Q: Are there any other clues to let us know that a consumer and provider may need to be relinked?

A: If you check the HINQ screen in Mainframe to see if the provider was previously working for the consumer, they may also need to be relinked in OR PTC DCI. Checking the accounts in OR PTC DCI, however, is the best way to find the consumer and provider's linking status.

Q: Will unlinking a terminated provider stop the vouchers in 10 status that continue to generate on their own?

A: No. The ONGO must be ended to stop the vouchers from being generated.

Q: How will we know if the consumer and provider have worked together before if significant time has passed since?

A: You will be able to find out if a relink is needed in OR PTC DCI, regardless of the amount of time that has passed. If it has been over a year, then the accounts are likely in an inactive status. Accounts, profiles, entries, etc. in OR PTC DCI are never deleted so you can always find historical data when needed.

Q: If a service plan is being updated due to a stop work date, should the case manager include a note such as HCW terminated, HCW quit, client deceased, etc.?

A: The PTC Team cannot dictate what case managers include on the service plan, however, this information is extremely helpful for other staff who need to view the service plan to create vouchers, or who send requests to the PTC Support Team.

Q: If a consumer changes programs and is being unlinked from the old program, should a staff member ask the provider to enter all their time for the old program? What about in a regular unlinking situation, where there is not a change in programs?

A: If there is a change in programs, it is important for the provider to enter all their time for the old program so the PTC Support Team can inactivate those accounts. Please see [APD-IM-22-075 When a Consumer Changes Programs](#) for more information.

If this is not a change in programs and is a typical unlinking situation, then we suggest asking the provider to enter all their time and mileage, but this is not required. If the provider indicates they have entered all their time and mileage, you can let the PTC Support Team know that all time and mileage has been entered and their accounts can be inactivated.

Q: If there is an end date on an account, can the provider still enter historical entries?

A: Yes. The provider can claim historical time and mileage for entries worked up until the end date.

Additional Resources

PTC.Support@odhsoha.oregon.gov

[PTC Staff Tools](#) - PTC resources, including Webinar and Learning Lab materials, as well as transmittals and other published communications - [PTC Staff Tools](#)

Relinking Action Request:

[APD-AR-23-029 Relinking in OR PTC DCI](#) - Explains local office responsibilities around relink requests.

Additional resources related to unlinking and relinking:

[OR PTC DCI Unlink and Relink Reminders](#)

["Employee Service Account End Date Punch Entry" Error](#)

[Business Process - Relinking a Provider and Consumer](#)

[APD-IM-22-075 When a Consumer Changes Programs](#) – Outlines the steps to take when a consumer changes programs (i.e., their service code changes) to ensure a smooth transition to the new program.

[OR PTC DCI Troubleshooting: Provider Cannot Claim Time or Provider Reports Incorrect Pay](#) – Includes instructions to assist providers with common issues, including steps to find out if a relink is needed.