PTC Priority Topics and Next Steps

We are now LIVE with OR PTC DCI, the new timekeeping system replacing paper vouchers. There are some important topics surfacing as we all begin to use OR PTC DCI.

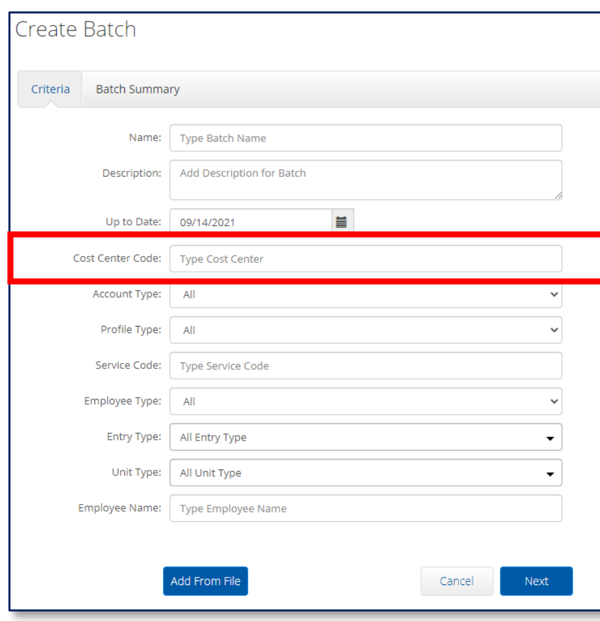
Topics included below:

- **CRITICAL INFO**: Cost Center Required for Payroll Batch
- Login Information and Go-Live Resources
- Support Avenues for Staff
- Support Avenues for Providers, Consumers and Consumer Employer Representatives
- Pending Entries
- Unverified Entries
- PTC-Related Errors in DHR/Mainframe
- ONGO Clean-Up
- Updating Info in OR PTC DCI and Legacy Systems
- Service Accounts and Funding Accounts

CRITICAL INFO: Cost Center Required for Payroll Batch

When creating a new payroll batch, you must enter your cost center (branch number). Do NOT leave the cost center field blank.

- *Why?* You are only authorized to run a payroll batch for your branch(es), and you can only process payments for providers in your branch. If you do not enter your cost center and this field is left blank, you will unintentionally run the payroll batch for all cost centers statewide. The PTC team is working on a system change to make this a required field to mitigate this issue.
- *What will this cause?* If the cost center field is left blank, every time entry in an approved status for the entire state will be included in your payroll batch. Once a time entry has been pulled into a payroll batch and that batch is processed, that time entry can never be pulled into another payroll batch. So, if your payroll batch includes time entries for providers not in your cost center (branch), you won't be able to pay them, and their correct office does not know that punch exists so the provider will not be paid for their time.



Bottom Line: **Always enter your cost center when creating a new payroll batch.**

Login Information and Go-Live Resources

What information do you need to get started?

- APD-IM-21-082: Includes staff support guides, login information, helpful resources and electronic versions of support guides mailed to consumers, providers and consumer employer representatives.
- Staff Learning Materials Catalog: All staff learning materials with descriptions. Staff training videos will also be available soon for staff who were not able to register or need a refresher.

Support Avenues for Staff

Who should you contact when you need help?

- PTC Command Center: Open Zoom session for staff only, available every weekday from 7:00am-5:00pm PST. Staff can join for real-time help from the PTC and Acumen teams. Info sent to all staff via calendar appt and within support guides.
- PTC Support: Contact by email at PTC.Support@dhsoha.state.or.us.

Support Avenues for Providers, Consumers and Consumer Employer Representatives

Who should they contact for help?

- DCI Help Desk: Available by phone or email 24/7 (except federal holidays) for basic system help, login assistance, and general questions. For specific questions regarding service authorizations, tasks, correcting time entries, or if the DCI Help Desk is unable to verify the caller, individuals will be directed to their local office (or equivalent contact for the PCA program).
- PTC Support: Contact by email at PTC.Support@dhsoha.state.or.us.
- AAA/APD Local Offices: Best contact for individuals who have questions related to service plans, authorized hours, task lists and policies. If providers need to make a correction to time entries that are no longer in a pending status, local office staff would need to provide assistance.

Pending Entries

Staff should ***review and address pending entries daily*** to keep them at a manageable level. Pending entries are provider time entries that have failed a business rule and need to be reviewed – for example, a time entry exceeding the provider's authorized hours.

- Time Entry Management
- QRG: Red Eye Pending Entries
- QRG: Troubleshooting Guide for Time Entries
- A mini training video on working pending entries will be available on PTC.Oregon.gov soon.

Unverified Entries

Unverified entries are time entries that staff members enter on behalf of a provider. This may occur if the provider is unwilling or unable to correct a time entry mistake. Unverified entries cannot move to next steps in order to be paid until they are verified.

- Staff Perspective: In these scenarios, the staff member edits the pending entry in OR PTC DCI to correct the time entry mistake. The original/incorrect punch goes into a Rejected status and a new punch is created in the system with updated information in an Unverified status. A different staff member must verify this entry for it to proceed to payment processes. The staff member who entered the correction on behalf of a provider cannot verify the same time entry they corrected.
- Provider Perspective: Providers receive an email notification when there is an entry that needs to be verified. They can also see the number of unverified hours on their dashboard/homepage and can view these entries from their Entries tab in the mobile app or web portal. Providers can verify these entries by selecting the entry that is in an Unverified status, then clicking Action, Verify, Confirm.

PTC-Related Errors in DHR/Mainframe

Staff will notice some changes/error messages in the HATH and OATH screens related to the work that the PTC Support team is doing behind the scenes to send voucher information from mainframe to OR PTC DCI. See Explanation of PTC Errors in DHR.

ONGO Clean-Up

The PTC Support team has been importing existing ONGO service authorizations into OR PTC DCI to have this information set up so providers can begin clocking in on Sept. 12. Issues discovered with ONGO service authorizations include being incorrect or outdated. In order to successfully import service authorizations into OR PTC DCI, PTC Support team is having to do extensive research in DHR/mainframe and Oregon Access to identify issues and piece together why a service authorization cannot be successfully imported into OR PTC DCI.

- **Examples of incorrect/outdated ONGOs include:**
  - ONGO service authorizations not being ended once the consumer/provider was no longer receiving/providing services.
  - Invalid, out of date, or other reasons related to incorrect consumer/provider information in DHR/mainframe.
- **Related Transmittal**: APD-AR-21-044
- **Important Note/Huddle Topic**: Monthly contacts, case management and ongoing conversations between staff and providers/consumers will inevitably uncover information about which consumer/providers are no longer receiving/providing services, providers who have not turned in paper vouchers for extended periods of time, and general contact information updates. ***Staff remain responsible for taking the appropriate actions to ensure the data in our existing systems is updated, accurate and in alignment with policy.***

Updating Info in OR PTC DCI and Legacy Systems (DHR/Mainframe and Oregon Access)

During this first phase of the PTC project, certain information needs to be updated in both OR PTC DCI and legacy/existing systems in order to maintain accurate and consistent data across systems. Below are the instances in which common updates need to be made and where.

- Contact Information Updates for Consumers, Providers and Consumer Employer Representatives (CER): When a consumer, provider or CER reports their contact information needs updates, staff must update this in OA and OR PTC DCI (and in ONE per local office procedure).
    - Information updates include name, phone number (primary, alternate and mobile), email address, address and status (if no longer receiving/providing services, moves to facility, or passes away).
    - If the consumer, provider or CER updates their own information in OR PTC DCI, these updates are compiled into the Change Email/Phone Report in OR PTC DCI. Designated staff at local offices receive this auto-generated monthly report and should share with teams as needed. Staff should review, verify the updated information is accurate, and then update OA and ONE.

  Related BPs: *1.3.2 Update Consumer Information*, *1.2.3 Update Provider Information*, *1.4.2 Update Consumer Employer Representative Information*

- Changes to Authorizations: If there is a change in an existing authorization, staff must update information in both DHR/mainframe and OR PTC DCI. If there are existing authorizations for both hours and mileage, then both need to be updated (including the voucher number) in DHR/mainframe and OR PTC DCI.
  Authorization changes/updates must occur when there is:
    - A permanent or one-time switch in provider(s) during a pay period
    - A provider has been terminated during a pay period and has already worked hours
    - A consumer has multiple providers with changing hours
    - There is an exception to increase a provider's weekly cap resulting in a change to the authorized hours
    - If there is an update in hours, mileage or end date.

  Related BPs: *1.1.2 Provider Switches During Pay Period - Permanently*, *1.1.3 Provider Switches During Pay Period - Temporary*, *1.1.4 Change Authorization*, *1.3.3 Consumer Transfers to a New Branch*, *2.6.2 End Authorization, Expiration, Terminations*

Service Accounts and Funding Accounts

Staff should not create or edit service accounts or funding accounts. The PTC Support Team will be managing these.

- The Authorizations Management Guide for staff has been updated and includes information on funding accounts, service accounts, and updating authorizations.

- If you believe a service account or funding account need to be created or modified, please email PTC.Support@dhsoha.state.or.us with the provider's name and provider number as well as the consumer's name and prime number.