

# Attention OR PTC DCI Users



*\*\*If you do not use OR PTC DCI, please disregard this message*

## OR PTC DCI Unlink and Relink Reminders

### Unlinking

A consumer and provider must be unlinked in OR PTC DCI whenever the provider stops working for the consumer for any reason. Unlinking means OR PTC DCI will prevent the provider from claiming time after their stop work date.

Unlinking must be initiated by the local office, and PTC Support will complete the final steps of unlinking in OR PTC DCI.

For background, there are two steps of unlinking that will be completed in OR PTC DCI by the PTC Support Team:

- The first step of unlinking is that the PTC Support Team adds an end date to the service accounts linking the consumer and provider. The end date is the last day worked. The provider will still see the consumer in OR PTC

DCI, but the system will not allow them to claim time/mileage after the end date.

- The second step is to deactivate the service and funding accounts. The PTC Support Team will deactivate the accounts, completing the unlink, when any one of these scenarios are true:
  - The local office indicates the provider has claimed all their time.
  - The local office indicates the provider wishes to be unlinked immediately.
  - Policy teams inform the PTC Support Team that the accounts should be deactivated due to fraud or other misconduct, or
  - 365 days have passed since the last date worked (ended service accounts are tracked by PTC Support).

When is unlinking needed?

- The consumer is no longer receiving services, moved to a facility, or passed away.
- The provider resigned or was terminated.
- The consumer or provider moved out of state (and is no longer receiving/providing services in Oregon).
- Any other scenario that leads to a provider no longer working for a consumer.

Steps for case manager or other staff member who manages the OA case:

- Create the 546N/PC/SF or 531 with the last day worked and prorated hours (if applicable).

- Complete form 4105 if applicable (recommended) to explain the prorated hours to the provider.
- Give the 546 to the voucher specialist.

#### Voucher specialist steps to unlink:

- Void the current voucher and issue a new voucher if the last worked day is in the middle of a pay period. The new voucher must match the 546 and may have prorated dates and hours.
- In OR PTC DCI, edit the current authorization(s) to match the new voucher. Reject any future authorizations.
- Void outstanding vouchers.
- End the ONGO – **This is a crucial step but is often missed!** Remember, if you change the hourly authorization, you must also change the mileage authorization.
- Email an unlink request to the PTC Support Team at [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov) and include the following:
  - Subject: Unlink
  - Body of email:
    - Consumer Prime
    - Consumer name (as it is spelled in OR PTC DCI)
    - Provider number
    - Provider name (as it is spelled in OR PTC DCI)
    - Last date worked (not necessarily the last day of the pay period)
    - Consumer deceased yes/no
    - Did the provider claim all time and miles or request to be unlinked immediately?

**Note: Please ensure the identifying information is accurate and is how it appears in OR PTC DCI. You do not need to attach a 546N/PC/SF or 531.**

- The PTC Support Team will add an end date to the service account so the provider cannot claim time after the stop work date. The team will also add the consumer/provider pair to a tracker to inactivate the service account after a year.
- See [APD-IM-22-021 Unlinking Consumers and Providers in OR PTC DCI](#) for detailed instructions on unlinking.

## Relinking

If a provider previously worked for a consumer but they were unlinked, they must be relinked for the provider to be able to claim time again for this consumer. Relinking does not happen automatically when new vouchers are created.

A provider who has been unlinked from a consumer will be unable to claim time until they are relinked. If your office does not handle relinks proactively, you will receive calls and complaints from providers after they notice a problem. Providers may also be eligible for underpayments for time that should have been claimed when a relink had not yet been initiated by the local office. The following steps will help the local office take a proactive role in identifying relinks.

### **Important information for case managers:**

If the case manager is aware a new 546N/PC/SF or 531 includes a previous consumer/provider pair, they must inform the voucher specialist that a relink may be needed by noting this on the form.

Steps for voucher specialist to check whether a relink is needed on a new 546N/PC/SF or 531:

- Check notes on the form for information about a possible relink.
- If the need for a relink is possible but not confirmed, check to see if they were previously linked. Review the OR PTC DCI service accounts by navigating to the consumer's account and searching for both active and inactive service accounts under the Accounts section.
  - If you find inactive service accounts for the consumer/provider pair, a relink is needed.
  - If you find an active service account for the consumer/provider pair that has an end date, a relink is needed.

If a relink is needed, complete these steps:

- Email PTC Support with a relink request.
  - Subject: Relink
  - Body of email:
    - Consumer Prime
    - Consumer name **(as it is spelled in OR PTC DCI)**
    - Provider number

- Provider name (as it is spelled in OR PTC DCI)
- First date worked

**Note: Please ensure the identifying information is accurate and is how it appears in OR PTC DCI. You do not need to attach a 546N/PC/SF or 531.**

- Check for the relink to be completed by checking that the provider and consumer now have an active service account with no end date. This could take 1-2 business days.
- Once relinking is done, you can complete the Mainframe steps.
  - Check Mainframe for any old vouchers to ensure there is no overlap.
  - Create new vouchers for the consumer and provider in Mainframe.
  - Open a new ONGO for the consumer and provider in Mainframe.
- If all steps have been completed in this order, the Authorizations should appear in OR PTC DCI automatically. Check to make sure the Authorizations have come through.
- If the need for a relink is discovered after vouchers are already created, send a relink email as soon as you can and let the PTC Support Team know in your relink email that you already created vouchers. The team will make sure the authorizations get sent through within 1-2 business days.
- See [APD-IM-22-049 Relinking Consumers and Providers in OR PTC DCI](#) for detailed instructions on relinking.

If you hear from a provider who is having trouble claiming time, here are clues they may be unlinked from their consumer:

- The provider is unable to find the consumer listed in OR PTC DCI (but they previously worked for the consumer), or
- The provider received the message “Employee Service Account End Date Punch Entry Error” when attempting to make an entry.