

Provider Time Capture (PTC)

OPI and PTC: Question & Answer Session

Date: 1/24/2022

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Agenda

- Review answers to questions received prior to meeting
 - Roughly 30 min
 - Includes a brief discussion of underpayments
- Open Q&A to discuss lingering questions
 - Remaining meeting time
- To keep the meeting moving and to end on time, we will focus the first part of the meeting on reviewing the slides. You can feel free to type questions in the chat at that time. We will address those and any follow up questions at the end.



How do we get a hold of someone for time sensitive issues? *I sent an email to the PTC support email and received an email response 2 weeks later and missed the deadline for voucher submission.*

Answer: Emailing PTC Support (PTC.Support@dhsoha.state.or.us) is the only way to send requests to the PTC Team. When PTC went live and for a couple months after that, we experienced such a high volume of requests that we struggled to get to them all. We are now caught up.

Some tips:

- Make sure the subject line of your email states clearly the urgency of your request.
- Make sure the body of the email provides all necessary information.
- Please follow up with us if you do not get a response within 2 business days.



When I ask a HCW to edit their time when they are over their authorized hours, why do I then also have to approve it? Why doesn't the system auto approve once it's within their authorized hours?

Answer: When a provider edits their time, it would reject the original entry and create a new entry that would be pending status and go through the auto approval process.



Why can't the system auto approve entries that are a few minutes above the authorized amount? *It makes more work for the case managers, voucher clerks and HCWs when the DCI system rounds the decimal hours up and puts the HCW 2 minutes over their authorized hours.*

Answer: That is not how the system was created to function. From a system perspective, any request we make to change core system functions must be approved by APD Policy, our Change Control Board and Acumen who weigh the cost of updating the system and the impact on other States using the system against the overall benefit to users. Additionally, the mainframe doesn't allow time to be entered above the voucher hours and if we allowed PTC do that, they would not be in sync.



Is there a time limit for adding the historical entry after the date the HCW actually worked? If yes, how long?

Answer: Yes, according to the Collective Bargaining Agreement that HCWs have with the union, they have 365 days from the date of service to submit any historical time entries.

Link to the CBAs: <https://www.oregon.gov/dhs/SENIORS-DISABILITIES/HCC/PSW-HCW/Pages/Collective-Bargaining.aspx>



Is there a way for the HCW to log mileage on the OR PTC DCI app instead of having to log onto the web portal?

Answer: The Mobile App does have functionality that would allow Providers to track their mileage but has not been implemented due to the tracking feature. When we were going through initial design sessions, APD Policy chose to turn that functionality off. This is something we are looking at again. Currently, we are exploring the benefits, cost and impact to Providers in the change control process.

On the web portal, “Unverified Hours” always shows “0”, is there a way to change this to show a list of the time entries that need verification?

Answer: The Total Hours widget was designed to show the break down of a specific provider’s hours they worked in a given week. The “Unverified Hours” populate on the widget when a Provider name is entered in the “Employee Name” search field *and* the State user has entered time/made edits on behalf of a Provider *and* the new time entry has not been verified.

Instead, to generate a list of Unverified entries for your branch, use the Reports module to create a Punch Entries Report. The [Punch Entries Report QRG](#) provides step-by-step instructions on how to do this.

NOTE: This report is useful to identify unverified and pending entries.



Will OR PTC DCI track provider number expirations and notify the HCW that they must renew their provider number?

Answer: No, Provider number expirations will not be tracked in OR PTC DCI and must be monitored according to the current process.

If a HCW has more than one client, will the check show the itemized hours for each client?

Answer: Yes, the Remittance Advice will continue to show the Consumer(s) they are being paid for.



When running the payroll batch report and dates for the upcoming pay period are shown, should we enter this time and save?

Answer: DHR *will* allow you to enter the time into STIM for the upcoming pay period and save it. The date range you use to generate your payroll batch and whether you should process time for an upcoming pay period is up to your local office management team.

Tip: Set the “Up to Date” field as the entry submission deadline. This will limit entries on the batch to Service Dates within the pay period you are processing or earlier.

Batch Summary

Name:

Description:

 Up to Date: 

Cost Center Code: 

Should the underpayment log be submitted during the current pay period?

Answer: An underpayment is only considered an underpayment when the **Pay Processing Date** has passed for the pay period *and* a partial payment has paid out. You can submit the underpayment form/spreadsheet as soon as you have made and saved the needed adjustments to the STIM screen.

See the CEP Manual for instructions:

<http://www.dhs.state.or.us/spd/tools/cm/homecare/CEP%20Guide%208-19-21.pdf>

It is recommended to submit underpayments to PRU APD.Ceppayments@dhsosha.state.or.us by the end of each day to ensure provider underpayments are processed timely.



What are some common reasons a HCW can't log in?

Answer: Common reasons for not being able to log in:

1. HCW Profile is not set up yet
 - a. If a provider is not working for a consumer, they will not be able to log into OR PTC DCI since they do not have a profile set up.
 - b. If the provider immediately begins working for a new consumer, it can take up to 2 business days for the PTC team to create a profile in the system once they have an authorization if they did not previously have one.
2. HCW username/password do not match
3. Provider is locked out
 - a. If you enter your password wrong 5 times in row, your account will be locked out.

Contact the **DCI Help Desk** 24/7 at **855-565-0155** or during normal business hours your local office to unlock your account.



What would be the reason a client isn't in the system?

Answer: There are 2 parts to ensuring a consumer profile is set up in OR PTC DCI, the first authorization is required in DHR and the second authorization is required in OR PTC DCI.

a. For new consumer: The first step is creation of the authorization in DHR. Once the authorization is created in DHR, there is a nightly report pulled by the PTC Project Team who manually create the accounts for consumers and providers that do not have a profile. Account creation in OR PTC DCI can take up to 2 business days after the authorization is created (the day the voucher is created does not count as the 1st business day) in DHR. Please see [PTC Business Process 1.7.0 Setting up EVV Options with Consumers and Providers](#) for step-by-step process to complete the authorization for new consumer and provider pairings.



What would be the reason a client isn't in the system? (continued)

b. For ongoing consumer: The first step is creation of the authorization in DHR. If there are already profiles created for the consumer and provider in OR PTC DCI, voucher specialist will create the initial voucher and ONGO and then go into OR PTC DCI and update voucher number, hours, mileage, and other authorization information. Please see [PTC Business Process 1.1.4 Change in Authorization](#) for step-by-step process to complete the authorization for ongoing consumer and provider pairings.



Why isn't the HCW given an option to enter mileage?

Answer: Mileage must be entered into the OR PTC DCI Web portal, it cannot be added on any of the EVV options (landline, mobile app, or fob). When adding a mileage entry on the Web Portal, the account type is Client Transportation. Please see the Quick Reference Guide titled ['How to Enter Mileage into OR PTC DCI'](#) with step-by-step instructions for providers.

If error is related to authorization: The DHR authorization must have mileage authorized before mileage can be added as an authorization in OR PTC DCI. Mileage authorizations are different than the hourly authorizations and if a provider has both, there will need to be 2 authorizations – one for mileage and the other for the service hours. If a voucher has paid out (36 status), the authorization cannot be retroactively updated to include mileage.



Why would the OR PTC DCI system continue to ask for new log in info?

Answer: The OR PTC DCI system has several security functions enabled to ensure that consumer and provider information is protected. These functions include timing out, requiring the provider to log in each time they want to clock in and out, and updating their password every 60 days.



Consumers and HCWs have not been able to log out.

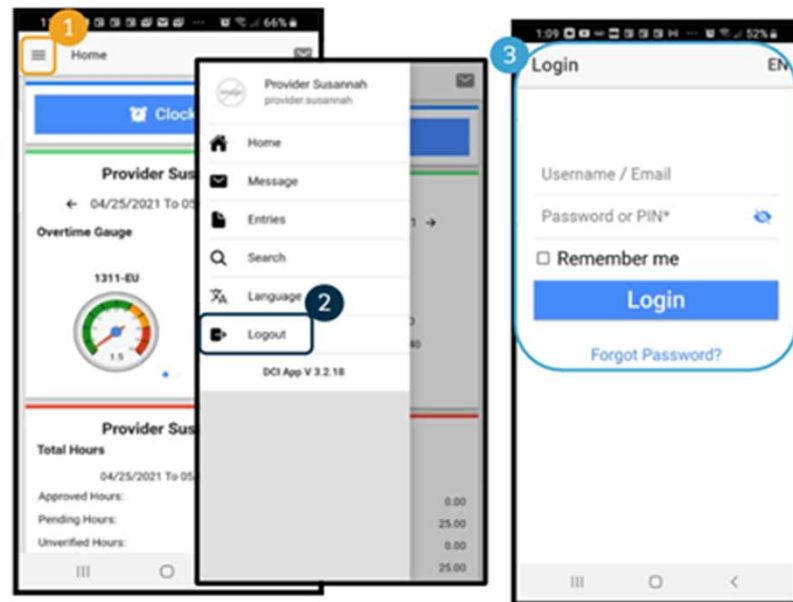
Answer: If you mean “clock out,” we have an open trouble ticket with Acumen for Providers who get stuck at the clock out step. If you run into a Provider with this issue, please email the PTC Support team.

For logging out on the mobile app, see page 41 in the [OR PTC DCI Provider Guide](#):

Mobile App Logout

To log out:

1. Click the 3 horizontal lines icon to view your menu options.
2. Click Logout.
3. You will be taken back to the Login screen.



Consumers and HCWs have not been able to log out. (Continued)

For logging out on the OR PTC DCI Web Portal, click on your username at the top of the dashboard and a dropdown menu will appear with an option to log out, see page 80 in the [OR PTC DCI Provider Guide](#) for detail information.

For clocking out on the landline EVV option, please see pages 62-63 in the [OR PTC DCI Provider Guide](#).

For clocking out on the mobile app EVV option, please see pages 45-52 in the [OR PTC DCI Provider Guide](#). Note: To log out completely, the provider must complete all of the clock out verification steps otherwise they will remain clocked in.



Case managers are still not able to see all their clients. How do we fix this?

Answer: All OPI cases should have been moved into the correct OPI branch. If a case manager is unable to see all of their consumers and believe that they have profiles created in OR PTC DCI, please follow transmittal [APD-AR-21-061](#) for instructions to have their cost center (branch) updated in OR PTC DCI.

How do we confirm that all of our clients are in the system?

Answer: To identify all consumers that are assigned to your cost center (branch) in OR PTC DCI, you can download the Clients Report from OR PTC DCI using the [Reports Guide](#).



For Historical entry time limits: If the HCW submits the voucher before the 365 days but has an error (over authorization), how long does the HCW have to make the correction.

Answer: Per APD Policy, it is not a recognized claim until the entry is correctly submitted, so fixed before 365 days from the date of service provided. APD Policy checked the CMS rules on when that timeframe could be extended, however this scenario does not apply. The HCW doesn't have a timeline for when they need to make corrections to their entries. However, if the HCW doesn't correctly submit time before 365 days, the time will not be paid and this is supported by the Collective Bargaining Agreement.



How do we know the partial payment is processed?

Answer: Use the HINQ screen to check if an underpayment has been processed:

- Type HINQ,v,voucher# and press enter

After an underpayment is processed for a voucher, you will see 3 entries on the HINQ screen

- The voucher in 36 status is the original payment
- The voucher in 27 status means “voucher credit”
 - shows that this amount was already paid and therefore is not included in the new check sent to the provider
 - Is accompanied by 46 status
- The voucher in 46 status means “voucher adjustment paid”
 - Original payment + underpayment = voucher adjustment paid amount
 - Is accompanied by 27 status

Because HCWs have a year to enter time, if the pay period comes to an end and they are still below authorized hours, do we assume they did not work full hours? Do we leave it for them to enter historical hours? Or is the expectation that we are to contact HCWs each time this happens? That can be extremely time consuming. With the old system, there was a finality to hours when the HCW turned in a paper voucher. Can there be some kind of system update which includes a "complete" button to indicate that HCWs are finished with the pay period?

Answer: The expectation is to pay the hours that the HCW submits. HCWs may enter historical entries up to day 365. OR PTC DCI will not allow a historical entry to be submitted if it is past day 365. It is not expected for case managers or voucher clerks to reach out to HCWs who have not submitted their time. However, this is something a case manager can check on as part of their case monitoring to ensure that services are being provided accurately for their consumer.



I get lots of calls from my HCW... she doesn't know how to get on the OR PTC DCI system website to make necessary changes. Could you point out where I can find the “how to sign up” tutorial for a HCW to sign up online and how to fix her hours?

Answer: The best resource for Providers who need help figuring out how to log into the Web Portal to make edits/corrections, is the Provider Guide. Please see pages 103-107 of the Provider Guide for step-by-step instructions on how to edit entries on the OR PTC DCI Web Portal.

Here is a link to that document:

<https://dciconfluenceprod.dcisoftware.com/display/ORPD/Download+the+OR+PTC+DCI+Provider+Guide>

Here is the link to an online training module:

https://orptctraining.z5.web.core.windows.net/en/web_portal_for_providers/story.html



If it is past the payment submission already but the voucher status in Mainframe is still 35, should I just adjust the hour instead of doing an underpayment?

Answer: Yes. If the voucher is in 35 status, you will need to move the voucher to 30 status, update the STIM screen, and then move the voucher back to 35 status so that it will process and pay out correctly.

For information on navigating Mainframe, see the CEP Training Manual:

<http://www.dhs.state.or.us/spd/tools/cm/homecare/CEP%20Guide%208-19-21.pdf>



How are entries over the authorized hours getting past pending? I have had several cases where hours over authorized amounts are getting to the batch level. No one authorized it.

Answer: There are 2 reason why these entries might be getting approved:

1. The entry was manually approved by a staff member. To see who approved the entry, click on the entry ID and check under the Events tab to determine if it was manually approved.
2. The entry was auto-approved by OR PTC DCI and it should **not** have been since it was over the authorized hours. When you have an outlier situation like this, that is clearly violating a business process, please send an email to PTC.support@dhsoha.state.or.us. We need to know about errors like this so we can report it to the vendor for follow-up.



Can HCWs see how many hours they've entered/have left? What does the app look like from the user end?

Answer: HCWs can view all entries they have on both the OR PTC DCI Mobile App and the Web Portal on the 'Entries' tab. The hours calculated on the Total Hours widget will show the total hours worked for all consumers. At this time, there is not a way to separate out the auto calculated total hours per consumer.

Here is a video tutorial of what the OR PTC DCI Mobile App looks like from the provider perspective:

<https://directcareinnovations.wistia.com/medias/9iis08x7z0>



STIM, Underpayments, and Provider Relations Unit (PRU)

- The STIM screen is where the provider hours are entered into the Mainframe.
- STIM data entry – adjust, delete or adds shift(s) in Mainframe to correct the time
- Access the STIM screen by typing in: STIM,voucher#
- PRU is responsible for processing under/overpayments

A Bit About Underpayments...

High-level process:

- 1) **Identify** entry belonging to a voucher that has been paid out (36 status)
- 2) **Adjust STIM** screen entries and delete/add shift(s), press F9 to save
- 3) **Add** entry to underpayment spreadsheet/form and submit to PRU

Tip: submit spreadsheet daily to avoid delayed payments

Underpayments Spreadsheet: PRU and PTC teams have set up a process so that staff can group underpayments into one spreadsheet when submitting to PRU, instead of having to send an individual underpayment forms for each provider.

- Located on the Staff Tools “Payment Adjustment and Troubleshooting” page: <http://www.dhs.state.or.us/spd/tools/cm/provovp/index.htm>
- Send the spreadsheet to the same email that you usually use when submitting underpayment forms - APD.Ceppayments@dhsosha.state.or.us



STIM Voucher: ICN: 00000000000000 Svc Period: 04/28/2019 05/11/2019

Recipient Name:

Recipient:

Page 001

STA:36

Provider Name:

Provider#:

Wkr

Authorized: ADL: 50.00 IADL: 0.00 24HR SUPP: 0.00 MILEAGE: 15

Miles Driven: 0015 Void PMT: N ADJ Time: N

BR: 0313

	Time	AM	Time	AM	Work	
Day	In		PM	Out	PM	Hrs
28	0800	A	1200	P	4.00	

28 0100 2 0500 2

A A

A A

A A

A A

_____ A _____ A _____

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_____ A _____ A _____

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Msg G3 Press F9 to save /

	Time	AM	Time	AM	Work	
Day	In		PM	Out	PM	Hrs
29	0800	A	1200	P	4.00	

I A A

A A

A A

A A

A A

_____ A _____ A _____

_____ A _____ A _____

_____ A _____ A _____

_____ A _____ A _____

_____ A _____ A _____

_____ A _____ A _____

_____ A _____ A _____

_____ A _____ A _____

dit

Msg G3 Press F9 to save / ENTER to edit

ADL=008.00(008.00) IADL=000.00(000.00) 24HR=000.00(000.00) MILE=0015

F3=Exit F5=Refresh F7=Prev F8=Next F9=Save

F11=HINO F12=STIO

Underpayment Spreadsheet

You will need the following information included on the spreadsheet for the underpayment to be processed:

- Branch #
- Voucher #
- Authorization Begin Date
- Authorization End Date
- Consumer Name
- Consumer Prime #
- Provider Name
- Provider #
- Hours Paid
- Correct Hours
- Procedure Code (OP332, OP338, OP334, or OP336)

A Bit About Underpayments...

H	I	J	K
Provider #	Hours Paid	Correct hours	Procedure code (e.g. OC111)

When you fill out the spreadsheet, make sure you are putting the correct amounts in the “Hours Paid” and “Correct Hours” columns. This will ensure payment accuracy when PRU approves the underpayment.

- **Hours Paid:** the number of hours originally paid to the Provider
- **Correct Hours:** matches the total hours on the STIM screen after adjustment

Ex. If a Provider should have been paid for 8 hours, but were only paid for 3 hours, “Hours Paid” would be 3 and “Correct Hours” would be 8

Underpayment Processing

After an underpayment is processed by PRU, you will see 3 entries on the HINQ screen:

- The voucher in 36 status is the original payment
- The voucher in 27 status means “voucher credit”
 - shows that this amount was already paid and therefore is not included in the new check sent to the provider
 - Is accompanied by 46 status
- The voucher in 46 status means “voucher adjustment paid”
 - Original payment + underpayment = voucher adjustment paid amount
 - Is accompanied by 27 status

VCH	PRCS	PRIM	RECIP	PROV	PROV	SERV	SERV	CHK	EFT	
NMBR	TRANS	ID	NAME	NMBR	NAME	BEG	END	DATE	REJ	PAID
21701	46		P	7		211219	220101	220121		106.30
21701	36		P	7		211219	220101	220115		58.45
21701	27		P	7		211219	220101	220121		58.45-



STIQ Screen

There are 2 parts to the STIQ screen:

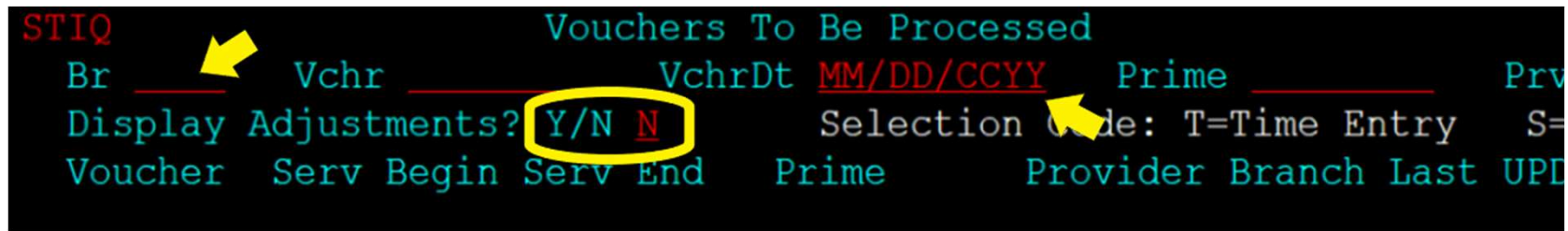
1. Vouchers that have time against them but remain in unpaid status (30 status)
2. Vouchers adjustments that have not been paid out
 - These are voucher underpayments that have **not** been approved by PRU but have time entries updated by local office

```
STIQ                      Vouchers To Be Processed                      12/16/2021
Br _____ Vchr _____ VchrDt MM/DD/CCYY Prime _____ Prv _____
Display Adjustments? Y/N N Selection Code: T=Time Entry S=CEP Screen
Voucher Serv Begin Serv End Prime Provider Branch Last UPDT UPDT ID
```



Accessing STIQ Screen

1. In mainframe, type STIQ and press enter
2. Enter branch number, default screen shows vouchers that have time against them but remain in unpaid status (30 status)
3. To display vouchers adjustments that have not been approved and paid out, put Y next to 'Display Adjustments?'



The screenshot shows the STIQ mainframe interface. The title 'STIQ' is in red. Below it, the text 'Vouchers To Be Processed' is displayed. The screen contains several fields: 'Br' (Branch) with a yellow arrow pointing to it, 'Vchr' (Voucher), 'VchrDt' (Voucher Date) with a date format 'MM/DD/CCYY' and a yellow arrow pointing to it, 'Prime', and 'Prv'. A prompt 'Display Adjustments?' is followed by 'Y/N' and a red 'N' which is circled in yellow. To the right, 'Selection Code: T=Time Entry S=' is visible. At the bottom, there are labels for 'Voucher', 'Serv Begin', 'Serv End', 'Prime', 'Provider Branch', and 'Last UPD'.

Note: Staff may also complete a search by Branch (Br) and Voucher Date (VchrDt) at the same time (note: when a date is entered, the branch must also be entered). When this type of search is completed, the results will display only the vouchers in that branch for that pay period.

Resources



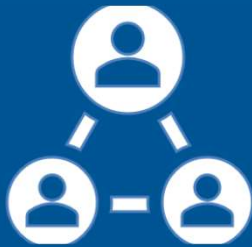
PTC Project Email

- **PTC.Support@dhsosha.state.or.us**
- The PTC Project Team will be monitoring emails on a daily basis.



PTC Project Website

- **PTC.Oregon.gov**
- Will include events, project updates, FAQs and more.



Local Office

- Staff able to answer questions.

