



# Time Entry Management Guide

OR PTC DCI  
VERSION 2.2



# Time Entry Management Guide

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# Time Entry Management Guide

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## Disclaimer

The content found in this document is intended for staff using the OR PTC DCI system.

## Auto-Approval

### What is Auto-Approval?

Auto-Approval is a system process that runs daily to compare entries submitted against the rules of the system.

After an entry is submitted, it will initially be in a pending status and can still be edited by providers. Providers cannot edit entries in an approved or processed status. Once the Auto-Approval runs, it will approve entries that pass all business rules. Once they are approved, the system will be able to pull them into a batch for payment.”

## How to Determine Available Balance for a Provider

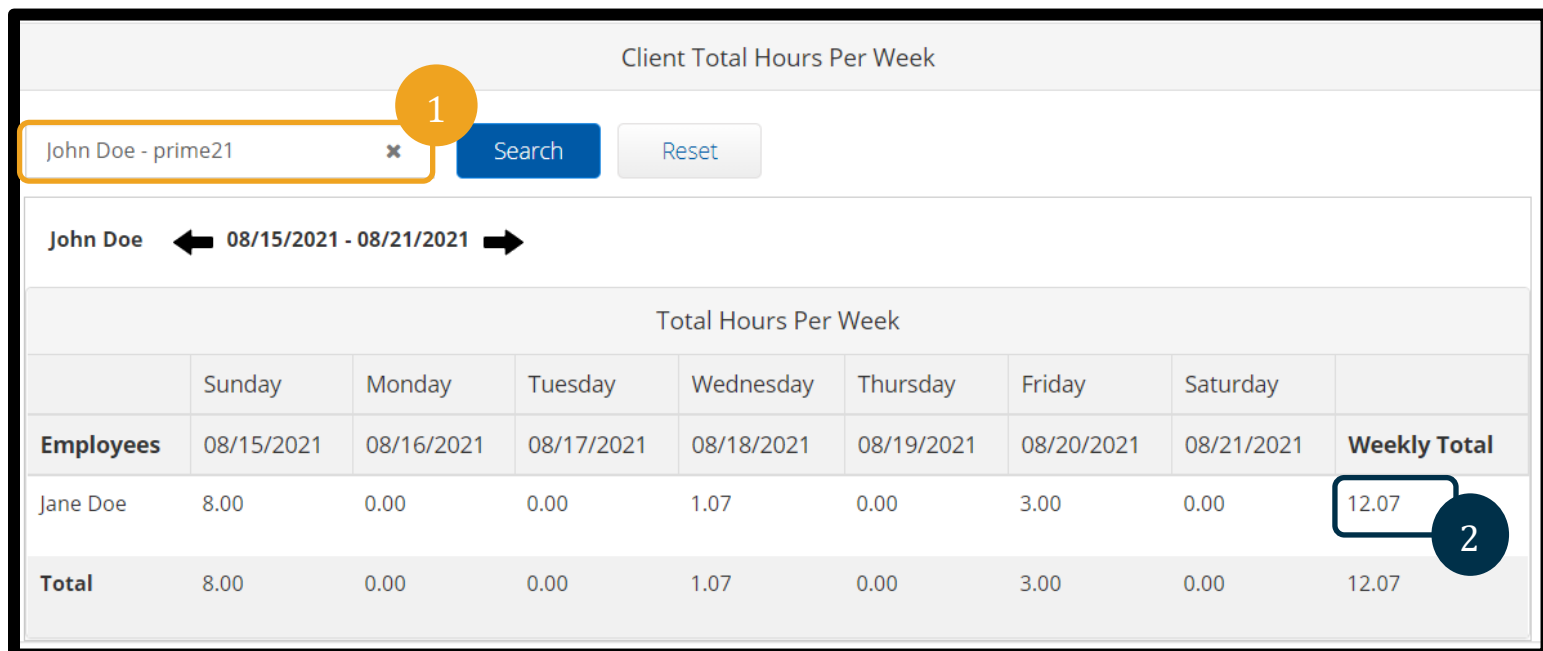
There are multiple options for how you can determine the Available Balance for a provider. Available Balance means the number of hours from the provider’s total authorized hours available to claim for a given pay period.

### Option One: Client Total Hours Per Week Widget

Client Total Hours Per Week widget on the dashboard can be used to determine the Available Balance. To do so:

1. Search for the consumer by name. The consumer’s name and prime number will display. Due to multiple consumers with the same name, always check that the prime number is correct.
2. Add the Weekly Total for the provider in question for the two-week pay period.
3. Compare this to the authorized hours. To do this, add the total hours for each week together to get the total hours claimed for the pay period. Then subtract this from the authorized hours. This will tell you the Available Balance.

# Time Entry Management Guide



Client Total Hours Per Week

John Doe - prime21

John Doe ← 08/15/2021 - 08/21/2021 →

Total Hours Per Week								
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	
Employees	08/15/2021	08/16/2021	08/17/2021	08/18/2021	08/19/2021	08/20/2021	08/21/2021	Weekly Total
Jane Doe	8.00	0.00	0.00	1.07	0.00	3.00	0.00	12.07
<b>Total</b>	8.00	0.00	0.00	1.07	0.00	3.00	0.00	12.07

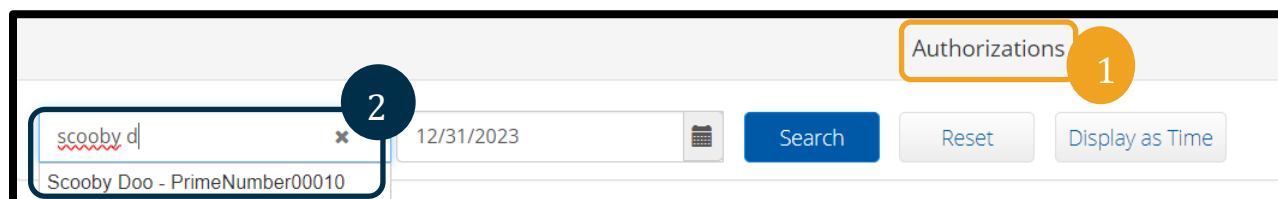
## Option Two: Authorizations Widget

The Authorizations Widget on the dashboard displays the following:

- Start and End Date of the pay period
- Initial Balance: the number of authorized hours/miles
- Remaining Balance: the number of hours/miles not in an approved or processed status
- Pre-Authorization Holds: the number of hours/miles in a pending status
- Current Available Balance: the number of hours/miles the provider has left to claim (calculated as Remaining Balance minus Pre-Authorization Holds)

To use the Authorizations Widget:

1. After you log into the web portal, you will be on the home page or dashboard. Scroll down to see Authorizations in the middle of the page. This is called the Authorizations Widget.
2. Begin typing the consumer's name in the Type Client Name field. After three or more characters are typed, a drop-down list will appear. Select the consumer's name from the drop-down.



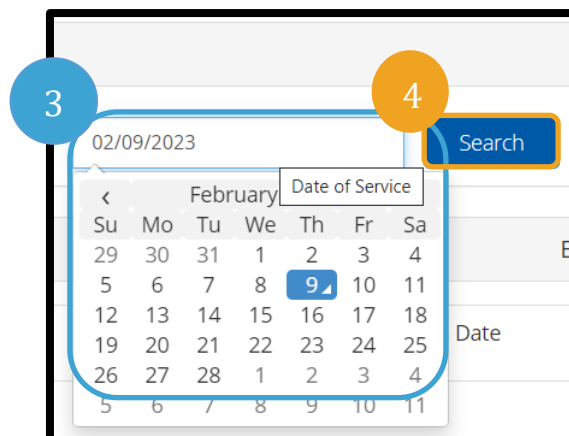
Authorizations

scooby d  12/31/2023

Scooby Doo - PrimeNumber00010

# Time Entry Management Guide

- Select the Date of Service field. From the calendar, select a date within the pay period in question. For example, if the provider wants to know what their Available Balance is for the current pay period, enter today's date.
- Select Search.
- All authorizations for this consumer and pay period will appear. Identify the service code associated with the provider in question to find the correct authorization.
- Identify the Current Available Balance for the specific authorization of interest. The display will default to hours and minutes.
- To convert the time displayed on the table to a decimal, select the "Display as Units" button.



Authorizations

Scooby Doo - PrimeNumber0( x | 12/31/2023   

Authorization for Client: Scooby Doo ⓘ

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
Hourly ADL/IADL-1 5	12/31/2023	01/13/2024	60 Hours, 0 Minutes	43 Hours, 55 Minutes	0 Hours, 0 Minutes	43 Hours, 55 Minutes 6	60 Hours, 0 Minutes	60 Hours, 0 Minutes	60 Hours, 0 Minutes

- Identify the Current Available Balance for the specific authorization of interest, now displayed as decimal units.
- To convert back to time, select "Display as Time."

Authorizations

Scooby Doo - PrimeNumber0( x | 12/31/2023   

Authorization for Client: Scooby Doo ⓘ

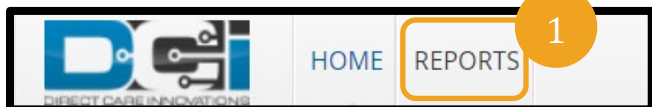
Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorization Holds	Current Available Balance	Monthly Max	Weekly Max	Daily Max
Hourly ADL/IADL-1	12/31/2023	01/13/2024	60.00 Units	43.92 Units	0.00 Units	43.92 Units 8	60.00 Units	60.00 Units	60.00 Units

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## Option Three: Authorization Entries Report

The Authorization Entries Report will show you the Available Balance. To find and read the Authorization Entries Report:

1. Select the Reports tab.



2. Hover over Authorization Reports, then select Authorization Entries Report.

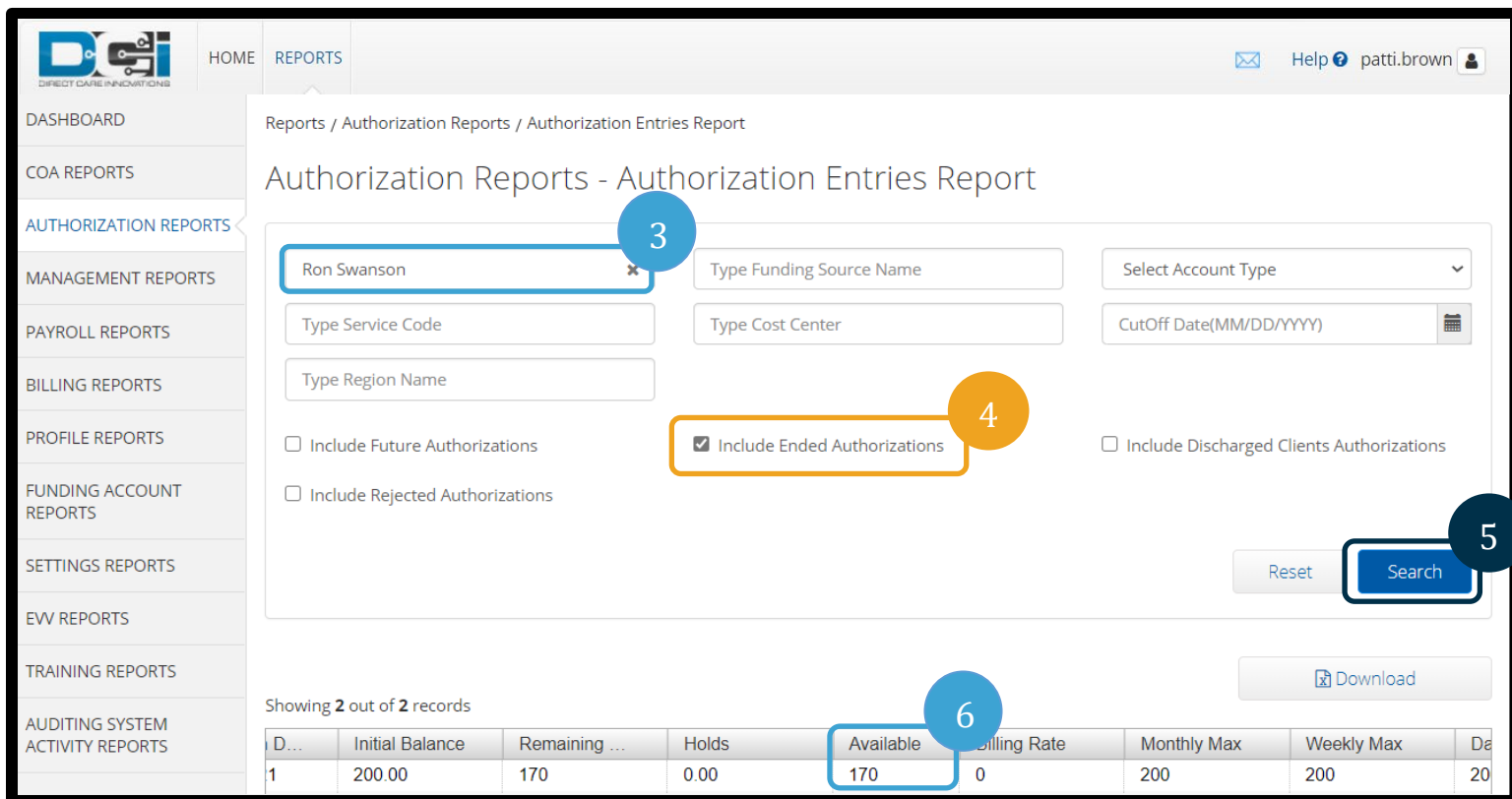
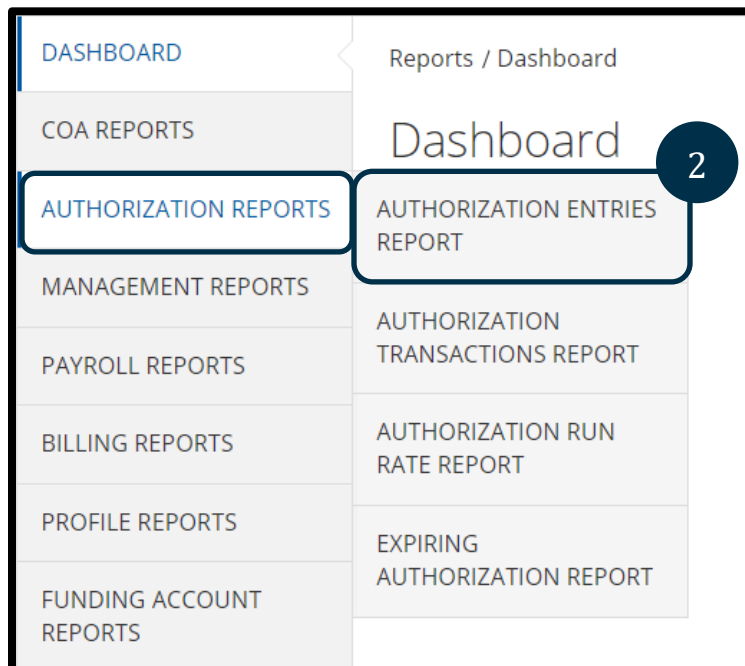
3. Enter the consumer's name.

4. Check Include Ended Authorizations.

5. Select Search.

6. On the report, identify the authorization

in question (identified by the Authorization ID Reference, Authorization ID Reference 1, and start and end dates). Once you identify the appropriate row, scroll over to find the Available column. This will show the Available Balance.



# Time Entry Management Guide

## Converting Decimal Hours to Minutes

Use this chart to convert hours to minutes. To view the chart online, go to <https://dciconfluenceprod.dcisoftware.com/display/ORPD/Time+Conversion+Chart+-+Minutes+to+Decimal+Hours>.

Minutes	Decimal Hours	Minutes	Decimal Hours	Minutes	Decimal Hours
1	.02	21	.35	41	.68
2	.03	22	.37	42	.70
3	.05	23	.38	43	.72
4	.07	24	.40	44	.73
5	.08	25	.42	45	.75
6	.10	26	.43	46	.77
7	.12	27	.45	47	.78
8	.13	28	.47	48	.80
9	.15	29	.48	49	.82
10	.17	30	.50	50	.83
11	.18	31	.52	51	.85
12	.20	32	.53	52	.87
13	.22	33	.55	53	.88
14	.23	34	.57	54	.90
15	.25	35	.58	55	.92
16	.27	36	.60	56	.93
17	.28	37	.62	57	.95
18	.30	38	.63	58	.97
19	.31	39	.65	59	.98
20	.33	40	.67	60	1.0

## Correcting an Entry Mistake

- If a mistake is made on an entry, or if a consumer or consumer employer representative disputes an entry, it should be corrected by the provider.
- If the entry is already in an approved or processed status, it will be canceled by a staff member with the Supervisor Role for the provider to create a new historical entry.

The path to correct the error can go a variety of ways depending upon the situation. We will look at each path and what a staff member's role will be within the process.

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**Note:** If the consumer or consumer employer representative disputes an entry, the case manager will contact the consumer or consumer employer representative to resolve the dispute.

## Correcting Paid Versus Unpaid Entries

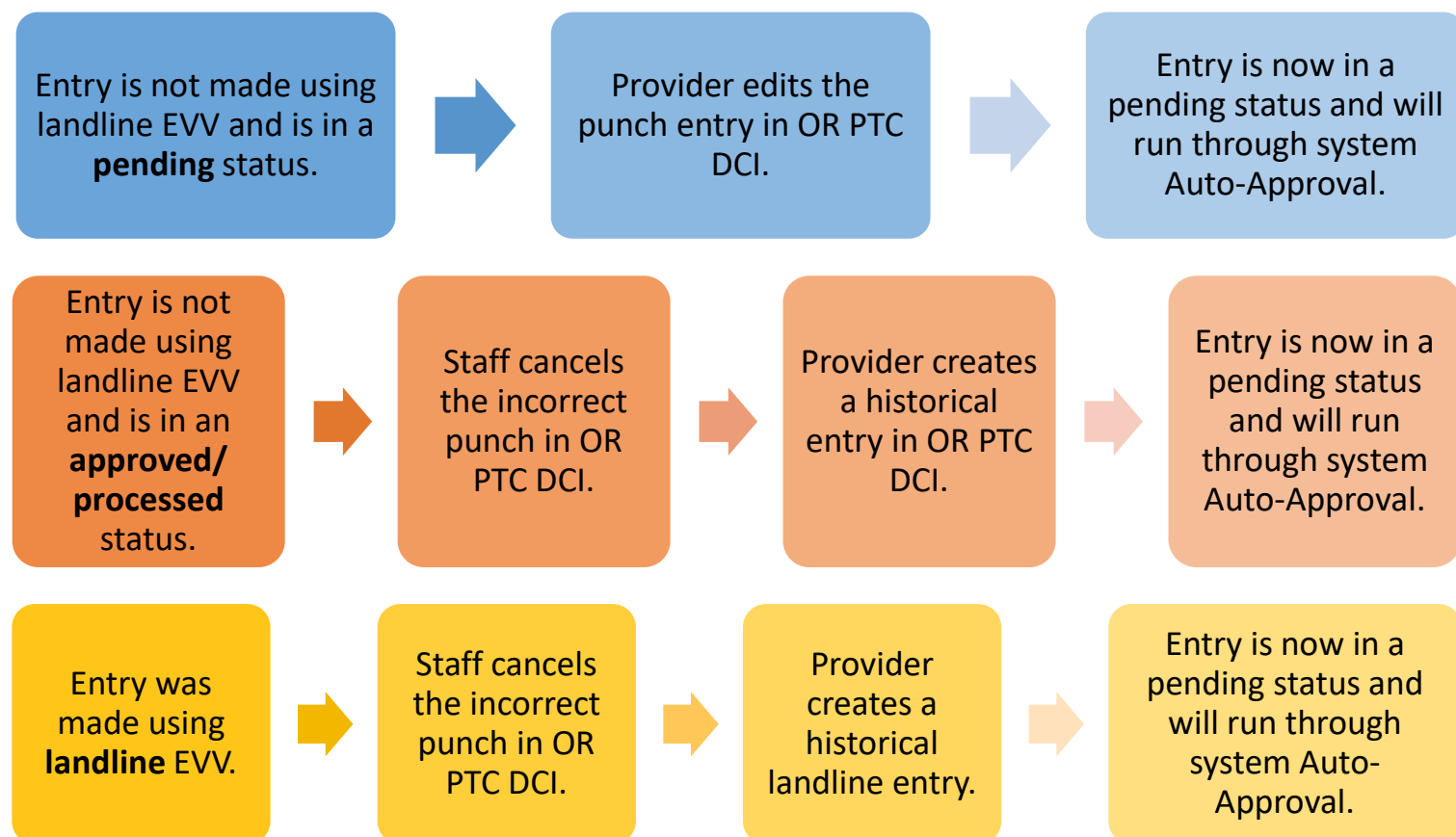
If an entry has been paid, you will need to follow the business process [6.3 Over- and Underpayments](#), which includes making an adjustment to the entry in OR PTC DCI.

- Time entry adjustments in OR PTC DCI are covered in [Adjustments](#).

If an entry has not been paid, there are several ways the entry can be corrected. See business process [6.1 Correct Entry Mistake](#) for more information.

## Process for Editing an Entry

The following displays the appropriate path based on the status of the entry and whether the entry was made using the landline method.

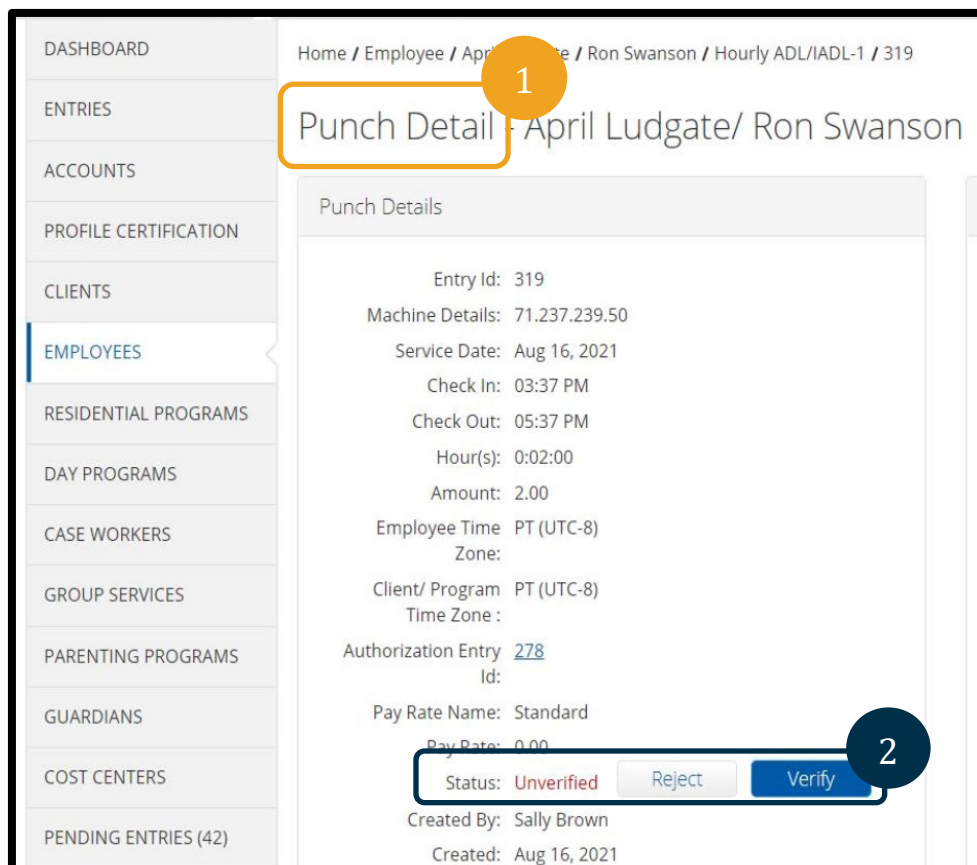




# Time Entry Management Guide

## How to Verify an Entry

If a staff member edits or creates an entry, the entry will be created in an unverified status. The staff member must have another staff member with a Supervisor Role over the consumer's cost center verify this entry. The system will not notify another staff member to do this. Entries created or edited by staff must be verified. Entries that remain in an unverified status will not be pulled into a payroll batch and will not be paid. The same staff member who created/edited the entry cannot also verify it.



1. On the Punch Detail screen for the specific entry in question, scroll to Status.
2. You will see it display Unverified in red. Select Verify.

Your office may choose to run a Punch Entry Details Report filtered on unverified entries to ensure all entries are verified. Instructions for pulling this report can be found in the [Reports Guide](#).

## Entry Edits in Pending Status

Providers should be editing their own entries that are in a pending status whenever an entry edit is needed. If there is a good reason why the provider cannot edit their own entry, staff can also edit entries in a pending status. You can do this from either the consumer or provider's profile.

# Time Entry Management Guide

1. To find the entry that needs to be edited, navigate to either the consumer or provider's profile. Scroll down to see the Entries tab. Use the filters to help you find the entry in question. Once identified, select the entry to see the Punch Detail screen.

Signature Set: No  
Email confirm: Yes

**1** Entries Accounts Certifications EVW Locations Notes Attachments Events Custom Fields

From (MM/DD/YYYY) 08/16/2022 Type Punch ID Type Client Name  
Type Service Code Select Account Type Select Status

Reset

Entries Showing 30

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount
<a href="#">2126</a>	Aug 15, 2022	09:00 AM	01:30 PM	Hourly		St Helens APD-EU - 0511-EU	<a href="#">Scooby Doo</a>	Hourly ADL/IADL-1	0:04:30
<a href="#">2188</a>	Aug 14, 2022	01:20 PM	02:30 PM	Hourly	<a href="#">2125</a>	St Helens APD-EU - 0511-EU	<a href="#">Scooby Doo</a>	Hourly ADL/IADL-1	0:01:10

2. From the Punch Detail screen, Select Actions.
3. Select Edit Entry.

Punch Detail - Shaggy Rogers/ Scooby Doo

**2** Actions

**3** Edit Entry

Punch Details

Entry Id: 2126  
Machine Details: 159.121.202.141  
Service Date: Aug 15, 2022  
Check In: 09:00 AM  
Check Out: 01:30 PM  
Hour(s): 0:04:30  
Amount: 4.50 Hours  
Employee Time Zone: PT (UTC-8)  
Client/ Program Time Zone: PT (UTC-8)

Account Details/ Service Account

Account Id: [877](#)  
Account Type: Hourly  
Client/ Program Time Zone: PT (UTC-8)  
Employee: [Shaggy Rogers](#)  
Employee Time Zone: PT (UTC-8)  
Service Code: [Hourly ADL/IADL-1](#)  
Portal Signoff: TRUE  
Funding Type: Units  
Funding Source: [APD](#)

New Note  
New Attachment  
Edit Custom Field Values  
Edit Entry  
Cancel Entry

# Time Entry Management Guide

4. Make the necessary changes.
5. Select inside the 'Add Reason Codes' box. The dropdown menu will expand.
6. Select Reason Code: State-Other from the drop-down list. Staff must select this reason.
7. Select somewhere else on the screen.
8. The reason code has been added to the entry.
9. Add Reason Code Note to explain the reason for the edit.

# Time Entry Management Guide

10. If you need to remove a Reason Code, select either of the two X signs located on either side of the reason code. If you do not see a Reason Code here, you did not successfully add one.
11. From the Statements field, select the check box next to the attestation, to specify the time is correct to the best of your knowledge.
12. Select Save.
13. When the Alert appears, select Yes.

The screenshot shows the 'Add Reason Codes' section with a dropdown menu containing 'State-Other'. There are 'X' icons on either side of the dropdown. Below it is the 'Add Reason Code Note' field and a 'Notes' field for 'Add Notes for Punch'. An 'Attachment' link is also visible. The 'Statements' field has a checked checkbox for 'Time is correct. Falsifying may be Medicaid fraud'. A callout box with a blue border and orange background contains the following text:

**Note:** When making edits, it is important to add a note that explains why you are making the edit and that you have validated the information with the provider.

An 'Alert' dialog box is shown in the foreground, asking: 'Are you sure you want to cancel the existing punch for 0:04:30 hour(s) for Aug 15, 2022 and add a new punch for 05:30 hour(s) for Shaggy Rogers for Scooby Doo-204 for Aug 15, 2022?'. The 'Yes' button is highlighted with an orange circle.

The original entry will be rejected, and a new entry will be added.

The new entry will be in an unverified status until verified by a separate staff member or the provider.

## Adjusting Entries in Approved or Processed Status

ODHS/OHA uses the term adjustment to refer to modifications and cancellations to entries after they have been paid through Mainframe (DHR). In OR PTC DCI, the term adjustment will refer to any modifications or cancellations on entries in an approved or processed status.

Who can edit/adjust entries in an approved or processed status?

# Time Entry Management Guide

- Staff users with a Supervisor role.
  - You will only be able to adjust entries under your Cost Center. For example, if Suzy has the Supervisor role over Cost Center A, Suzy will only be able to adjust entries in Cost Center A.
  - In most situations, staff should cancel the entry that needs correction and instruct the provider to create a new historical entry with the correct time or miles.

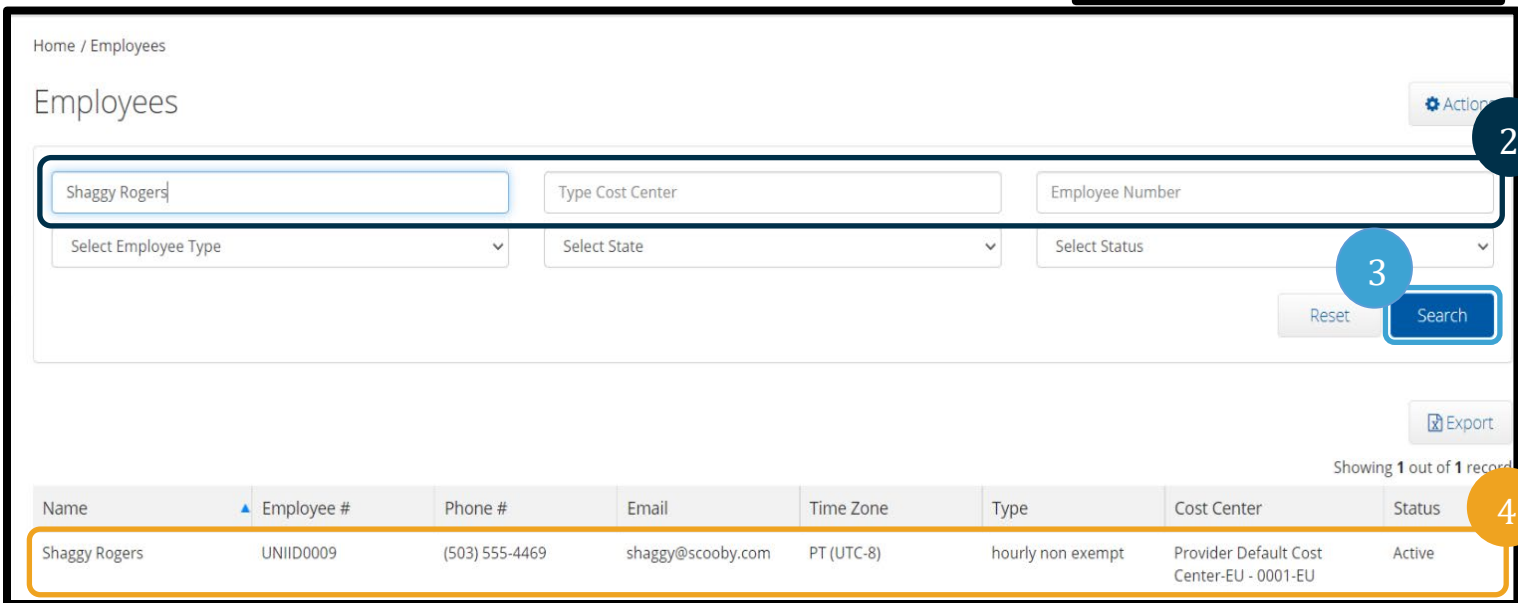
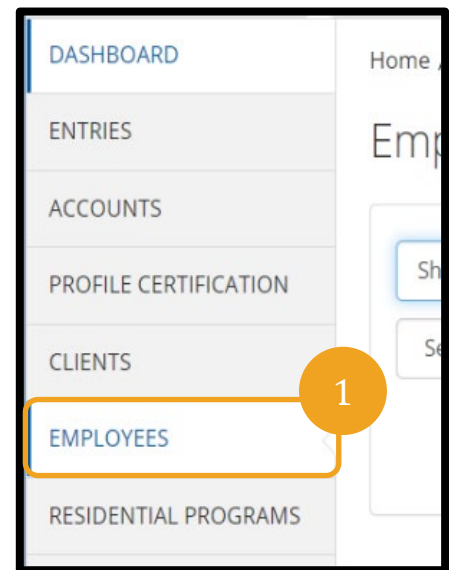
**Note:** Providers cannot edit/adjust their own entries that have a status of approved or processed.

## How to cancel a provider's punch entry:

1. Select the Employees tab.
2. Enter the provider's name or Uni ID into the search criteria.

**Note:** The Uni ID is not the same as a provider number.

3. Select Search.
4. Select the correct provider from the results to go to their Employee Details page.



# Time Entry Management Guide

5. Select Entries Tab located below provider demographics.
6. Enter search criteria to find the entry you need to edit. For example: enter a start and end date, select Approved or Processed in the status filter (whichever status the entry needing adjusting is in), or enter a client name.
7. Select Search to display entries matching your search criteria.
8. Select the entry that needs to be adjusted. This will take you to the Punch Detail page.

## Employee Details - Shaggy Rogers

Basic Demographics

Address: 100 Address Street  
Salem, OR 97305-0000

GNIS: 41-047-1167861

Phone: (503) 555-4469

Email: [shaggy@scooby.com](mailto:shaggy@scooby.com)

Username: shaggy.rogers

Time Zone: PT (UTC-8)

Type: Hourly Non Exempt

SSN: ###-##-#### [Show](#)

Allow SSN Retrieval: No ⓘ

Mobile Device ID: 07E3DEBF-4AD5-4F53-B581-15C8F2B55FB0

Status: Active

Entries
Accounts
Certifications
EVV Loca

Entries
Accounts
Certifications
EVV Locations
Notes
Attachments
Events
Custom Fields
History

From (MM/DD/YYYY) 
To (MM/DD/YYYY) 
Type Punch ID 
Type Client Name

Type Service Code 
Select Account Type 
Approved

Reset
Search

Export

Showing 4 out of 4 records

	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
<a href="#">2125</a>	Aug 14, 2022	01:00 PM	02:30 PM	Hourly		St Helens APD-EU - 0511-EU	<a href="#">Scooby Doo</a>	Hourly ADL/IADL-1	0:01:30	Approved
<a href="#">2163</a>	Jul 04, 2022	10:23 AM	01:30 PM	Hourly	<a href="#">2116</a>	St Helens APD-EU - 0511-EU	<a href="#">Scooby Doo</a>	Hourly ADL/IADL-1	0:03:07	Approved

9. From the Punch Detail page, select Actions.

# Time Entry Management Guide



## 10. Select Cancel Entry.

Punch Detail - Shaggy Rogers/ Scooby Doo

Punch Details	Account Details/ Service Account
Entry Id: 2125	Account Id: <a href="#">877</a>
Machine Details: 159.121.202.141	Account Type: Hourly
Service Date: Aug 14, 2022	Client/ Program Time Zone: PT (UTC-8)
Check In: 01:00 PM	Employee: <a href="#">Shaggy Rogers</a>
Check Out: 02:30 PM	Employee Time Zone: PT (UTC-8)
Hour(s): 0:01:30	Service Code: <a href="#">Hourly ADL/IADL-1</a>
Amount: 1.50 Hours	Portal Signoff: TRUE
Employee Time Zone: PT (UTC-8)	Funding Type: Units
Client/ Program Time Zone : PT (UTC-8)	Funding Source: <a href="#">APD</a>
Authorization Entry Id: <a href="#">2123</a>	Cost Center: <a href="#">St Helens APD-EU</a>
Pay Rate Name: Standard	Unit Type: Hourly
Pay Rate: 0.00	Status: Active

9 Actions

- New Note
- New Attachment
- Edit Custom Field Values
- Edit Entry
- Cancel Entry

10

11. Select inside the 'Add Reasons Codes' box. The dropdown menu will expand.
12. Select State-Other from the Add Reason Codes drop-down list.
13. Select somewhere else on the screen.

Cancel Entry

Entry Type: Punch

Employee Name: Shaggy Rogers - UNIID0009

Account Type: Hourly

Client Name: Scooby Doo - PrimeNumber00010

Service Code: Hourly ADL/IADL-1

Service Date: 08/14/2022

Remaining Balance: 21.33

Check In: 1:20 PM Check Out: 2:30 PM

Check Out Date: 08/14/2022

Diagnostic Code: Diagnostic Code

Add Reason Codes: Select Reason

Notes:

- State-Intentional Program Violation
- State-No Longer Working
- State-Other
- State-Overpayment Corrected in Error
- State-Overpayment Reversed in Grievance

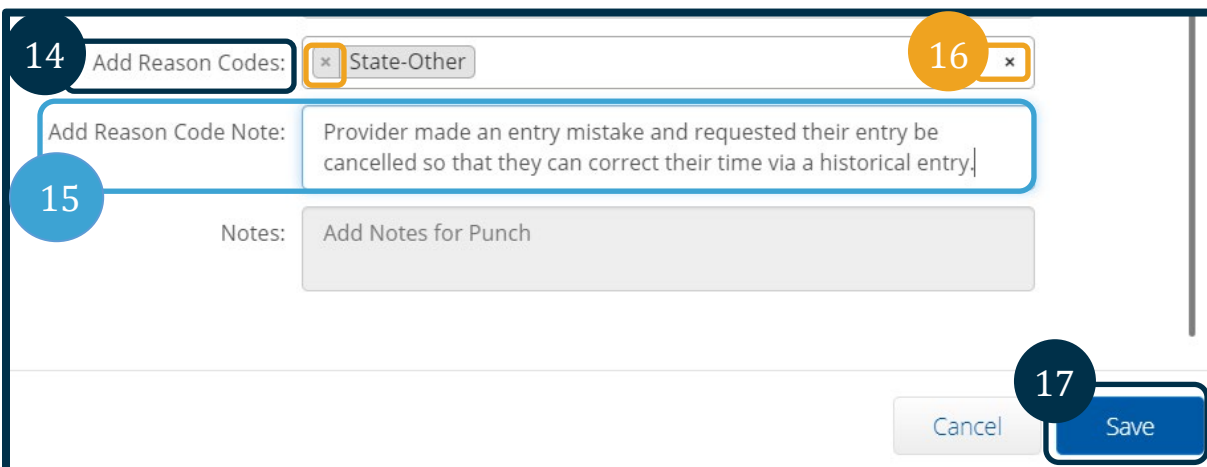
11

12

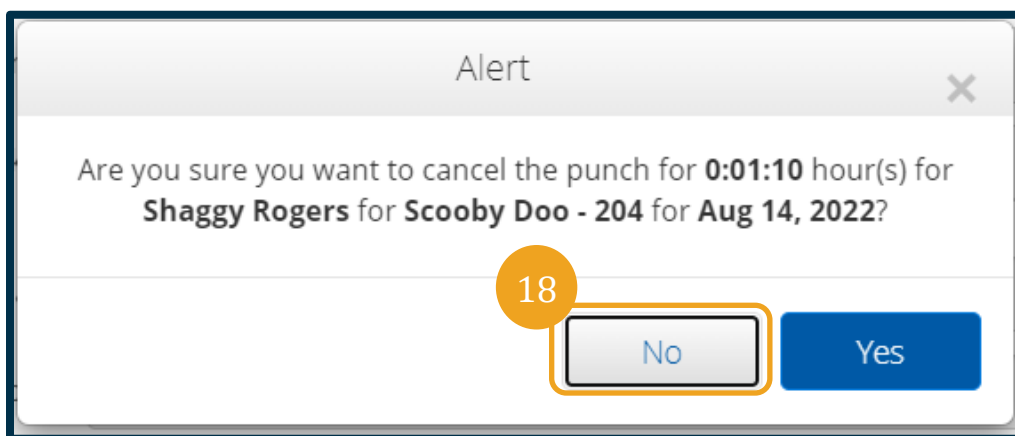
13

Save

# Time Entry Management Guide



14. The Reason Code has been added to the entry.
15. Add Reason Code Note to explain the reason for the edit.
16. If you need to remove a Reason Code, select either of the two X signs located on either side of the Reason Code. If you do not see a Reason Code here, you did not successfully add one.
17. Select Save.



18. When the Alert appears, select Yes.
19. Notify the provider that the entry is cancelled, and they must enter a historical entry with the correct time and date.
20. Provider logs into the OR PTC DCI Web Portal and enters a historical entry.
21. The new punch entry goes through the Auto-Approval process and is worked as part of the regular business processes.



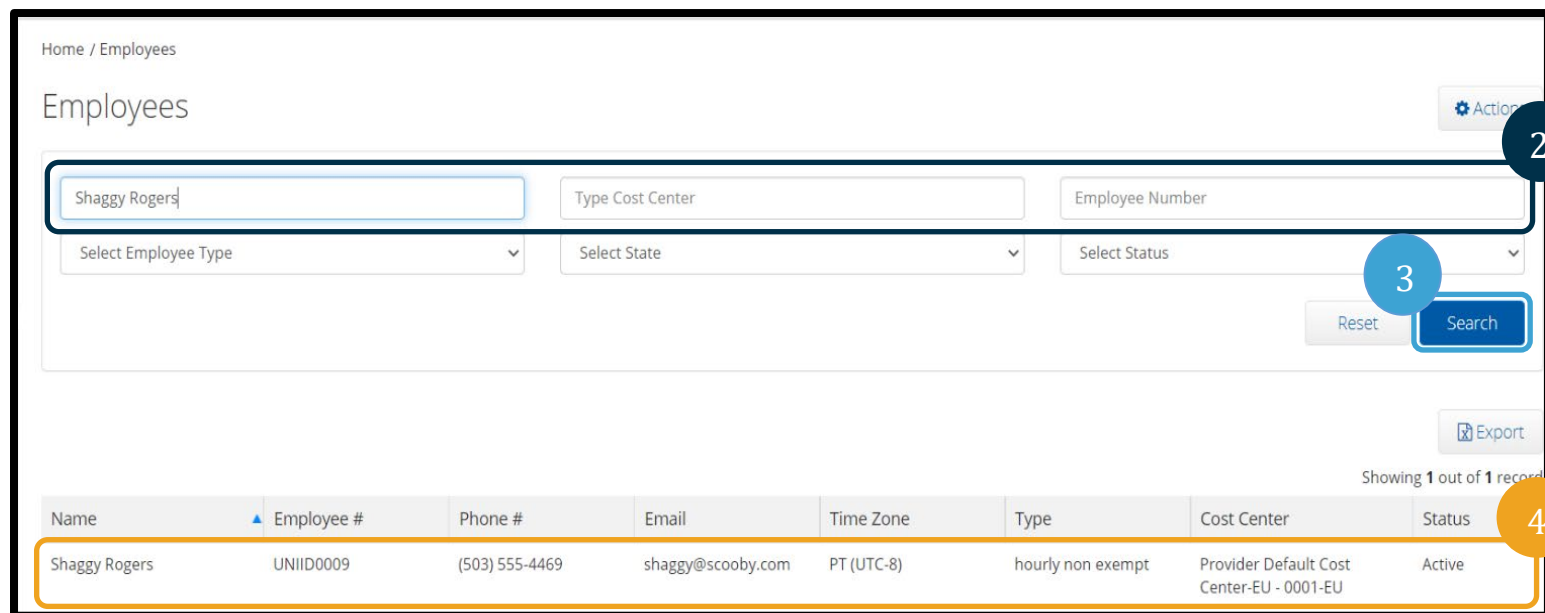
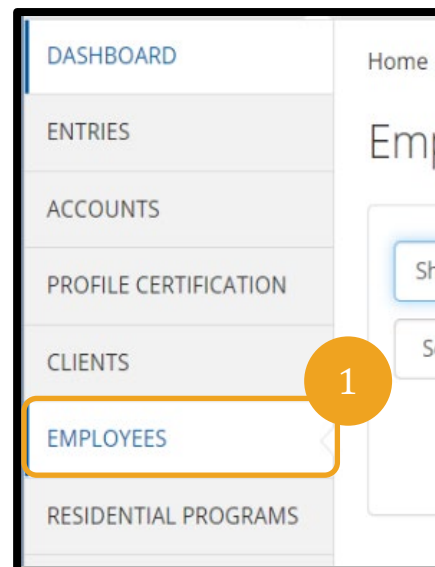
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## How to edit/adjust a provider's punch entry:

1. Select the Employees tab.
2. Enter the provider's name or Uni ID into the search criteria.

**Note:** The Uni ID is not the same as a provider number.

3. Select Search.
4. Select the correct provider from the results to go to their Employee Details page.



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5. Select Entries Tab located below provider demographics.

### Employee Details - Shaggy Rogers

Basic Demographics

Address: 100 Address Street  
Salem, OR 97305-0000

GNIS: 41-047-1167861

Phone: (503) 555-4469

Email: [shaggy@scooby.com](mailto:shaggy@scooby.com)

Username: shaggy.rogers

Time Zone: PT (UTC-8)

Type: Hourly Non Exempt

SSN: ###-##-#### [Show](#)

Allow SSN Retrieval: No ⓘ

Mobile Device Id: 07E3DEBF-4AD5-4F53-B581-15C8F2B55FB0

Status: Active

**5**

Entries Accounts Certifications EVW Loca

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6. Enter search criteria to find the entry you need to edit. For example: enter a start and end date, select Approved or Processed in the status filter (whichever status the entry needing adjusting is in), or enter a client name.
7. Select Search to display entries matching your search criteria.
8. Select the entry that needs to be adjusted. This will take you to the Punch Detail page.

Entries

Showing 4 out of 4 records

	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
<a href="#">2125</a>	Aug 14, 2022	01:00 PM	02:30 PM	Hourly		St Helens APD-EU - 0511-EU	<a href="#">Scooby Doo</a>	Hourly ADL/IADL-1	0:01:30	Approved
<a href="#">2163</a>	Jul 04, 2022	10:23 AM	01:30 PM	Hourly	<a href="#">2116</a>	St Helens APD-EU - 0511-EU	<a href="#">Scooby Doo</a>	Hourly ADL/IADL-1	0:03:07	Approved

9. From the Punch Detail page, select Actions.
10. Select Edit Entry.

Punch Detail - Shaggy Rogers/ Scooby Doo

**Punch Details**

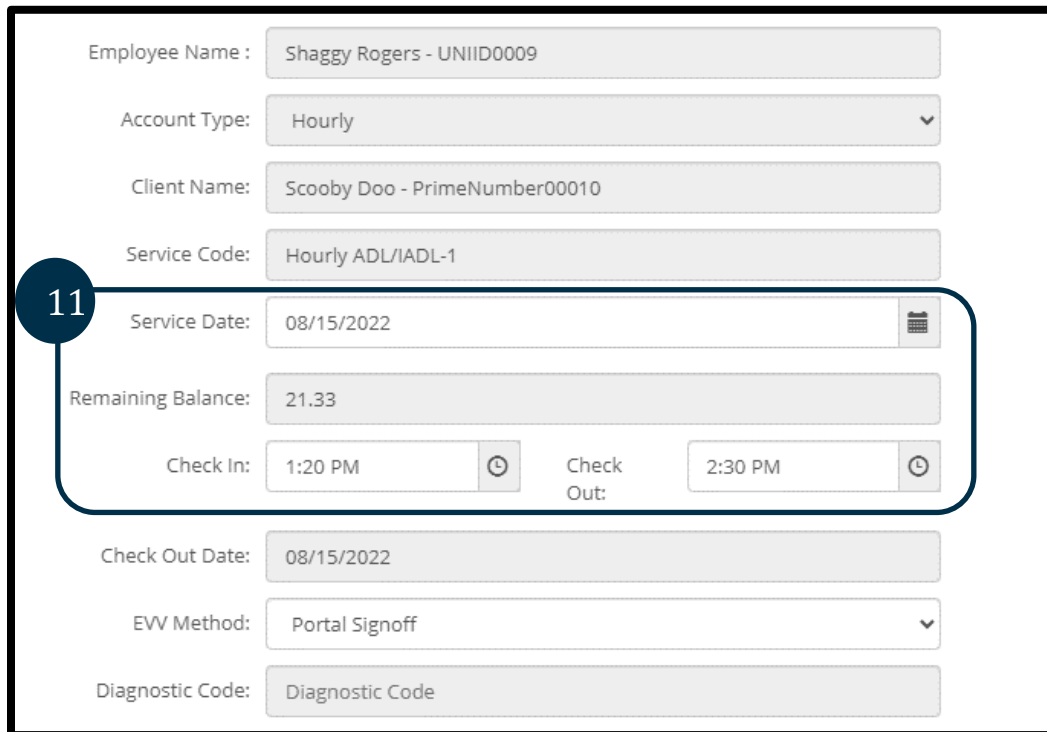
Entry Id: 2125  
 Machine Details: 159.121.202.141  
 Service Date: Aug 14, 2022  
 Check In: 01:00 PM  
 Check Out: 02:30 PM  
 Hour(s): 0:01:30  
 Amount: 1.50 Hours  
 Employee Time Zone: PT (UTC-8)  
 Client/ Program Time Zone : PT (UTC-8)  
 Authorization Entry Id: [2123](#)  
 Pay Rate Name: Standard  
 Pay Rate: 0.00

**Account Details/ Service Account**

Account Id: [877](#)  
 Account Type: Hourly  
 Client/ Program Time Zone: PT (UTC-8)  
 Employee: [Shaggy Rogers](#)  
 Employee Time Zone: PT (UTC-8)  
 Service Code: [Hourly ADL/IADL-1](#)  
 Portal Signoff: TRUE  
 Funding Type: Units  
 Funding Source: [APD](#)  
 Cost Center: [St Helens APD-EU](#)  
 Unit Type: Hourly  
 Status: Active

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11. Make the necessary adjustment(s).



Employee Name : Shaggy Rogers - UNIID0009

Account Type: Hourly

Client Name: Scooby Doo - PrimeNumber00010

Service Code: Hourly ADL/IADL-1

11 Service Date: 08/15/2022

Remaining Balance: 21.33

Check In: 1:20 PM    Check Out: 2:30 PM

Check Out Date: 08/15/2022

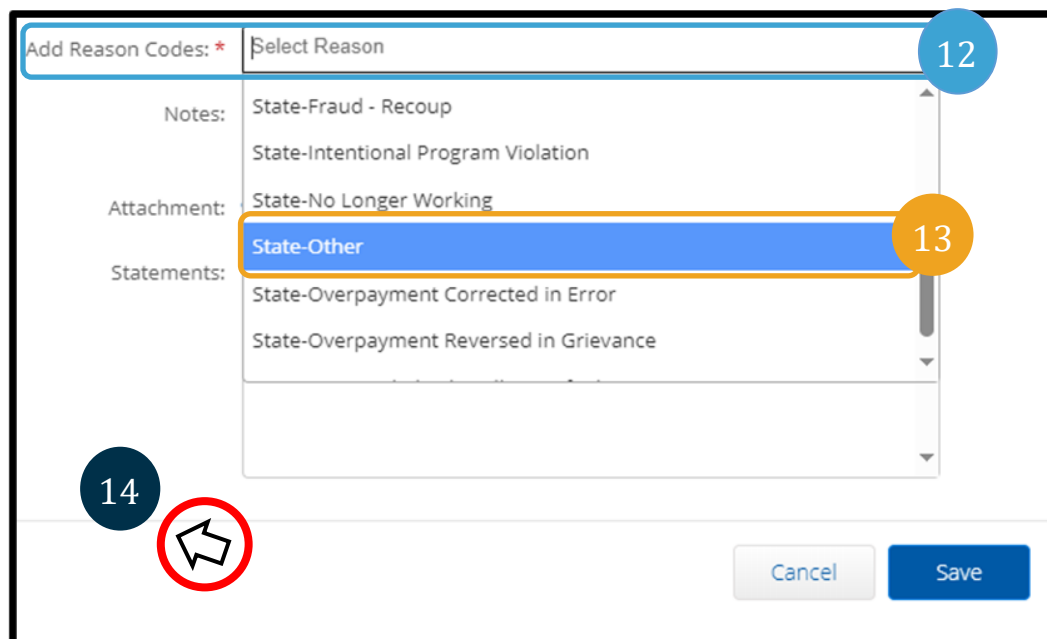
EVW Method: Portal Signoff

Diagnostic Code: Diagnostic Code

12. Select inside the 'Add Reasons Codes' box. The dropdown menu will expand.

13. Select State-Other from the Add Reason Codes drop-down list.

14. Select somewhere else on the screen.



Add Reason Codes: \* Select Reason

Notes: State-Fraud - Recoup

Attachment: State-Intentional Program Violation

Statements: State-No Longer Working

13 State-Other

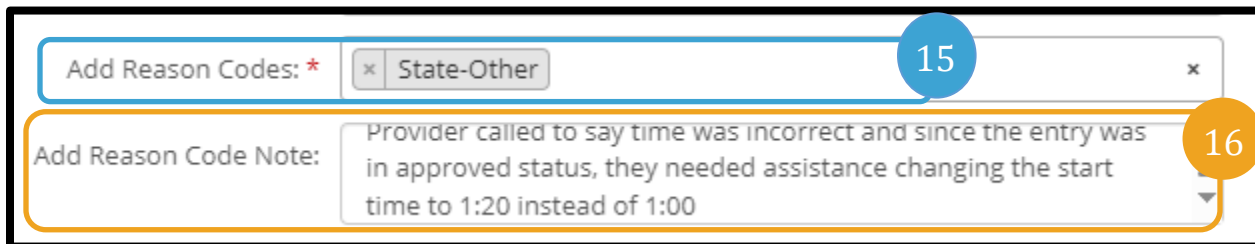
State-Overpayment Corrected in Error

State-Overpayment Reversed in Grievance

14

Cancel Save

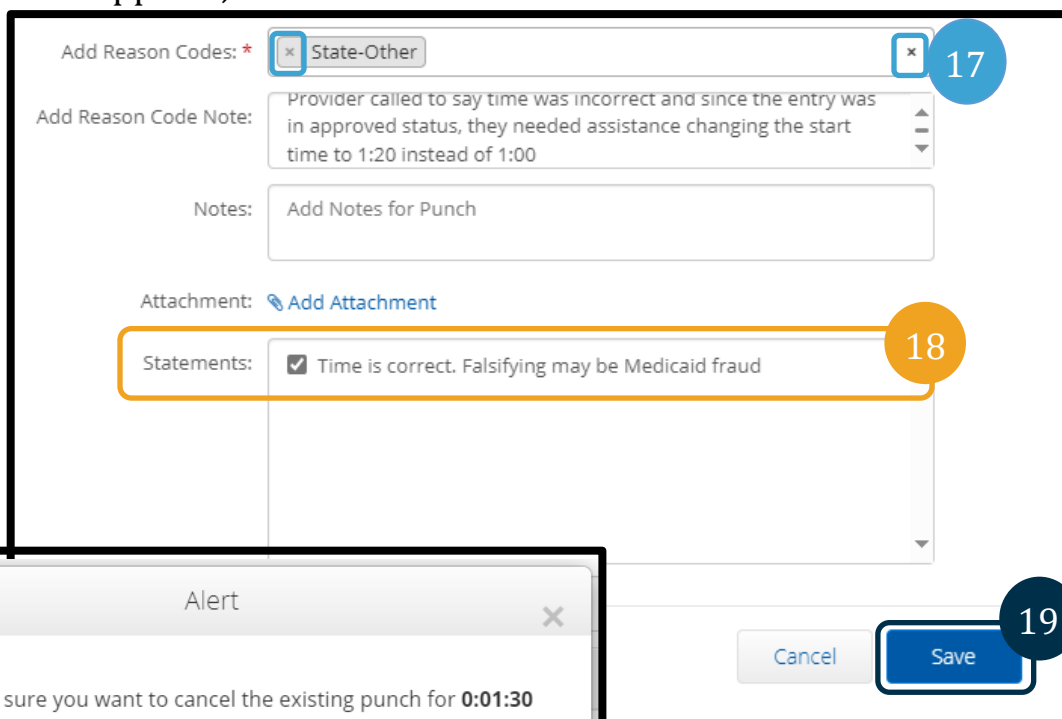
# Time Entry Management Guide



15. Add Reason Codes: \* State-Other

16. Add Reason Code Note: Provider called to say time was incorrect and since the entry was in approved status, they needed assistance changing the start time to 1:20 instead of 1:00

15. The Reason Code has been added to the entry.
16. Add Reason Code Note to explain the reason for the edit.
17. If you need to remove a Reason Code, select either of the two X signs located on either side of the Reason Code. If you do not see a Reason Code here, you did not successfully add one.
18. From the Statements field, select the check box next to the attestation, to specify the time is correct to the best of your knowledge.
19. Select Save.
20. When the Alert appears, select Yes.



17. Add Reason Codes: \* State-Other

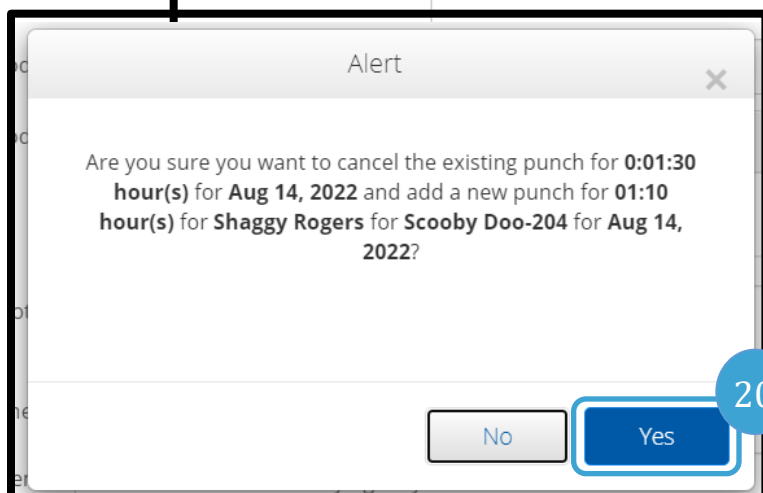
Add Reason Code Note: Provider called to say time was incorrect and since the entry was in approved status, they needed assistance changing the start time to 1:20 instead of 1:00

Notes: Add Notes for Punch

Attachment: [Add Attachment](#)

18. Statements:  Time is correct. Falsifying may be Medicaid fraud

19. Cancel Save



Alert

Are you sure you want to cancel the existing punch for 0:01:30 hour(s) for Aug 14, 2022 and add a new punch for 01:10 hour(s) for Shaggy Rogers for Scooby Doo-204 for Aug 14, 2022?

20. No Yes

# Time Entry Management Guide

21. The original entry will be flagged as Compensated.
22. An entry for the negative amount of the original will be created and automatically approved. This negative entry is called a Compensating entry.
23. A new entry will be created; this new entry will reflect the adjustments made. The new entry will have a status of Pending until the entry goes through Auto-Approval.

Punch Detail - Shaggy Rogers/ Scooby Doo

---

Punch Details

Entry Id: 2125  
 Machine Details: 159.121.202.141  
 Service Date: Aug 14, 2022  
 Check In: 01:00 PM  
 Check Out: 02:30 PM  
 Hour(s): 0:01:30  
 Amount: 1.50 Hours  
 Employee Time Zone: PT (UTC-8)  
 Client/ Program Time Zone : PT (UTC-8)  
 Authorization Entry Id: [2123](#)  
 Pay Rate Name: Standard  
 Pay Rate: 0.00  
 Status: Approved  
 Approved By: Sally Brown  
 Approved Date: 9/15/2022 02:50  
 Flag: Compensated  
 Created By: Shaggy Rogers  
 Created: Aug 15, 2022

Entries											
Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status	
<a href="#">2188</a>	Aug 14, 2022	01:20 PM	02:30 PM	Hourly	<a href="#">2125</a>	St Helens APD-EU - 0511-EU	<a href="#">Scooby Doo</a>	Hourly ADL/IADL-1	0:01:10	Pending	23
<a href="#">2187</a>	Aug 14, 2022	01:00 PM	02:30 PM	Hourly	<a href="#">2125</a>	St Helens APD-EU - 0511-EU	<a href="#">Scooby Doo</a>	Hourly ADL/IADL-1	-0:01:30	Approved	22

## Working Over and Under Payments

Underpayments are needed when a provider is underpaid or not paid for all hours/miles worked. Overpayments are needed when a provider is overpaid for hours worked or hours not authorized to work.

Instructions on how to work under and overpayments will differ depending on the date the entry is created for in OR PTC DCI.

For the full business process, see [6.3 Over- and Underpayments](#).

### For Underpayment Entries worked after Phase 2A Go-Live:

1. The provider creates a historical entry for the unpaid time or miles.
2. If the entry is within the authorized hours and/or miles, then the underpayment will process automatically.
3. Payment is issued to the provider automatically.

# Time Entry Management Guide

## **For Overpayment Entries worked after Phase 2A Go-Live:**

1. Local office staff member updates the approved or processed entry with the correct time and includes an explanation for why the update was made.
2. Once the payroll batch is run by the PTC Support Team, STIM data entries will automatically update in Mainframe.
3. A local office staff member completes the applicable overpayment form and submits to the Provider Relations Unit.
4. The Provider Relations Unit issues a recoupment as authorized.

## **For Underpayment Entries worked before Phase 2A Go-Live:**

1. The provider creates a historical entry for the unpaid time or miles.
2. The PTC Support Team emails the local office the payroll batch data related to historical entries needing under or overpayment requests.
3. A local office staff member edits STIM data entries and deletes or adds shift(s) in Mainframe to correct the time.
4. A local office staff member completes the applicable underpayment form or spreadsheet and submits to the Provider Relations Unit.
5. The Provider Relations Unit issues payment.

## **For Overpayment Entries worked before Phase 2A Go-Live:**

1. A local office staff member cancels or edits entries to correct the time and includes an explanation for why the update was made.
2. The PTC Support Team emails the local office the payroll batch data related to historical entries needing under or overpayment requests.
3. A local office staff member edits STIM data entries and deletes or adds shift(s) in Mainframe to correct the time.
4. A local office staff member completes the applicable overpayment form and submits to the Provider Relations Unit.
5. The Provider Relations Unit issues a recoupment as authorized.

## Historical Entries

Entries that are entered via the web portal without valid fob codes, or landline entries for previous days and times, are called historical entries. These entries are not EVV compliant.

Historical entries may be needed if a provider forgot to clock-in/out or could not clock-in/out for a variety of reasons.

# Time Entry Management Guide

## Who can enter historical entries?

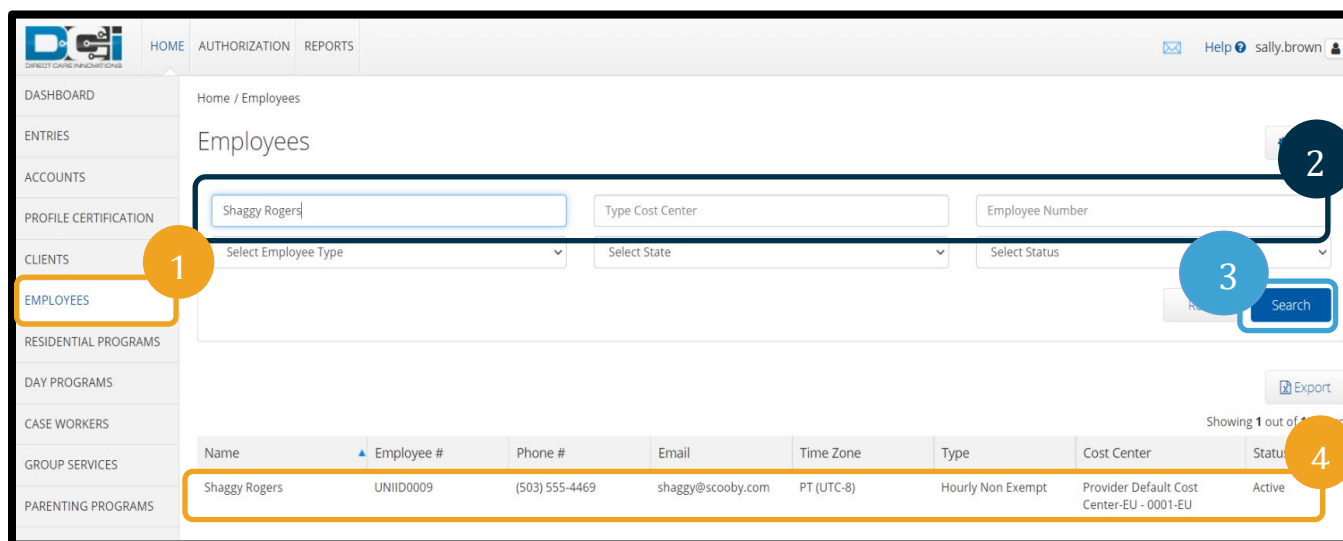
- Staff with the Supervisor role
  - Note that staff will only be able to add historical entries for consumers in cost centers they have a role over. For example, if Suzy only has the Supervisor role over Cost Center A, Suzy will only be able to create historical entries in Cost Center A. Staff may have roles over more than one cost center. In these instances, the staff may create historical entries for consumers in each cost center they have a role over.
- Providers can retroactively make historical entries themselves for up to 365 days from the day worked.

**Note:** There are rare situations when staff will make entries on a provider's behalf. However, it is the provider's responsibility to enter their time accurately, including corrections and historical entries.

## How to Add a Historical Entry

### As a staff member, to add a historical entry:

1. Select the Employees tab.
2. Enter the provider's name or Uni ID in the search criteria.
3. Select Search.
4. Select the provider in the search results who you want to add an entry for.



The screenshot shows the 'Employees' search page in the DSI system. The search form contains the following fields and values:

- Search Input: Shaggy Rogers
- Type Cost Center: (empty)
- Employee Number: (empty)
- Select Employee Type: (dropdown menu)
- Select State: (dropdown menu)
- Select Status: (dropdown menu)

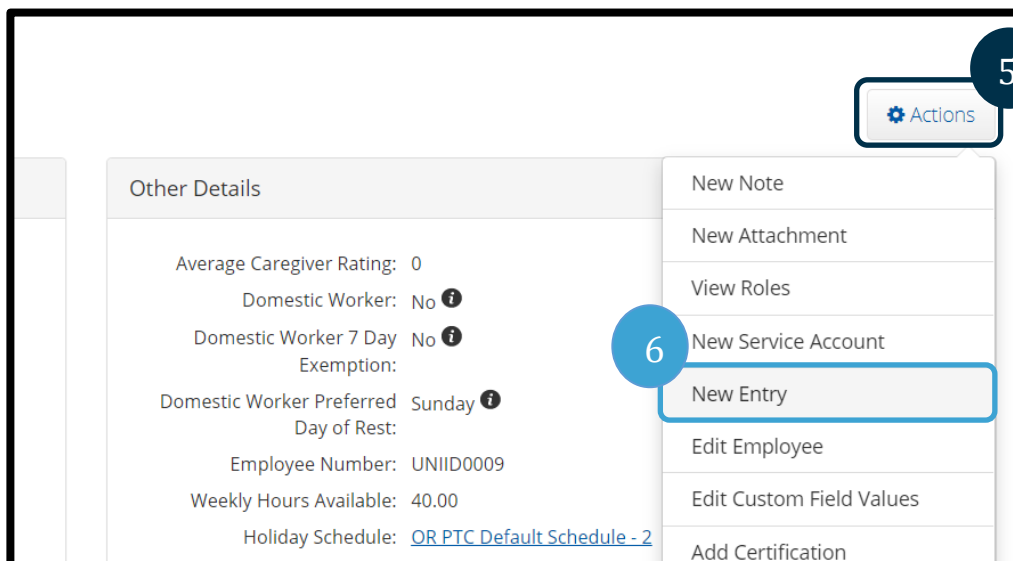
The search results table displays the following data:

Name	Employee #	Phone #	Email	Time Zone	Type	Cost Center	Status
Shaggy Rogers	UNIID0009	(503) 555-4469	shaggy@scooby.com	PT (UTC-8)	Hourly Non Exempt	Provider Default Cost Center-EU - 0001-EU	Active

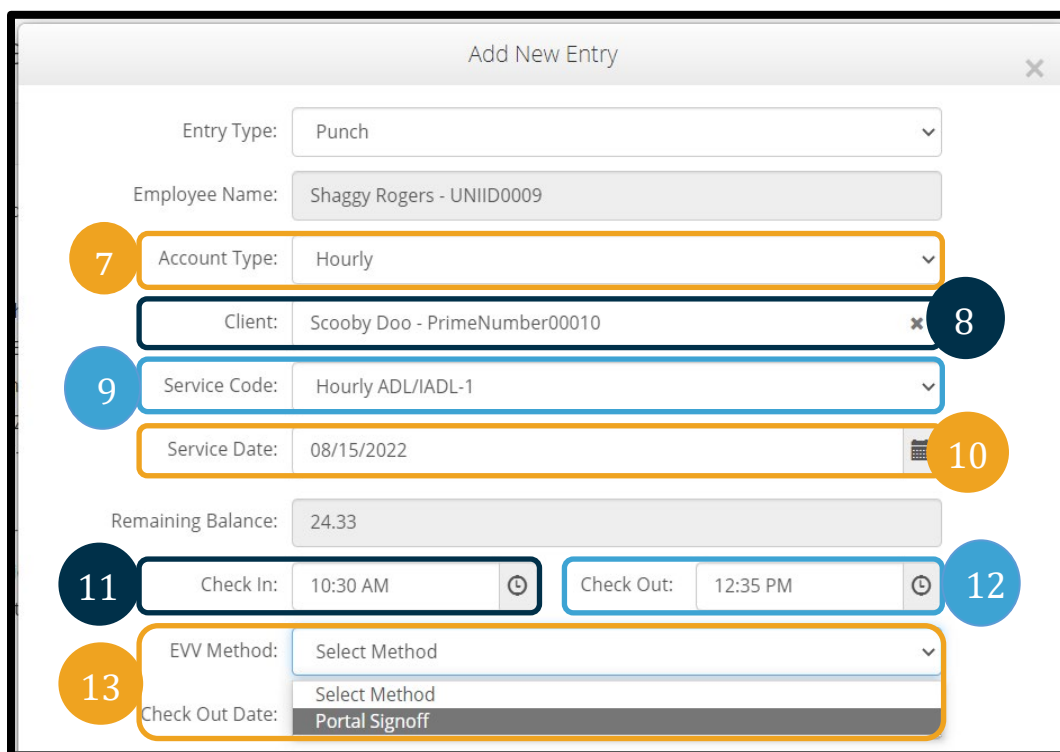


# Time Entry Management Guide

5. From the Employee Details page, select Actions.
6. Select New Entry from the drop-down menu.
7. Select Account Type as Hourly or Client Transportation.
8. Enter the consumer's name in the Client field.
9. Select the proper



- Service Code. There will likely only be one option. There may be more than one option if the provider/consumer pairing worked together under a different program previously.
10. Enter the Service Date.
11. Enter Check In as the time the provider started working.
12. Enter Check Out as the time the provider stopped working.
13. Select Portal Signoff as the EVV Method.



# Time Entry Management Guide

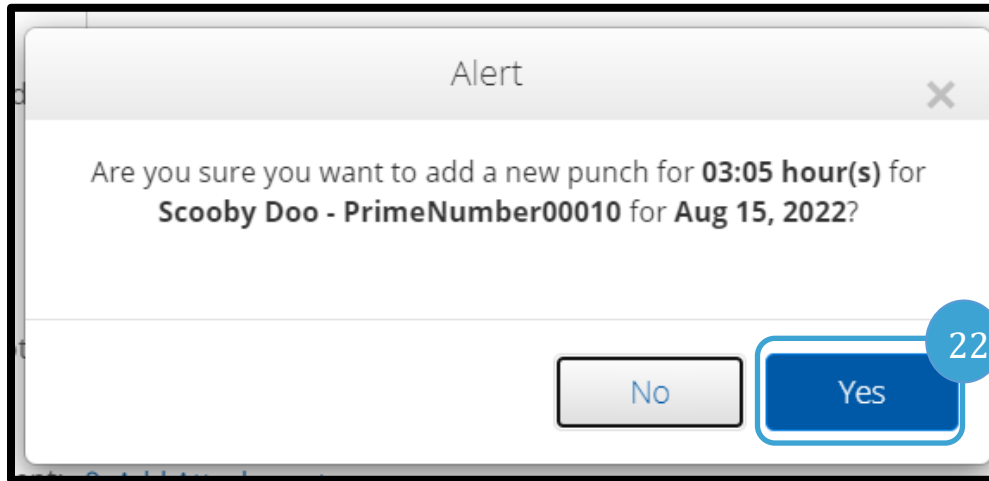
14. Select inside the 'Add Reasons Codes' box. The dropdown menu will expand.
15. Select State-Other from the Add Reason Codes drop-down list.
16. Select somewhere else on the screen.
17. The Reason Code has been added to the entry.
18. Add Reason Code Note to explain the reason for the edit.

19. If you need to remove a Reason Code, select either of the two X signs located on either side of the Reason Code. If you do not see a Reason Code here, you did not successfully add one.
20. From the Statements field, select the check box next to the attestation, to specify the time is correct to the best of your knowledge.
21. Select Save.

# Time Entry Management Guide



22. When the Alert appears, select Yes.



The new entry will be in an unverified status until verified by another staff member or the provider.