



Purpose: Step-by-step instructions for how to correct a punch entry that is in an approved status whether the provider is able to update the entry or not.

Outcome: Staff will be able to assist a provider in correcting a punch entry in an approved status in OR PTC DCI.

Provider is Able to Update Entry

An entry in an Approved status may need to be changed, due to a provider, consumer, or consumer employer representative calling to say an entry was made incorrectly, due to a staff member otherwise being made aware of a mistake, or as part of the over/underpayment process. A provider cannot update an entry in approved status without Local Office assistance.

Scenario 1: The entry is in Approved status and the provider is able to create a historical entry.

1. Click the Employees tab.
2. Search for the provider (via the name or Uni ID number).
3. Click on the provider's profile.

The screenshot shows the DCI system interface. The sidebar on the left has the 'EMPLOYEES' tab highlighted with a blue circle and the number '1'. The main content area is titled 'Employees' and contains a search form. The search bar contains the text 'Shaggy Rogers' and is highlighted with a blue circle and the number '2'. Below the search bar are several dropdown menus for 'Select Employee Type', 'Select State', and 'Select Status'. There are 'Reset' and 'Search' buttons. Below the search form is a table with one row of data. The table has columns for Name, Employee #, Phone #, Email, Time Zone, Type, Cost Center, and Status. The data row shows 'Shaggy Rogers', 'UNIID0009', '(503) 555-4469', 'shaggy@scooby.com', 'PT (UTC-8)', 'Hourly Non Exempt', 'Provider Default Cost Center-EU - 0001-EU', and 'Active'. The table is highlighted with a blue circle and the number '3'. There is also an 'Export' button and 'Showing 1 out of 1 records' text.

Staff - Correcting a Punch Entry in Approved Status



4. From the Employee Details page, go to Entries in the middle of the screen.

The screenshot shows the 'Employee Details - Shaggy Rogers' page. The left sidebar contains a navigation menu with 'EMPLOYEES' selected. The main content area is divided into two columns: 'Basic Demographics' and 'Other Details'. At the bottom, a horizontal tab bar contains 'Entries', 'Accounts', 'Certifications', 'EVV Locations', 'Notes', 'Attachments', 'Events', 'Custom Fields', and 'History'. The 'Entries' tab is highlighted with a red box, and a red circle with the number '4' is placed over it.

5. Locate the punch entry in Approved status that will be updated and click into the punch entry.

The screenshot shows the 'Entries' table with the following data:

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
2009	Jun 16, 2022	01:30 PM	02:30 PM	Hourly		St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	0:01:00	Pending
2007	Jun 29, 2022	01:17 PM	01:20 PM	Hourly		St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	0:00:03	Approved

The row for entry ID 2007 is highlighted with a red box, and a red circle with the number '5' is placed over it.

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- 6. From the Punch Detail page, click Actions.
- 7. Click Cancel Entry.

Home / Employee / Shaggy Rogers / Scooby Doo / Hourly ADL/IADL-1 / 2007

Punch Detail - Shaggy Rogers/ Scooby Doo

Punch Details

Entry Id: 2007
Machine Details: 50.39.179.141
Service Date: Jun 29, 2022
Check In: 01:17 PM
Check Out: 01:20 PM
Hour(s): 0:00:03
Amount: 0.05 Hour
Employee Time PT (UTC-8)
Zone:
Client/ Program PT (UTC-8)

Account Details/ Service Account

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

Actions

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

- 8. Click on blue plus sign.
- 9. Add Reason Code "State-Other-StateO," enter note in notes field.
- 10. Click the blue plus sign to save reason.
- 11. Click Save. An Alert will display, "Are you sure you want to cancel the existing punch for..," click Yes.
- 12. Notify the provider the entry is cancelled, and they must enter a historical entry for the correct time and date.

Cancel Entry

Employee Name: Shaggy Rogers - UNIID0009
Account Type: Hourly
Client Name: Scooby Doo - PrimeNumber00010
Service Code: Hourly ADL/IADL-1
Service Date: 06/29/2022
Remaining Balance: 22.37
Check In: 1:17 PM
Check Out: 1:20 PM
Check Out Date: 06/29/2022
Diagnostic Code: Diagnostic Code

Reason: Reason

Add Reason Codes: State-Other - StateO

Add Note: Incorrect time entered. Provider enter corrected time.

Added Reason Codes:	Name	Code	Note	Actions
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Cancel Save



- 13. Provider logs into the OR PTC DCI Web Portal and enters a historical entry.
- 14. The new punch entry now goes through the auto-approval process and is worked as part of regular business processes.

Scenario 2: Entry is in Approved status and the Provider IS NOT able to create a historical entry.

- 1. Click the Employees tab.
- 2. Search for the provider (via the name or Uni ID number).
- 3. Click on the provider's profile.

The screenshot shows the DCI web portal interface. On the left is a navigation menu with 'EMPLOYEES' highlighted. The main content area is titled 'Employees' and contains a search form with fields for Name (Shaggy Rogers), Type Cost Center, Employee Number, Select Employee Type, Select State, and Select Status. A search button is present. Below the search form is a table with one record for Shaggy Rogers. The table columns are Name, Employee #, Phone #, Email, Time Zone, Type, Cost Center, and Status.

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

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4. From the Employee Details page, go to Entries in the middle of the screen.

The screenshot shows the 'Employee Details - Shaggy Rogers' page. The left sidebar contains a navigation menu with 'EMPLOYEES' selected. The main content area is divided into two panels: 'Basic Demographics' and 'Other Details'. At the bottom, a horizontal tab bar contains 'Entries', 'Accounts', 'Certifications', 'EVV Locations', 'Notes', 'Attachments', 'Events', 'Custom Fields', and 'History'. The 'Entries' tab is highlighted with a red circle and the number 4.

5. Locate the punch entry in Approved status that will be updated and click into the punch entry.

The screenshot shows the 'Entries' table with the following data:

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
2009	Jun 16, 2022	01:30 PM	02:30 PM	Hourly		St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	0:01:00	Pending
2007	Jun 29, 2022	01:17 PM	01:20 PM	Hourly		St Helens APD-EU - 0511-EU	Scooby Doo	Hourly ADL/IADL-1	0:00:03	Approved

The entry with ID 2007 is highlighted with a red circle and the number 5.



- 6. From the Punch Detail page, click Actions.
- 7. Click Edit Entry.

Home / Employee / Shaggy Rogers / Scooby Doo / Hourly ADL/IADL-1 / 2007

Punch Detail - Shaggy Rogers/ Scooby Doo

Punch Details	Account Details/ Service Account
Entry Id: 2007	Account Id: 877
Machine Details: 50.39.179.141	Account Type: Hourly
Service Date: Jun 29, 2022	Client/ Program: PT (UTC-8)
Check In: 01:17 PM	Time Zone:
Check Out: 01:20 PM	Employee: Shaggy Rogers
Hour(s): 0:00:03	Employee Time: PT (UTC-8)
Amount: 0.05 Hour	Zone:
Employee Time: PT (UTC-8)	Service Code: Hourly ADL/IADL-1
Zone:	Portal Signoff: TRUE
Client/ Program: PT (UTC-8)	Funding Type: Units

- 8. Edit the entry with the correct punch details including:
 - a. Service Date of punch entry
 - b. Check In and Check Out time of punch entry
- 9. Select Portal Signoff as the EVV Method.

Edit 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: 06/29/2022

Remaining Balance: 22.37

Check In: 1:17 PM Check Out: 1:20 PM

Check Out Date: 06/29/2022

EVV Method: Portal Signoff



- 10. Click on blue plus sign.
- 11. Add Reason Code "State-Other-StateO," enter note in notes field.
- 12. Click the blue plus sign to save the reason.
- 13. Click Save. An Alert will display, "Are you sure you want to cancel the existing punch for...," click Yes.

Diagnostic Code: [Field]

Reason: [Field] **10**

Add Reason Codes: State-Other - StateO **11** **12**

Add Note: Corrected Time from 6/29 to 6/28

Name	Code	Note	Actions
Added Reason Codes			

Notes: Add Notes for Punch

Attachment: [Add Attachment](#)

Statements: Time is correct. Falsifying may be Medicaid fraud

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- 14. The new punch entry now goes through the auto-approval process and is worked as part of regular business processes.