Oregon
PROVIDER
Time Capture

Troubleshooting Guide

OR PTC DCI

Contents

Disclaimer

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

Below you will find common scenarios and steps to follow when troubleshooting each scenario.

Issues When Entering Time in Mainframe

Staff may come across issues when entering time and mileage into Mainframe from OR PTC DCI. As we continue to develop connections between these systems and automate the information sharing, staff will need to monitor and/or correct data.

Voucher on Batch is Voided

A line representing an entry, on a batch pulled from OR PTC DCI, either correlates with a voucher that has been voided in Mainframe (the voucher is in 10 status) or does not match a voucher at all in Mainframe.

Questions to ask yourself during this troubleshooting:

1. Is the voucher number in Mainframe different from the voucher number in OR PTC DCI for the same pay period?
2. Does the consumer/provider combination have an active voucher in Mainframe?
3. If there is not a voucher in Mainframe, is there a narration in OA or 546 indicating there should be a voucher?

If the pairing has an active voucher in Mainframe that differs from OR PTC DCI, it is likely that OR PTC DCI was not updated upon the void and reissue of a voucher. Update the authorization in OR PTC DCI to match the Mainframe, then process the payment on this voucher.

If there is not an active voucher in Mainframe but you can see there should be one, create the voucher in Mainframe. Then update the authorization in OR PTC DCI to match this new voucher, then process the payment.

If there is not an active voucher in Mainframe and there should not be one, the provider was not supposed to be working. Cancel the entries in OR PTC DCI and do not pay the entries.

Entry on a Batch is Missing a Voucher Number

A line representing an entry, on a batch pulled from OR PTC DCI is missing a voucher number.

Steps to troubleshoot this issue:

1. Look up the voucher for the consumer/provider combination in Mainframe for the appropriate pay period.

2. Compare voucher details in Mainframe with the corresponding authorization in OR PTC DCI to ensure you have the correct authorization. To determine which authorizations to compare, look at the pay period dates or other key information.
3. Update the "Authorization ID Reference" field in the OR PTC DCI authorization to match the correct voucher number found in Mainframe.

Issues with Entries in OR PTC DCI

Staff may come across issues when reviewing time and mileage entries in OR PTC DCI.

Not all Time is Entered into the STIM Screen

Only some time has been entered into the STIM screen, meaning there will be more entries and/or mileage on a future payroll batch for this same voucher that will need to be entered into Mainframe for payment.

To add additional entries and/or mileage:

1. On the STIM screen, press F9 to save the voucher in a 30 status.
2. After all time for this voucher has been entered, go to the STIQ screen to process the voucher.
3. Mark the voucher you would like to pay with an 'S' and press enter. This takes you to the HPAY screen where you can complete the process.

> **Note**: See the CEP Guide for more information on how to complete tasks in Mainframe.

More Entries for a Voucher in 35 (Ready-to-Pay) Status

A voucher is in ready-to-pay status (35), but more time entries or mileage must be added to it.

To add additional entries and/or mileage:

1. On the HPAY screen, key "E" at "Trans Type" and press Enter.
2. At the bottom of the screen, the system will ask "Erase/Cancel Payment?" Key "Y" and press Enter.
3. When you change the pay status back to 30, it will automatically change the end date back to the original end date.

> **Note**: See the CEP Guide for more information on how to complete tasks in Mainframe.

Data Integrity – What to do When Data Doesn't Match

There are many situations where information needs to be updated in both OR PTC DCI and Mainframe. Detailed procedures for ensuring these updates are made may vary across local offices. However, the situations where this must occur remain consistent. Below is a list of these situations:

- Authorization changes result in data updates in both Mainframe and OR PTC DCI.
  - o Examples of scenarios that result in authorization changes are:
    - Emergency increase in authorized hours.
    - Change in providers during a pay period.
    - Consumer has multiple providers who have varying hours each pay period.
    - Any situation requiring a voucher to be voided, including when it is reissued.
  - o Related business processes:
    - [1.1.2 Provider Switches During Pay Period - Permanently](#)
    - [1.1.3 Provider Switches During Pay Period - Temporarily](#)
    - [1.1.4 Change Authorization](#)
    - [2.1.0 Increase in Weekly Cap](#)
    - [2.6.2 End Authorization, Expiration, Terminations](#)
    - [6.1.0 Case with Multiple Providers and Varying Hours](#)
- A profile is updated in OR PTC DCI. This means a consumer, provider, or consumer employer representative changed their information, including but not limited to address, name, email, or phone number.
  - o Related business processes:
    - [1.2.3 Update Provider Information](#)
    - [1.3.2 Update Consumer Information](#)
    - [1.4.2 Update Consumer Employer Representative Information](#)
- An entry is updated after being entered into Mainframe.
  - o Examples of scenarios:
    - If an adjustment is needed after time has been entered into Mainframe, the correction must also be done in OR PTC DCI.
    - If an entry must be corrected prior to entering into Mainframe, the provider can edit it in OR PTC DCI if in a pending status. If the entry is in an approved or processed status, staff must cancel the entry to allow the provider to create a historical entry.
  - o Related business processes:
    - [2.2.3 Correct Entry Mistake](#)
   - [4.4.0 Over and Underpayments](#)

If an entry must be fixed, the update must be made in OR PTC DCI. Simply making the change on a batch file you've previously downloaded will not fix the error. After DCI is updated, it will be pulled into the next batch. If an authorization must be fixed, the update must be made in OR PTC DCI *and* Mainframe. Do **not** update the batch file and do **not** only update Mainframe.
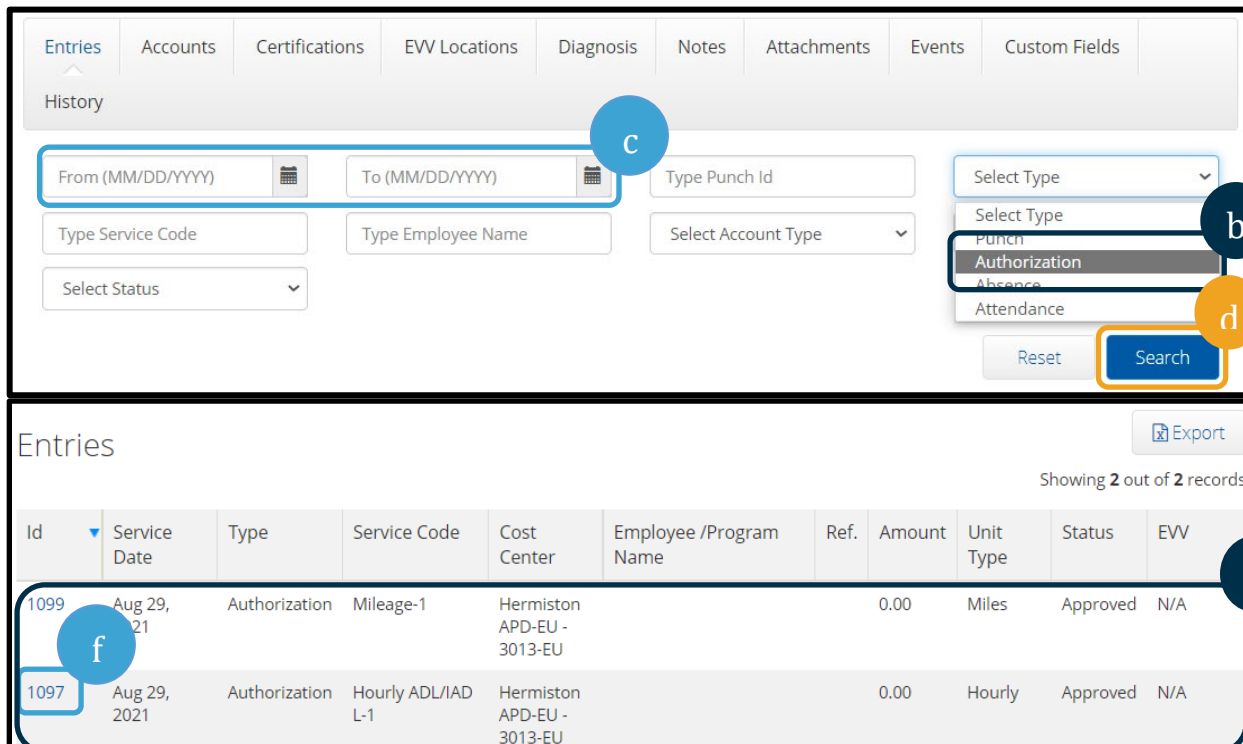
Provider Reports an Issue

Provider Says There are no Hours Authorized in OR PTC DCI

1. Check Oregon Access (OA) to see if the consumer has a service plan with this provider listed.
    i. There must be an approved service plan in OA for an authorization to be issued in Mainframe and OR PTC DCI. If there is not an active service plan, a case manager needs to create the service plan and complete a 546 for processing.
    ii. If there is an active service plan, continue to step 2.
2. Check the HINQ screen in Mainframe to ensure there is an active voucher for the pay period in question.
    i. If there is no authorization, a 546 needs to be processed by the local office. In this case a service plan does exist but a 546 was never completed or processed. This is why there is no active authorization in OR PTC DCI or vouchers generating in Mainframe.
    ii. If there is an active authorization, continue to step 3.
3. Check to see if the authorization exists in OR PTC DCI. You can do this in a few separate ways, via the consumer's profile, the Authorization tab, or the Authorization section on the dashboard.
    i. Via the Client Profile under Entries:
        a. From the consumer's profile, scroll down until you see Entries.
        b. From the Select Type drop-down list, select Authorization.
        c. Optional: Enter From and To dates for which the authorizations shown will start and end.
        d. Click Search.
        e. This will show all authorizations for this consumer in the system. You can use the service code to determine which provider the authorization is for.
        f. If you have the Authorization Admin Permissions, click on the Id of an
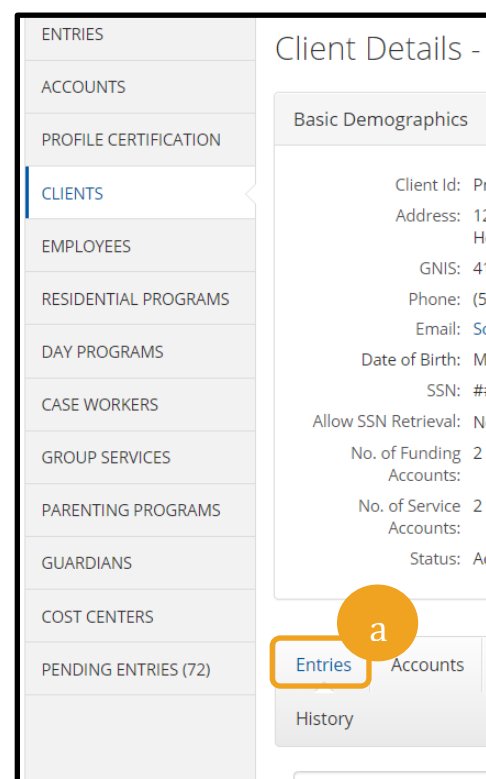
authorization to see more information. This will show the authorization screen.

ii. Via the Authorization Tab:
   a. Click Authorization at the top of the screen.
   b. Click Authorizations on the left navigation bar.
   c. Enter the consumer's name and click Search.
   d. Click on the authorization in question. The Authorization ID Reference column lists the voucher number. You can use this to identify the authorization by matching it to the voucher number in Mainframe.

e. This will display authorization details:
   1. Start and End Date
   2. Initial Balance for the voucher
   3. Voucher Number
   4. Provider Number

iii. Via Authorization section of dashboard:
   a. Type in the consumer's name and a date within the pay period in question. Then select Search to see the authorization for that pay period.

4. If there is not an approved authorization with the correct dates, hours, and service code then the provider will be unable to clock in and out. Staff should email the PTC Support Team at PTC.Support@odhsoha.oregon.gov for assistance with creating the authorization.
5. If the provider is still experiencing issues and there is an active authorization in OR PTC DCI, email the PTC Support Team at PTC.Support@odhsoha.oregon.gov for assistance.

Authorizations originate in Oregon Access (OA) with an approved service plan. After the service plan is approved in OA, the case manager needs to send a 546 to the Voucher Team for processing in Mainframe. Once there is an active voucher in Mainframe (30 status), the authorization is pulled into OR PTC DCI. For new consumer/provider pairings, it takes 2 full business days for the authorization to appear in OR PTC DCI. For ongoing consumer/provider pairings, the authorization will immediately appear in OR PTC DCI once the authorization is created in Mainframe for a pay period that is less than 8 days away. For a pay period further than 8 days away, they will be sent to OR PTC DCI once the pay period is 8 days away.

> **Note**: Always check the HINQ screen to determine if voucher authorizations are in the Mainframe before proceeding to OR PTC DCI.

Provider Reports they Received the Authorized Remaining Balance Error and Doesn't Know Why

This error means the provider tried to claim more hours or miles than their authorization in OR PTC DCI states. If this is on a real-time entry, the entry will be automatically rejected. If an

hourly or mileage historical entry is entered via the web portal, it will not be saved until the error is corrected.

If a provider does not know why they received the Authorized Remaining Balance error

- Explain what the error means.
- Provide the provider with instructions for how to determine their Remaining/Available Balance.
- Verify the voucher in OR PTC DCI matches the authorization in Mainframe (meaning make sure the authorized number of hours and miles match between the two systems). If they do not match, update OR PTC DCI to match Mainframe.
- Check if there is a new 546 which authorizes additional hours waiting to be processed.

The provider can correct the error by creating a historical entry that is not more than the Remaining Balance. The provider can claim up to but not more than the number of hours or miles they have available to claim. Depending on what method is used, staff and the provider may see Remaining Balance or Available Balance.

The provider can determine their Available Balance on the web portal
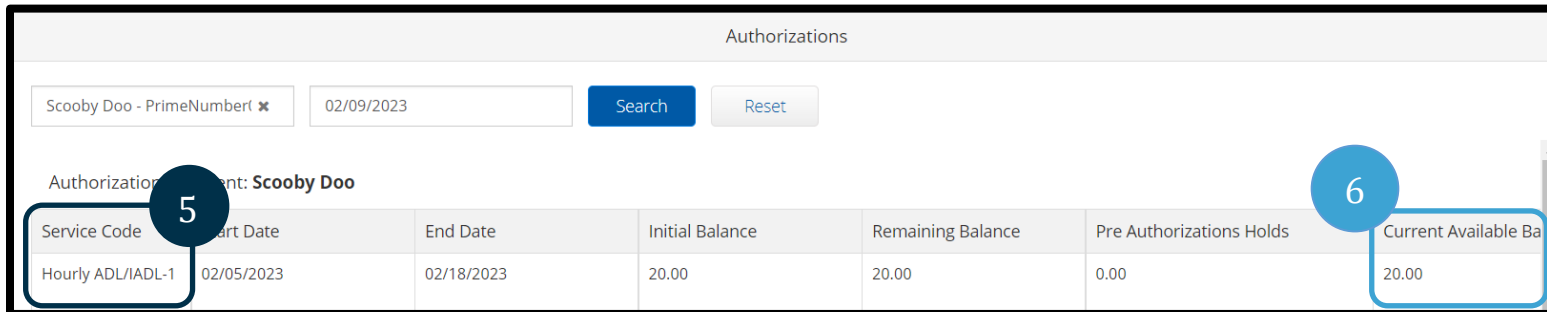
1. After the provider logs into the Web Portal, they will be on the home page or dashboard. Scroll down to see Authorizations in the middle of the page. This is called the Authorizations Widget.
2. The provider will begin typing the consumer's name in the Type Client Name field. Once 3 or more characters have been typed, a drop-down list will appear. They will select the consumer's name from the drop-down list.
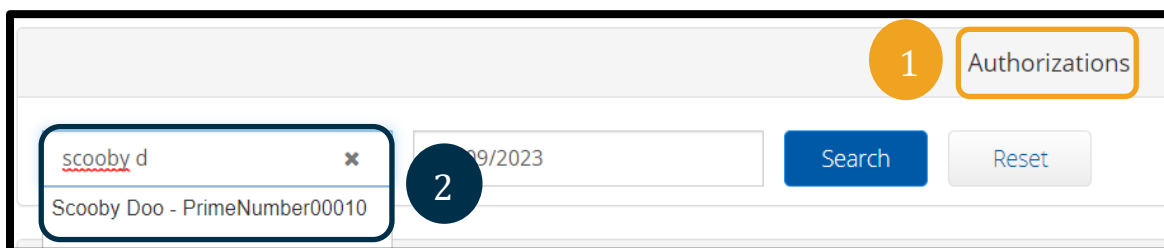
3. Select the Date of Service field. From the calendar, select a date within the pay period in question. For example, if the provider wants to know what their Available Balance is for the current pay period, enter today's date.
4. Select Search.
5. All authorizations for this consumer and pay period will appear. The Service Code shows whether it is for hours or miles.
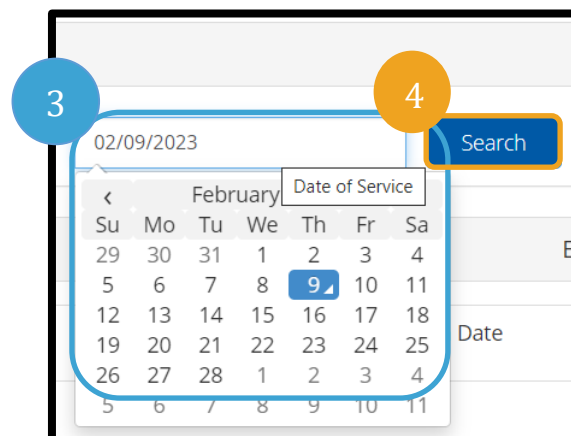
6. The Current Available Balance for this period is listed to the right of Pre-Authorizations Holds as number of hours available.

The provider can find out the Remaining Balance on the mobile app during clock in

- Before selecting Confirm Clock In, the provider will see clock in details under the blue button. This includes the Consumer's Name, Service Code, and Auth Remaining Balance. The item titled Auth Remaining Balance is the Remaining Balance the provider has for this consumer for the current pay period.
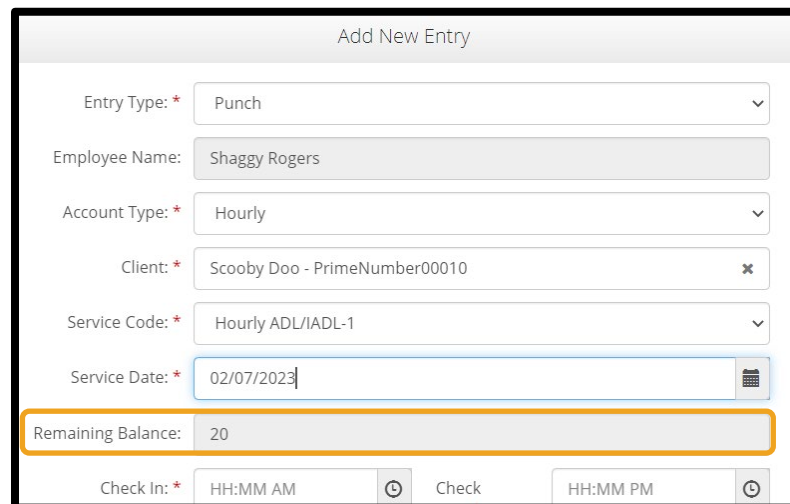
The provider can find out the Available Balance on the landline for real-time entries

- During clock in, after confirming the consumer, selecting real time punch, and selecting the proper service code, the system will read the available number of hours for the current pay period.

> **Note**: There are no other ways to determine Available Balance only using the landline option.

The provider can find out their Remaining Balance of hours on the web portal

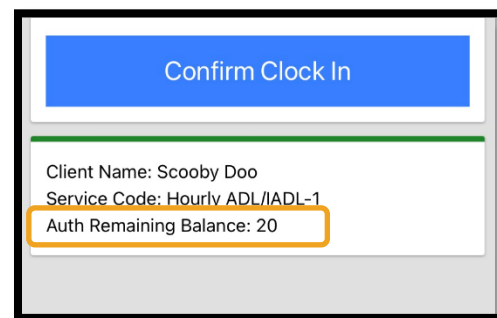- Use the Authorizations Widget as described in The provider can determine their Available Balance on the web portal.
  OR
- After clicking Add Entry on the dashboard and entering the Consumer's Name and Service Date, the field Remaining Balance will populate. The provider is not able to claim more hours than is listed here.

This field is highlighted in the screenshot. This example shows hours, but the field also applies to mileage entries.

The provider can find out the Remaining Balance on a historical landline entry

- After confirming the consumer, selecting historical entry, and selecting the proper service code, the system will read the available number of hours for the pay period.

A staff member can determine the Remaining/Available Balance

- Authorizations Widget on the dashboard.
    - o This is done in the same fashion as a provider with the exception that staff will need to determine which provider the authorization is associated with by looking at the service code.
- Authorizations tab if they have the Authorizations Admin Permission.
    - o This involves looking up the authorization via entering the search criteria, selecting the appropriate authorization, and calculating Available Balance as Remaining Balance minus Pre-authorization Holds.
- Authorization Entries Report.
    - o This involves using the Reports Tab, finding Authorization Entries Report under Authorization Reports, and entering search criteria. In the results, staff will scroll to the right until they find the column labeled Available for the specific authorization in question.

> **Note**: For more information on all of these methods, see the Authorization Management Guide.

Provider Reports they Cannot Enter Mileage but Can Enter Hours

1. Check Oregon Access (OA) to see if there is an active service plan with mileage.
    a. If there is no mileage authorized in OA, there is no authorization in OR PTC DCI. The case manager will need to update the service plan to include mileage and complete a 546 for processing.
    b. If there is mileage on the active service plan, go to step 2.
2. Check the HINQ screen in Mainframe to make sure there is an active voucher that includes mileage.
    a. If there is no voucher in Mainframe that includes mileage, the unpaid authorization needs to be voided and reissued by the local office to include mileage. Send a 546 to be processed for this to occur. Then OR PTC DCI will need to be updated per the process in Updating an Authorization.
    b. If there is an active voucher that includes mileage, go to step 3.

3. Check the authorizations in OR PTC DCI to see if there is a mileage authorization. This can be done via a few different methods: Entries under the Client Profile, Authorization tab, or the Authorizations section on the dashboard. You can find screenshots and instructions for each of these in the [Provider Says There are no Hours Authorized in OR PTC DCI](#) section of this document.

4. If there is not an approved authorization with the correct dates, mileage, and service code, the provider will be unable to claim mileage. Staff should email the PTC Support Team for assistance with creating a mileage authorization.

> **Note**: If there is Authorized Mileage on the voucher when it is created in Mainframe and that voucher is now in 36 status you will need to contact the Provider Relations Unit (PRU). An adjustment form will need to be submitted to Apd.ceppayments@odhsoha.oregon.gov adding the mileage, even if the voucher has already paid.
>
> The OR PTC DCI system and Mainframe need to match. If there is no mileage authorized under the voucher, the PTC team cannot create a mileage authorization in OR PTC DCI.
>
> Questions on how to add mileage to an already paid claim need to be directed to PRU. PTC Support does not manage that process.

5. If the provider is still experiencing issues and there is an approved authorization in OR PTC DCI, email the PTC Support Team at PTC.Support@odhsoha.oregon.gov for assistance.

Service Authorizations originate in Oregon Access (OA) with an approved benefit. After the benefit is approved in OA, staff need to send a 546 to their voucher team for processing in Mainframe. Once there is an active voucher authorization in Mainframe (30 status), those authorizations are pulled into OR PTC DCI.

> **Note**: Always check the HINQ screen to determine if voucher authorizations are in the Mainframe before proceeding to OR PTC DCI.

Provider Reports They Have Not Been Paid

This situation entails a provider reporting they have not been paid. However, the authorization was approved, and they may have successfully created entries in OR PTC DCI.

Steps to identify the issue:

1. Check OR PTC DCI for entries to ensure time and/or mileage was entered correctly.

a. Navigate to the provider's Employee Profile.
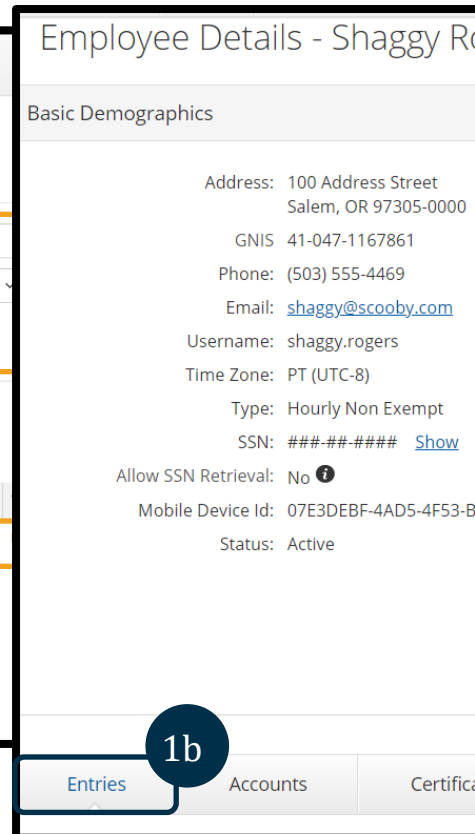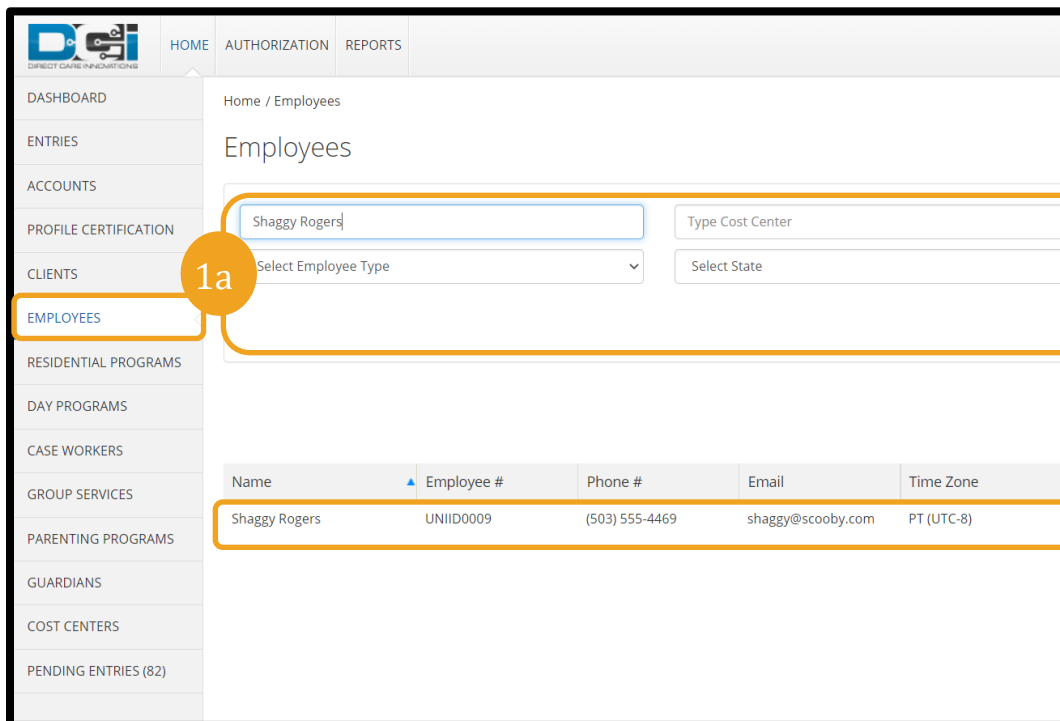
b. Scroll down to see Entries.
c. You may choose to filter their entries by consumer and/or pay period dates (using the start and end dates) to make it easier to identify the entries they were not paid for.
d. If you do not see any entries in OR PTC DCI, instruct the provider that they must enter their time to be paid.
e. If there are entries in OR PTC DCI, continue to step 2.
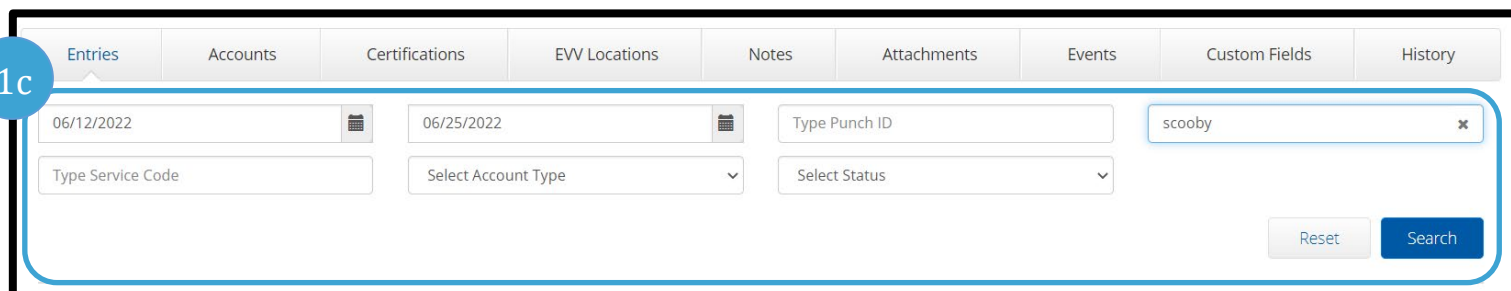
2. While still looking at Entries, review each entry submitted for the pay period. Best practice is to open them in a new tab. To do this: right click on the Entry Id, and click Open Link in New Tab.
   a. On the Entry Details page, compare the Created Date to the submission deadline for the pay period in question.
   b. If the entries were all created after the submission deadline, this explains why the provider was not paid. Inform the provider of deadlines for entering their time to be paid timely. These entries can be pulled into the next batch to be paid.

    c.   If the entries were all created before the submission deadline, continue to step 3.

3. In Mainframe, check the status of the voucher for the pay period in question to determine if the voucher was paid or not.

    a. If the voucher is in a status of 10, look for another voucher for the same pay period.

        i. If you find another voucher, meaning a voucher in a status other than 10 for the same pay period, it means OR PTC DCI was not updated when the authorization was voided and reissued. Follow instructions in [Updating an Authorization](#) to update the voucher number in OR PTC DCI. Then the entries can be entered into the STIM screen and paid.

        ii. If you do not find any other voucher in Mainframe, meaning the only voucher for the pay period in question is the one in a 10 status, it means the authorization was supposed to be rejected in OR PTC DCI but was not. Do additional research in OA to see if the service plan ended or if a new voucher should have been created. Look at the provider's credentials. If they expired the auth will not pull over. (Example: provider number expires 10/31/22, the auth that will pull over is the 10/9 to 10/22. Because the number expired in the middle of the next pay period, the system does not prorate, it just stops issuing.)

    b. If the voucher is in a status of 35, open the authorization and compare the time entries on the authorization to those in OR PTC DCI.

        i. If the entries match what is in OR PTC DCI, the authorization should be paid.

        ii. If the entries do not match what is in OR PTC DCI, edit the time in Mainframe. Then the voucher can be put back into 35 status to be paid.

    c. If the voucher is in a status of 36, open the voucher and compare the time entries on the authorization to those in OR PTC DCI.

        i. If the entries match what is in OR PTC DCI, the authorized entries were paid. Clarify with the provider what entries they were not paid for.

ii. If the entries do not match what is in OR PTC DCI, reach out to your voucher team to follow up to determine if an underpayment or overpayment needs to be submitted.

d. If the voucher is in a status of 46

i. If the entries match what is in OR PTC DCI, the authorization was paid. Clarify with the provider what they were not paid for. To do this, you may need to do research to ensure the provider was paid under the correct voucher number.

ii. If the entries do not match what is in OR PTC DCI, reach out to your voucher team to follow up to determine if an underpayment or overpayment needs to be submitted.

Punch Detail - Shaggy Rogers/ Scooby Doo

Punch Details

Entry Id: 2009
Machine Details: 50.39.179.141
Service Date: Jun 16, 2022
Check In: 01:30 PM
Check Out: 02:30 PM
Hour(s): 0:01:00
Amount: 1.00 Hour
Employee Time Zone: PT (UTC-8)
Client/ Program Time Zone : PT (UTC-8)
Authorization Entry Id: 1968
Pay Rate Name: Standard
Pay Rate: 0.00
Status: Processed
Batch Name: shaggy test - 38
Flag: Compensated
Created By: Shaggy Rogers   2a
Created: Jun 29, 2022

Note: Voucher statuses to look for include:
a. 10 = voucher authorization voided
b. 35 = voucher in ready to pay status
c. 36 = voucher in paid status
d. 45 = adjustment approved
e. 46 = voucher adjustment paid

Provider Reports They Were Underpaid

To troubleshoot the issue of a provider being underpaid, follow the same steps as Provider Reports They Have Not Been Paid to determine where the discrepancy in pay is.

Provider Reports the Landline Won't Let Them Clock In

If a provider calls in from their consumer's landline and the landline phone number is not properly connected to the consumer's Phone field on their profile in OR PTC DCI, then they will hear this message: "The phone number you are calling from does not match the phone number on the consumer record in DCI. Please call back from the phone number on record or call your local office for assistance. Goodbye."

Please review transmittal APD-IM-22-033 for additional information about phone numbers in OR PTC DCI.

To resolve the issue:

1. Confirm with the consumer that they have a landline phone or VOIP (Voice Over Internet Protocol, which allows you to make calls via your internet connection) phone in their home.
2. Navigate to the consumer's profile in OR PTC DCI and check the phone number listed in the Phone field.
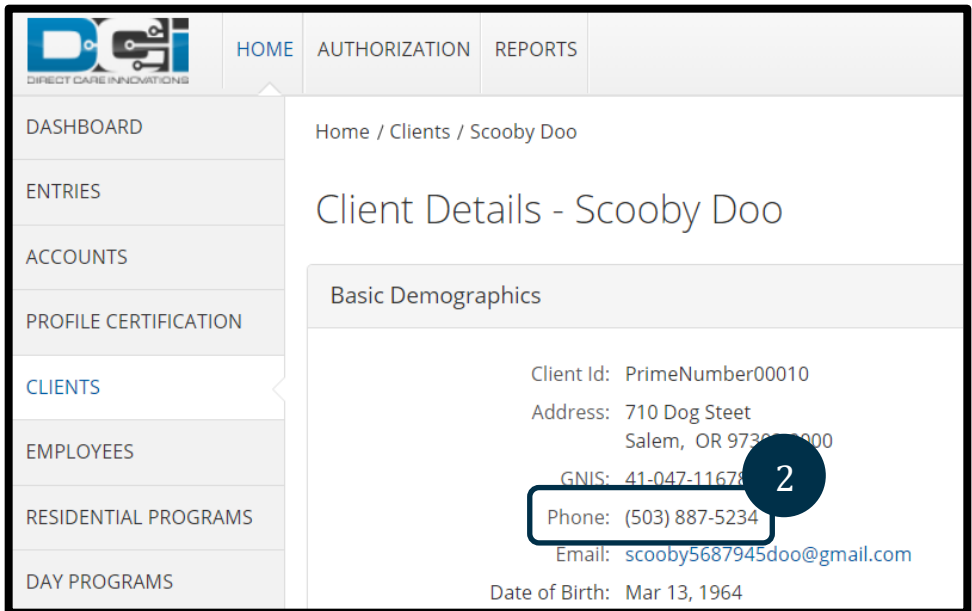
   a. If (000)-000-0000 or a number different from the consumer's landline the provider is calling from is listed in that field, then update it to reflect the correct landline phone number. Once the phone number has been updated, the provider will immediately be able to clock in and out. To edit the phone number, see the Update Consumer Information section of the Profile Management Guide.

   b. If the consumer's phone number is a landline and their provider was previously using it to clock in, but the phone number is now showing as (000)000-0000, please see APD-IM-22-033.

   c. If the phone number listed is correct, contact PTC Support at PTC.Support@odhsoha.oregon.gov for additional assistance.

Provider Reports Their Profile is Locked

There are several reasons that can result in a profile being locked, including the user typing the wrong password more than five times in a 24-hour period.

See 1.5.3 Managing User Profiles - Unlock a Profile.

To unlock someone's profile, you must have the supervisor role over their assigned cost center.

> **Note**: Profile automatically unlocks after 24 hours, assuming the profile was not manually locked, if no action is taken.

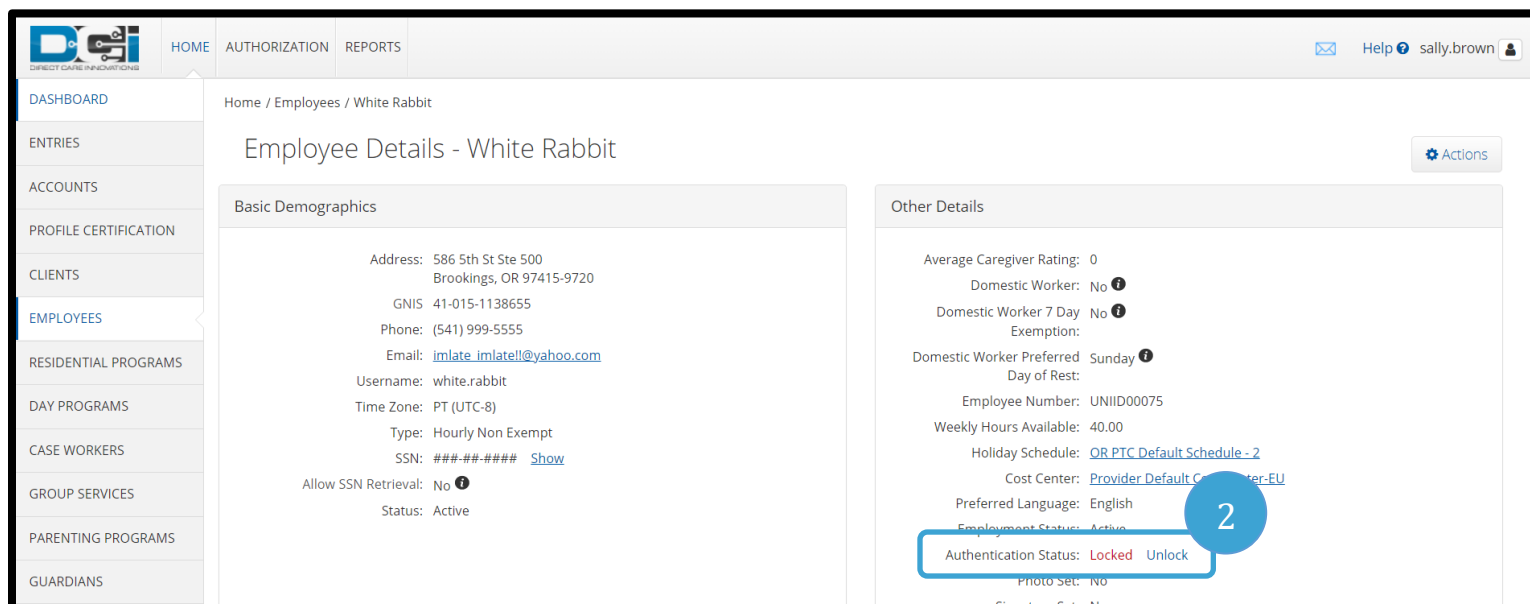> **Note**: The DCI Help Desk cannot unlock profiles for anyone.

After verifying the user's identity in OR PTC DCI with last four of SSN, email address, prime/provider number (as there are multiple profiles sharing the same name), follow these steps to unlock their profile:

1. Navigate to the provider, consumer, or CER's profile in OR PTC DCI.

2. Click Unlock under the Other Details column on the right.

Resources

For questions on business processes, please reach out to: PTC.Support@odhsoha.oregon.gov.
Information on Homecare Worker or Mainframe Entry Processes can be found by clicking this
link: DHS Staff Tools - Homecare Worker. For a full list of PTC business processes and learning
materials, see the Staff Learning Materials Catalog.