

Troubleshooting Guide

OR PTC DCI
VERSION 2.2



Troubleshooting Guide

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Troubleshooting Guide

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 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

When 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. For entries made after 7/28/24, the entries made in OR PTC DCI will process and pay automatically. For historical entries made before 7/28/24, payroll batches will be run by the PTC Support Team and historical entry data will be emailed to local offices shared payroll email box for STIM entry.

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 when this must occur remain consistent. Below is a list of these situations:

- 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.
 - Related business processes:
 - [2.2 Update Provider Information](#)
 - [3.2 Update Consumer Information](#)
 - [4.2 Update Consumer Employer Representative Information](#)
- An entry is updated after being processed into STIM.
 - Example:

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- A historical entry prior to 7/28/24 was made in OR PTC DCI and processed into a payroll batch. The entry was entered into STIM and paid by local office staff. The entry was later cancelled, causing a negative 'compensating' entry to show in OR PTC DCI. There will be a new payroll batch emailed to the local office showing the negative 'compensating' entry. A staff member will edit STIM data entries in Mainframe and submit the applicable overpayment form to the Provider Relations Unit.
- If an entry must be corrected, 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.
- Related business processes:
 - [6.1 Correct Entry Mistake](#)
 - [6.3 Over and Underpayments](#)

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 form 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 form needs to be processed by the local office. In this case a service plan does exist but a 546 form 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.

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3. Check to see if the authorization exists in OR PTC DCI. You can do this either via the consumer's profile or the Authorization widget 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.

Client Details -

Basic Demographics

Client Id: Pr
Address: 12
He
GNIS: 41
Phone: (5
Email: Sc
Date of Birth: M
SSN: #
Allow SSN Retrieval: No
No. of Funding: 2
Accounts:
No. of Service: 2
Accounts:
Status: Ac

ENTRIES

ACCOUNTS

PROFILE CERTIFICATION

CLIENTS

EMPLOYEES

RESIDENTIAL PROGRAMS

DAY PROGRAMS

CASE WORKERS

GROUP SERVICES

PARENTING PROGRAMS

GUARDIANS

COST CENTERS

PENDING ENTRIES (72)

Entries Accounts

History

Entries Accounts Certifications EVW Locations Diagnosis Notes Attachments Events Custom Fields

History

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Punch Id

Type Service Code Type Employee Name Select Account Type

Select Status

Select Type

Select Type

Punch

Authorization

Absence

Attendance

Reset Search

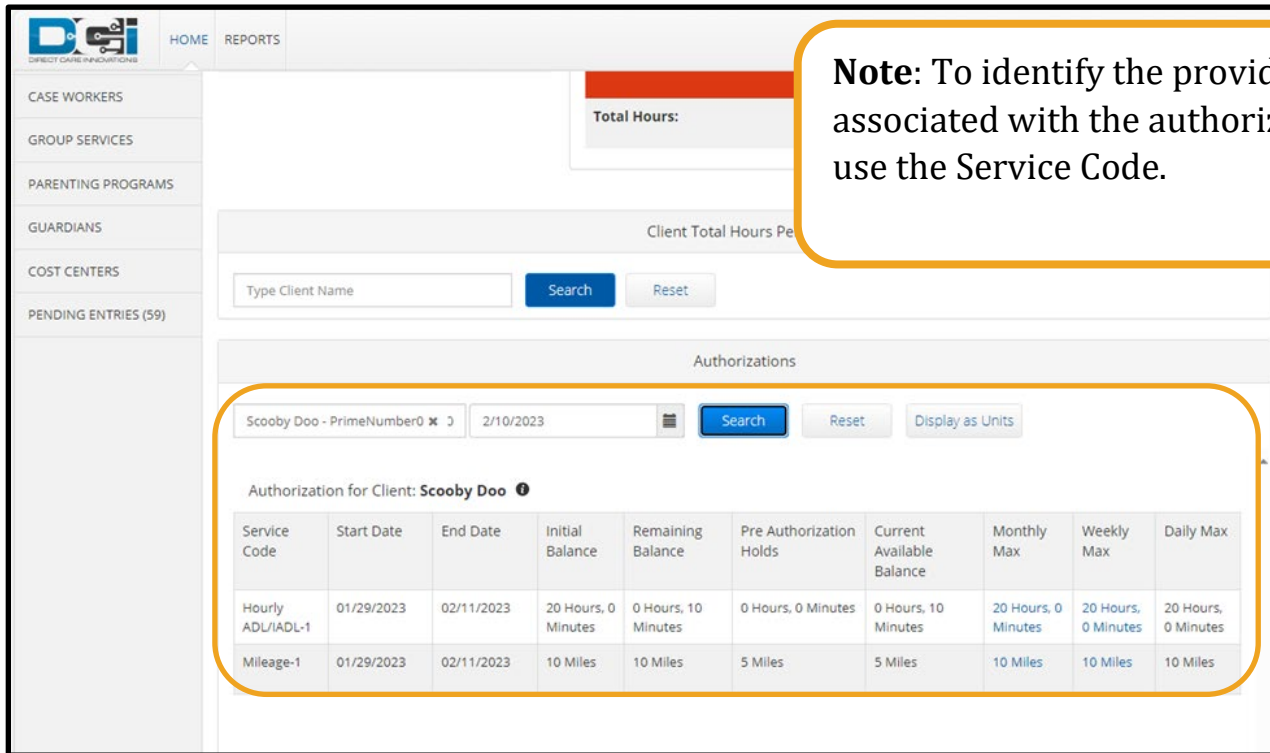
Entries Export

Showing 2 out of 2 records

Id	Service Date	Type	Service Code	Cost Center	Employee /Program Name	Ref.	Amount	Unit Type	Status	EVW
1099	Aug 29, 2021	Authorization	Mileage-1	Hermiston APD-EU - 3013-EU			0.00	Miles	Approved	N/A
1097	Aug 29, 2021	Authorization	Hourly ADL/IAD L-1	Hermiston APD-EU - 3013-EU			0.00	Hourly	Approved	N/A

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- ii. Via Authorization widget on 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.



Note: To identify the provider associated with the authorization, use the Service Code.

Client Total Hours Pe

Type Client Name

Authorizations

Scooby Doo - PrimeNumber0 2/10/2023

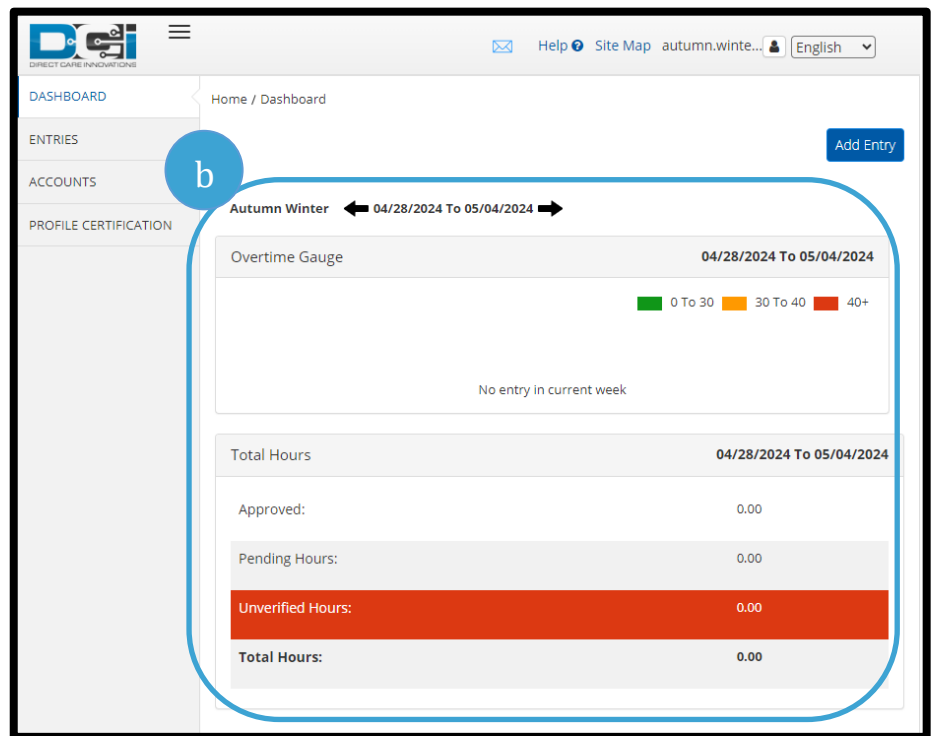
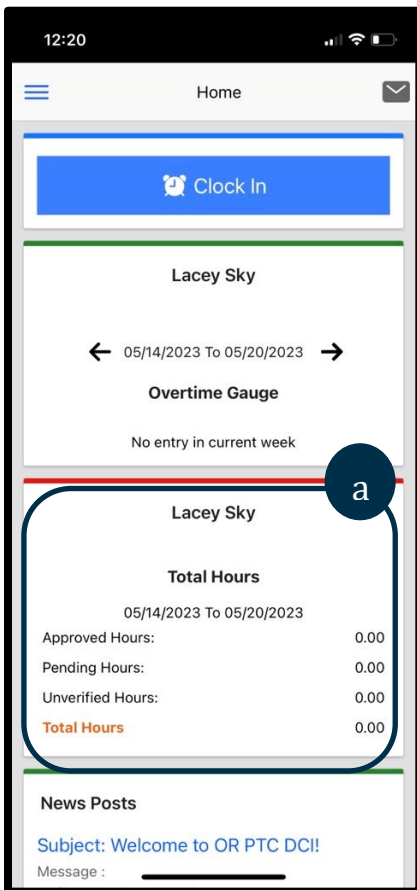
Authorization for Client: **Scooby Doo** ⓘ

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	01/29/2023	02/11/2023	20 Hours, 0 Minutes	0 Hours, 10 Minutes	0 Hours, 0 Minutes	0 Hours, 10 Minutes	20 Hours, 0 Minutes	20 Hours, 0 Minutes	20 Hours, 0 Minutes
Mileage-1	01/29/2023	02/11/2023	10 Miles	10 Miles	5 Miles	5 Miles	10 Miles	10 Miles	10 Miles

- 4. If there is a voucher in Mainframe, but here is not an approved authorization in OR PTC DCI 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 further troubleshooting assistance.
- 5. If there is an approved authorization with the correct dates, hours, and service code, clarify with the provider where they are seeing no hours are authorized. If the provider is looking at the 'Total Hours' section on the dashboard of the web portal or mobile app, 0 hours will show until an entry is made that moves to approved, pending, or unverified status.

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- a. Example of what the mobile app ‘Total Hours’ section will look like if no entries have been made for the week selected.
 - i. For instructions on how the provider can determine their available balance in the mobile app, see: [The provider can find out the Remaining Balance on the mobile app during clock in.](#)
- b. Example of what the web portal ‘Total Hours’ section will look like if no entries have been made for the week selected.
 - i. For instructions on how the provider can determine their available balance in the web portal, see: [The provider can determine their Available Balance on the web portal.](#)



The ‘Total Hours’ section shows the status of entries that have already been made for the week selected, and not how many hours are authorized to be worked. For instructions on how the provider can determine their available balance, see: [The provider can determine their Available Balance on the web portal.](#)

6. 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.

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Authorization Creation

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 form 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 two 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 eight days away. For a pay period more than eight days away, they will be sent to OR PTC DCI once the pay period is eight 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 allows. 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

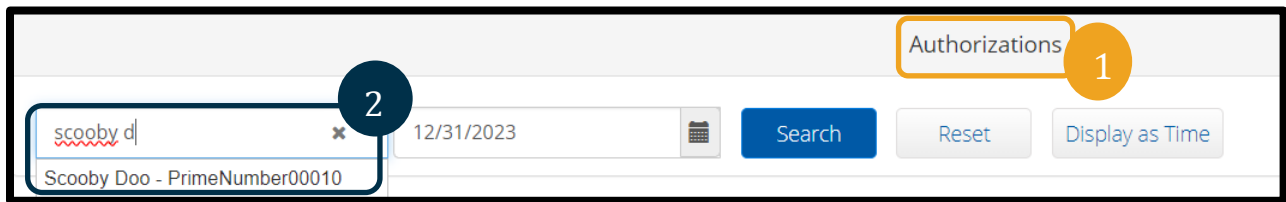
- Explain what the error means.
- Provide the provider with instructions for how to determine their Remaining/Available Balance.
- Check if there is a new 546 form which authorizes additional hours waiting to be processed.

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.

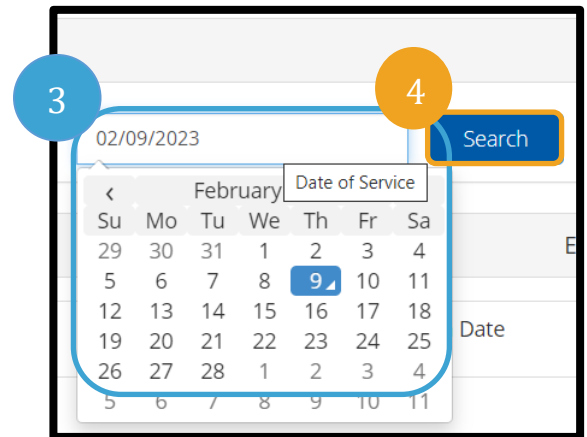
Troubleshooting Guide

The provider can determine their Available Balance on the web portal

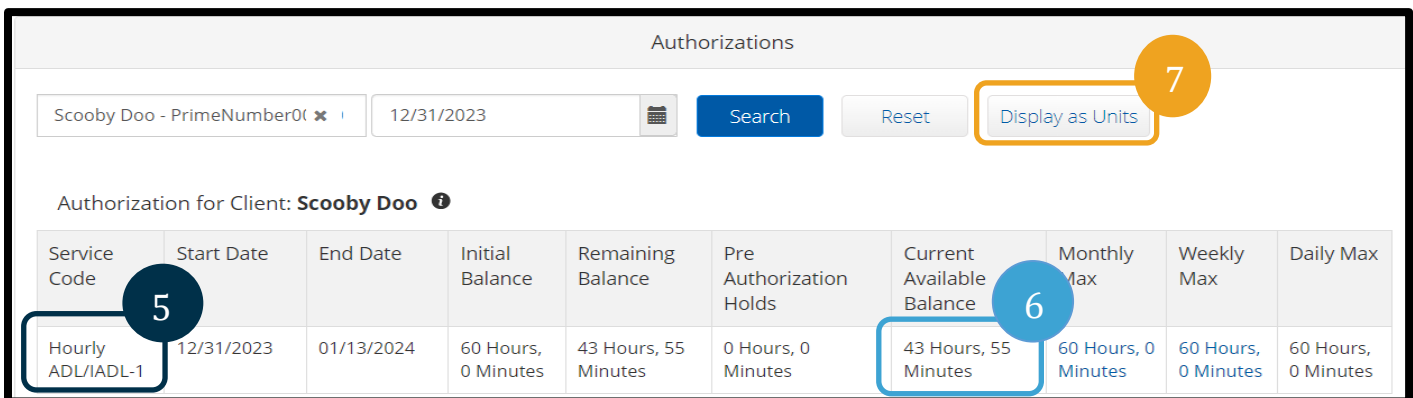
1. After the provider logs into the web portal, they will be on the home page or dashboard. Scroll down to see Authorizations in the middle of the page. This is called the Authorizations Widget.
2. The provider will begin typing the consumer's name in the Type Client Name field. Once three or more characters 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.

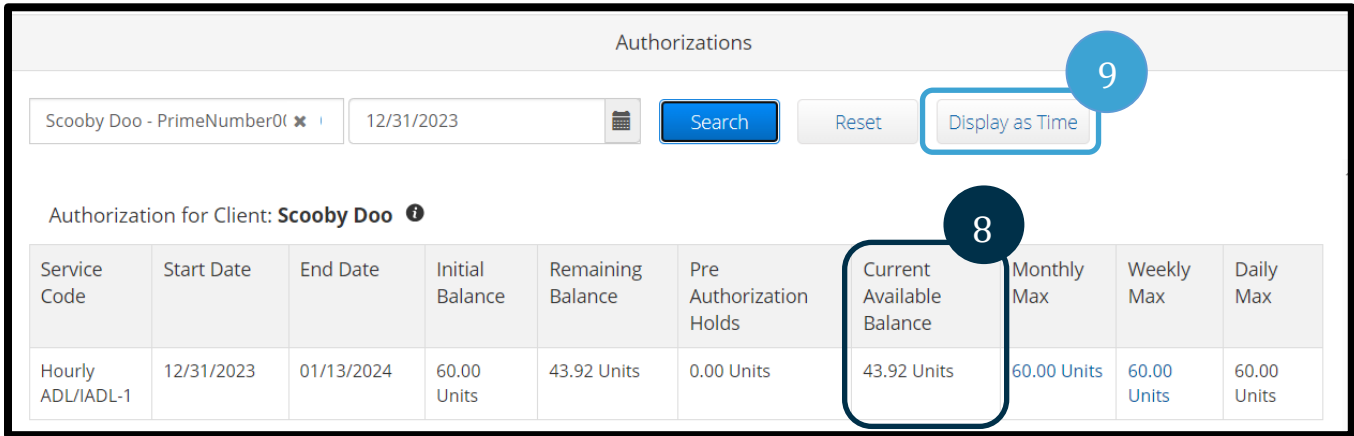


5. All authorizations for this consumer and pay period will appear. The Service Code shows whether it is for hours or miles.
6. The Current Available Balance for this period is listed to the right of Pre-Authorizations Holds as number of hours available. The display will default to hours and minutes.
7. To convert the time displayed on the table to a decimal, select the "Display as Units" button.



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



A Note About Rounding

There are times the authorizations widget rounds down to the nearest minute. If there is any doubt about if the number of minutes displayed on the widget is correct, take the following steps:

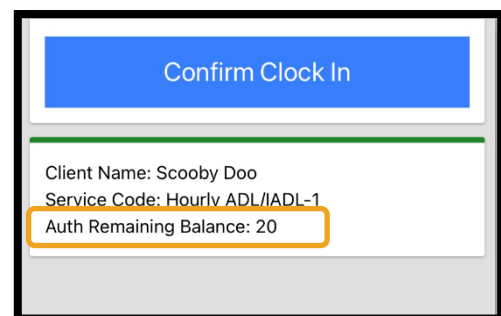
1. Select the “Display as Units” button to view the time in decimal format.
2. Use the [Time Conversion Chart](#) to figure out the number of minutes that corresponds with the decimal hour.

For example, if the authorizations widget shows 3.52 hours in the Current Available Balance column, the provider has 3 hours and 31 minutes remaining on their authorization.

Minutes	Decimal Hours
31	.52
32	.53

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.



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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.

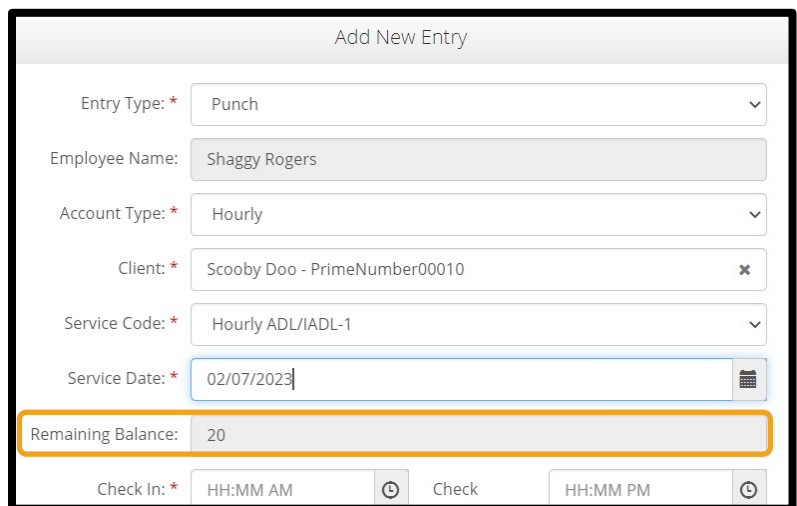
Note: There are no other ways to determine Available Balance only using the landline option.

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 selecting 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



The screenshot shows a web form titled "Add New Entry". The form contains several fields: "Entry Type" (dropdown menu set to "Punch"), "Employee Name" (text input "Shaggy Rogers"), "Account Type" (dropdown menu set to "Hourly"), "Client" (dropdown menu set to "Scooby Doo - PrimeNumber00010"), "Service Code" (dropdown menu set to "Hourly ADL/IADL-1"), and "Service Date" (calendar icon and text input "02/07/2023"). Below these fields is a "Remaining Balance" field with a value of "20", which is highlighted with an orange border. At the bottom, there are "Check In" and "Check" fields, both with time input formats (HH:MM AM/PM).

more hours than 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

- Client Total Hours Per Week Widget on the dashboard.
 - This is completed by searching the consumer by name and adding the weekly total for the provider in question for the two-week pay period. 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.
- Authorizations Widget on the dashboard.

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- This is completed in the same way 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.
- Authorization Entries Report.
 - 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 form 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 edited in the UATH screen in Mainframe by the local office to include mileage. Send a 546 form to be processed for this to occur. If the mileage will be ongoing, you will need to end the current ONGO and create a new ONGO with the mileage.
 - b. If there is an active voucher that includes mileage, go to step 3.
3. Check to see that there is an active funding and service account for mileage associated with the consumer/provider pairing in OR PTC DCI.
 - a. If you find the mileage funding and service account have been inactivated, email the PTC Support Team to request the mileage be relinked.
 - b. If there are active funding and service accounts for mileage associated to the consumer/provider pairing, go to step 4.
4. Check the authorizations in OR PTC DCI to see if there is a mileage authorization. This can be done via two different methods: Entries under the Client Profile, or the Authorizations widget on the dashboard. You can find screenshots and instructions



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for each of these in the [Provider Says There are no Hours Authorized in OR PTC DCI](#) section of this document.

5. If there is not an approved authorization with the correct dates, mileage, and service code, the provider will be unable to claim mileage.
6. 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 form 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 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. 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.

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a. Navigate to the provider's Employee Profile.

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

Username: shaggy.rogers

Time Zone: PT (UTC-8)

Type: Hourly Non Exempt

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

Allow SSN Retrieval: No ⓘ

Mobile Device Id: 07E3DEBF-4AD5-4F53-B

Status: Active

Name	Employee #	Phone #	Email	Time Zone
Shaggy Rogers	UNIID0009	(503) 555-4469	ptc.support@odhs.oha.oregon.gov	PT (UTC-8)

Entries Accounts Certifica

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.

1c

Entries Accounts Certifications EW Locations Notes Attachments Events Custom Fields History

06/12/2022 06/25/2022 Type Punch ID scooby

Type Service Code Select Account Type Select Status

Reset Search

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.

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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 will 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 you find the voucher is in a paid status, review that the entries in STIM match the entries made in OR PTC DCI.
 - i. If you find entries are missing from dates worked before 7/28/24 Phase 2A Go-Live, check the payroll batch files that were emailed to the

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
 Created: Jun 29, 2022

2a

Note: Voucher statuses include:

- 10 = voucher voided
- 17 = voucher voided w/ canceled entries
- 24 = Authorization credit ready to pay
- 27 = Authorization credit
- 30 = voucher in authorized status
- 35 = voucher in ready to pay status
- 36 = voucher in paid status
- 45 = adjustment approved to pay
- 46 = voucher adjustment paid
- 47 = Authorization adjustment zero paid

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local offices containing historical entries to verify if an entry or entire batch file was missed for STIM entry.

- ii. If you find the voucher is in 30 status, you should check that all the entries made in OR PTC DCI reflect in STIM and then pay the voucher if the payroll deadline has already passed. Do not pay vouchers before the payroll processing date.
 - iii. If the voucher is in a status of 10, look for another voucher for the same pay period.
 - a. If you do not find any other voucher in Mainframe, 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 their credentials expired, the authorization will not pull over.
 - Example: provider number expires 10/31/22, the authorization that will pull over is pay period 10/9/22 to 10/22/22. Because the number expired in the middle of the next pay period, the system does not prorate, it just stops issuing.
 - If the provider's provider number expired in the middle of the pay period, a voucher will need to be recreated with the end date matching the provider number expiration date.
4. Check the STIQ screen in Mainframe for payment errors.
- a. If you find an error for the applicable pay period, select the error to view details in the STSS screen.
 - b. Resolve the errors in OR PTC DCI to allow the entry to be pulled into a future payroll batch.

Note: If a provider made all their entries by the deadline to submit entries correctly, but received late or partial payment, they may be eligible for Late Payment Penalty Fees and should contact Oregon Home Care Commission (OHCC) Customer Relations to make a request. Contact information is in the [Resources](#) section of this document.

Provider Reports They Were Underpaid

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

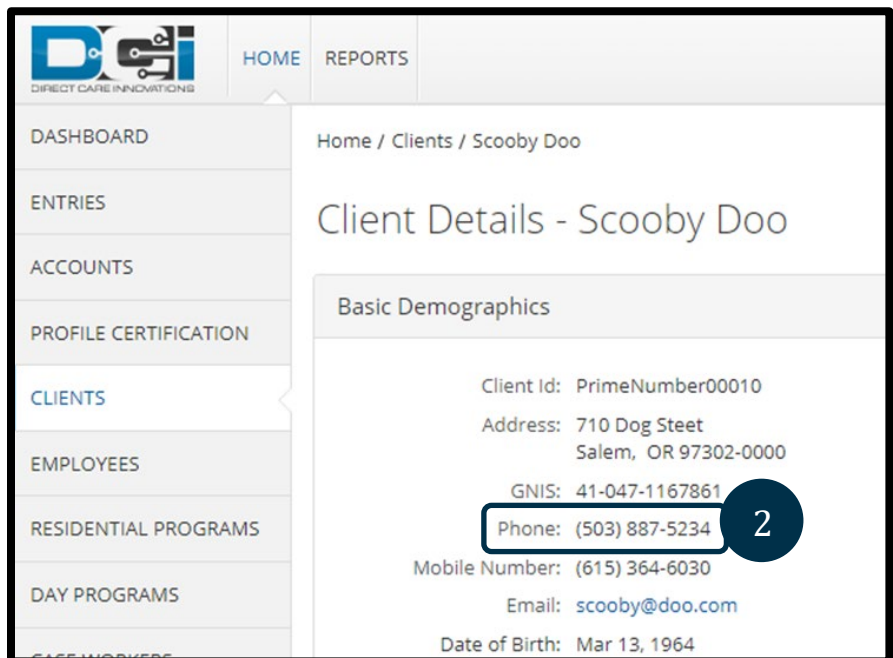
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Provider Reports the Landline Won't Let Them Clock In

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.





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Resources

For questions on business processes, please email: 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](#).

Providers may contact Oregon Homecare Commission (OHCC) Customer Relations by visiting the [Resources for the Home Care Workforce](#) webpage and completing the applicable request form. OHCC can also be reached by phone at 877-624-6080 or by email at ohcc.customerrelations@odhsoha.oregon.gov.