Unlinking and Relinking Guide

OR PTC DCI

VERSION 1.0

Contents

Disclaimer

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

How are new consumer/provider pair(s) created in OR PTC DCI?

- After receiving a 546 form, the voucher specialist creates a voucher in Mainframe and sets up ONGO, if applicable.
- If the consumer and provider have never been linked in OR PTC DCI, this new voucher will create a PTC error. PTC errors go to a daily queue that the PTC Support Team manages.
- PTC Support Team creates new profiles by pulling information from Mainframe and Oregon Access (OA).
- Funding and services accounts are automatically created for all new consumer/provider pair(s) after new profiles are created.
- PTC Support Team sends a welcome email with login information to new users who have a valid email address in OA.

What is Unlinking?

The two types of unlinking:

End date: When an unlink is requested, PTC Support Team adds an end date to the service accounts matching the last day worked. Providers will be unable to claim time/mileage after this date.

Inactive: PTC Support Team inactivates the funding and service accounts that link the consumer and provider. Typically happens one year after the end date, one year of no time claimed, or upon request.

Reasons to Unlink

Local office staff should request an unlink if a provider stops working for a consumer for any reason, including but not limited to:

- Consumer passed away
- Consumer moved to a facility
- Consumer stopped receiving services
- Provider quit or moved away

Note: Only the PTC Support Team unlinks or relinks a provider in OR PTC DCI.

The PTC Support Team may receive requests to unlink from Central Office if:

- The provider number expired and the provider did not respond to requests from Central Office (The PTC Support Team is NOT notified if the provider number is reactivated!)
- There is an APS or fraud case

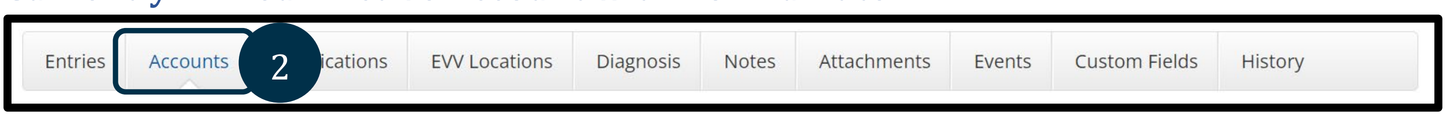
The PTC Support Team may unlink if it is discovered the provider is no longer working for the consumer.

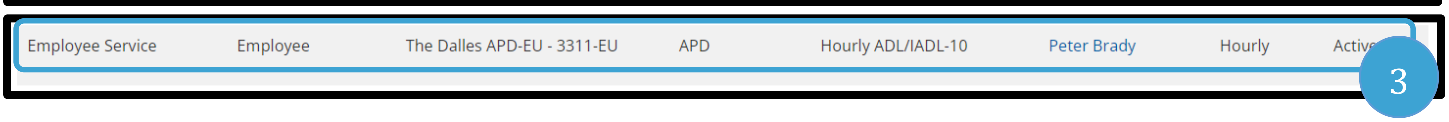
Checking the Link Status

Every time a new service plan is created, a staff member must check OR PTC DCI to see if the consumer and provider are:

- Currently linked – Active accounts with no end date
- Never linked – No accounts
- Unlinked via an end date
- Unlinked via inactivated accounts

Currently Linked – Active Account with No End Date

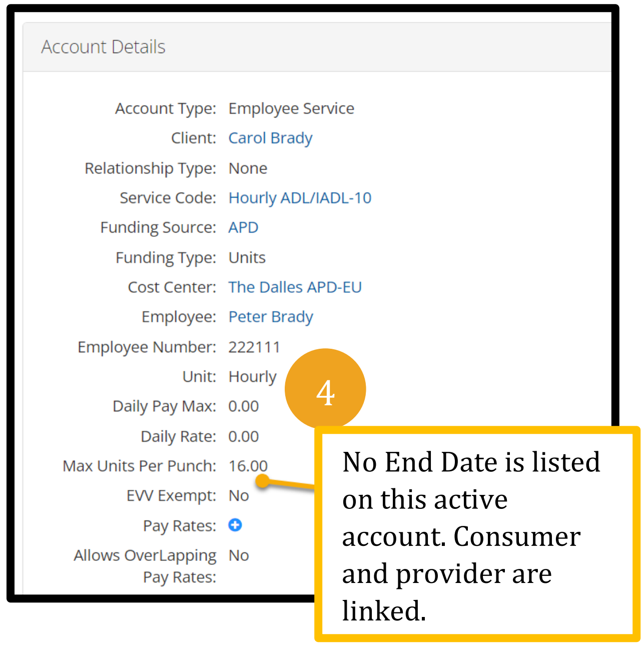




Go to the consumer's Client Details page.

1. Go to Accounts.
2. Find the Employee Service account with the provider's name.
3. Select anywhere on the account except the provider's name hyperlink.

4. This example shows an active service account with no end date.

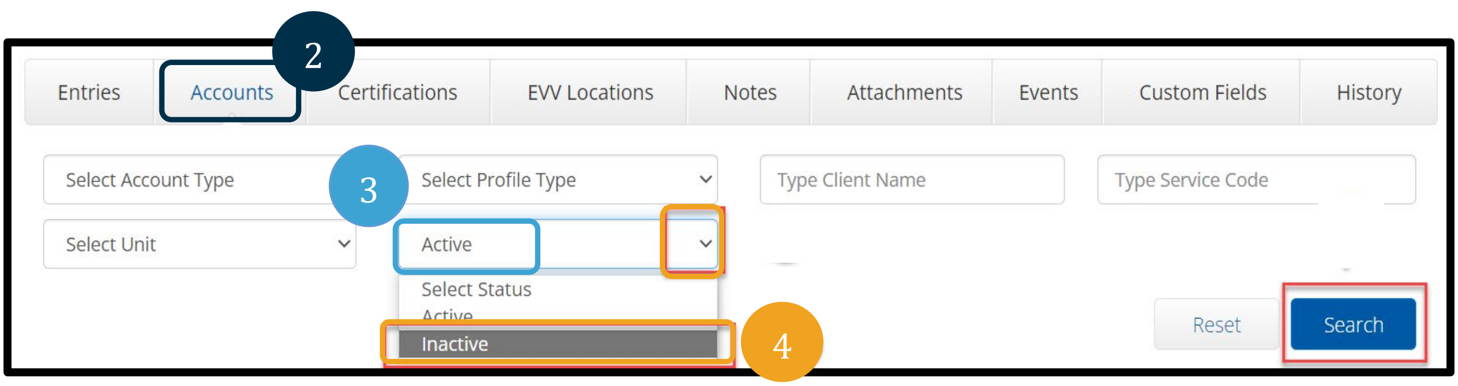


The consumer and provider are linked. Once Mainframe vouchers are created, they will be sent to OR PTC DCI automatically.

Never Linked – No Accounts

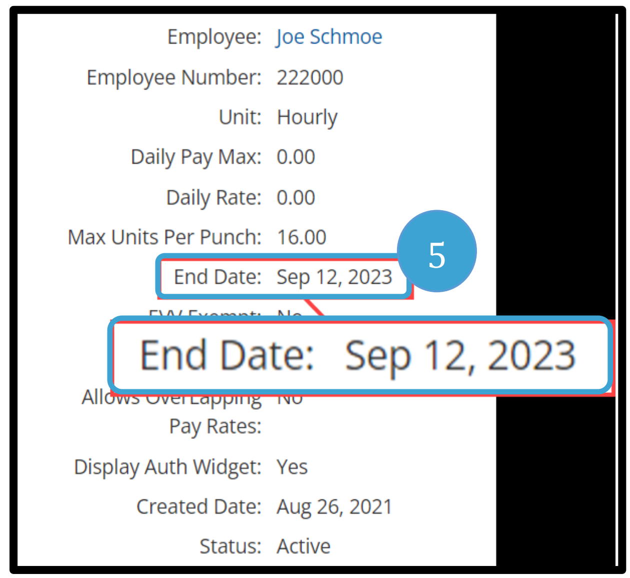
1. Go to the consumer's Client Details page.
2. Go to Accounts.
3. Look at the active Employee Service accounts for the provider's name.
4. If you don't find any with the provider's name, change the status from Active to Inactive.
5. If you still don't see the provider's name, this means the consumer and provider have never been linked.

Once Mainframe vouchers are created, they will be sent to OR PTC DCI within two business days.



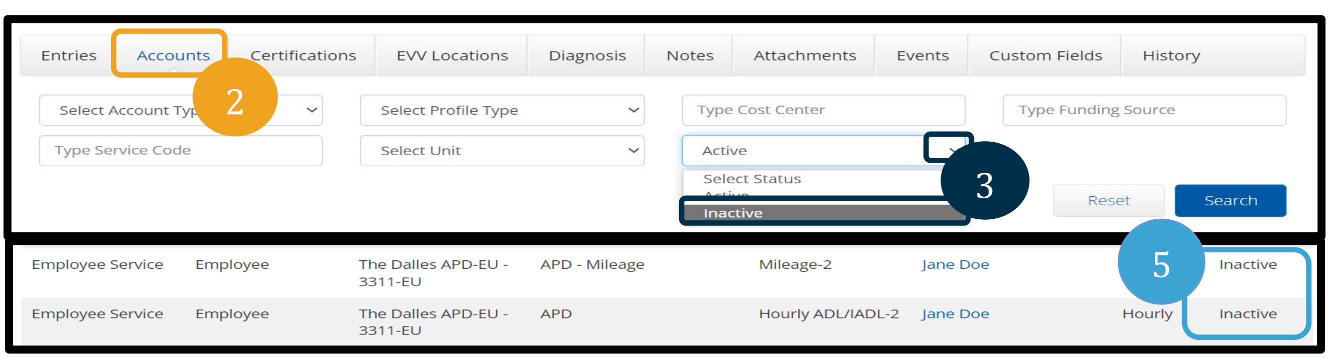
Unlinked via End Date

1. Go to the consumer's Client Details page.
2. Go to Accounts.
3. Find an account with the provider's name.
4. Select anywhere on the account except the provider's name hyperlink.
5. This example shows a service account with an end date of September 12, 2023. The provider stopped working for the consumer on this date.
6. Email a relink request to the PTC Support Team.



Unlinked via Inactive Accounts

1. Go to the consumer's Client Details page.
2. Go to Accounts.
3. Change the status to inactive.
4. Look for an inactive account with the provider's name.
5. If you find an inactive account, email a relink request to the PTC Support Team.



How to Unlink a Provider and Consumer:

1. The Case Manager or local office staff member receives notification that the provider is no longer working for any reason.
2. The Case Manager completes 546 form to request voiding of outstanding vouchers.
3. Voucher Specialist edits voucher in Mainframe with end date per the 546 form.
4. Voucher Specialist then checks for and voids any future dated voucher(s) in Mainframe that have issued for upcoming pay periods and **ends ONGO**.
5. Notify the PTC Support Team that the provider is no longer working for the consumer by emailing PTC.Support@odhsoha.oregon.gov.
6. The PTC Support Team will update the funding account(s) and service account(s) and change the Client Profile status to deceased or inactive, if needed.

Note: Don't forget to end ONGO!

How to Request an Unlink:

Note: Unlink requests are completed within 1-2 business days.

Email the PTC Support Team at PTC.Support@odhsoha.Oregon.gov with the following information:

Subject:	Unlink

Body of email:	Please Unlink this consumer and provider.
	• Consumer name (as it is spelled in OR PTC DCI):
	• Consumer's Prime number:
	• Provider name (as it is spelled in OR PTC DCI):
	• Provider number:
	• Last date worked (not necessarily the last day of the pay period)
	• Was the ONGO ended and future vouchers voided?
	• Did the provider claim all time and miles or request to be unlinked immediately?
	• Reason for unlink. For example:
	  ○ Consumer or provider passed with date of death noted
	  ○ Consumer's services closed
	  ○ Consumer moved into a care facility
	  ○ Provider quit or was terminated by the consumer

Note: If the consumer passed away, please follow the [Case Management Death Checklist] to ensure all other appropriate actions are taken.

Unlink Spreadsheet

Please only use a spreadsheet to send unlink requests if:

- Your office has high volumes of daily unlinks and it is impractical to send individual emails; or
- You use the spreadsheet for small numbers of requests at a time (i.e., approximately five or fewer) and have ensured the requests are needed.

Unlink requests should be sent one at a time in most situations. This ensures an efficient workflow and decreases duplicate work for local office staff and the PTC Support Team.

Note: Please send spreadsheets, if needed, daily and DO NOT save several weeks of requests to be sent at once.

If a consumer or provider needs to be unlinked from multiple providers or consumers at once, please send those all at once either in one email message or in a spreadsheet.

Please follow this link to download a template for unlink and relink requests: Unlink/Relink Template.

Spreadsheet template example:

Providers/Consumers to Unlink							
Consumer Name	Consumer Prime	Provider Name	Provider Number	Last Day Worked	Reason for Unlinking	ONGO ended, future vouchers voided, and auths rejected?	Remove consumer from provider profile now?

Note: Please ensure to separate unlink and relink requests on separate spreadsheets and do not combine them on the same request.

What is Relinking?

A relink may be needed if a provider previously worked for a consumer but stopped working for them. If the provider stopped working for the consumer, the pair may have been unlinked in OR PTC DCI. “Unlinked” means that an end date was added to their service accounts, or that their funding and service accounts were inactivated. If they were previously unlinked, then they must be relinked for the provider to claim time.

Local offices must send relink requests to the PTC Support Team, as the PTC Support Team has no way of knowing when a relink will be needed. To relink a consumer and provider, the PTC Support Team removes the end date or re-activates the funding and service accounts.

Note: Not relinking a consumer and provider timely will result in delays in claiming time and may result in late payments. Late payments caused by delayed relinks may be eligible for late payment penalty fees.

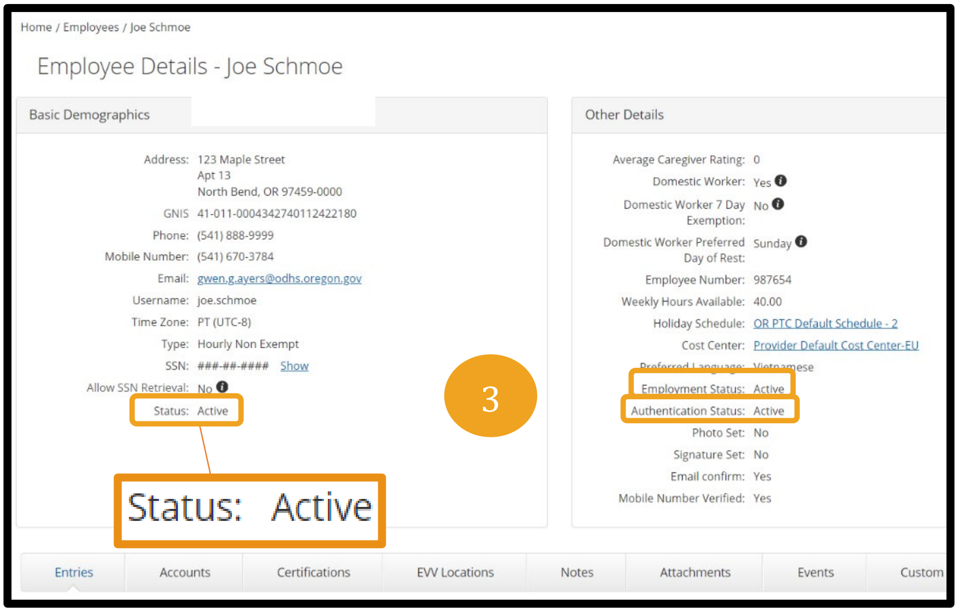
When is a Relink Needed?

When a new service plan is created, a staff member must check the consumer’s service accounts to determine if:

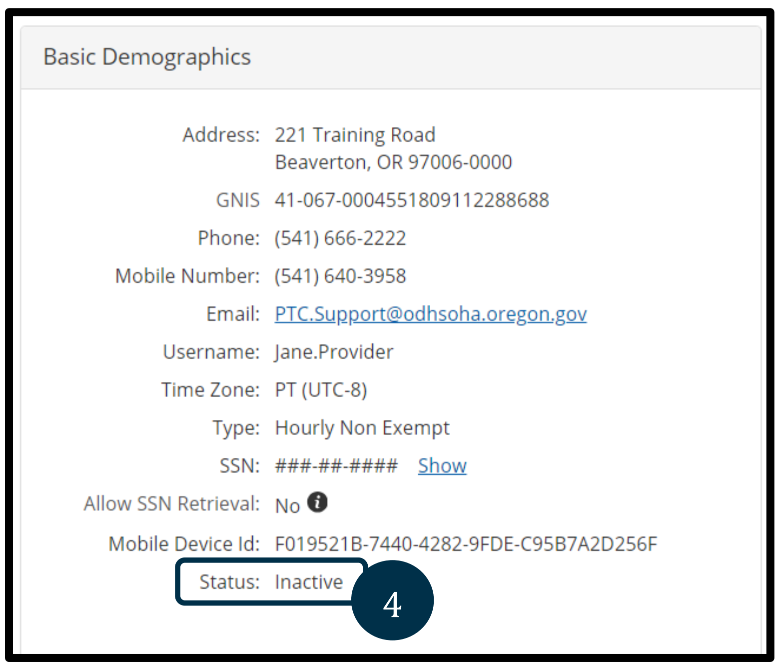
- The consumer and provider are linked and have a service account end date; or
- They were previously linked, and the account is in an inactive status.

Check if a Relink is Needed (From the Provider's Profile)

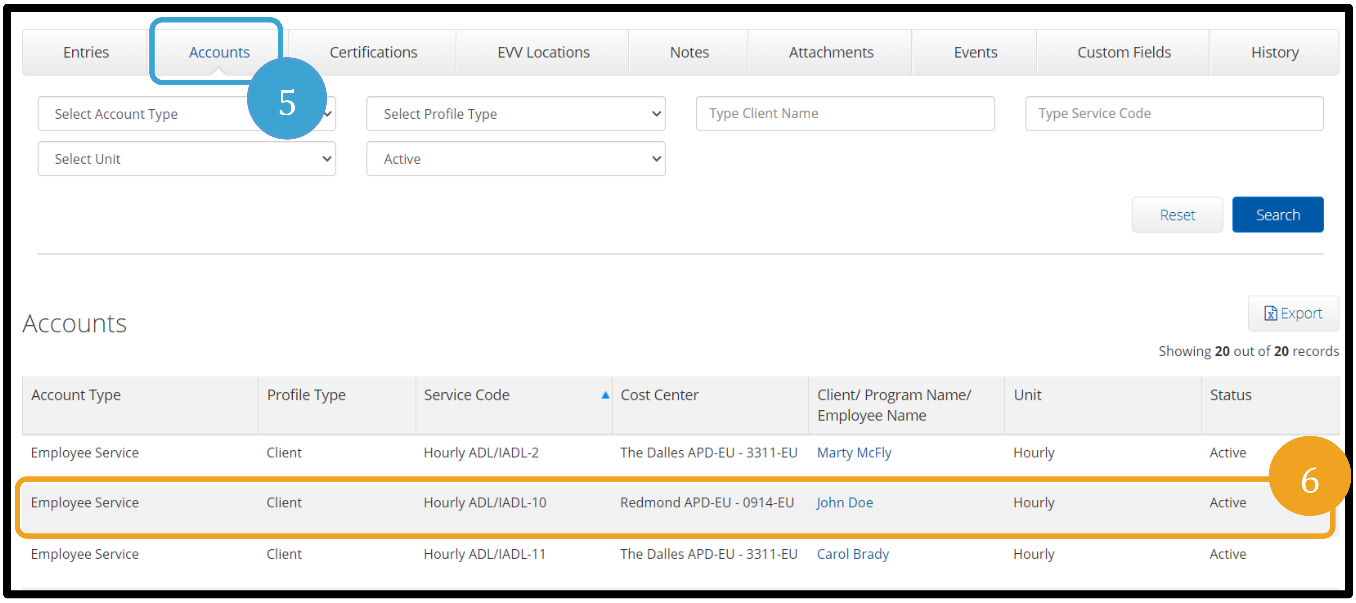
1. Log into OR PTC DCI.
2. Go to the provider's Employee Details page.
3. Check that the provider's Employee Details page is in an Active status in the following three areas: Status, Employee Status, and Authentication Status. If the Employee Details page shows an Active status in all three areas, go to step 5 to check their accounts.



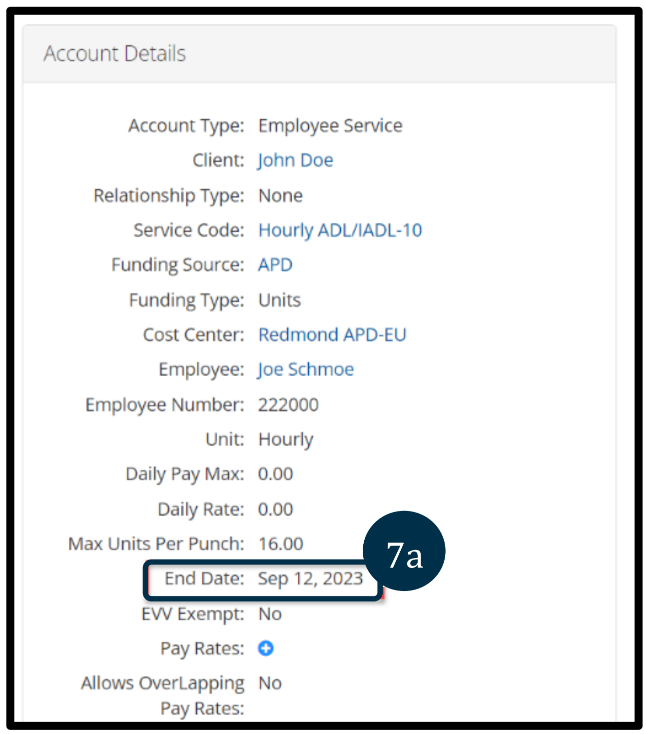
4. If the Employee Details page shows an Inactive status, a relink request to re-activate the provider's profile is needed. If the provider needs to be relinked to one or more consumers, include a request to re-activate the profile in your relink request.



5. Scroll down and select the Accounts tab. You will see the provider's active service accounts.
6. Look for the consumer's name on one or more of their service accounts.

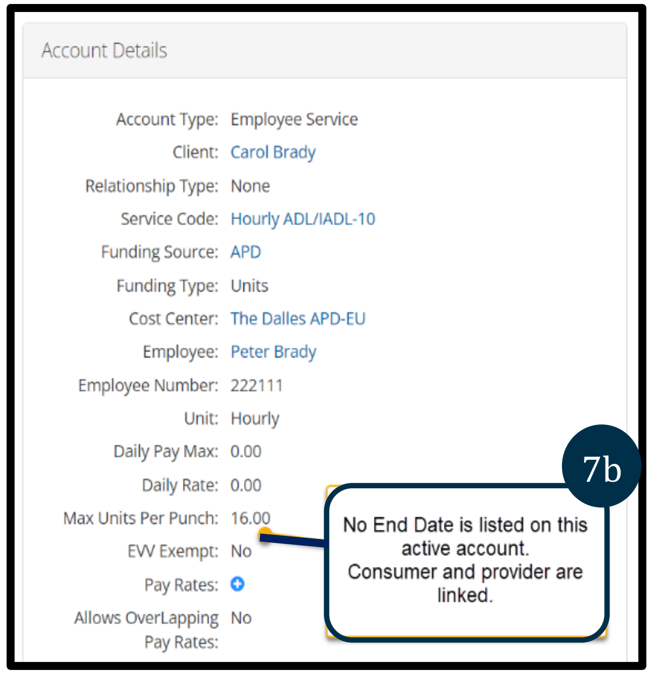


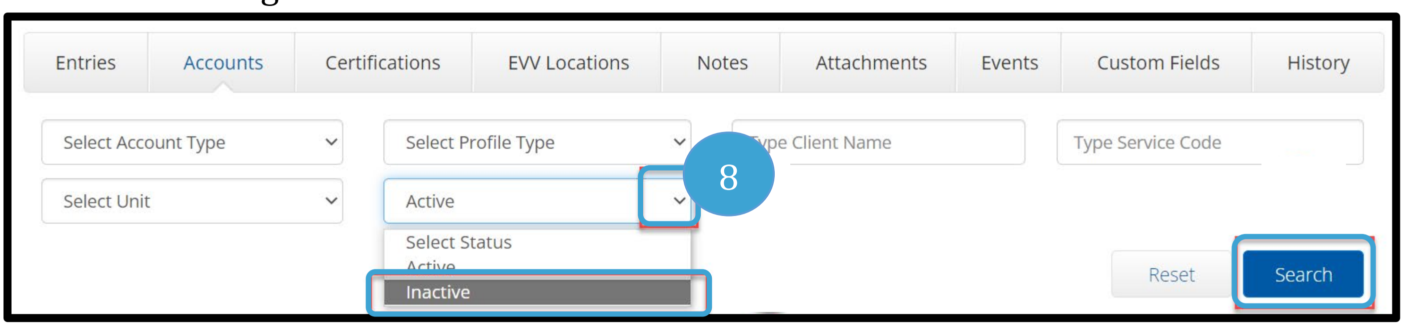
7. If one or more of the service accounts has the consumer's name, you must check the service account(s) to see if there is an end date.
   a. Click on an Employee Service account with the consumer's name to see the account details. If you see an End Date, they are unlinked. A relink is needed. Send an email to the PTC Support Team asking for a relink.



   b. If you do **not** see an end date, the consumer and provider are linked. The provider can claim time and mileage for this consumer once the vouchers have been created in Mainframe. A relink is not needed.

8. If none of the service accounts show the consumer's name, change the filter on the status (defaults to Active) to show Inactive accounts. Click Search.
9. If you see an inactive Employee Service account for the consumer, the consumer and provider have been unlinked and a relink is needed. Send an email to the PTC Support Team asking for a relink.





10. If you do not see any active or inactive Employee Service accounts with the consumer's name, this consumer and provider have never been linked. Create vouchers in Mainframe. This will prompt the PTC Support Team to create any needed accounts, linking the consumer and provider within the next two business days. A relink is not needed.

Recommended Relink Process

The PTC Support Team recommends the following process for offices to ensure relinking is completed correctly and timely:

1. When a new service plan is created or a change to the service plan occurs, the case manager logs into OR PTC DCI and reviews the consumer's or provider's Accounts tab to determine if a relink is needed (see Check if a Relink is Needed (From the Provider's Profile)).
2. If the consumer and provider need to be relinked, the case manager notes that on the 546 form and sends it to their voucher team. The voucher specialist receives the 546 form and emails the PTC Support Team to relink the consumer and provider. The voucher specialist should not take action on the 546 form until the relink is completed.
3. Once the relink has been completed, the voucher specialist processes the update requested on the 546 form in Mainframe.

Note: Your office may choose a different process, but it is imperative that a staff member is checking OR PTC DCI to determine if a relink is needed and requesting them when needed before creating vouchers.

Timing of Relink Request

Relink requests must be sent to the PTC Support Team prior to voucher creation whenever possible. If vouchers were already created, please note this in the relink request so the PTC Support Team can take the additional action needed to send the authorizations to OR PTC DCI. Relinking after the vouchers are created, and not letting the PTC Support Team know that vouchers were created, will result in the vouchers being "stuck" in Mainframe. The provider will not be able to claim time until the PTC Support Team resends the vouchers.

How to Request a Relink

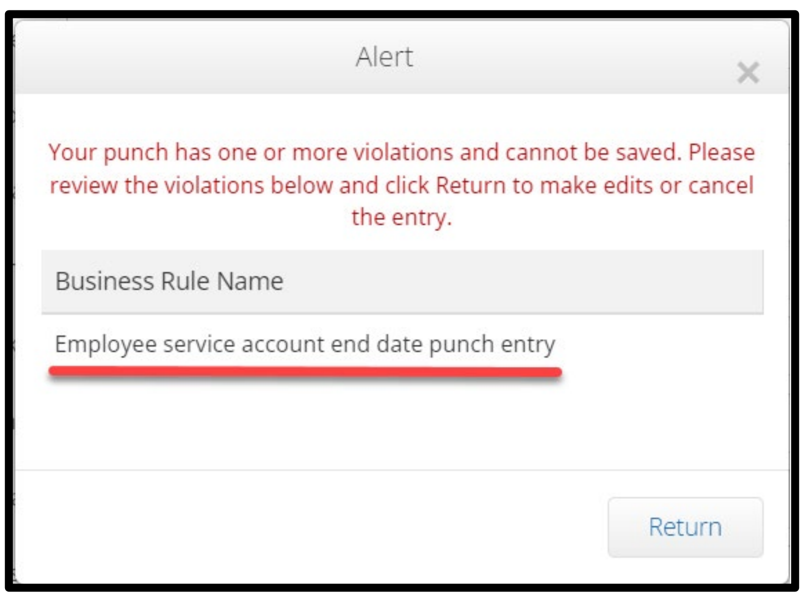
Email the PTC Support Team at PTC.Support@odhsoha.Oregon.gov with the following information:

Subject:	Relink
Body of email:	Please relink this consumer and provider. Consumer name: Prime number: Provider name: Provider number: Start work date: Whether vouchers were created yet:

Relinks are completed within one business day.

Unlinking and Relinking Troubleshooting

Scenario One: Employee service account end date punch entry



Problem:

Provider reports when they tried to make a time or mileage entry for their consumer, they received an error "Employee service account end date punch entry" and are not able to claim time or miles.

Solution:

When a provider receives the error "Employee service account end date punch entry", it means there is an end date on the service account from when the provider previously worked for the consumer and stopped working. The provider cannot claim time or mileage after this date. A relink request must be sent to the PTC Support Team if the provider is working again. Please see How to Request a Relink. Once the PTC Support Team relinks the provider to the consumer, the provider will be able to clock-in and claim time and miles. The provider will need to make historical entries for any time they were unable to claim prior to being relinked.

Scenario Two: Provider cannot find consumer to clock-in

Problem:

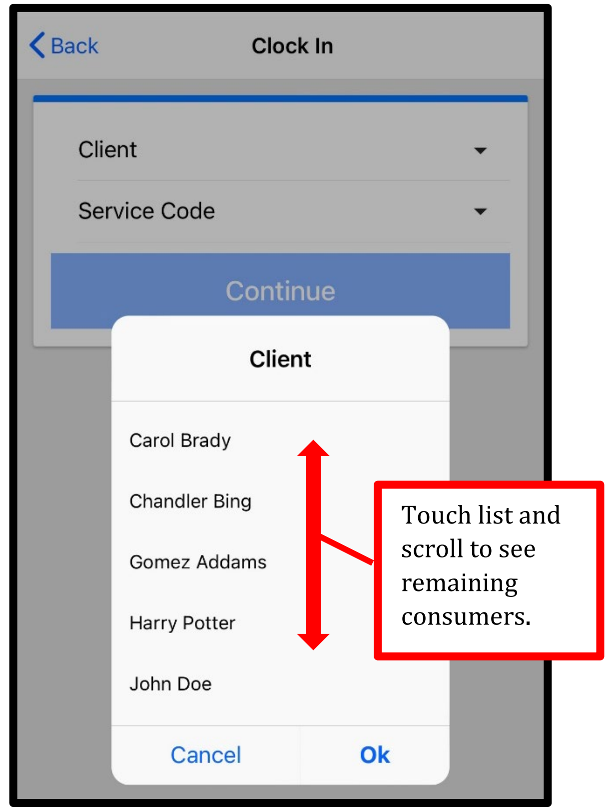
Provider reports they are trying to clock-in for their consumer and cannot find them in OR PTC DCI. The consumer is not showing on their client dropdown list of consumers during clock-in on the mobile app.

Solution:

When a provider reports they cannot find their consumer in OR PTC DCI, one of three problems could exist. First, check if the provider is linked to the consumer by following the steps in Checking the Link status.

1. If you find the provider/consumer pair have no active or inactive accounts, check if or when vouchers were created in Mainframe. It takes the PTC Support Team two business days to create new accounts in OR PTC DCI after vouchers are created. If vouchers were created and two business days have already passed, please email PTC.Support@odhsoha.Oregon.gov.
2. If you find the provider/consumer pair have inactive accounts, a relink request must be sent to the PTC Support Team if the provider is working again. Please see How to Request a Relink. Once the PTC Support Team relinks the provider to the consumer, the provider will then be able to clock-in and will need to make historical entries for any time they were unable to claim prior to being relinked.
3. If you find the provider/consumer pair have active accounts and no end date is present on the service accounts, check the number of consumers the provider is currently linked to. In the mobile app, only the first five consumers show on the

provider's client dropdown list on the clock-in screen. Any remaining consumers the provider is linked to are seen by utilizing a scrollbar on the dropdown list. This scrollbar option is often missed by providers, leading them to think the consumer is not present as an option to clock-in for. Please explain this scrollbar option to the provider and confirm if there are any consumers listed that the provider is no longer working for and has claimed all time and mileage for. Please see How to Request an Unlink if the provider requests any of the consumers on their dropdown list to be removed.



Scenario Three: Provider wants a consumer removed from their profile in OR PTC DCI

Problem:

An unlink request was already sent, but the provider reports they can still see their consumer who passed away on their clock-in list and wants them removed immediately.

Solution:

When an unlink request is sent to the PTC Support Team, if it is not specified that the provider has claimed all time and mileage, or if it does not request they be unlinked immediately, the PTC Support Team will add an end date to the accounts. An end date prevents the provider from claiming any time or mileage beyond that date. The PTC Support Team must leave the provider linked to the consumer for 365 days to allow the provider time to claim any needed historical entries. If it is specified in the unlink request that all time and miles have been claimed or the provider wants to be unlinked immediately, the PTC Support Team can fully unlink and inactivate accounts at that request. Please email PTC.Support@odhsoha.Oregon.gov to fully unlink the provider at their request if an unlink request has already been sent, or make sure to include this in your original request and follow How to Request an Unlink.