

# Staff – Over and Underpayments QRG

**Purpose:** This guide provides instructions for staff on what actions to take when an over or underpayment request is needed.

**Outcome:** Staff have properly submitted over and underpayments as needed.

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 (7/28/2024):

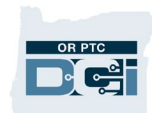
1. The provider creates a historical entry for the unpaid time or miles.
2. If the entry is within the authorized hours and/or miles, then the underpayment will process automatically.
3. Payment is issued to the provider automatically.

## For Overpayment Entries worked after Phase 2A Go-Live (7/28/2024):

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.

**Note:** For instructions on how to update entries and how to verify entries, see the [Time Entry Management Guide](#).

**Note:** See the [Provider Payment Adjustment and Troubleshooting](#) section of APD Staff Tools for further over and underpayment resources.



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**Note:** Instructions for how to work over/underpayments before Phase 2A Go-Live will no longer apply after 7/19/2025. This is due to providers being allowed 365 days to make historical entries from the day worked.

## **For Underpayment Entries worked before Phase 2A Go-Live (7/28/2024):**

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 (7/28/2024):**

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.

Email over and underpayment forms to: [APD.CEPpayments@odhsoha.oregon.gov](mailto:APD.CEPpayments@odhsoha.oregon.gov) (APD)  
[SPD.Provideradjustment@odhsoha.oregon.gov](mailto:SPD.Provideradjustment@odhsoha.oregon.gov) (OPI)