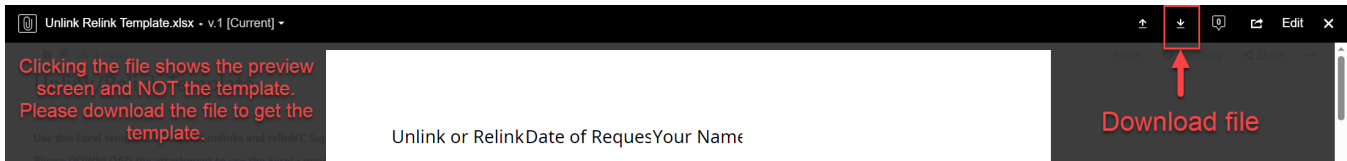


Unlink/Relink Template

Use this Excel template to request unlinks and relinks from the PTC Support Team. This ensures that the unlink and relink data is being tracked correctly by the PTC Support Team.

Please DOWNLOAD the attachment to use the Excel file. Selecting preview will not let you use the file.



Unlink: Local offices should request an unlink from the PTC Support Team when a provider stops working for a consumer. The PTC Support Team will add an end date to the service account(s) that matches the last day worked. One year after the last day worked, the PTC Support Team will inactivate the service and funding accounts.

Relink: When a provider starts working for a consumer again after they were previously unlinked, the PTC Support Team must relink the consumer /provider pair before the provider can claim time/mileage again. Relink requests must be sent by the local office when a relink is needed. The local office should request the relink BEFORE new vouchers are created. If vouchers have already been created when a relink is needed, the local office must inform the PTC Support Team that a relink is needed AND that the vouchers were already created.

Important! If a consumer and provider have been unlinked, they must be relinked before the provider can claim any time or mileage for that consumer. Local office staff must check to see if a consumer and provider need to be relinked, and if they do, a staff member must send a relink request to the PTC Support Team at PTC.Support@odhsoha.oregon.gov. Please download the Unlink/Relink template and use it for unlink and relink requests.

How to check if a consumer and provider need to be relinked:

1. Log into OR PTC DCI.
2. Navigate to the consumer's profile page.
3. Scroll down and click on the Accounts tab.
4. Check for any accounts with the provider's name on them.
5. If you see an account with the provider's name, click on one of the service accounts to see if there is an end date in the End Date field. Note: if there is no end date on the account, the End Date field will not appear.
6. If there is an End Date, ask the PTC Support Team to relink the consumer and provider via email.
7. If you don't see any accounts with the provider's name, they still may have inactive accounts together. In the search criteria on the Accounts tab, filter by accounts with an inactive status and click Search.
8. If you see an inactive account with the provider's name, they have been unlinked and need to be relinked. Request a relink from the PTC Support Team.

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