Provider Time Capture

Fall 2023-Winter 2024 Webinar Series

Phase 2A Basics

Reports

STIM Time Entry

Payroll Batches

Presenters:
Gwen Ayers
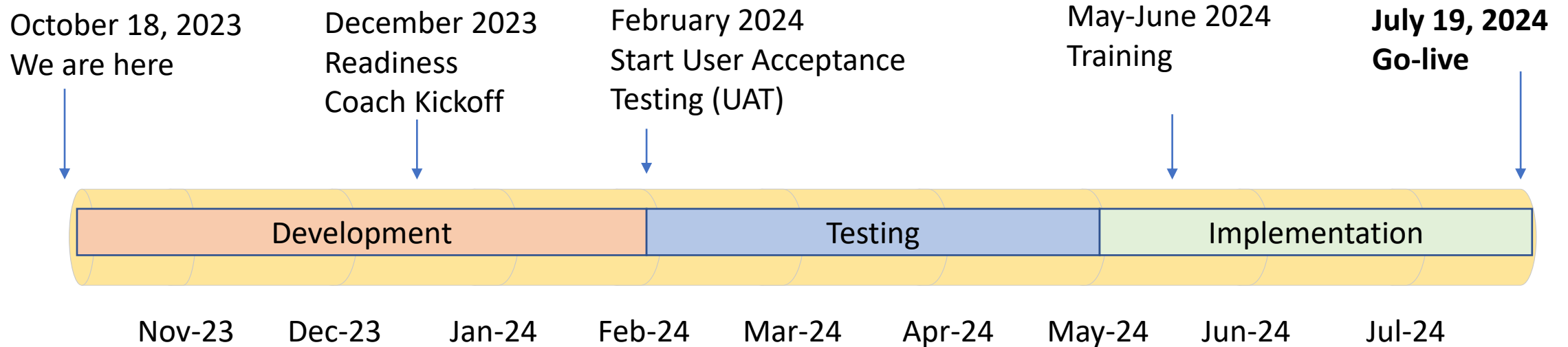Allison Vidaurri
Mckynna Capson
Nicole Martin

Agenda

- Phase 2A Basics
- Helpful Reports in OR PTC DCI
- Mainframe STIM Time Entry
- Payroll Batches
- Q&A

Phase 2A Basics

- Planned for implementation in late July 2024

- Will automate payroll batch entry into STIM – eliminates manual data entry!*

- Time Entry errors will go to the STIQ screen which will be monitored by local office staff

- Will make Mainframe vouchers editable and automate the PTC authorization updates

*For entries made after the Phase 2A go-live date

Phase 2A- Payroll Automation

OLD for local offices:
- Creating payroll batches in OR PTC DCI
- Entering time and mileage into STIM

NEW for local offices:
- STIQ screen tasks for time entry errors

*NOTE: Historical entries will steadily decrease over time. After 365 days, offices will no longer need to do any manual entry into STIM.

Entries with a start date of **go-live or later**:
- PTC Support will pull batches and enter into STIM via automated process.

Historical entries with a start date **prior to the go-live date**:*
- Will need to be entered into STIM manually following current process.
- PTC Support will run batches to capture those entries and email them to offices to process in STIM.

Time /mileage entries with errors will go to the STIQ screen to be worked by staff.

Phase 2A- Changes to Underpayments

- If a late entry is made in OR PTC DCI that does not exceed the authorized hours, this will automatically go through payment processing.

- This means the local office will **not** need to request an underpayment in most situations.

Phase 2A- Automation of Authorization Edits

Edit the Mainframe voucher--
No more voiding and reissuing!

The OR PTC DCI Authorization is updated
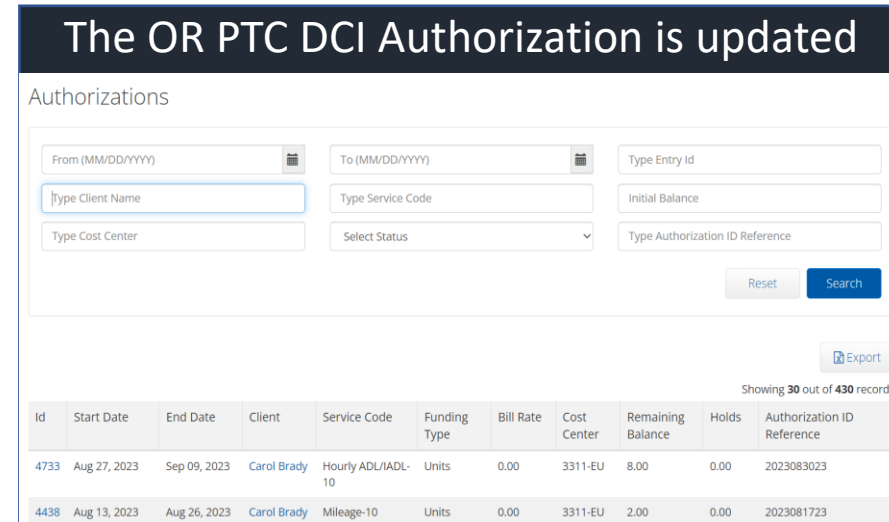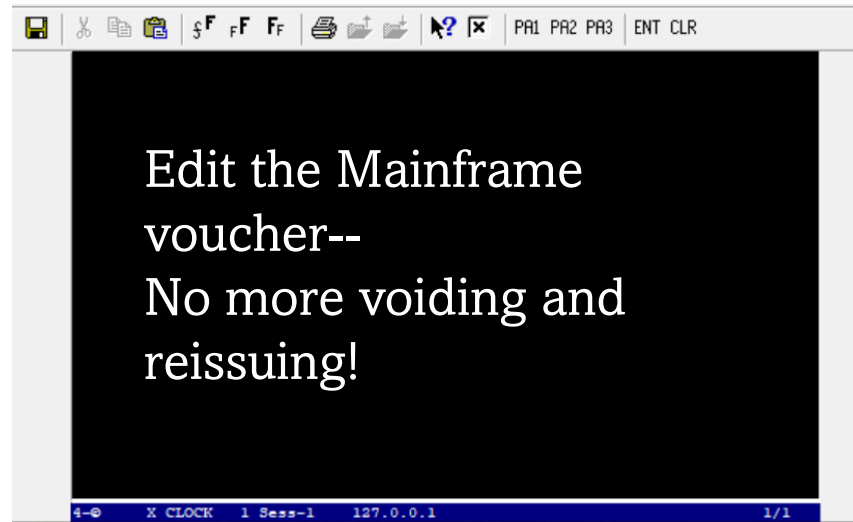
- You will be able to **edit** the voucher in Mainframe, rather than voiding and reissuing it. The update will send to OR PTC DCI automatically.
- If a voucher needs to be **ended** or **voided**, void in Mainframe and the authorization will be automatically rejected in OR PTC DCI.
- If a consumer **changes programs**, void the voucher in the current program and reissue under new program in Mainframe. OR PTC DCI will update automatically.
- **Mileage** can be added to vouchers that did not have mileage previously.

Questions about Phase 2A?

Helpful Reports in OR PTC DCI

Unverified entries report

Payroll batch details report

Punch entry details report

Guide - Reports

STIM Time Entry Tips in Mainframe

1

Track progress

- When entering time entries into STIM, make sure you are tracking your progress on the payroll batch spreadsheet so no entries are missed.

2

Compare PTC and STIM

- Compare the number of entries and in/out times on your spreadsheet to the number of entries and in/out times input into STIM to ensure they match.

3

Track batches

- Make sure each full batch is being tracked in some way to ensure all batches are entered into STIM.

4

Check AM/PM

- Make sure AM/PM is being entered correctly into STIM. Mixing these up can lead to incorrect payments.

Consistency between OR PTC DCI and STIM in Mainframe

Entries that are not in OR PTC DCI should never be entered into STIM. It is strictly against policy to enter time or mileage in STIM that was not claimed by the provider in OR PTC DCI. If an entry needs to be edited before being entered into STIM, it must be edited in OR PTC DCI first.
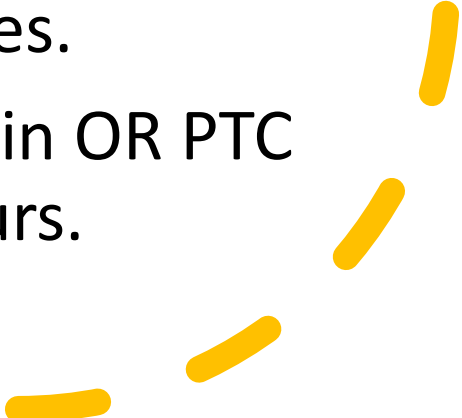
The following guide has tips on dealing with some common OR PTC DCI issues, including batch/payroll issues: [Troubleshooting Guide](#)

Exceptions to 100% consistency

Exception 1 - Rounding entries:

• Time entries from OR PTC DCI payroll batches are not always in full minutes, which means the total entries may be short of the full authorized hours by less than a minute. If a voucher is short of being the full authorized hours by less than one minute, you should round up **one** entry in STIM to use the full authorized amount. This ensures the provider is not occasionally shorted by one minute due to rounding issues.

• For example, 79.99 hours claimed in OR PTC DCI should be rounded up to 80 hours.

Exceptions to 100% consistency, cont'd

Exception 2 - Midnight shifts:

• If you see a midnight shift in a payroll batch report (i.e., one entry ends at 11:59 pm and the next entry starts at 12:00 am), please correct the time in STIM by changing 11:59 pm to 12:00 am.

• The way OR PTC DCI handles shifts crossing midnight is different from STIM. Until OR PTC DCI has rolled out interfaces that will automate the process, this minute needs to be added in STIM manually. Please make sure you and your team members are making this adjustment on all midnight entries.

Exceptions to 100% consistency, cont'd

Exception 3 - Daylight Savings:

• The PTC Support Team will reach out when there are entries that need to be adjusted in STIM due to Daylight Savings. These are rare.

Questions?

- Reports
- STIM time entry

Payroll Batch Reminders

Always include your cost center:

When creating the payroll batch, don't forget to select the appropriate cost center (select the cost center ending with "-EU").

Not selecting a cost center will run a payroll batch for the entire state of Oregon.

If you accidentally run a statewide payroll batch, **STOP**. Do not take action in PTC. Inform the PTC Support Team immediately by emailing PTC.Support@odhsoha.oregon.gov.

Use the naming convention:

Branch number_yyyy-mm-dd_military time (for example: **BR3013_2021-03-11_17-06** is the name of a batch pulled for branch 3013 on 3/11/2021 at 5:06 PM)

Guide - Payroll Batch and Time Entry

Payroll / Payroll Batches / New Batch

Create Batch

| Criteria | Batch Summary |

Name:	Type Batch Name
Description:	Add Description for Batch
Up to Date:	09/22/2023
Cost Center Code:	Type Cost Center
Account Type:	All
Profile Type:	All
Service Code:	Type Service Code
Employee Type:	All
Entry Type:	All Entry Type
Unit Type:	All Unit Type
Employee Name:	Type Employee Name

Add From File

Cancel   Next

Payroll Batch Reminders, cont.'d

Batch Details

Batch Id: 55
Date: Sep 15, 2023
Status: Transmitted
No. of Credit Entries: 39
No. of Debit Entries: 39
Credit Total: 46.95
Debit Total: -46.95
No. of Employees: 3

Add the up to date:

The system will pull in all entries that have an Approved status and a date of service prior to or on the Up to Date selected.

Make sure the batch status is "Transmitted":

After running the batch, make sure the entire process is complete by checking that the status is "Transmitted", and not "Pending" or "Processed." To check for any batches that may not have been completed, you can filter by Pending or Processed in the Payroll tab.

Guide - Payroll Batch and Time Entry

Payroll / Payroll Batches / New Batch

Create Batch

Criteria   Batch Summary

Name: Type Batch Name

Description: Add Description for Batch

Up to Date: 09/22/2023

Cost Center Code: Type Cost Center

Account Type: All

Profile Type: All

Service Code: Type Service Code

Employee Type: All

Entry Type: All Entry Type

Unit Type: All Unit Type

Employee Name: Type Employee Name

Add From File   Cancel   Next

Need to double check a batch?

- An original version of a batch can be downloaded again.

- You or another staff member may need to compare an original batch if there is an error. You might also do this as a way to make sure all entries were entered into STIM.

- Go to the payroll screen, select the batch, go to Attachments, and select the download icon.

Tip: To search for a batch, do not search by typing "br" into the batch name field. Instead, type the branch number or narrow down the dates before typing "br".

Enroll in the Learning Lab!

Registration is required

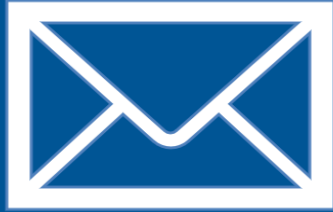**Register for the Learning Lab:**

October 25th

2:05-3:25 PM

[Link to Workday Course](#)

Resources

PTC Project Email

- **PTC.Support@odhsoha.oregon.gov**
- **The PTC Support Team monitors this inbox daily**

PTC Project Website

- **PTC.Oregon.gov**
- Includes learning materials and project updates