Staff - Web Portal Guide

OR PTC DCI

VERSION 2.2

Staff- Web Portal Guide

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Disclaimer

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

Who uses the Web Portal?

Providers

- Enter historical time and mileage entries.
- Enter fob entries.
- View/Edit entries.
- View authorizations and available balance for a given pay period.
- Use the messaging module.

Consumers/Consumer Employer Representatives (CERs)

- View entries made by their provider(s).
- Signoff on or reject entries.
- Use the messaging module.

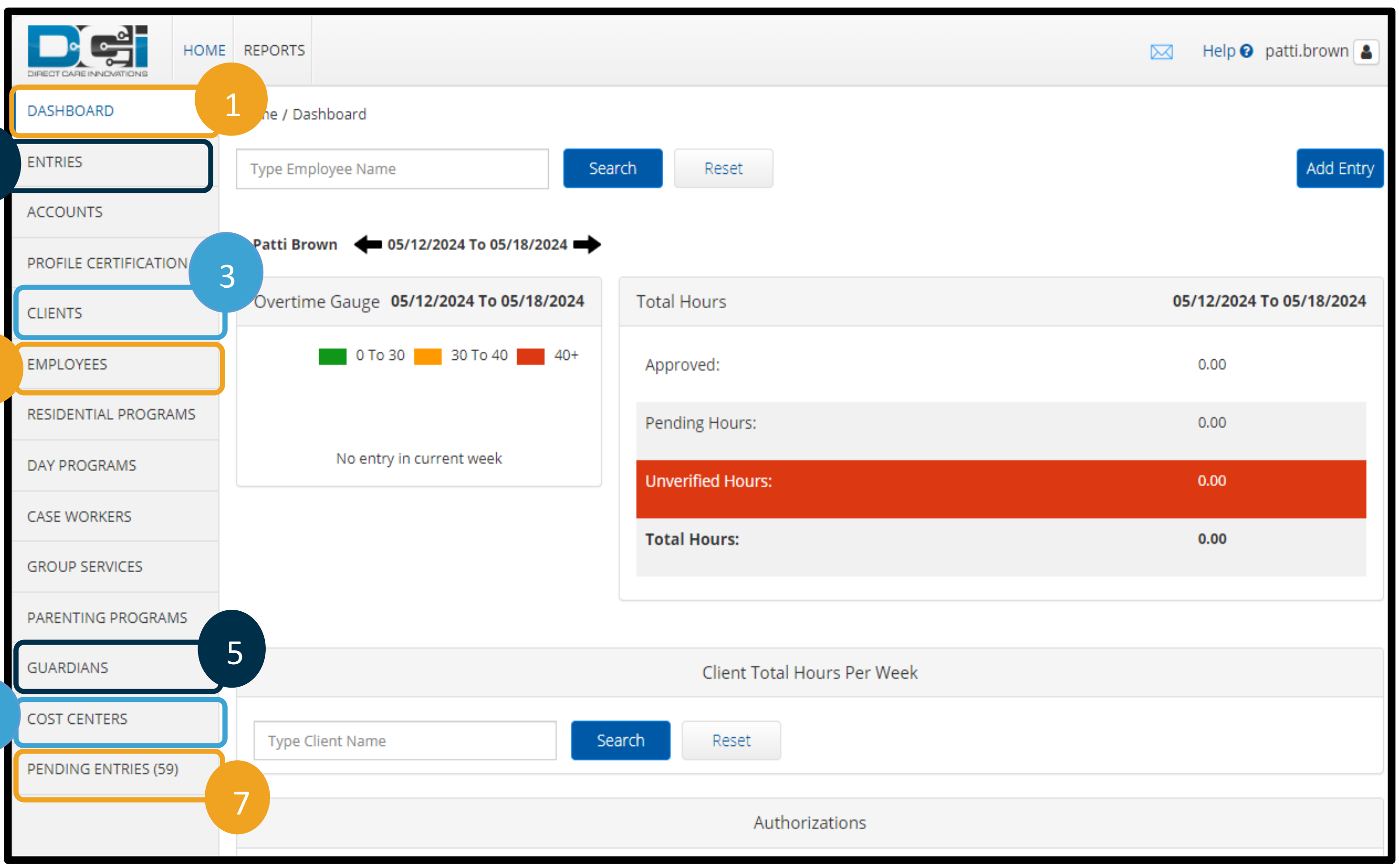
Staff

- Track/Update provider, consumer, and CER information.
- View/Edit a provider’s entries.
- Use the messaging module.
- Generate and view reports.

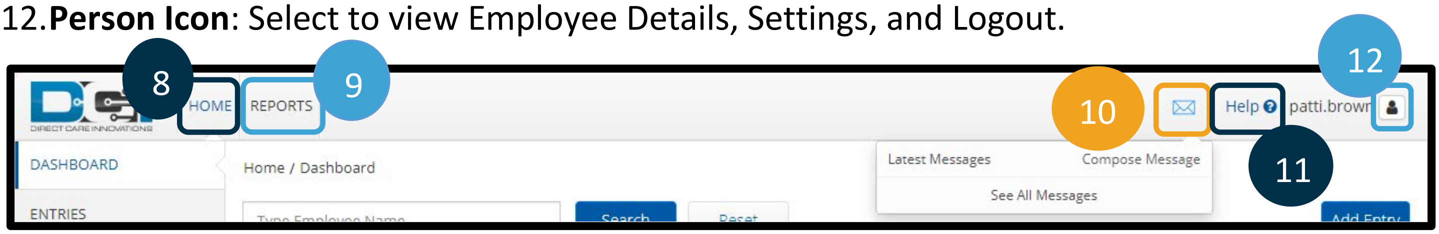
Menu Overview

After logging into the web portal, staff can select and view the following:

1. **Dashboard**: View high priority message alerts, Overtime Gauge, Client Total Hours Per Week widget, Authorizations widget.
2. **Entries**: This will be blank for staff.
3. **Clients**: Select to view all consumers in cost centers you have a role over.
4. **Employees**: Select to view all providers.
5. **Guardians**: Select to view all consumer employer representatives (CERs) in cost centers you have a role over.
6. **Cost Centers**: Select to view all Cost Centers you have a role over.
7. **Pending Entries**: Select to view all pending entries in cost centers you have a role over.



8. **Home Tab**: Select to return to dashboard and menu view.
9. **Reports Tab**: Select to view reports available.
10. **Messaging Module**: Select to send messages to and receive messages from other OR PTC DCI users as well as automated messages from OR PTC DCI.
11. **Help Button**: Select to view Oregon PTC DCI Help Catalog.
12. **Person Icon**: Select to view Employee Details, Settings, and Logout.

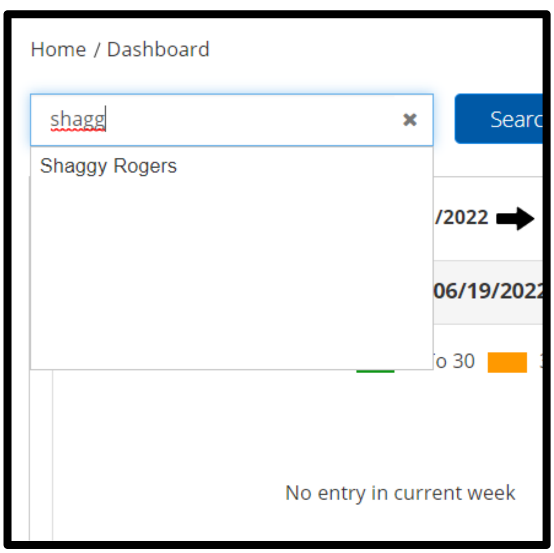


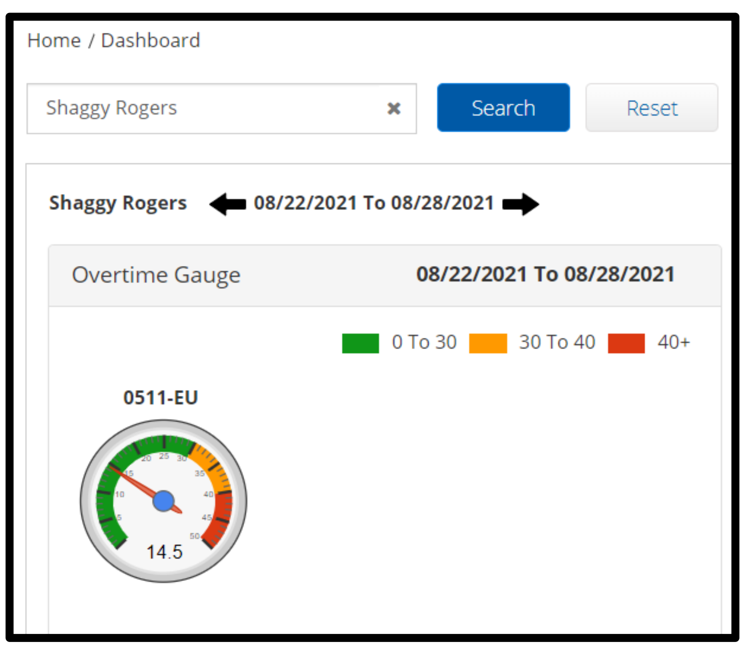
Dashboard Overview

Overtime Gauge

The Overtime Gauge is present on the dashboard for all users with an Employee Profile (this includes providers and staff) and shows the total hours a provider worked during the week selected for all consumers.

- Staff with the supervisor or auditor role can view the Overtime Gauge for any provider. To view the overtime gauge, type the provider's name into the search bar at the top of the dashboard.
- The arrows on each side of the date can be used to toggle between different weeks for the provider Overtime Gauge being viewed.
- This gauge can be useful to get an overview of the hours a provider is working.



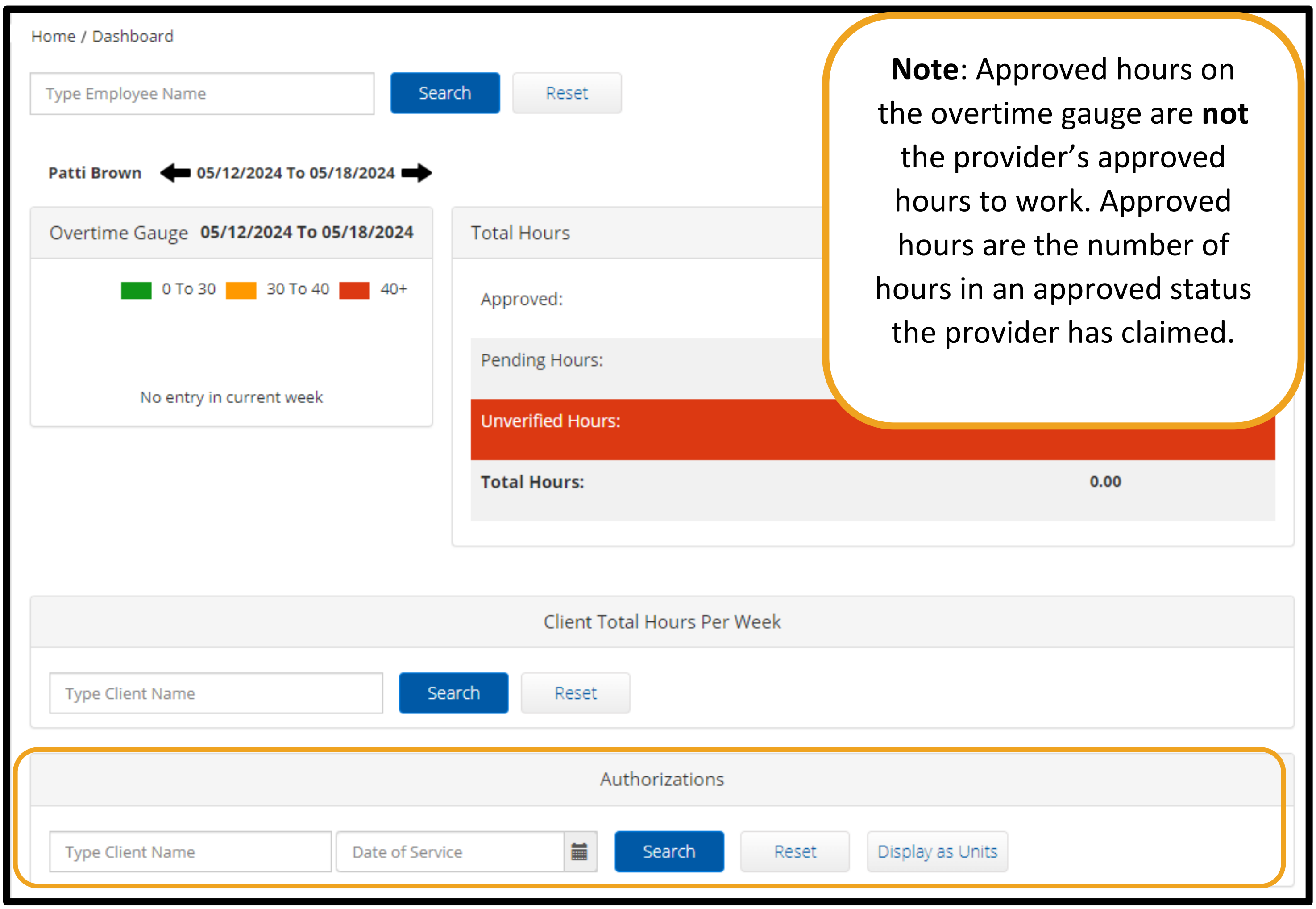


Authorizations Widget

The Authorizations Widget on the Dashboard is available to the following user types:

- Employee Profile with the Supervisor Role (most staff fall into this category), though they can only look at consumers in Cost Centers they have this role over.
- Employee Profile with no role (providers)
- Client Profile
- Guardian Profile (Client Employer Representative (CER))

The Authorizations Widget on the Dashboard is visible on the user's main Dashboard under the Home Tab.

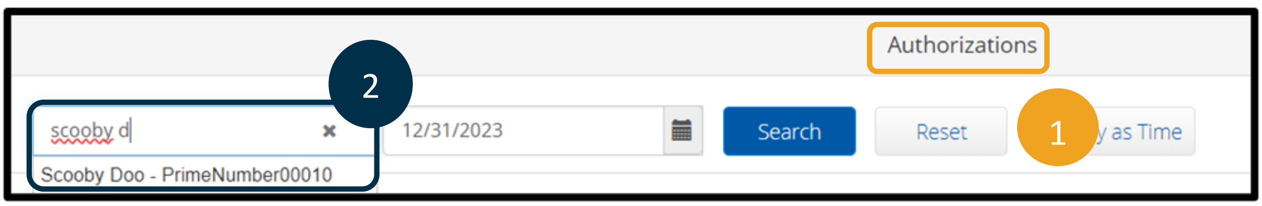


The Authorizations Widget on the dashboard displays the following:

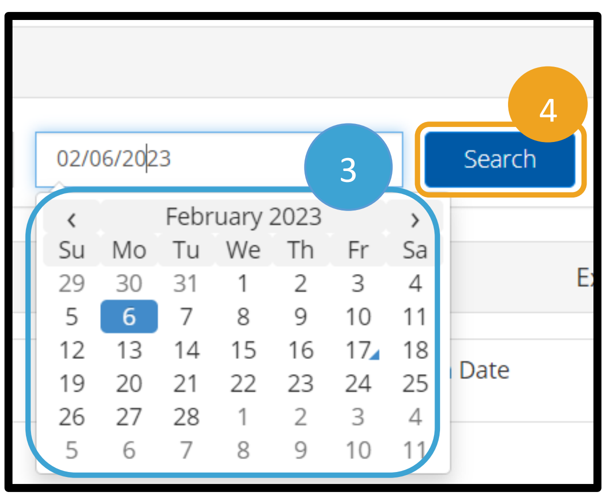
- Start and End Date of the pay period
- Initial Balance: the number of authorized hours/miles
- Remaining Balance: the number of hours/miles not in an approved or processed status
- Pre-Authorization Holds: the number of hours/miles in a pending status
- Current Available Balance: the number of hours/miles the provider has left to claim (calculated as Remaining Balance minus Pre-Authorization Holds)

To use the Authorizations Widget:

1. After you log into the web portal, you 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. Begin typing the consumer's name in the Type Client Name field. After three or more characters are typed, a drop-down list will appear. Select the consumer's name from the drop-down.

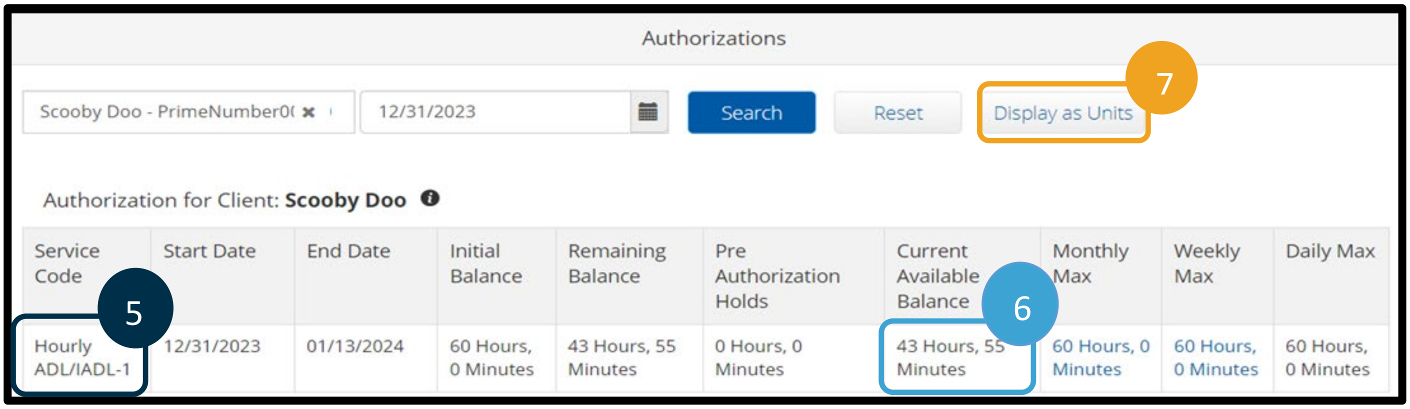


3. Select the Date of Service field. From the calendar, select a date within the pay period in question. For example, if the provider wants to know what their Available Balance is for the current pay period, enter today's date.
4. Select Search.

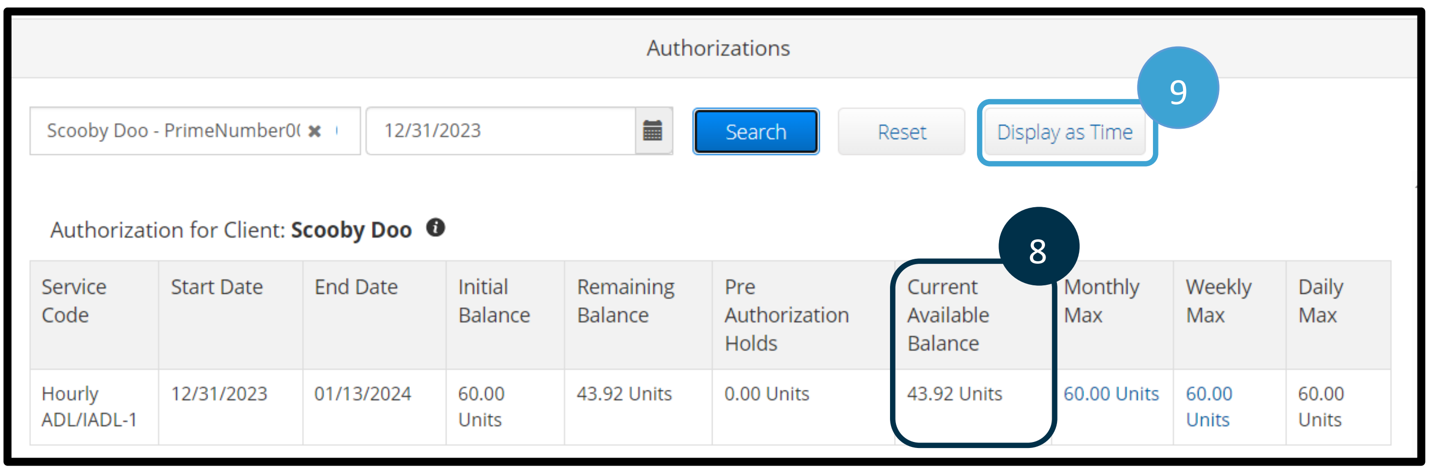


5. All authorizations for this consumer and pay period will appear. Identify the service code associated with the provider in question to find the correct authorization.

6. Identify the Current Available Balance for the specific authorization of interest. 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.
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.”

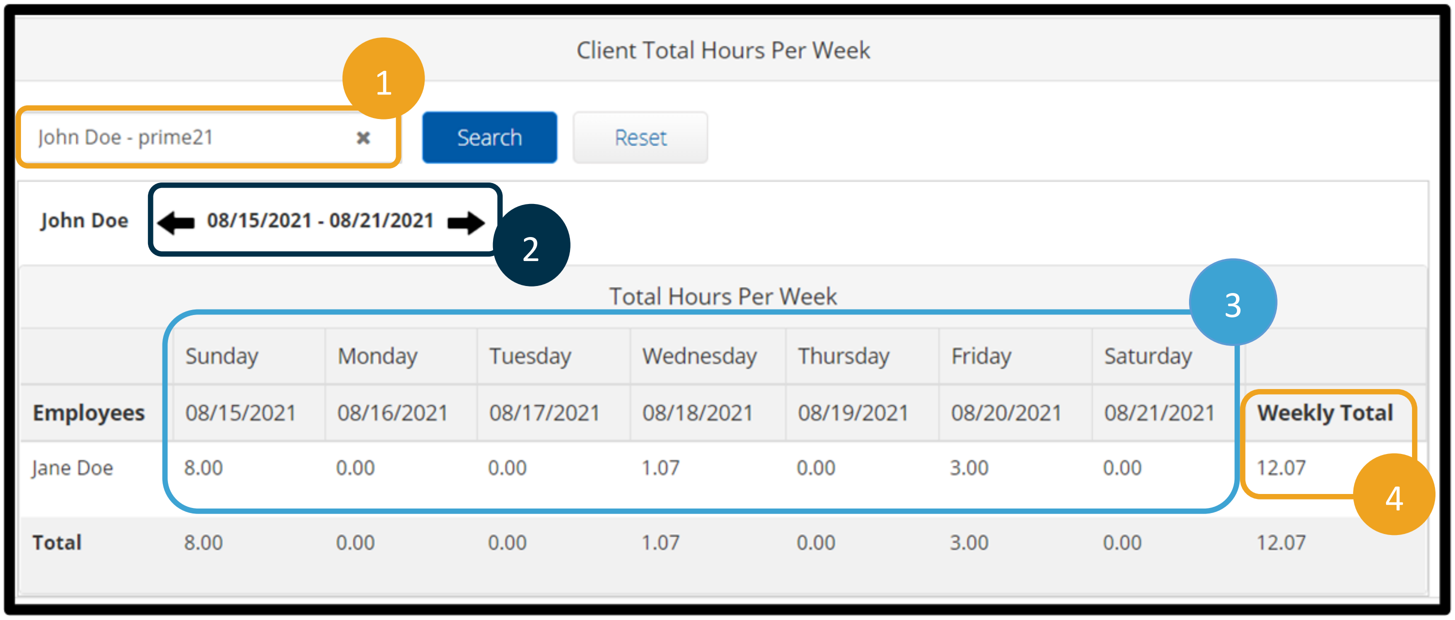


Client Total Hours Per Week

This is a quick way to determine how many hours all providers for a particular consumer have worked in a week.

To use the Total Hours Per Week Widget:

1. Search for the consumer by name. The consumer’s name and prime number will display. Due to multiple consumers with the same name, always check that the prime number is correct.
2. Utilize the right or left arrows next to the date selection to view other weeks.
3. The number of hours claimed by the provider for the day will show under the date.
4. The weekly total adds the total number of hours claimed by the provider for the week selected.

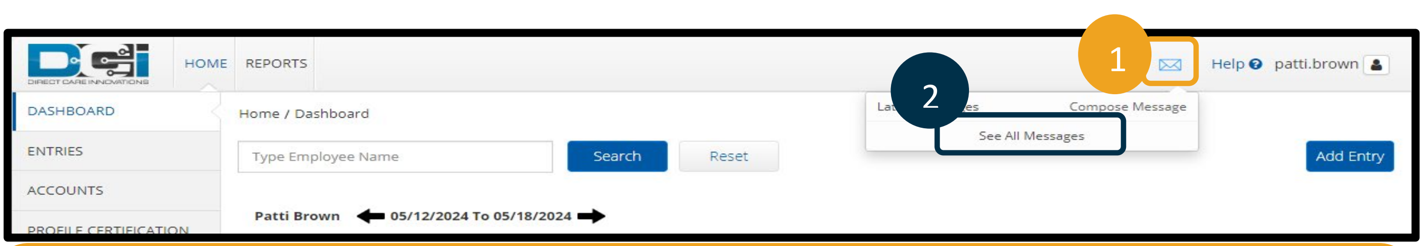


Messaging Module Overview

The Messaging Module is not a recommended way to contact OR PTC DCI users due to limitations in functionality, explained in Messaging Module Restrictions. The Messaging Module allows users to send messages to and receive messages from other OR PTC DCI users. It also allows users to receive automated messages from OR PTC DCI, which is the most useful function.

To access the Messaging Module:

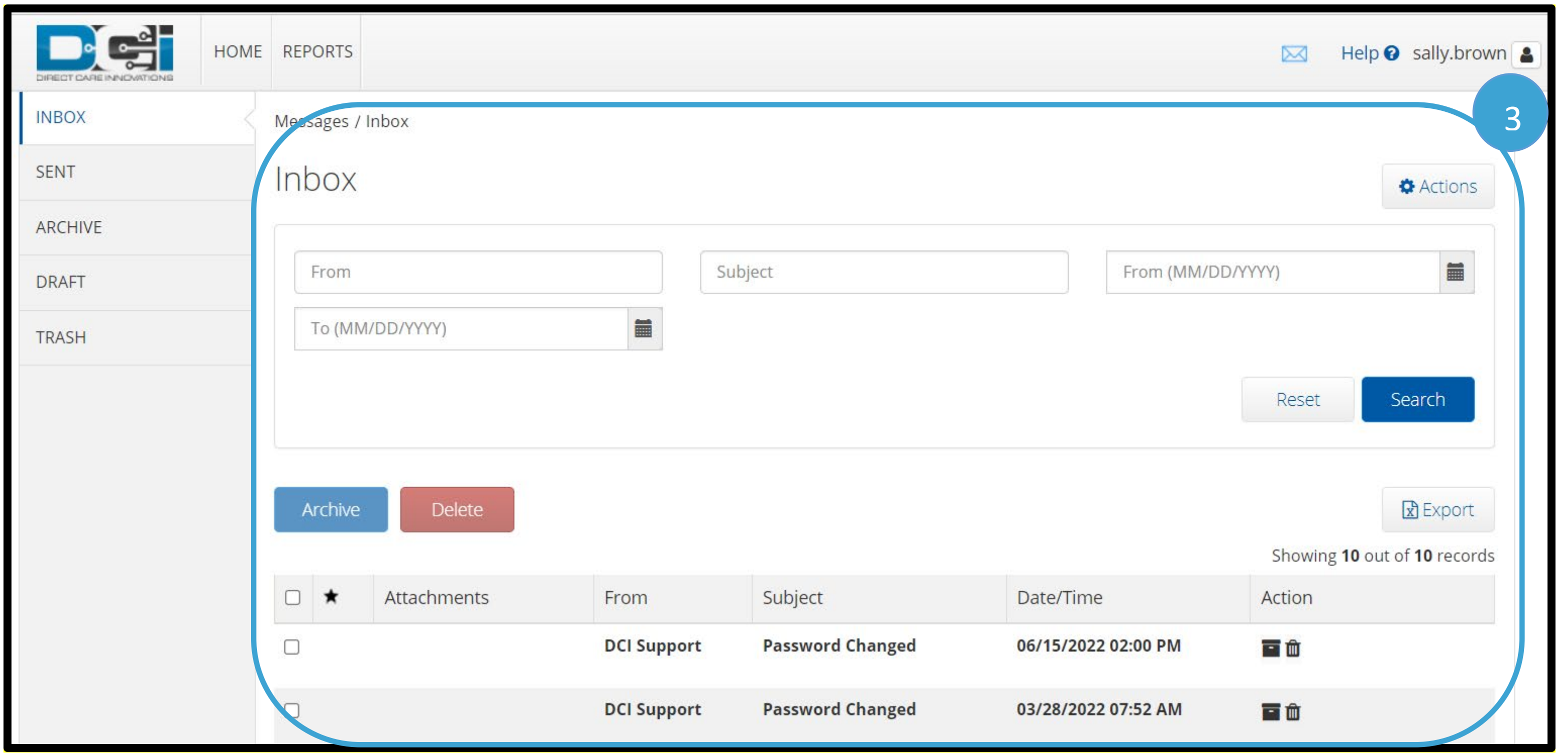
1. Select the envelope in the upper right-hand corner of the screen.



Note: While a red bar will appear across the top of the Dashboard screen if there are unread high priority messages, there is no indicator on the envelope itself to alert the user when there is a new regular priority message.

2. Select See All Messages.

3. The Inbox will display. If you are looking for specific messages, you can use the search functionality.



Messaging Module Restrictions

Users can only send messages to specific individuals based on the Cost Centers they have roles over. When a direct message is sent, the user will receive an email notifying them there is a new message in the OR PTC DCI system, but the email does not include the message content and the user must log in to OR PTC DCI to check their messages.

- Supervisor Role can send direct messages to the following individuals associated with their Cost Center(s)
    - Providers
    - Consumers
    - Consumer Employer Representatives

Note: If a user shares the same name with another user, there is no way to be sure a message is being sent to the correct person. It's best for staff to contact OR PTC DCI users via phone or email.

Messaging Module – Notifications

OR PTC DCI sends automated messages when certain events happen.

Events that trigger automated messages for different types of users include:

- All Users
  - **Reset Password** - A profile's password was reset by an administrative user.
  - **User Locked Out** - A profile is locked out due to entering an incorrect password five times in a row.
  - **Changed Password** - The user changed their own password.
  - **User Unlocked** - A profile is unlocked after being locked.
  - **PIN Changed** - A profile PIN is changed.
- Providers
  - **Signoff Rejected** - Client or guardian rejected one of your entries.
  - **Approved Authorization Related Business Rule Violation** - An entry that violated an authorization related business rule was approved by staff.
  - **Business Rule Validation Failed** - At least one enabled business rule failed for a particular entry.
  - **Unverified Punch Created** - Staff added a punch on behalf of the provider or edited an existing punch, resulting in an unverified punch.
  - **Compensate Punch Created** - An approved punch was canceled. A compensating punch is an offsetting punch that was created to cancel out the original approved punch.