



Auditor Guide

OR PTC DCI
VERSION 2.1



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Disclaimer

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

Common Terms and EVV

Common terms in OR PTC DCI are as follows:

- **Authorization** – Contains data for how many hours and/or miles the provider has available to work in each pay period.
- **Consumer** – A person who receives services from a provider. Sometimes referred to as a client, recipient, service recipient, Oregonian, or participant. In OR PTC DCI, the Client profile type is used.
- **Consumer Employer Representative** – A person selected by the consumer to help with Optional Signoff on the time a provider works. In OR PTC DCI, the Guardian profile type is used.
- **Cost Center** – This is equivalent to the branch. There are two different versions of cost centers in OR PTC DCI, one ending in EU (external user) and one not (i.e. 2011-EU and 2011). The cost center ending in “-EU” is where consumers are housed. This is also where entries are created by providers. The non-EU cost center is where staff profiles are housed.
- **Pay Period** – A pay period for a provider is a two week (14 day) time period that begins on Sunday the first week and ends on Saturday the second week.
- **Permissions** – Determines actions a user can take in addition to their role. The only permission staff may have in the system is the Authorization Admin Permission which allows them to edit authorizations.
- **Provider** – A Homecare Worker or Personal Care Attendant who provides services to consumers based on their authorization. In OR PTC DCI, the Employee profile type is used.
- **Punch Entry (Time Entry)** – An entry representing a time or mileage entry by a provider for services being performed for a consumer.
- **Roles** - Determines primary actions a user can take for a specified cost center. Staff can only be assigned one role per cost center. Roles are given over the non-EU cost centers.
- **Service Account** – Links the provider and the consumer in OR PTC DCI.
- **Service Code** – Represents what type of service is being provided (ex. Hourly, Mileage).
- **Signoff** – Term used to describe the optional process consumers use to verify punch entries created by their provider.

Electronic Visit Verification (EVV)

- OR PTC DCI was implemented to comply with federal regulations in the 21st Century Cures Act called Electronic Visit Verification (EVV).

- EVV requires states to capture the following data elements when Home Health Care Services are provided:
 - **Type** of service performed;
 - **Consumer** receiving care;
 - **Provider** who is providing care to consumer;
 - **Date** of the service provided;
 - **Time** the service begins and ends; and
 - **Location** services are provided.

Provider Overview

A provider enters time into OR PTC DCI using one of three EVV-compliant methods:

1. Mobile App (includes optional consumer verification)
2. Landline
3. Fob

*Aside from fob entries, a provider only uses the Web Portal when creating mileage entries or historical entries, or to edit an entry.

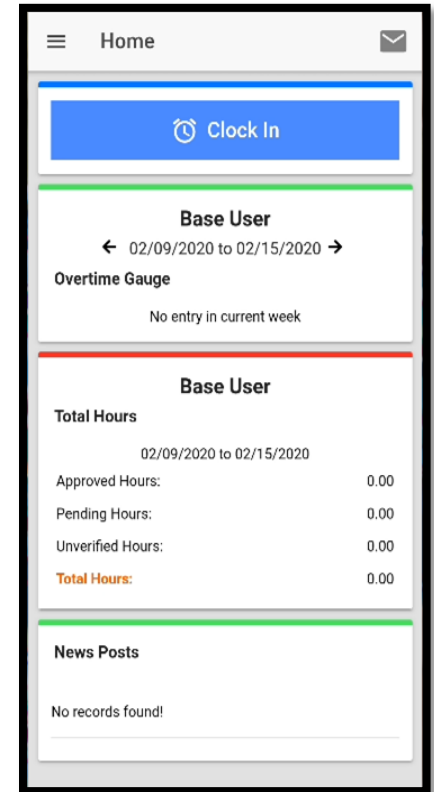
Note: Historical Entries and edited entries are not EVV compliant.





Mobile App Overview

- **Clocking-in:** Providers clock in from the home screen. They will select which consumer they are providing services to. The mobile app records the location of the user at clock in but does not continue to track location during the shift.
- **Clocking-out:** Providers clock out (again from the home screen) and attest that their time is correct. The mobile app records the location of the user at clock out.
- **Consumer Verification:** The consumer has the option to review and signoff on the punch entry submitted by the provider while clocking out.
- **Reviewing Hours:** Providers can see previous punch entries as well as how many hours they are authorized to work at the time of clock-in or when creating a historical entry. Additionally, the app maintains a count of hours used on a per week basis.



Mobile App Clock out Verification

Consumers are not required to sign off on their providers time entries.

However, the OR PTC DCI Mobile App continues to give consumers the option to sign off on a time entry during the clock out process. Below are the three options the provider will see during clock out:

1. **PIN/Password** - If the consumer knows their own PIN or password, they can enter that info into the app to sign-off on the entry.
2. **Signature** - If a consumer wants to sign off on a time entry, but doesn't know their PIN or Password, e-signature allows them to provide a signature.
3. **Portal Signoff** – The consumer or their consumer employer representative (CER) can review time entries later via the web portal. This option is also selected when the consumer does not want to sign off on time entries.

Note: Consumer signoff is optional and the choice to do so is up to the consumer.

Landline Overview

Real time OR PTC DCI Landline is an EVV compliant way to clock-in and out at the beginning and end of the provider's shift.



- The consumer must have their landline phone number added as the primary phone on their profile to use the OR PTC DCI Landline option.
- Real time OR PTC DCI Landline EVV requires the provider to call at the start of the shift and call again at the end of the shift.
- This does not record the location because it is assumed this call is made from the consumer's home.

Note: This is the method we suggest for providers who might struggle with technology.

Fob Overview

The OR PTC DCI Fob is another EVV compliant method that can be used in the consumer's home.

- The fob is a small device that must be kept in the consumer's home.
- Provider presses a button and must write down the six-digit code. There is an optional timesheet that can be used to track these codes with the start and end times of the shift.
- Before the grace period ends for the pay period, providers are responsible for recording time entries in the web portal, by entering the six-digit number to verify the time/location.



Historical Entries

- If a provider needs to record a time after service has been completed and they did not use a fob, they need to create a Historical Entry.
- These entries are completed via the web portal and are not EVV compliant.
- Historical entries can also be completed via the landline option and are not EVV compliant.

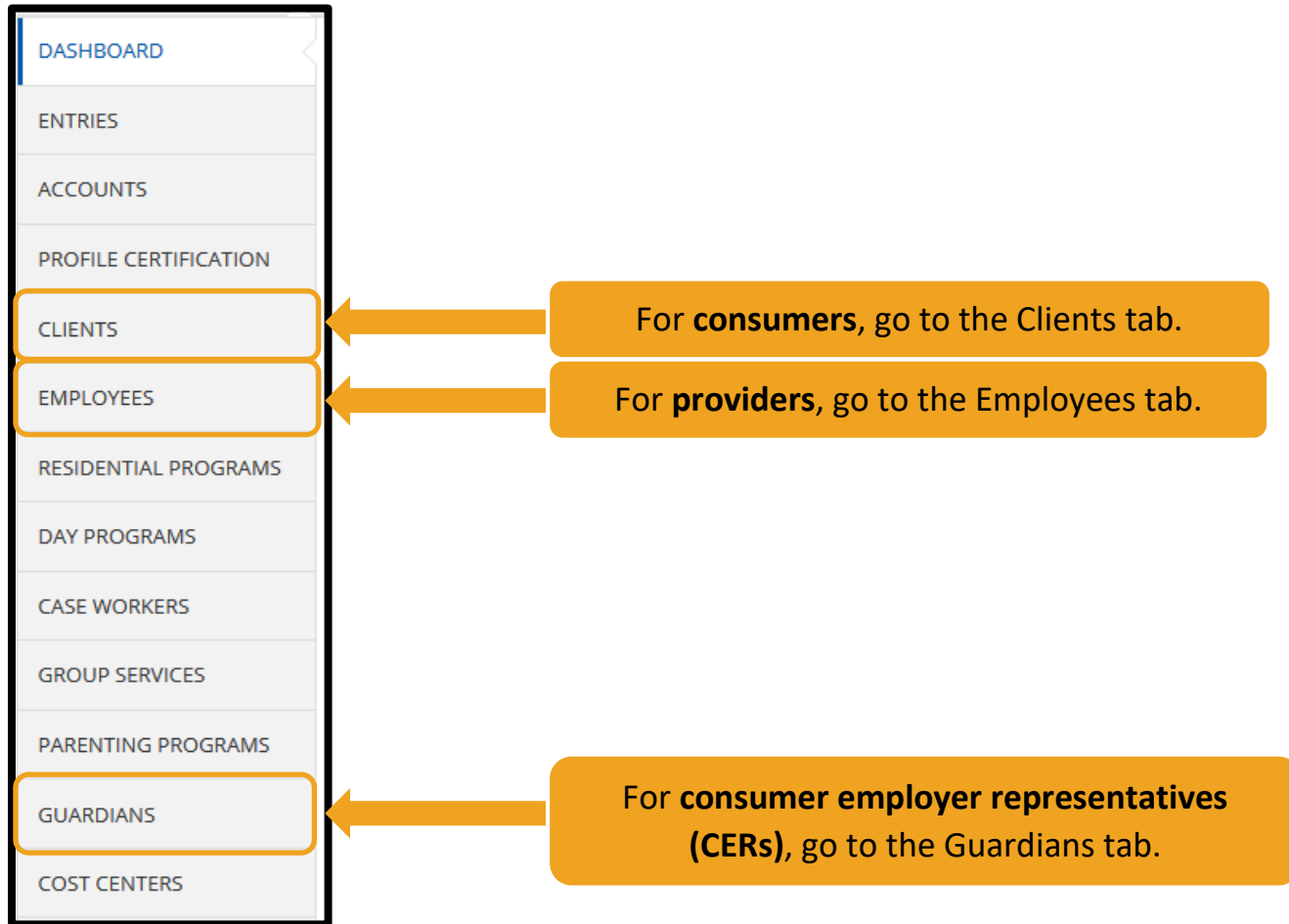
Auditor Role in OR PTC DCI

Your role in OR PTC DCI is an Auditor. As an Auditor, you can:

- View employees and employee details (providers);
- View clients and client details (consumers);
- View punch entries and punch details;
- Run reports;
- View events; and
- Access help center materials.

Looking Up a User

Start your search by clicking the relevant tab from the right-hand side of the screen.



Once you have clicked on the appropriate tab to find your user:

1. Begin typing the name of the user you're searching for. You can also search via the Profile ID to ensure you are getting the correct person.
 - a. For consumers, the Profile Id is their prime number.
 - b. For providers, the Profile Id is their UniID. This can be found in Mainframe on the PRV8 screen.
 - c. For CERs, the Profile Id is the prime number of their associated consumer with a "1" at the end (Ex. ABCDEFGH1). If they have more than one consumer, their Profile ID is based on the prime of the first consumer they were assigned.
2. Click Search.
3. You will see your search result at the bottom. Click on the correct search result to go to the user's profile.
4. The profile details page will display.

1

swan|

Type Client Id

Type Cost Center

Select State

Select Status

Select Funding Source

2

Reset

Search

Export

Showing 1 out of 1 record

Name	Client Id	State	Region	Cost Center	Status
Ron Swanson	AB9007CD	OR		St Helens APD-EU - 0511-EU	Active

3

4

Client Details - Ron Swanson

Actions

Basic Demographics

Client Id: AB9007CD
Address: 123 Park Street
Pawnee, OR 97439-0000
GNIS: 41-039-1142259
Phone: (541) 555-5555
Email: ronswaneeofpawnee@email.com
Date of Birth: Jan 02, 1966
SSN: ###-##-####
Allow SSN Retrieval: No ⓘ
No. of Funding Accounts: 3
No. of Service Accounts: 2
Status: Active

Other Details

Cost Center: [St Helens APD-EU](#)
Guardian: [Leslie Knope](#)
Preferred Language: English
Username: ron.swanson
Client Status: Active
Authentication Status: Disabled
Photo Set: No
Signature Set: No
Enable Caregiver: No
Rating Emails:

Entries

Accounts

Certifications

EWV Locations

Diagnosis

Notes

Attachments

Events

Custom Fields

History

Identifying Consumer/Provider Pairings

You can find the names of the providers connected to a consumer based on Service Accounts. From the Client Details page, click on the Accounts tab (it is located in the middle of the page).

Basic Demographics	Other Details
Client Id: AB9007CD Address: 123 Park Street Pawnee, OR 97439-0000 GNIS: 41-039-1142259 Phone: (541) 555-5555 Email: ronswaneeofpawnee@email.com Date of Birth: Jan 02, 1966 SSN: ###-##-#### Allow SSN Retrieval: No ⓘ No. of Funding Accounts: 3 No. of Service Accounts: 2 Status: Active	Cost Center: St Helens APD-EU Guardian: Leslie Knope Preferred Language: English Username: ron.swanson Client Status: Active Authentication Status: Disabled Photo Set: No Signature Set: No Enable Caregiver Rating Emails: No

[Entries](#)
Accounts
[Certifications](#)
[EVW Locations](#)
[Diagnosis](#)
[Notes](#)
[Attachments](#)
[Events](#)
[Custom Fields](#)

In the **Account Type** column, you can select to show results by Client Funding or Employee Service. To determine the provider, see **Employee Service**.

Account Type	Profile Type	Cost Center	Funding Source	Service Code			
Client Funding	Client	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-11			
Client Funding	Client	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-11			
Client Funding	Client	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-10			
Client Funding	Client	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-10	Carol Brady	Hourly	Active
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-11	Joe Schmoe	Miles	Active
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-11	Joe Schmoe	Hourly	Active
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-10	Peter Brady	Miles	Active
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-10	Peter Brady	Hourly	Active

Important Note: The number at the end of the service code correlates to a specific Provider. For example, Peter Brady's service codes both end in -10.

Finding the Provider's UniID on the Provider Profile

The UniID is found in the Employee Number field of the provider's profile. You will see this before clicking on your search result.

Home / Employees

Employees

Search filters: Peter Brady, Type Cost Center, Employee Number, Select Employee Type, Select State, Select Status. Buttons: Reset, Search, Export.

Showing 1 out of 1 record

Name	Employee #	Phone #	Email	Time Zone	Type	Cost Center	Status
Peter Brady	UNII110010	(503) 669-7777	peter.brady@email.com	PT (UTC-8)	Hourly Non Exempt	Provider Default Cost Center-EU - 0001-EU	Active

After clicking on your search result, you can also find the UniID in the Employee Number field on the Employee Details page.

Home / Employees / Peter Brady

Employee Details - Peter Brady

Actions

Basic Demographics

Address: 200 Brady Street
Salem, OR 97301-0000
GNIS: 41-047-1167861
Phone: (503) 669-7777
Email: peter.brady@email.com
Username: peter.brady
Time Zone: PT (UTC-8)
Type: Hourly Non Exempt
SSN: ###-##-####
Allow SSN Retrieval: No ⓘ
Status: Active

Other Details

Average Caregiver Rating: 0
Domestic Worker: No ⓘ
Domestic Worker 7 Day Exemption: No ⓘ
Domestic Worker Preferred Day of Rest: Sunday ⓘ
Employee Number: UNII110010
Weekly Hours Available: 40.00
Holiday Schedule: [OR PTC Default Schedule - 2](#)

For how to find the UniID in Mainframe, see [How to Find a UniID Number](#).

Finding the Provider Number on the Provider's Profile

1. Go to the Employee Details page.
2. Once there, scroll down to Custom Fields and click on that tab.

Home / Employees / Brian Hamill

Employee Details - Brian Hamill

Actions

Basic Demographics

Address: 105 MONROE ST
EUGENE, OR 97402-0000
GNIS: 41-039-1120527
Phone: (206) 458-5509
Mobile Number: (206) 458-5509
Email: hamill.bm@gmail.com
Username: Brian.Hamill
Time Zone: PT (UTC-8)
Type: Hourly Non Exempt
SSN: ###-##-#### [Show](#)
Allow SSN Retrieval: No ⓘ
Status: Active

Other Details

Average Caregiver Rating: 0
Domestic Worker: No ⓘ
Domestic Worker 7 Day Exemption: No ⓘ
Domestic Worker Preferred Day of Rest: Sunday ⓘ
Employee Number: 10400493
Weekly Hours: 40.00
Available:
Holiday Schedule: [OR PTC Default Schedule - 2](#)
Cost Center: [Provider Default Cost Center-EU](#)
Preferred Language: English
Employment Status: Active
Authentication Status: Active
Photo Set: No
Signature Set: No
Email confirm: Yes
Mobile Number Verified: Yes

Entries Accounts Certifications EVV Locations Notes Attachments Events **Custom Fields** History

3. You will find the HCW Provider Number and/or PCA Provider Number listed here.

Entries Accounts Certifications EVV Locations Notes Attachments Events Custom Fields History

Type Label: Type Value:
Select EDI: Active:
Reset Search

Export

Showing 1 out of 1 record

Label	Value	EDI	Required	Status
HCW Provider Number	222222	No	No	Active



Entries and Entry Status Breakdown

How to View Entries

1. From a provider's profile, click the Entries tab.

Employee Details - Peter Brady Actions

Basic Demographics

Address: 200 Brady Street
Salem, OR 97301-0000

GNIS: 41-047-1167861

Phone: (503) 669-7777

Email: peter.brady@email.com

Username: peter.brady

Time Zone: PT (UTC-8)

Type: Hourly Non Exempt

SSN: ###-##-####

Allow SSN Retrieval: No ⓘ

Status: Active

Other Details

Average Caregiver Rating: 0

Domestic Worker: No ⓘ

Domestic Worker 7 Day Exemption: No ⓘ

Domestic Worker Preferred Day of Rest: Sunday ⓘ

Employee Number: UNII110010

Weekly Hours Available: 40.00

Holiday Schedule: [OR PTC Default Schedule - 2](#)

Cost Center: [Provider Default Cost Center-EU](#)

Preferred Language: English

Employment Status: Active

Authentication Status: Active

Photo Set: No

Signature Set: No

Email confirm: Yes

1
Entries
Accounts
Certifications
EVV Locations
Notes
Attachments
Events
Custom Fields
History

2. Sort entries by date the services were performed by clicking the Service Date column. This will make finding specific entries easier. There are also search filters to help identify entries within a specific pay period or in a specific status.

2

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
1611	Dec 04, 2021	07:30 PM	07:59 PM	Hourly	1610	The Dalles APD-EU - 3311-EU	Carol Brady	Hourly ADL/IADL-10	0:00:29	Pending
1610	Dec 04, 2021	07:30 PM	08:16 PM	Hourly		The Dalles APD-EU - 3311-EU	Carol Brady	Hourly ADL/IADL-10	0:00:46	Rejected



Entry Statuses

Status	Description
Open	An active entry (clock in has occurred but not clock out).
Unverified	An entry that was created/edited on behalf of a provider by a staff member. These entries <u>must</u> be verified by the provider or <u>another</u> staff member to initiate the approval process.
Pending	An entry that has been successfully saved and is waiting for review (through the automated approval process).
Approved	An entry that has been approved by either Auto-Approval or a staff member and is eligible to be batched for payment.
Batched	An approved entry that was pulled into a pending payroll batch.
Processed	An approved entry that was pulled into a processed payroll batch.
Rejected	An entry that will not be paid. An entry can be marked as rejected upon clock out if certain business rules are failed or manually by the provider, consumer, CER, or staff while in a pending status.

Useful Features for Auditors in Provider Profiles

Additional Features in Provider Profile - Map/GPS

1. From the provider's profile, scroll down to see the Entries tab and click the punch entry you'd like to investigate.

Photo Set: No
Signature Set: No
Email confirm: Yes

Entries Accounts Certifications EVV Locations Notes Attachments Events Custom Fields History

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Punch ID Type Client Name
Type Service Code Select Account Type Select Status

Reset Search

Export

Showing 30 out of 131 records

Id	Service Date	Start Time	End Time	Account Type	Ref.	Cost Center	Client/ Program Name	Service Code	Amount	Status
6359576	Jan 10, 2022	06:49 AM	12:07 PM	Hourly		Portland SE ASO/DSO-EU - 1418-EU	[REDACTED]	Hourly ADL/IADL-1	0:05:18	Approved
6352310	Jan 09, 2022	04:38 PM	08:08 PM	Hourly		Portland SE ASO/DSO-EU - 1418-EU	[REDACTED]	Hourly ADL/IADL-1	0:03:30	Approved
6330957	Jan 08, 2022	10:32	01:54	Hourly		Portland SE	[REDACTED]	Hourly	0:03:22	Approved

2. After clicking on the entry, you will be taken to the Punch Details page.

Punch Details

Entry Id: [REDACTED]
Machine Details: [REDACTED]
Service Date: Jan 01, 2022
Check In: 12:00 AM
Check Out: 09:43 AM
Hour(s): -0:09:43
Amount: -9.72 Hour
Employee Time PT (UTC-8)
Zone:
Client/ Program PT (UTC-8)
Time Zone:
Authorization Entry Id: [REDACTED]

Account Details/ Service Account

Account Id: [REDACTED]
Account Type: Hourly
Client/ Program PT (UTC-8)
Time Zone:
Employee: [REDACTED]
Employee Time PT (UTC-8)
Zone:
Service Code: [Hourly ADL/IADL-1](#)
Portal Signoff: TRUE
Funding Type: Units
Funding Source: [APD](#)
Cost Center: [Portland SE ASO/DSO-EU](#)
Unit Type: Hourly



3. Scroll down to see Client Details, Employee Details, EVV Details and Reason Codes.

The screenshot shows four panels of information:

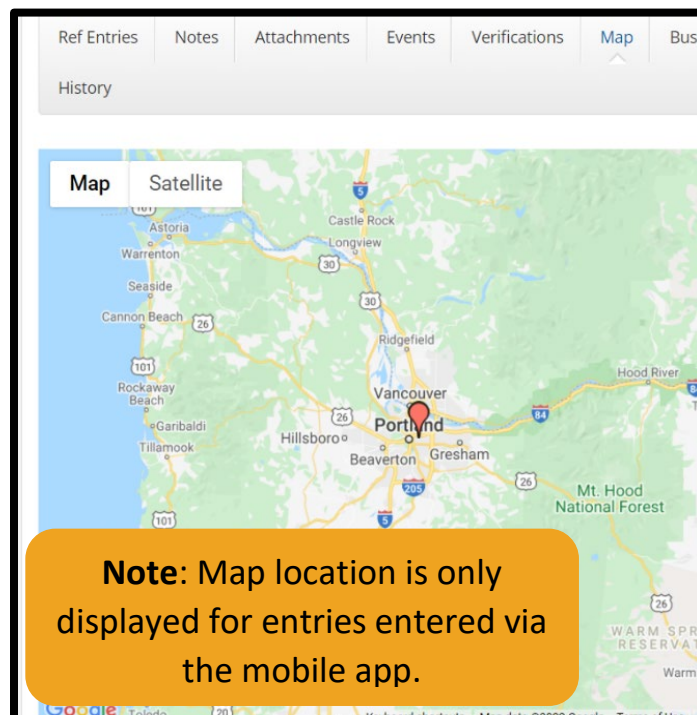
- Client Details:** Name, Address, Phone: (000) 000-0000, Email: PTC.Support@dhsosha.state.or.us, DOB.
- Employee Details:** Type: Hourly Non Exempt, Employee Number, Name, Holiday Schedule: [OR PTC Default Schedule - 2](#), Status: Active.
- EVV Details:** EVV Method: Portal Signoff, EVV: No, Clock In.
- Reason Codes:** Reason Code: Provider-Forgot to Clock In/Clock Out, Name, Reason Code: ProvcICOF.

4. Continue scrolling down until you see a row of tabs. Click Map.

The screenshot shows a row of navigation tabs: Ref Entries, Notes, Attachments, Events, Verifications, **Map**, Business Rules, Auto Approval, Custom Fields. Below the tabs are input fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Punch ID', and a dropdown for 'Select Account Type'.

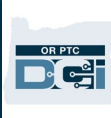
5. This will show you the start and end locations listed on the right. These indicate exactly where the provider clocked in and out from.

- If it is the same location, you will have one location pin on top of the second. You can see the start and end locations listed off to the right of the map.
- If there are two locations and you only see one on the map, you can click the plus sign to zoom in on the map so that you can see the start and finish locations.



Note: Map location is only displayed for entries entered via the mobile app.

This allows you to verify if the provider recorded their time from the correct location.



Additional Features in Provider Profile- Events Tab

The Events tab displays a log of all activity with the displayed time entry or user profile. Access this by navigating to either the entry or provider’s profile. Scroll down to the row of tabs and click Events.

Relevant Reports and How to Create Them

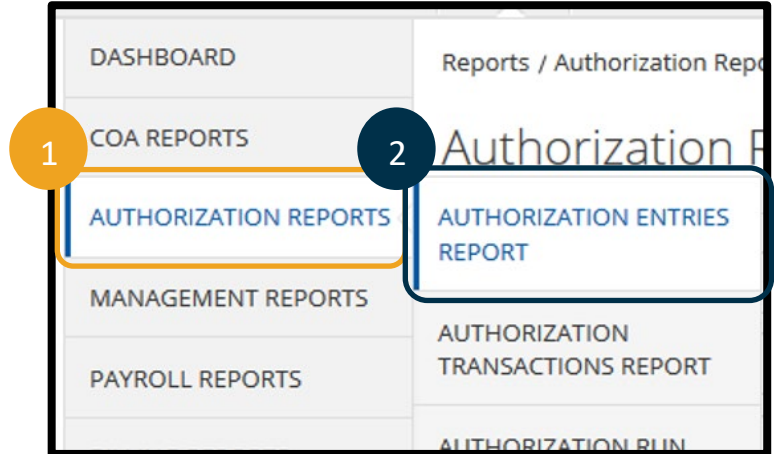
Reports are a great way to see data that is not easily viewed by looking at individual profiles or entries. Some common reports you might pull include:

Report	Functionality
Authorization Entries Report	Displays the information relevant to the authorization, such as start and end date, hours used, and hours remaining.
Punch Entry Details Report	Displays important details about the provider, Consumer, Punch Entry Status, EVV Method, the punch ID, Service Code, who created the entry, the date the entry was created, the IP address where it was created, who approved or rejected the entry, etc. You can also view the input method and the entry type.
Employee Service Account Punch Notes Report	Displays notes and canned statements entered by the Provider which may explain activities that occurred during a shift.



Authorization Entries Report

1. From the Reports Tab, click Authorization Reports.
2. Click Authorization Entries Report.
3. Refine your search with the following fields before clicking Search:
 - a. **Client Name:** Enter the name of the consumer you're searching for.
 - b. **Include Ended Authorizations:** Make sure this box is checked to display authorizations that are not current.
4. Click Download to view the report in Excel.
5. Click the right-facing double-arrow to select all columns, then click Next.
6. Select Excel as the format, then click Download.



Authorization Reports - Authorization Entries Report

3a

Type Client Name Type Funding Source Name Select Account Type

Type Service Code Type Cost Center CutOff Date(MM/DD/YYYY)

Type Region Name

Include Future Authorizations Include Ended Authorizations Include Discharged Clients Authorizations

Include Rejected Authorizations

Reset Search

4

Download

Showing 642 out of 642 records

Punch ID	Date of Service	Account Type	Employee Name	Employee Number	Client/ Residenti...
1611	12/04/2021	Hourly	Peter Brady	222111	Carol Brady
1611	12/04/2021	Hourly	Peter Brady	222111	Carol Brady
1608	12/04/2021	Hourly	Peter Brady	222111	Carol Brady

5

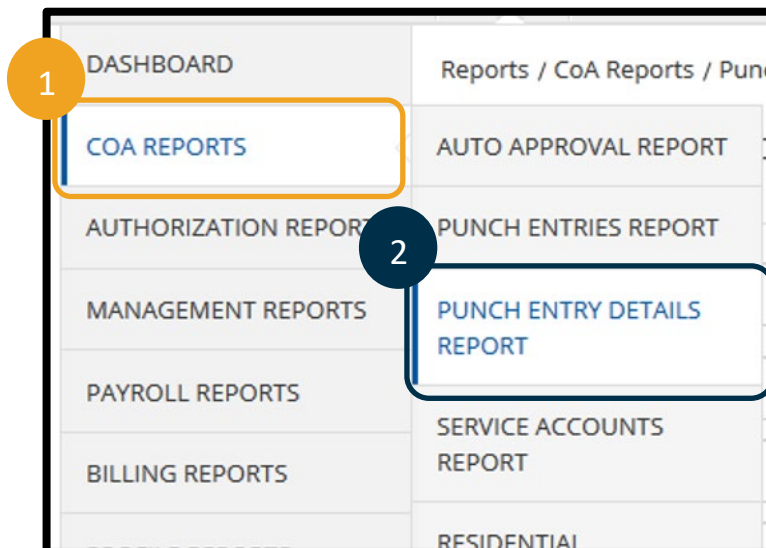
6

Format: * Excel



Punch Entry Details Report

1. From the Reports tab, select COA Reports.
2. Select Punch Entry Details Report.
3. Refine your search with the following fields before clicking Search:
 - a. **Client Name:** Enter the name of the Consumer you're searching for.
 - b. Add any other filters you may want to refine your results.
4. Click Download so you can view the report in Excel.
5. Click the right-facing double-arrow to select all columns then click Next.
6. Select Excel as the format, then click Download.



CoA Reports - Punch Entry Details Report

From (MM/DD/YYYY) 3a

To (MM/DD/YYYY)

Select Account Type

Type Service Code

Type Client Name

Type Employee Name

Select Status

Type Cost Center

Select Activity

Select Entry Type

Type Payroll Batch Name

Enter Payroll Batch Id

Select Entry Type

Include Canceled and Rejected Punches

Include Only Unbatched Punches

3b

Reset Search

4

Download

Showing 642 out of 642 records

Punch ID	Date of Service	Account Type	Employee Name	Employee Number	Client/ Residenti...
1611	12/04/2021	Hourly	Peter Brady	222111	Carol Brady
1611	12/04/2021	Hourly	Peter Brady	222111	Carol Brady
1608	12/04/2021	Hourly	Peter Brady	222111	Carol Brady

5

>>

Format: * Excel

6



Employee Service Account Punch Notes Report

1. From the Reports tab, select Notes Report (bottom-left of the screen).
2. Select Employee Service Account Punch Notes Report.
3. Refine your search with the following fields before clicking Search:
 - a. **Date Fields:** Select the date range you're researching. This will likely be a specific pay period.
 - b. **Employee Name:** Enter the name of the provider you're researching.
 - c. **Client Name:** Enter the name of the consumer you're researching.
4. Click Download to view the report in Excel.
5. Click the right-facing double-arrow to select all columns; then click Next.
6. Select Excel as the format, then click Download.

Showing 642 out of 642 records

Punch ID	Date of Service	Account Type	Employee Name	Employee Number	Client/ Residenti...
1611	12/04/2021	Hourly	Peter Brady	222111	Carol Brady
1611	12/04/2021	Hourly	Peter Brady	222111	Carol Brady
1608	12/04/2021	Hourly	Peter Brady	222111	Carol Brady



PTC Support Resources and Contact Information

If you are stuck and need help with doing something in the OR PTC DCI solution, we have support for you!

PTC Support Email: PTC.Support@odhsoha.oregon.gov.

Resources can be found on the [OR PTC DCI Help Center](#).

You can find a list of resources in the Learning Catalogs on the [PTC Website](#) under [Learning Materials](#).

The resources available consist of:

- **Quick Reference Guides (QRGs)** – These are short documents intended to help guide users through common system tasks which will be faced regularly.
- **Computer Based Trainings (CBTs)** – These are online modules intended to allow users a more engaging experience as users click through the operations as the trainer is narrating the steps.
- **Guides** – These are longer documents which cover many system functions and walk users through what the screens look like as well as the fields that will need to be filled out.
- **Business Processes** – These explain the steps to complete different tasks, including the steps within Mainframe, OA, and OR PTC DCI.

The OIS Service Desk has been provided with basic information on OR PTC DCI, but for streamlined assistance, please contact PTC Support for any issues related to OR PTC DCI.