

Staff – Profile Requests for OR PTC DCI

Purpose: To explain how to use the Staff Profile Maintenance form to make changes to and create OR PTC DCI profiles of local/program office staff members.

Outcome: Management teams will understand how to use the Staff Profile Maintenance form to add, deactivate, modify and reactivate staff profiles.

Relevant Business Process: [5.1 Process for Staff: Managing Staff Profiles](#)

As a manager, you may need to request PTC Support to add, deactivate, modify or reactivate your employee's OR PTC DCI profile. To take any of these actions, you will need to fill out the Staff Profile Maintenance form and email it to

PTC.Support@odhsoha.oregon.gov. The form can be located on the PTC website (ptc.oregon.gov) under the AAA/APD Staff tab and "New User Forms" heading.

It is important to keep staff profiles up to date. It ensures that only authorized personnel have access to OR PTC DCI.

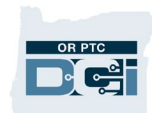
How to Know What Role to Request

There are two main roles a profile can have in OR PTC DCI. A role dictates what actions a user can take in OR PTC DCI. A single profile cannot have more than one role over a cost center (branch). A role may be combined with a permission set or it may stand alone.

Supervisor Role: This is the most common role for staff using OR PTC DCI. Users with this role can:

- Edit, reject or create entries in OR PTC DCI;
- Make updates to profiles for consumers housed in their cost center;
- Make updates to provider profiles;
- View authorizations;
- Run reports.

Auditor Role: The auditor role allows users to view entries and pull reports from the system. Users with this role cannot take any action on entries in the system. This role is great for fraud units, OHCC staff, policy staff or others who need to review actions that have been taken, but not create or edit entries or authorizations. This role can utilize the Authorization widget on the dashboard to review authorized hours.



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Adding a Staff Profile

When a new staff member starts with your team who needs access OR PTC DCI, you will need to submit a Staff Profile Maintenance form for their profile to be created.

1. On the Staff Profile Maintenance form, check the box for “Add a New Staff User.”
2. Fill in all boxes under “User Information Part 1” and “User Information Part 2.”
 - a. The branch name and branch number here refer to the home branch of the staff member.
3. Select the role you would like to add to this staff member’s profile. Fill in the branch(es) the role will be over.
 - a. For more information on roles, see “*How to Know What Role to Request*” above.
 - b. If you are requesting access to multiple branches, you can add them here or list them in the spaces or Notes field on page 2.
4. Check Yes or No indicating if you would like the user to receive the Change Email/Phone Report. (See “*Change Email/Phone Report*” section below for more information.)
5. Manager fills out “Manager Information” section.
6. Email completed form to PTC Support.

Manager approval is **required** to take any action on a staff member’s OR PTC DCI profile.

Deactivating a Staff Profile

When a staff member leaves your team and they previously had access to OR PTC DCI, you will need to submit a Staff Profile Maintenance form to PTC Support to deactivate their profile. This is crucial to ensure that only authorized personnel have access to OR PTC DCI.

1. On the Staff Profile Maintenance form, check the box for “Deactivate a User.”
2. Fill out “User information Part 1.”
3. Manager fills out “Manager Information” section.
4. Email completed form to PTC Support.

Modifying a Staff Member’s Access

If a staff member moves from one team or branch to another, their role or cost center may need to be modified in OR PTC DCI.

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1. On the Staff Profile Maintenance form, check the box for “Modify Access.”
2. Fill out “User Information Part 1.”
3. Under “Staff User Roles,” fill out the roles that need to be added or removed.
 - a. Tip: for requests that are more complex, use the Notes section on the 2nd page to provide details of your request.
4. Manager fills out “Manager Information” section.
5. Email completed form to PTC Support.

Reactivating a Staff Profile

If a staff member returns to a role that requires access to OR PTC DCI, their profile will need to be reactivated.

1. On the Staff Profile Maintenance form, check the box to “Reactivate Access.”
 - a. If the staff member transferred branches, check the “Due to Branch Switch” box. Fill in the “Staff User Roles” section indicating which roles/cost centers to remove or add.
 - b. If additional explanation is needed, use the Notes section on page 2 to provide the details of your request.
2. Fill out “User Information Part 1.”
3. Manager fills out the “Manager Information” section.
4. Email completed form to PTC Support.

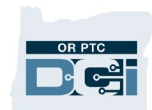
Change Email/Phone Report

The Change Email/Phone Report is generated each month by DCI. Users who have been identified by their management team to be a recipient of the report will receive it via the messaging module in OR PTC DCI on or around the first of the month.

The report lists all email addresses and phone numbers that have been updated by providers, consumers, or Consumer Employer Representatives in OR PTC DCI in the last month.

Follow the business processes below to update user information across all State systems:

- [2.2 Update Provider Information](#)
- [3.2 Update Consumer Information](#)
- [4.2 Update Consumer Employer Representative Information](#)



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Month:	Feb-21				
Branch:	3412 - EU				
User Name	Profile Type	Prime/UnID	Provider Number	Old Email Address	New Email Address
Test Provider	Employee	123456	456789		
Provider Ten	Employee	UI0000000	123456	emailscool@email.com	ten@email.com
Provider Six	Employee	UI6666666	55555,66666		
Provider Four	Employee	UI4444444	444444,OR1212122		
Consumer Three	Client	AZ222222		iiiikeemail@email.com	C3@email.com
Test Guardian	Guardian				
Old Alternate Phone	New Alternate Phone	Old Mobile Phone	New Mobile Phone		
		(503)555-0143	(503)999-9999		
		(971)923-1234	(971)800-0123		
		(503)555-9876	(503)867-5309		
Changed Date	Changed Time	Changed By Name	Changed By Employee Number		
March 18, 2021	3:09:29 PM	Case Manager	123456		