OR PTC DCI
Consumer Employer Representative Guide
Version 1.4

Contents

What is Electronic Visit Verification (EVV)?

What is Electronic Visit Verification (EVV)?

The Federal Government is requiring states to gather certain information electronically when personal care services are provided, this comes from the 21st Century Cures Act.

- This is called Electronic Visit Verification (EVV)
- This will replace the current paper-based voucher process

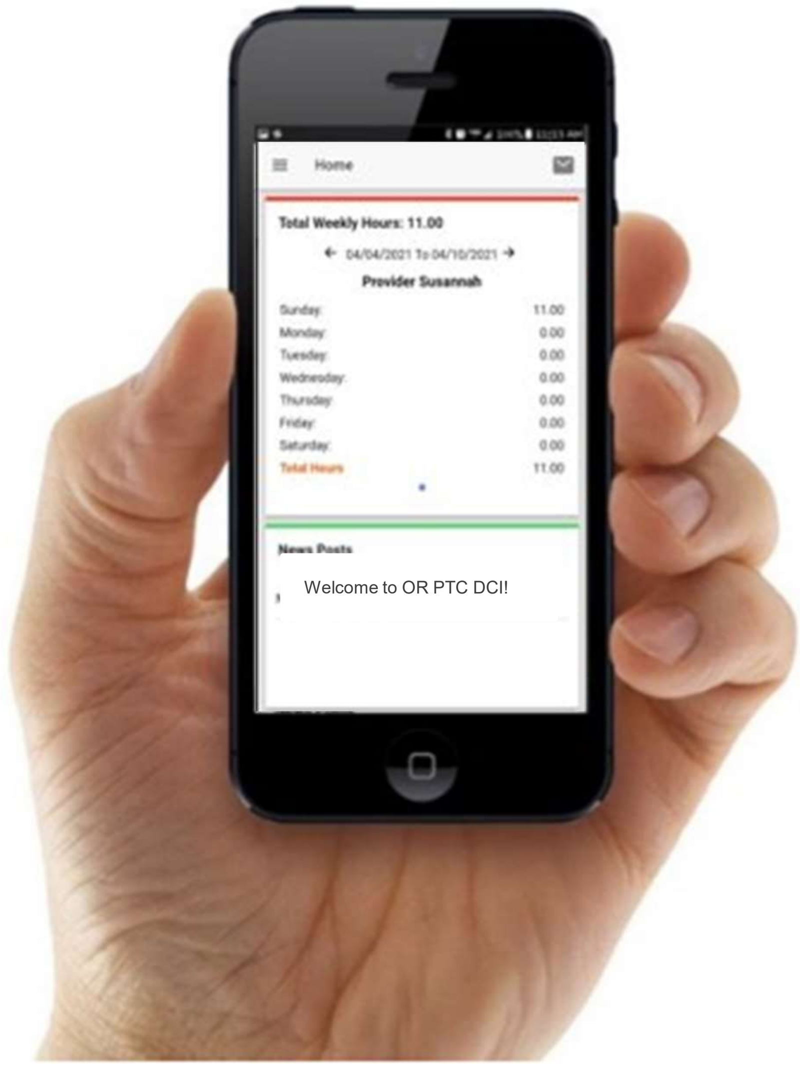
The following data is collected for each visit:

- Date of service provided
- Start/End time
- Type of service
- Location of service
- Name of Provider
- Name of Consumer receiving services

What is OR PTC DCI?

What is OR PTC DCI?

- OR PTC DCI stands for Oregon Provider Time Capture Direct Care Innovations.
- Direct Care Innovations (DCI) is the electronic time keeping tool.
- The OR PTC DCI Mobile App can be downloaded on your smart device.
- Providers will use OR PTC DCI to enter time worked and mileage.
- You will use OR PTC DCI to sign off on Provider's time for the Consumer(s) you represent.



Common Terms

- **Client:** The Consumer's profile in OR PTC DCI is called a Client Profile.
- **Guardian:** Your profile in OR PTC DCI is called a Guardian Profile.
- **Historical Entry:** A historical entry, is any entry added to OR PTC DCI not in real time. Historical entries are not EVV compliant. Historical Entries made by the Provider will require your approval.
- **OR PTC DCI Mobile App:** Provider(s) may use the mobile app to clock in and clock out.
- **OR PTC DCI Mobile Full Site:** The full OR PTC DCI website can also be accessed on mobile devices. Navigate to the DCI website on your mobile device browser. Then click "Go to Full Site" under the Sign In button.
- **OR PTC DCI Mobile Web:** The mobile web is a mobile friendly version of OR PTC DCI. Your smart device will default to the mobile web when you navigate to the OR PTC DCI website in a browser.

Common Terms

- **OR PTC DCI Landline:** Providers may use the landline of the Consumer you represent to clock in and clock out, or to enter historical time entries.
- **OR PTC DCI Web Portal:** The full OR PTC DCI website. The web portal can be accessed from desktop and laptop computers, as well as the browser in smart devices.
- **Password:** The password provided to you by the Agency in order to access OR PTC DCI, but will need to be updated on your first log in.
- **Real-Time Entries:** Real-time entries are made when the Provider, clocks in and out in real time. Real-time entries in OR PTC DCI are EVV compliant.
- **Reason Code:** OR PTC DCI will require a reason code when Providers add a historical entry in the web portal. Reason Codes are important for the Agency to be able to monitor EVV compliance.
- **Service Code:** The name of the service being provided to the Consumers. An example of a service code name is Hourly ADL/IADL-1.
- **Username:** The name provided to you by the Agency to access OR PTC DCI.

Time Entry Options

Time Entry Options

Time entries are EVV compliant if Providers use one of the following time entry methods:

- OR PTC DCI Mobile App
- OR PTC DCI Landline
- OR PTC DCI Fob

You must work with the Consumer(s) you represent and their Provider(s) to determine the best method or methods for time entry. Multiple methods can be used if needed.

OR PTC DCI Mobile App Entries

OR PTC DCI Mobile App is a free mobile application that allows the Provider to easily clock in and out in real time and perform EVV verifications using their smart device.

To use the OR PTC DCI Mobile App, the Provider must:

- Have a smart phone/device (Android or Apple)
- Meet the minimum operations system requirements (Android 8.0, Apple iOS 13 and above)
- Have internet access through cellular data or WIFI
- If using the OR PTC DCI Mobile App, the Provider will clock-in at the beginning of the shift and clock out at the end of the shift. During clock out, the Provider(s) will always select Client Portal Signoff. You must sign off on these entries at the end of the pay period.

OR PTC DCI Landline Entries

The OR PTC DCI Landline option is an option for Providers to capture time if the Consumer has a landline phone where they receive services, and the Provider does not have access to a smart device.

- The landline can be used for real-time and historical entries.

To use the OR PTC DCI Landline:

- The Consumer must have a landline phone at the address they receive services.
- Have the landline verified through the Consumer's Local Office.

OR PTC DCI Landline Entries

Real-Time

- A time entry is considered real-time if a Provider clocks in at the beginning of the shift and clocks out at the end of the shift.
- The Provider must be calling from the Consumer's landline phone number on file in OR PTC DCI.
- You are not required to verify real-time landline entries.
- You do not need to be present during clock in or clock out.

OR PTC DCI Landline Entries

Historical

- A time entry is considered historical if it is added after the services were provided.
- Historical landline phone entries are **not** EVV compliant and should be used on an exception basis.
- The Provider must be calling from the Consumer's landline phone number on file in OR PTC DCI.
- While adding the entry, the Provider will hand you or the Consumer the phone. The system will read the Consumer the entry details and ask the Consumer to confirm by entering their PIN. The Consumer's PIN is a 4-digit code provided by the Agency.

Note: If you or the Consumer will not be present for a historical entry, please ask the Provider to enter these historical entries into the OR PTC DCI web portal.

OR PTC DCI Fob

The OR PTC DCI Fob is another method the Consumer may use if the Provider does not have access to a smart device and the Consumer does not have a landline where they receive services.

- A fob is a small device, which should be secured in the Consumer's home.

To use a OR PTC DCI Fob:

- The Provider must have access to the fob at the start and end of their shift.
- The Provider must have access to the internet at the end of the pay period to enter the fob codes into the OR PTC DCI Web Portal.

Note: You are not required to verify entries made with a fob.

Web Portal Entries

If the Provider is unable to enter their time using an EVV compliant method or you the Consumer are not present for a landline historic entry, they can add a historical entry using:

- The OR PTC DCI Web Portal

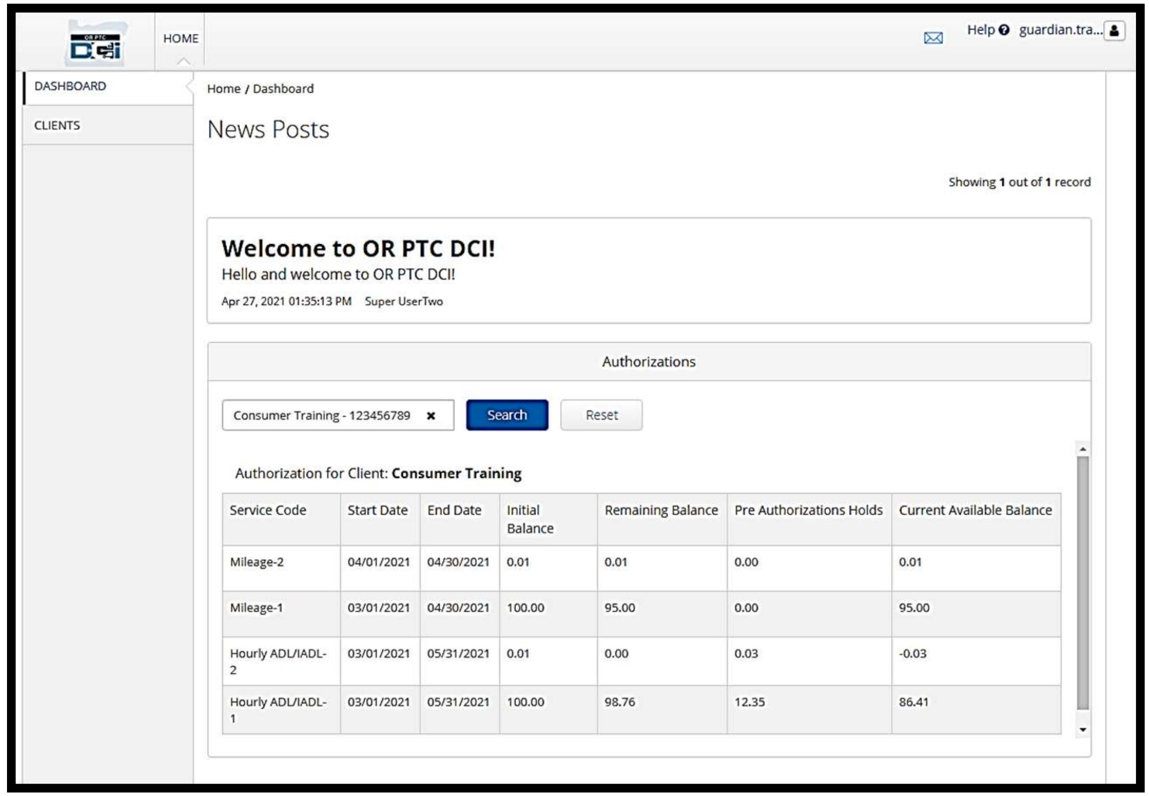
If the Provider enters time in the OR PTC DCI Web Portal, you must sign off on this time at the end of the pay period for the Provider to be paid.

OR PTC DCI Web Portal

OR PTC DCI Web Portal

Now that we have reviewed available time entry options for Providers, let's talk about how you will access and use the OR PTC DCI Web Portal. You can use the web portal to:

- View the Consumer's service authorizations
- Sign off on and reject time entries
- View all entries for services provided
- Use the DCI Messaging Module
- Access the DCI Help Center



Username & Password

What is my username?

- Your username will be provided to you by the Agency. Typically, your username is in the following format: firstname.lastname. For example, if your name is John Smith, your username is John.Smith.
- If you need to confirm your username, please contact your Local Office.

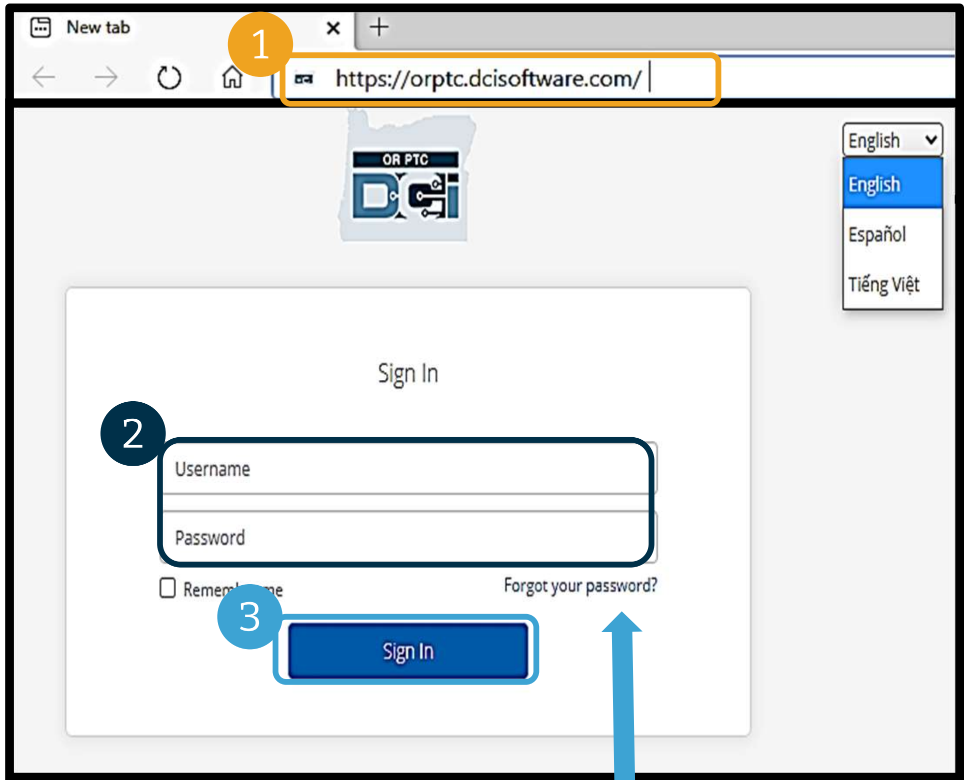
What is my password?

- Your password was provided to you by the Agency.
- Passwords must:
  - Contain at least 10 characters
  - Contain 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character
  - Cannot have more than 2 repeated characters in a row
  - Cannot have more than 2 repeated characters from your name
  - An example password looks like: *ILoveEVV2021!*

First Time Logging In

Let's first explore how to log in to the Web Portal. From a desktop or laptop computer, follow these steps:

1. Navigate to https://orptc.dcisoftware.com/
2. Enter the username and password provided to you (see details on the next slide)
3. Click Sign-In



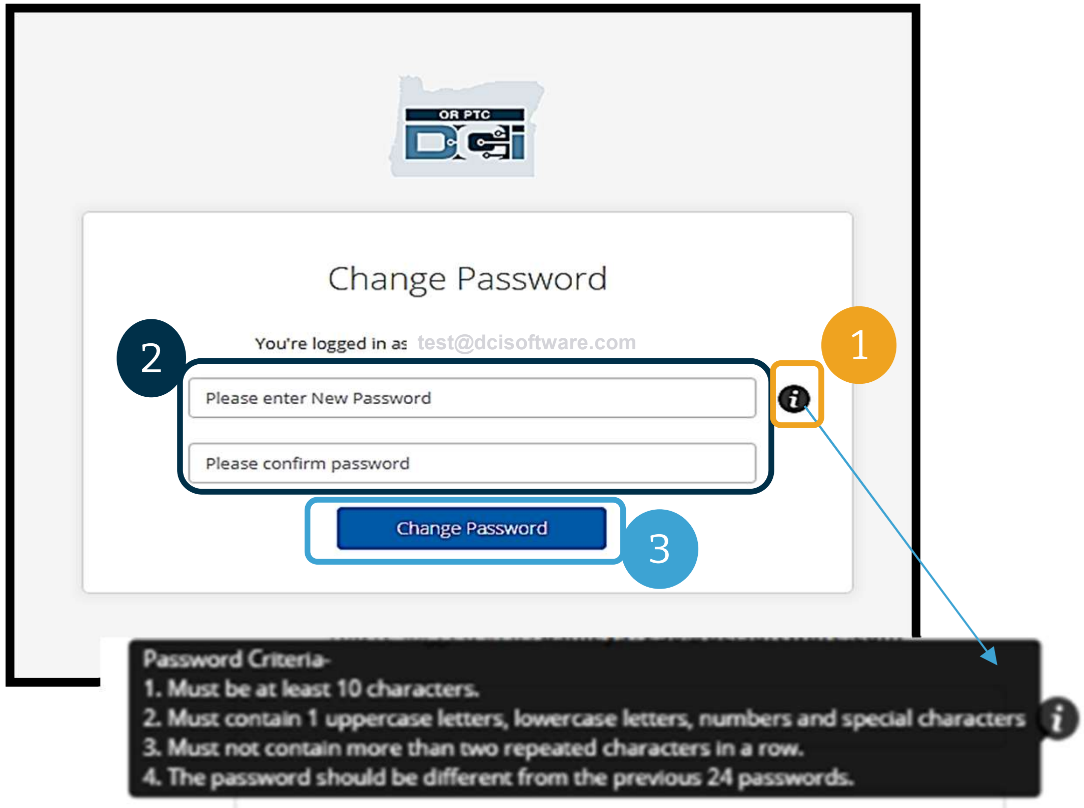
Note: You can change your preferred language by clicking on the language button in the top right corner. The default language is set to English. Available language options include: English, Spanish, Russian, Mandarin, Vietnamese, Arabic, and Somali.

Forgot your password? See the User Settings module for instructions on how to reset your own password.

First Time Logging In

When you log in for the first time, you will be asked to change your password.

1. Hover over the circular "i" icon on the right to see the password requirements
2. Enter the same password in both password fields
3. Click Change Password



First Time Logging In

After you change your password, an email will be sent to you stating that you have changed your password.

Hi
Your password has been changed. If you did not make this request, please contact the DCI Help Line at 855-565-0155.

Support
Direct Care Innovations

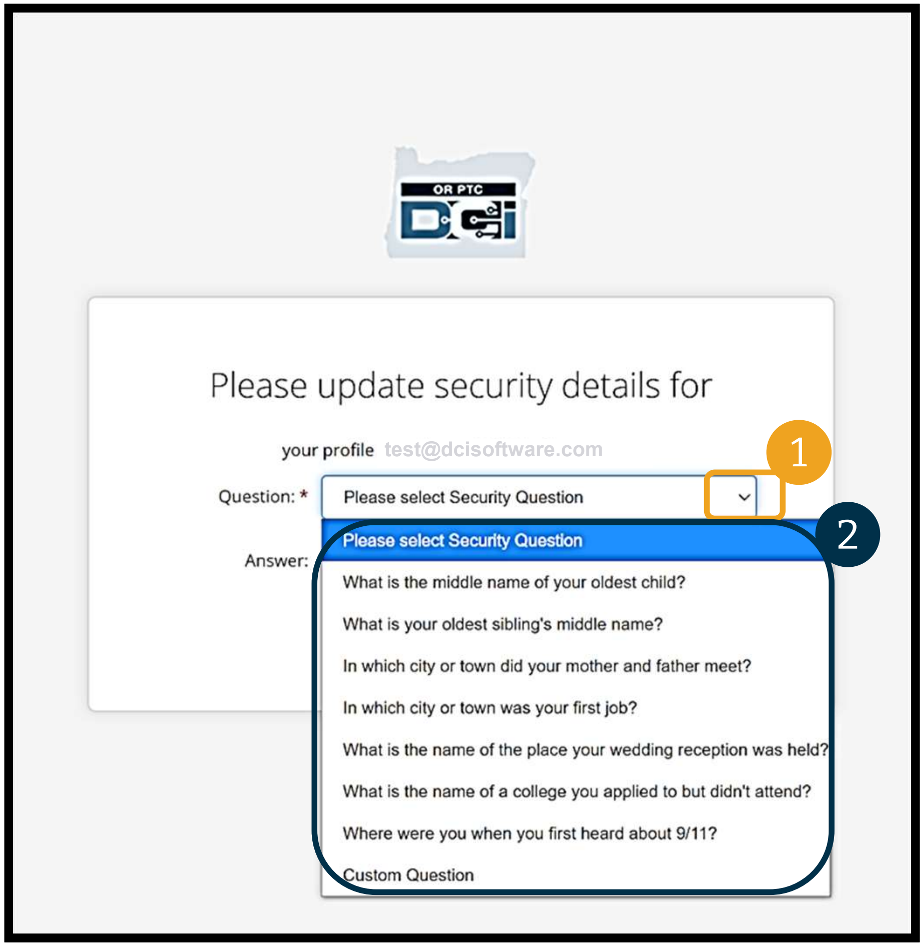
Need help?
Email: support@dcisoftware.com
Direct Care Innovations

This message is for the designated recipient only and may contain privileged, proprietary, or otherwise private information. If you have received it in error, please notify the sender immediately and delete the original. Any other use of the email by you is prohibited.

Security Question

To keep your profile safe, you will need to choose a security question.

1. Click the drop-down menu
2. Select one question you think you will remember the answer to



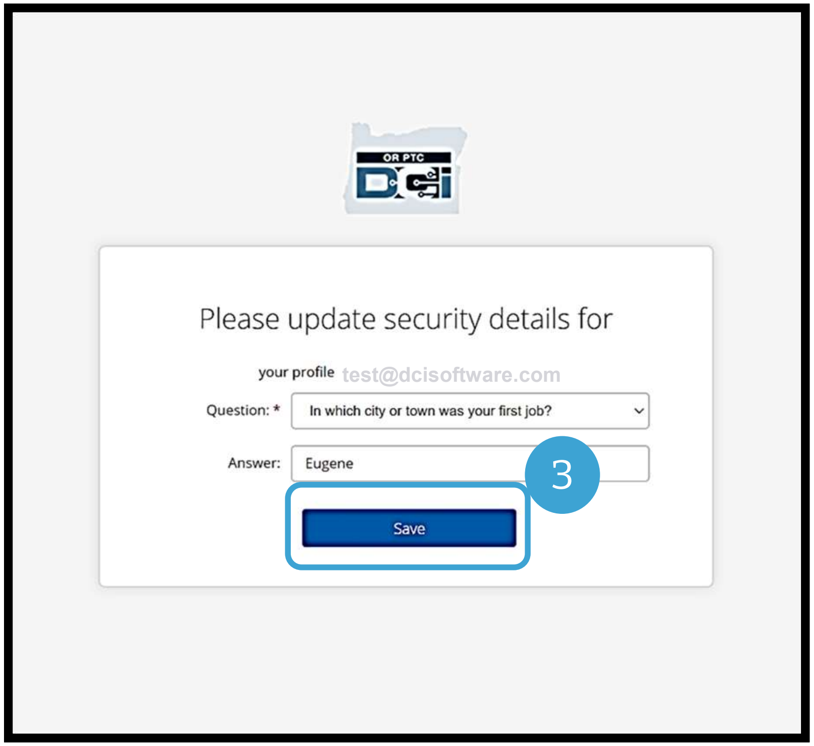
Security Question

3. Click Save

You have now successfully set a security question!

More on Security Questions:

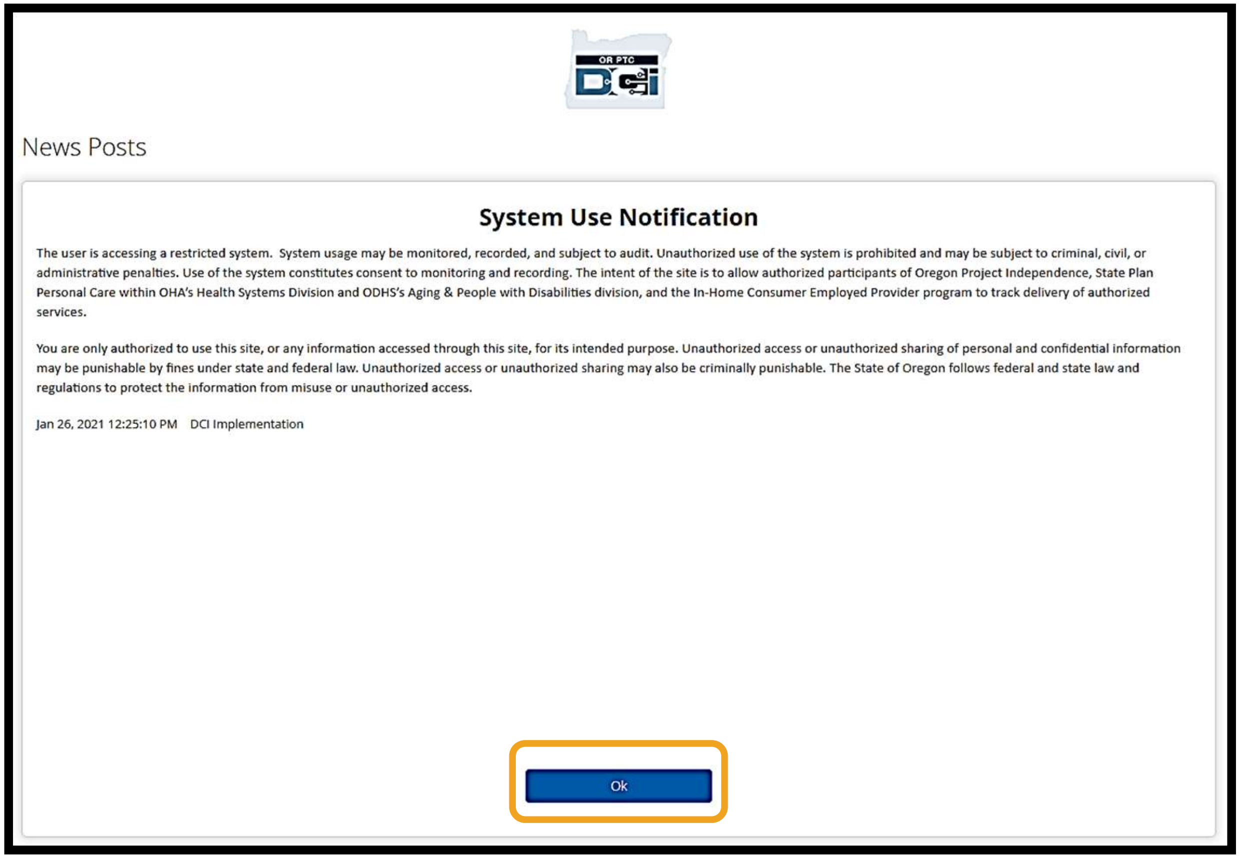
- You will only need to select your security question the first time you log in.
- The answer must be at least five characters and cannot have more than one of the same character in a row.



Note: You will need to remember the answer to the security question you chose in order to reset your password in the future.

News Post

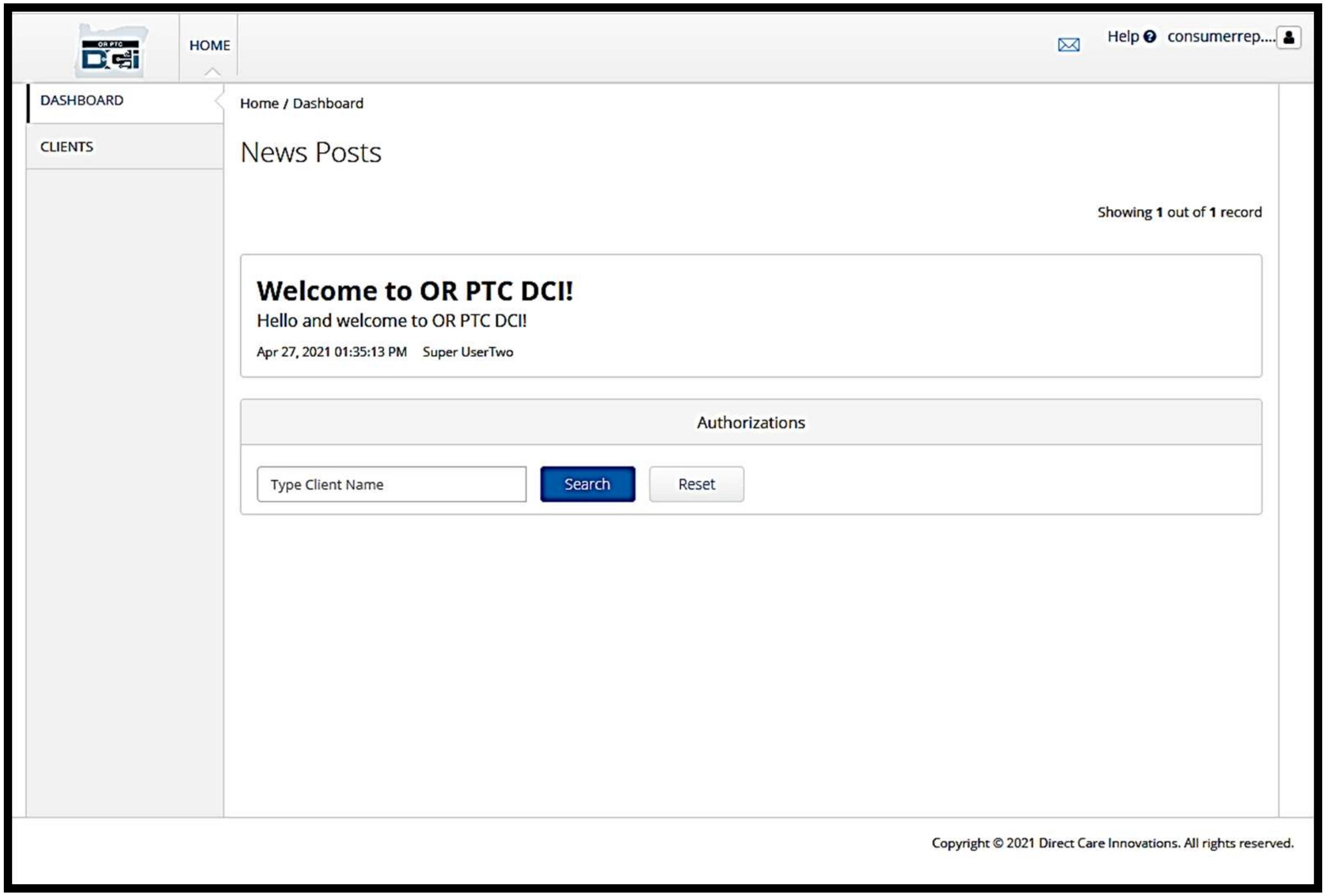
After you finish logging in, you will see at least one News Post:



Click OK to acknowledge the content on each News Post.

Dashboard Overview

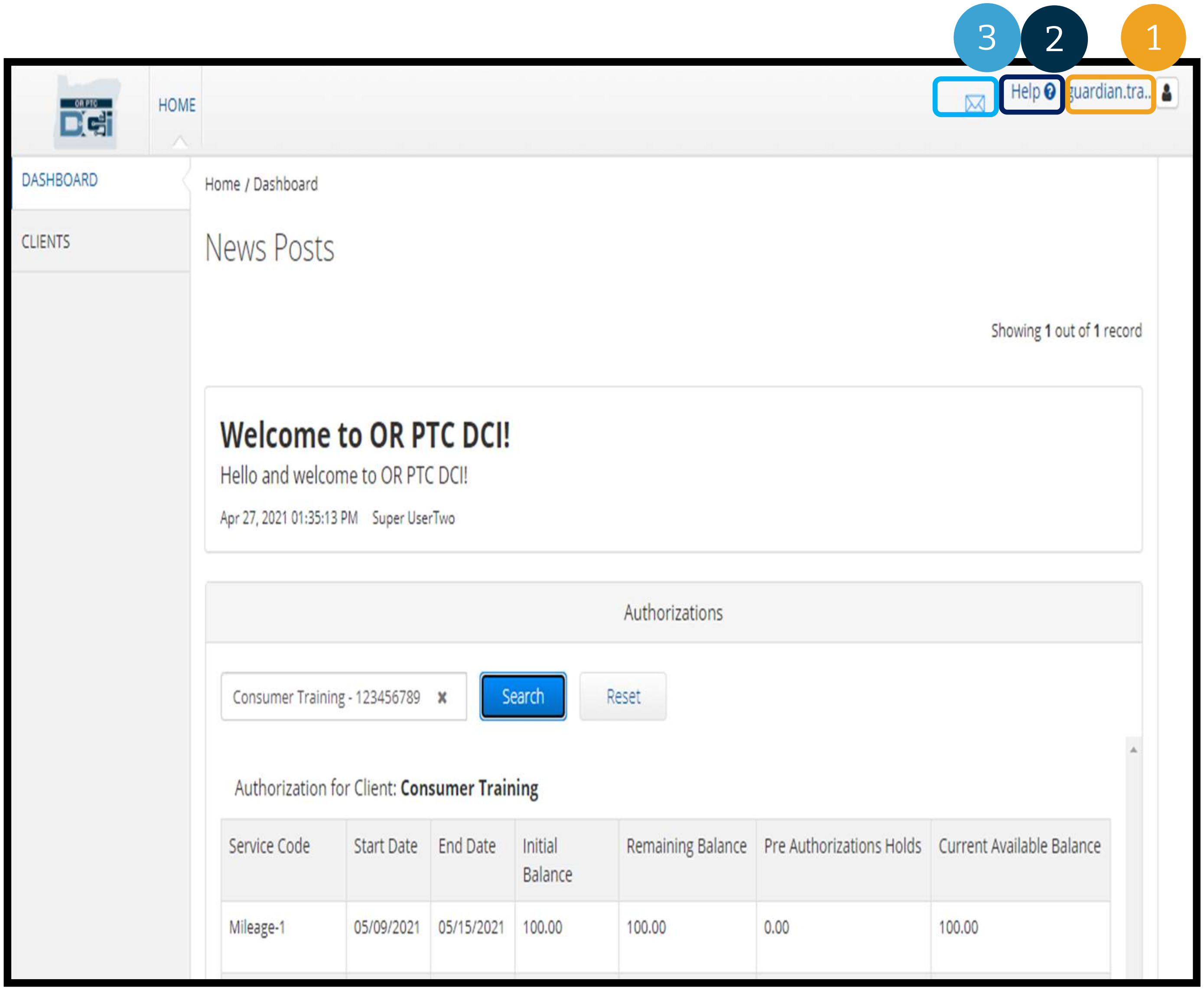
Congratulations! You have successfully logged into the OR PTC DCI Web Portal. The Dashboard is the first thing you will see when you log in. Let's review your Dashboard together.



Dashboard Overview

On your dashboard, you can find:

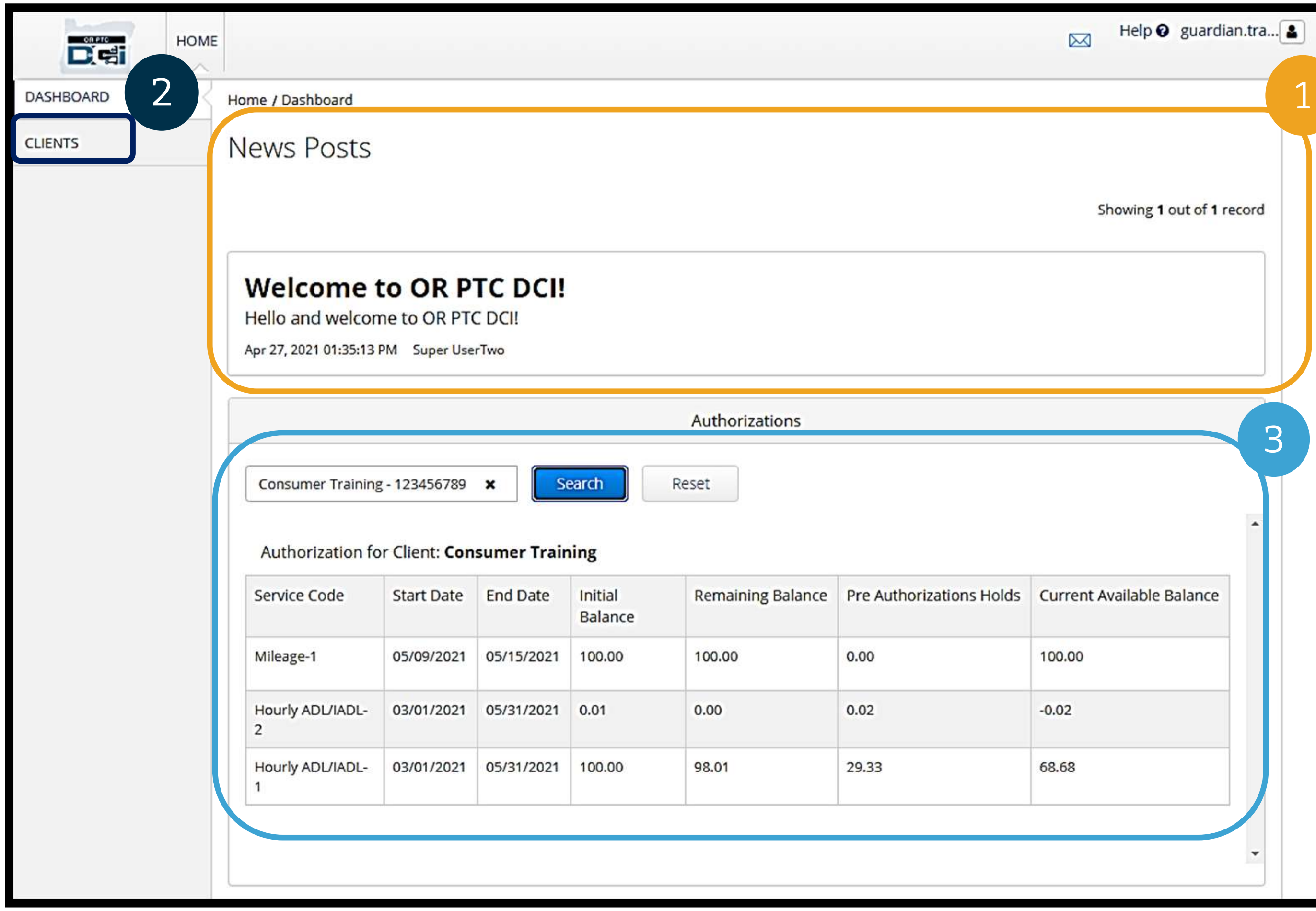
1. Your username: Click to find User Settings.
2. Help: Click to find the DCI Help Center.
3. Envelope: Click to find the DCI Messaging Module.



Dashboard Overview

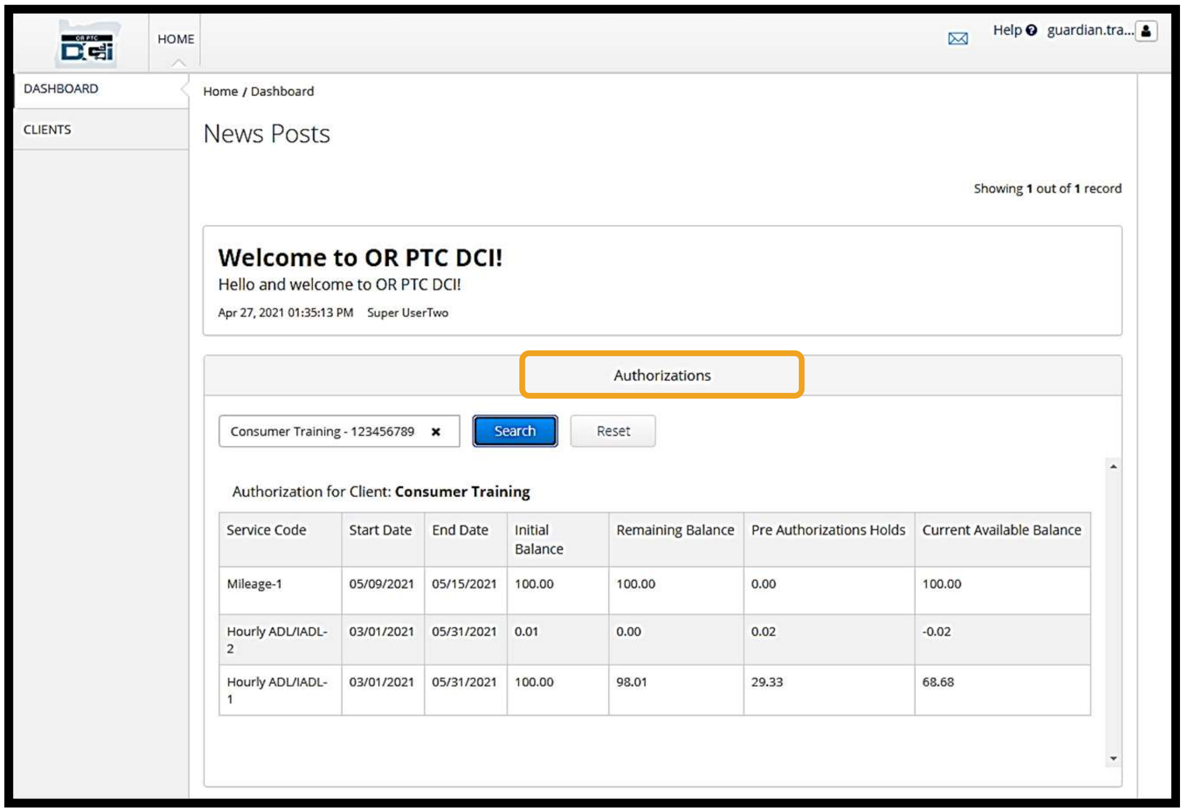
You will also see the following:

1. Important messages from the Agency called News Posts.
2. Clients Tab, where you can see the list of Consumers you represent.
3. Current authorizations for the Consumers you represent.



Authorizations

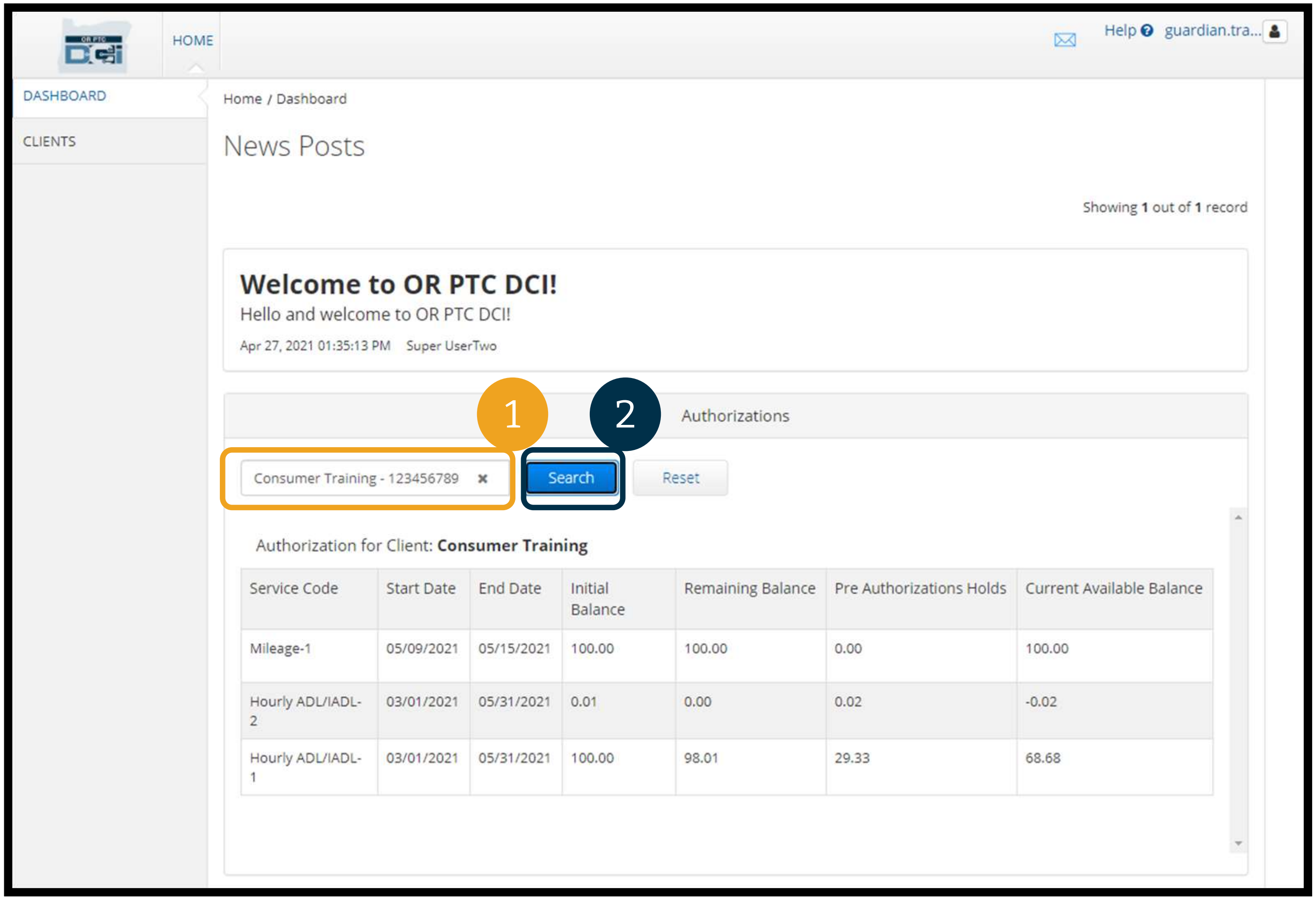
In OR PTC DCI, an authorization is like a voucher - it tells you how many hours and miles the Consumer has available for services in the current pay period. To see the Consumer's authorizations, go to the Dashboard page, and scroll down to Authorizations. Your Authorizations dashboard is directly below the News Posts.



Authorizations

To display the Consumer's current authorization information:

1. Type the Consumer's name
2. Click Search



Authorizations

What does this information mean?

- **Service Code -** The name of the service being provided to the Consumer.
- **Start and End Dates** - Represents the current service period.
- **Initial Balance** - Represents how many hours or miles the Consumer was authorized at the start of the current service period.
- **Remaining Balance** - Hours or miles left on the Consumer's authorization after services have been approved.
- **Pre-Authorization Holds** - Hours or miles of services provided that have not yet been approved.
- **Current Available Balance** - Hours or miles that are currently available to use.

Authorizations

Consumer Training - 123456789 ✖ | Search | Reset

Authorization for Client: **Consumer Training**

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
Mileage-1	05/09/2021	05/15/2021	100.00	100.00	0.00	100.00
Hourly ADL/IADL-2	03/01/2021	05/31/2021	0.01	0.00	0.02	-0.02
Hourly ADL/IADL-1	03/01/2021	05/31/2021	100.00	98.01	29.33	68.68

Authorizations

Note: If you believe an authorization is missing, please call your Local Office.

Authorizations

Consumer Training - 123456789 × | Search | Reset

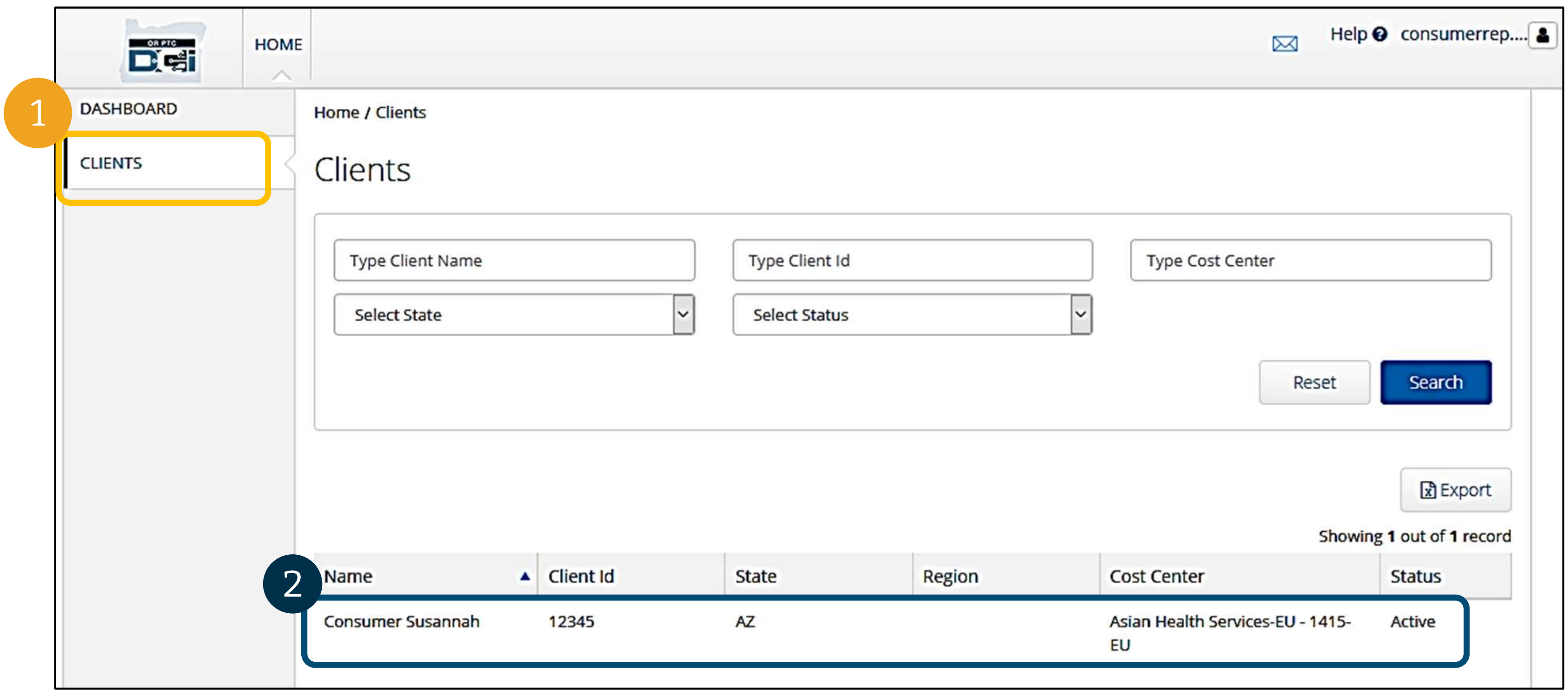
Authorization for Client: **Consumer Training**

Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
Mileage-1	05/09/2021	05/15/2021	100.00	100.00	0.00	100.00
Hourly ADL/IADL-2	03/01/2021	05/31/2021	0.01	0.00	0.02	-0.02
Hourly ADL/IADL-1	03/01/2021	05/31/2021	100.00	98.01	29.33	68.68

Entries Requiring Sign Off

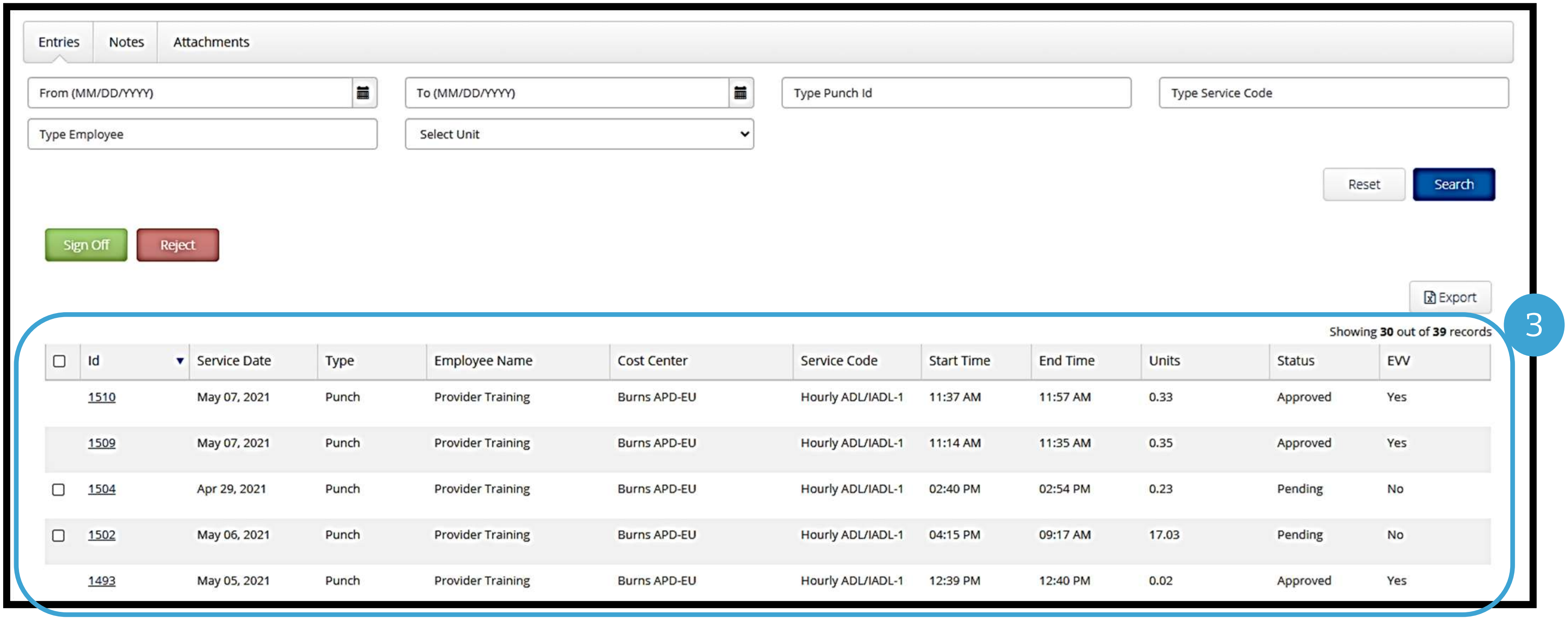
You must sign off on all the Provider's entries at the end of the pay period in order to ensure timely payment to the Provider(s). **To get to entries needing sign off:**

1. Click Clients
2. Click on the Consumer's name



Entries Requiring Sign Off

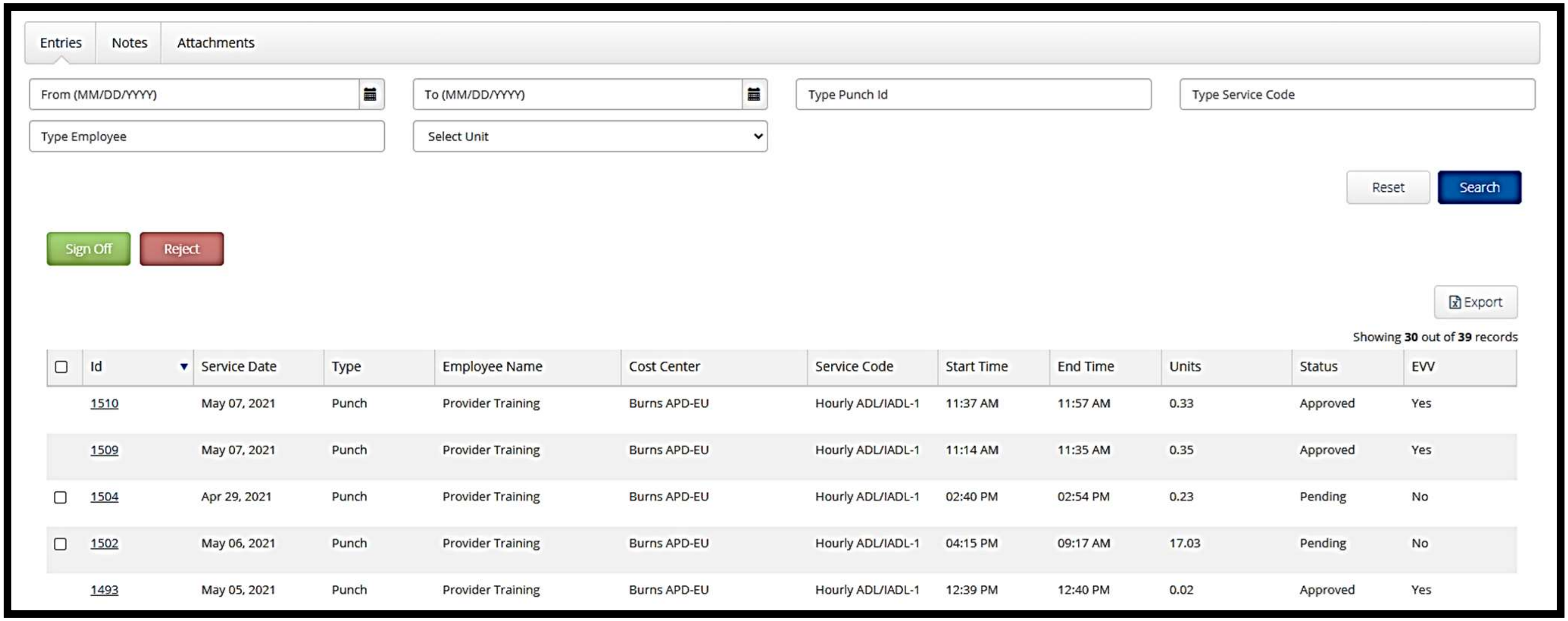
3. Scroll down to the entries listed below the Consumer's demographic information. There, you will see all the entries that have been entered for that Consumer.



Entries Requiring Sign Off

- **Sign off** on entries you believe are correct and accurate.
- **Reject** entries you do not think are correct or that were made in error. If you reject an entry, the status of the entry will change to rejected, and the entry can no longer be edited or approved.

Note: Instead of rejecting an entry, you may ask the Provider to edit their entry to be correct.



	Id	Service Date	Type	Employee Name	Cost Center	Service Code	Start Time	End Time	Units	Status	EVV
	1510	May 07, 2021	Punch	Provider Training	Burns APD-EU	Hourly ADL/IADL-1	11:37 AM	11:57 AM	0.33	Approved	Yes
	1509	May 07, 2021	Punch	Provider Training	Burns APD-EU	Hourly ADL/IADL-1	11:14 AM	11:35 AM	0.35	Approved	Yes
☐	1504	Apr 29, 2021	Punch	Provider Training	Burns APD-EU	Hourly ADL/IADL-1	02:40 PM	02:54 PM	0.23	Pending	No
☐	1502	May 06, 2021	Punch	Provider Training	Burns APD-EU	Hourly ADL/IADL-1	04:15 PM	09:17 AM	17.03	Pending	No
	1493	May 05, 2021	Punch	Provider Training	Burns APD-EU	Hourly ADL/IADL-1	12:39 PM	12:40 PM	0.02	Approved	Yes

Entries Requiring Sign Off

Let's review the information in the entries list:

- **ID:** Click on the ID to view the entry details.
- **Service Date:** The date the Consumer received the service.
- **Employee Name:** The name of the Provider.
- **Cost Center:** The Branch Office Name
- **Service Code:** The type of service received.
- **Start Time:** The time the Provider started working.
- **End Time:** The time the Provider stopped working.
- **Units:** Number of hours or miles on the entry.
- **Status:** The status of the entry.
- **EVV:** This will say No if you have not yet signed off, and Yes if you have.

Export

Showing **30** out of **39** records

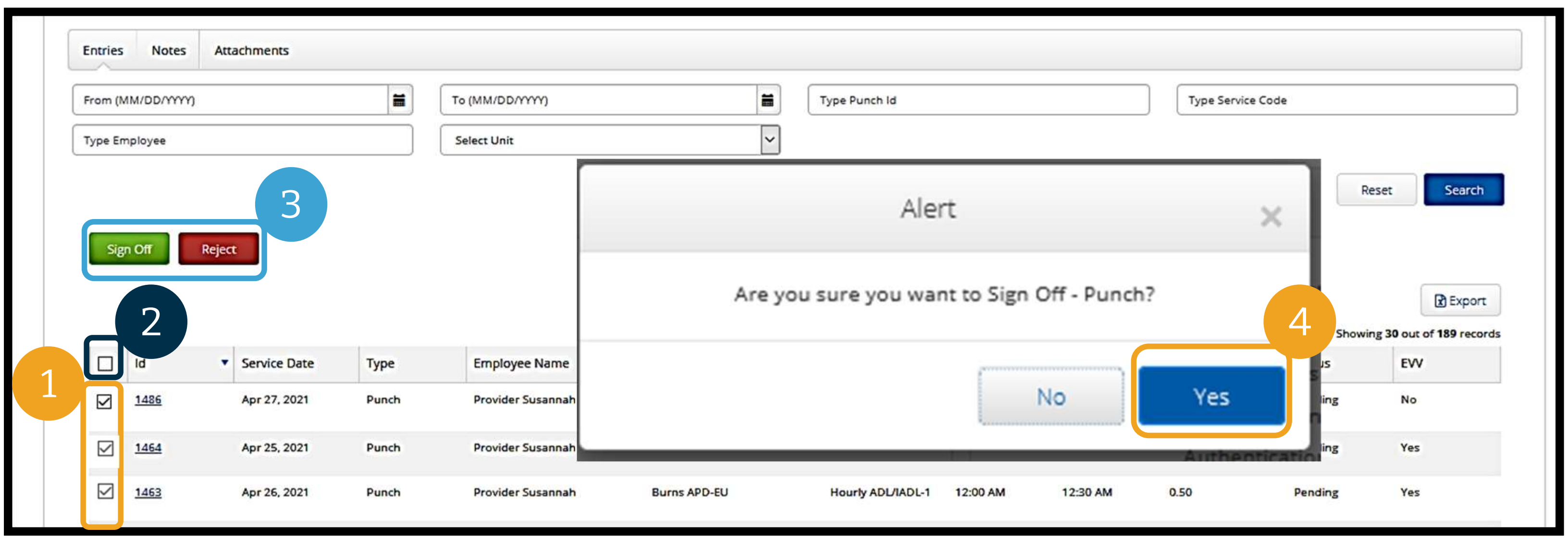
☐	Id	Service Date	Type	Employee Name	Cost Center	Service Code	Start Time	End Time	Units	Status	EVV
	1510	May 07, 2021	Punch	Provider Training	Burns APD-EU	Hourly ADL/IADL-1	11:37 AM	11:57 AM	0.33	Approved	Yes

Entries Requiring Sign Off

Signing off or rejecting an entry:

1. Select individual entries you are taking action on or
2. Select all entries by selecting the top check box
3. Click appropriate action, Sign Off or Reject
4. Click Yes on Alert pop-up

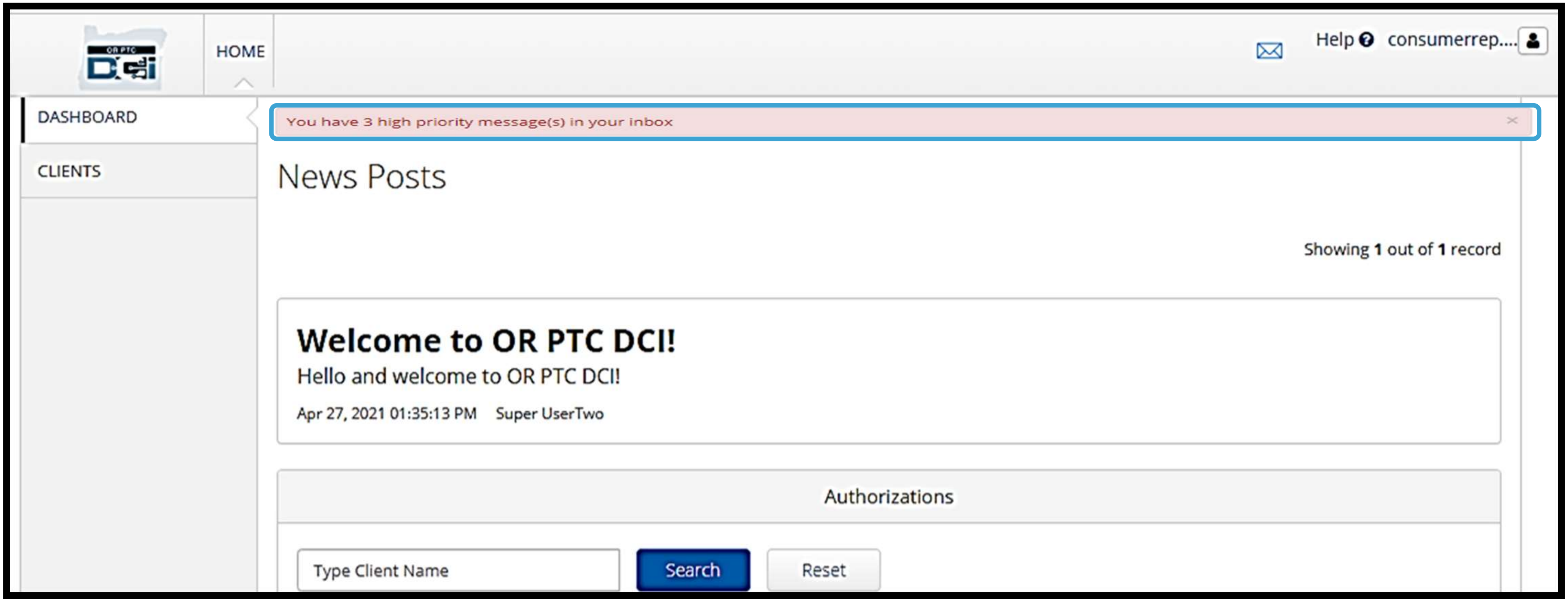
Note: You may also use the search filters to find a specific entry



Messaging Module Overview

OR PTC DCI has its own messaging system. This allows you to send messages to the Consumer's Provider and to your contact at their Local Office. You may also receive system-generated messages. At the top of your dashboard, you will see a red alert if you have a high priority message.

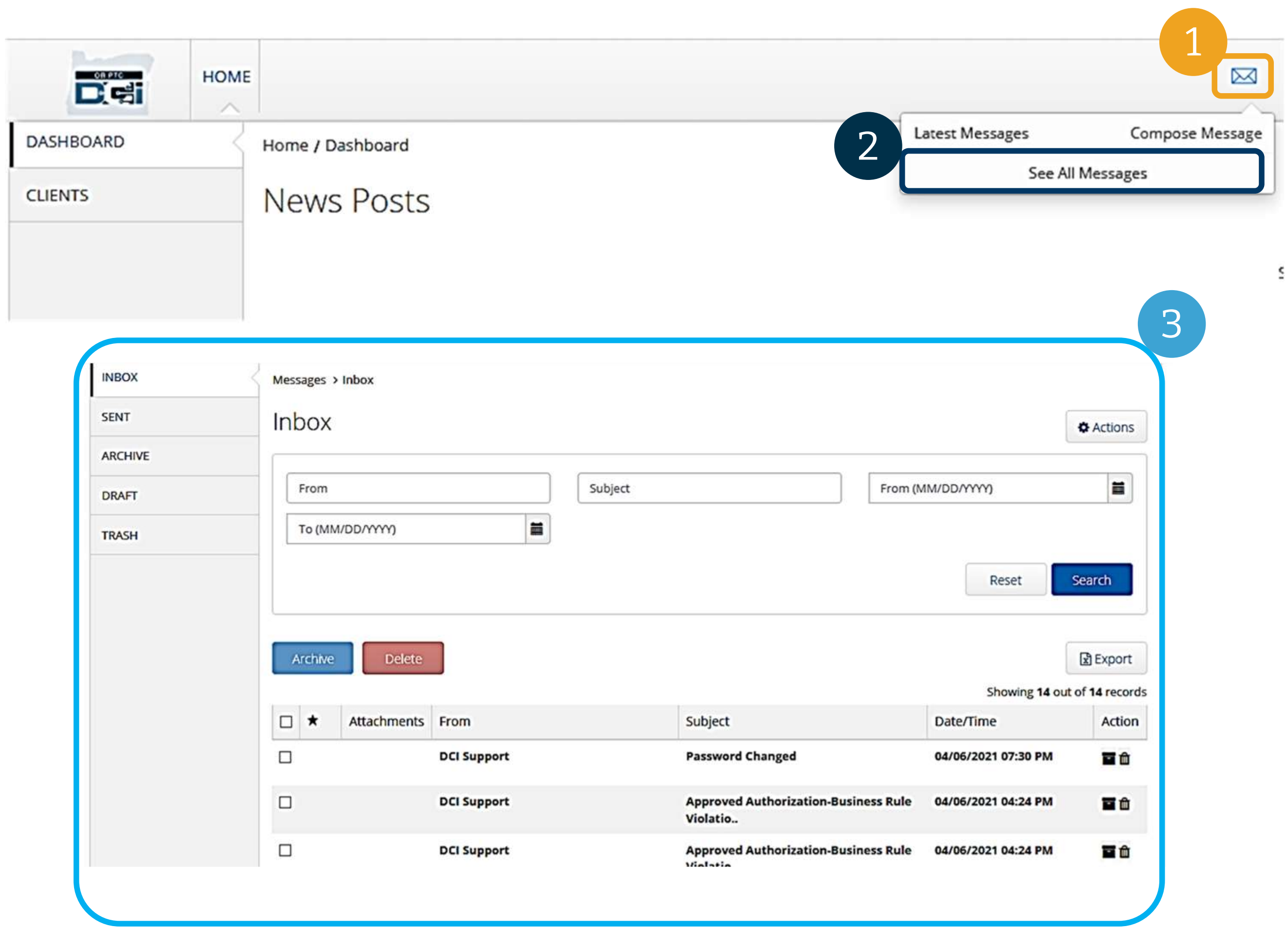
Note: The OR PTC DCI Messaging Module should not be used for emergency communications.



Messaging Module Overview

To see your messages in the messaging module, log into the OR PTC DCI Web Portal. Then follow these steps:

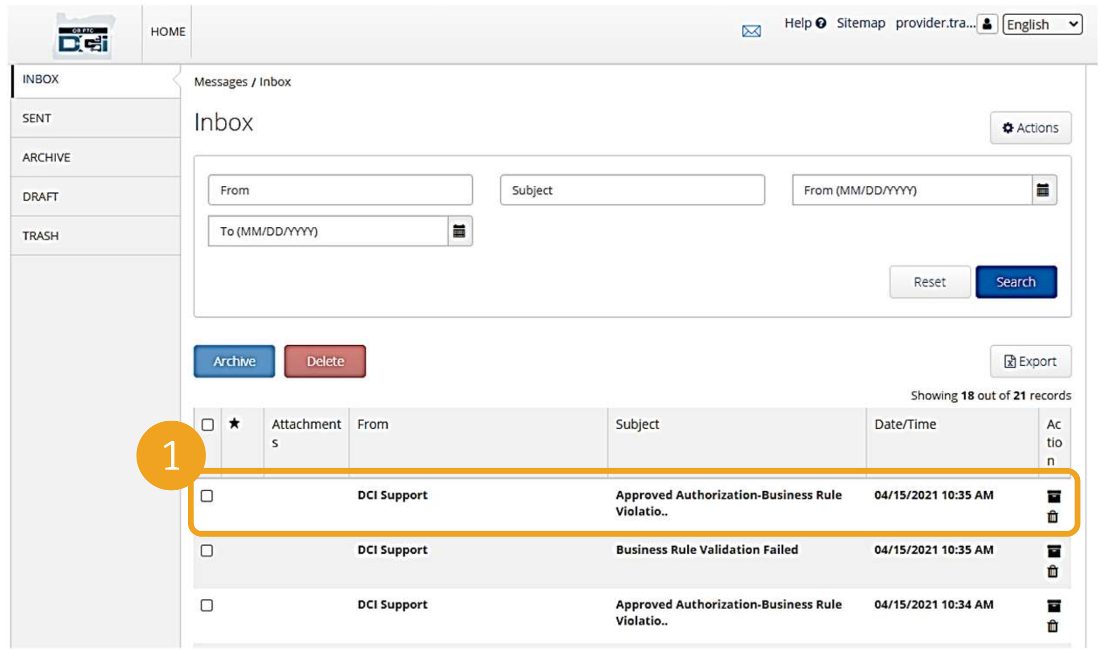
1. Click the envelope icon in the upper right corner of the screen
2. Click See All Messages
3. You will be taken to the Messaging Module

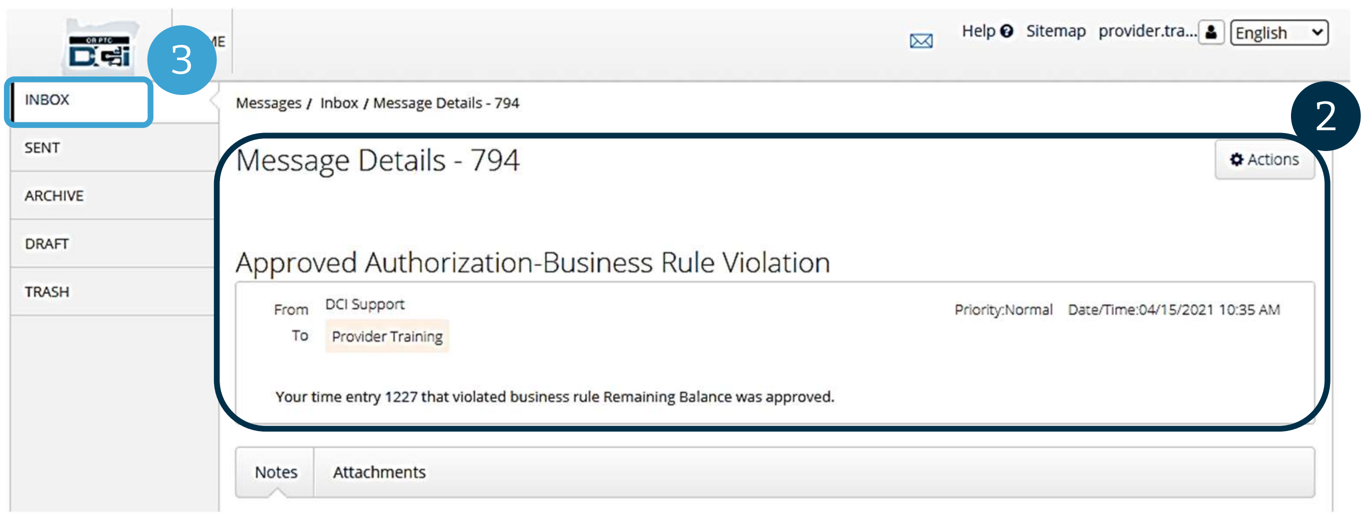


Messaging Module Overview

To read a message in the Inbox:

1. Click on the message
2. The Message Details page opens and you will be able to read the message
3. Click Inbox to return to see all messages



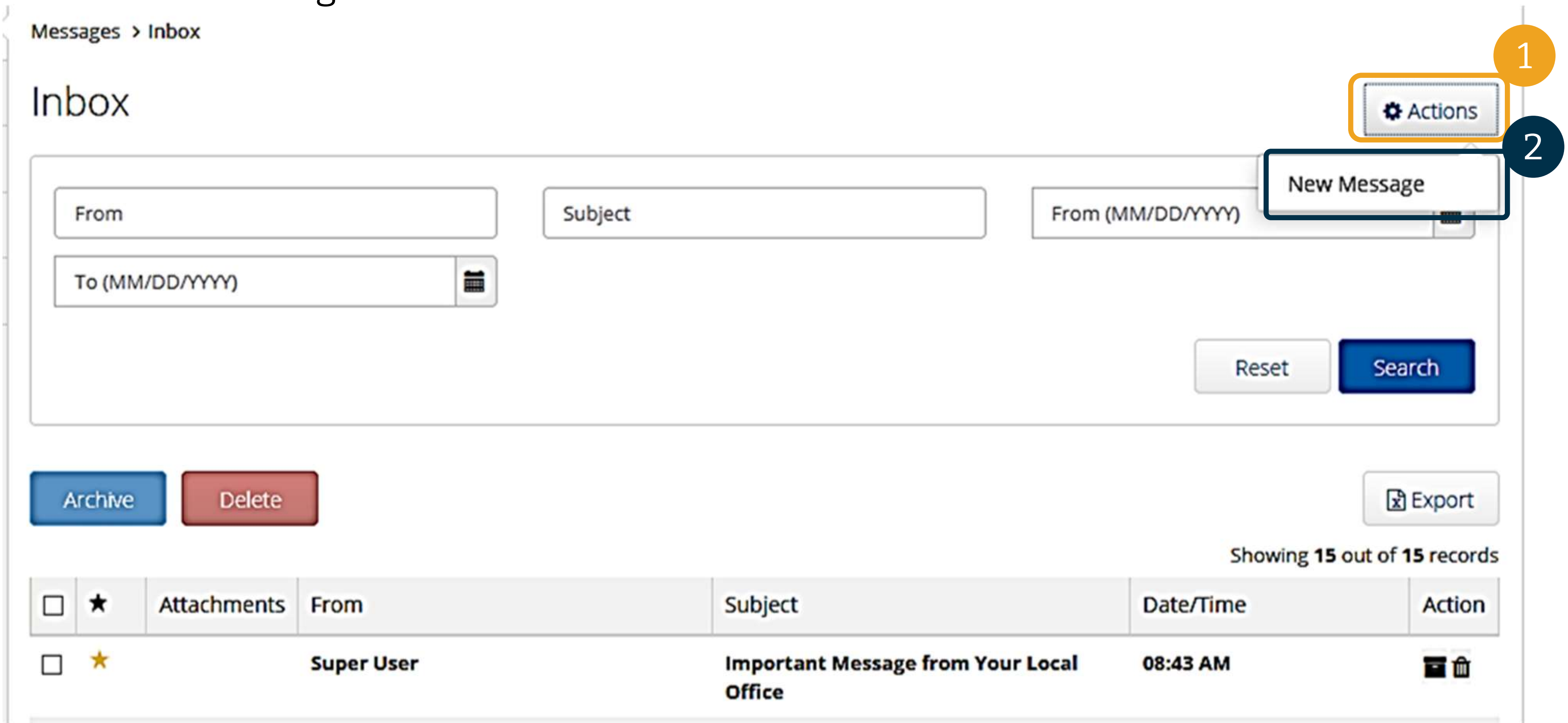


Messaging Module Overview

Now, let's learn how to send a message.

To send a message:

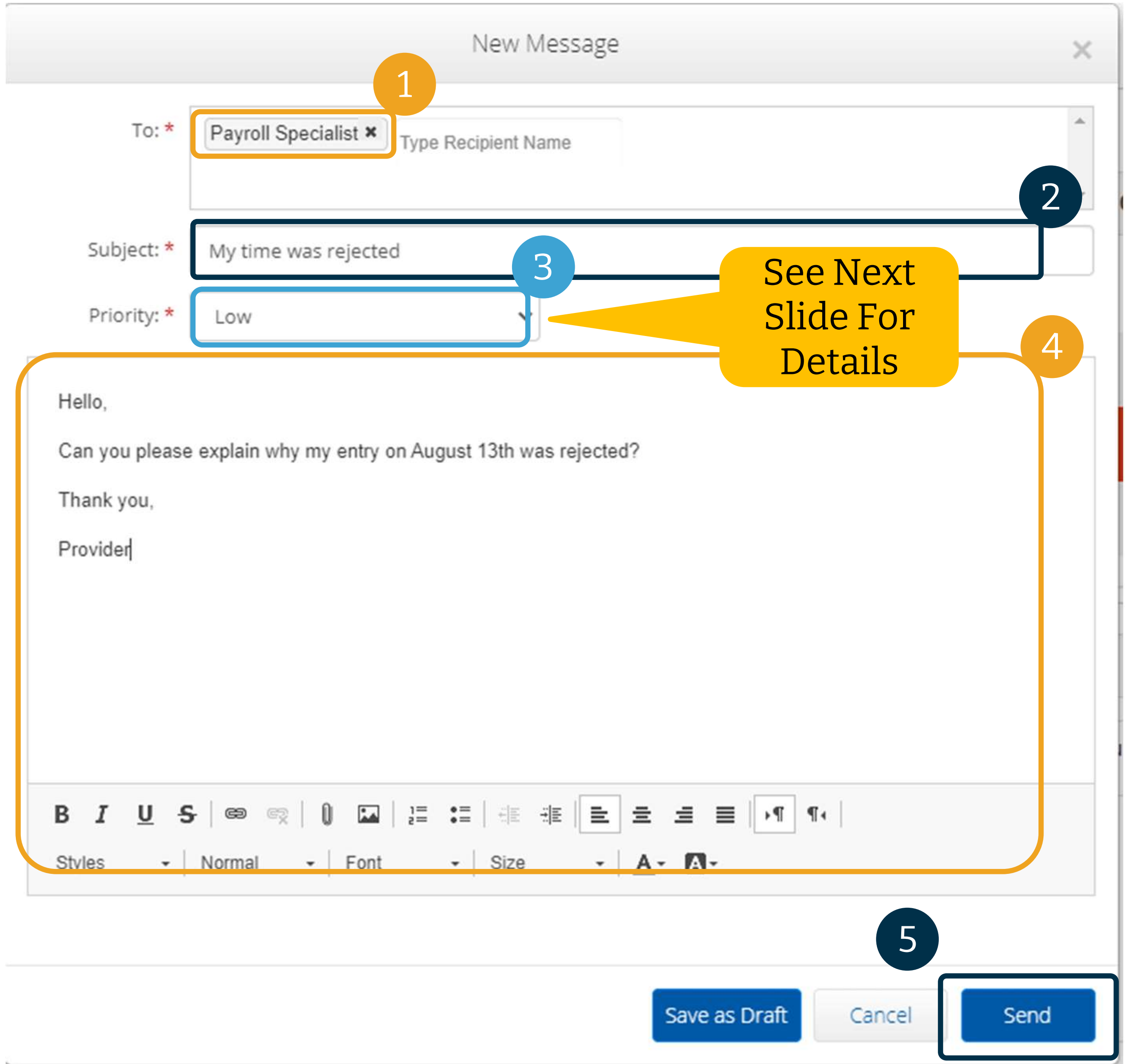
1. Click Actions
2. Click New Message



Messaging Module Overview

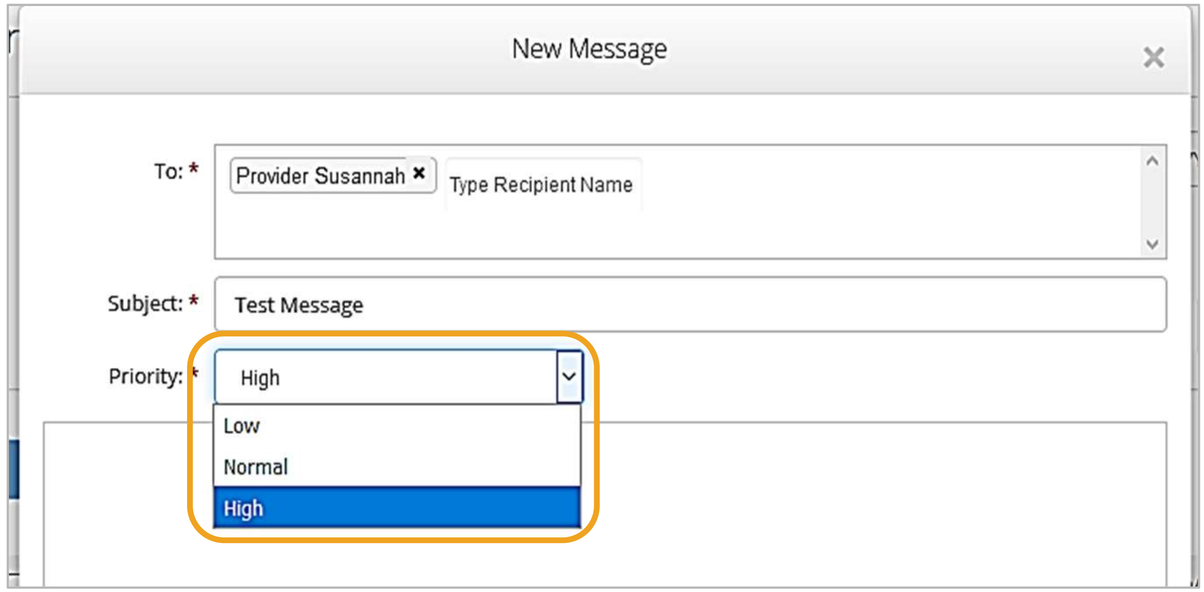
Next, fill out the following fields:

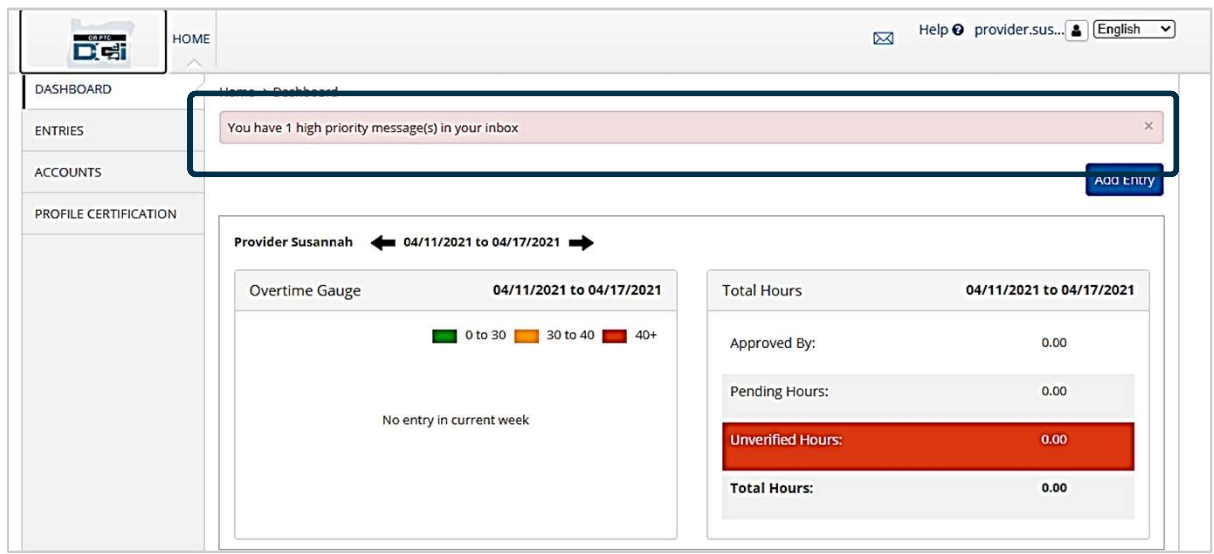
1. To: Start typing the 1st three letters of the recipient's first or last name and select a name from the dropdown menu when it appears
2. Subject: Type the subject of the message in the Subject box
3. Priority: Select the priority level from the dropdown menu *(see next slide for details)*
4. Type the message in the Body box
5. Click the Send button



Messaging Module Overview

- Select Low, Medium, or High from the dropdown menu in the Priority box.
- High Priority messages will cause a red alert to appear at the top of the recipient's OR PTC DCI Dashboard when they log in.





OR PTC DCI Mobile App

OR PTC DCI Mobile App

The OR PTC DCI Mobile App is not just for Providers! You, as the Consumer Employer Representative, can use the mobile app to:

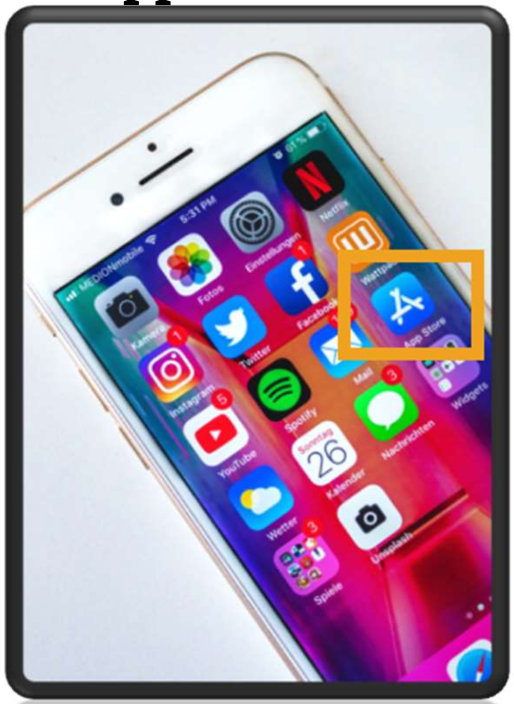
- View entries for services provided
- Sign off on and reject time entries
- Use the DCI Messaging Module

Let's start by learning how to download the OR PTC DCI Mobile App.

Downloading the Mobile App

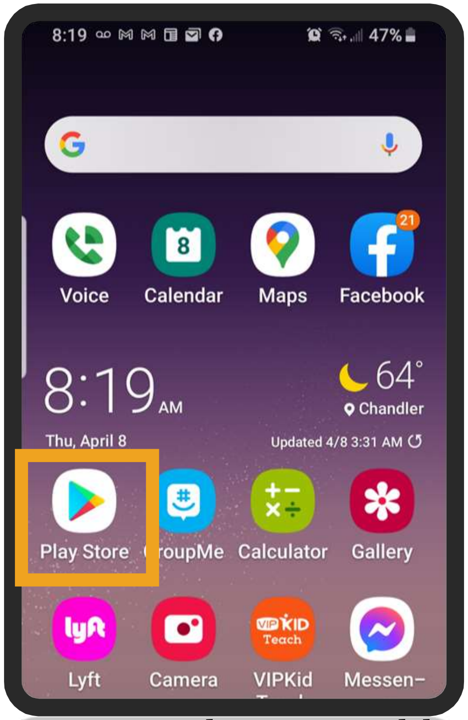
To download the App, go to your Apple App Store or Google Play Store on your smart device.

Apple Device



ie: smartphone or iPad

Android Device



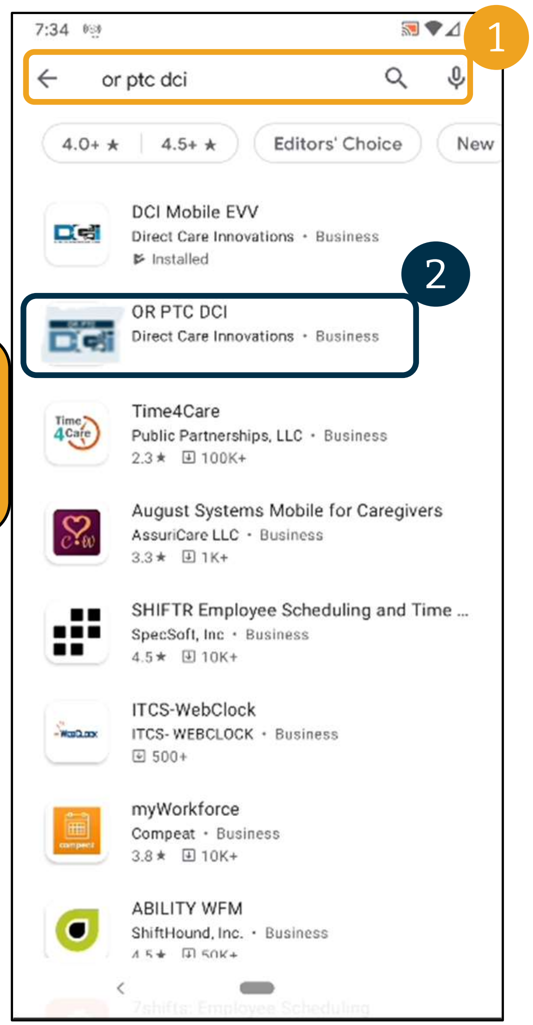
ie: smartphone or tablet

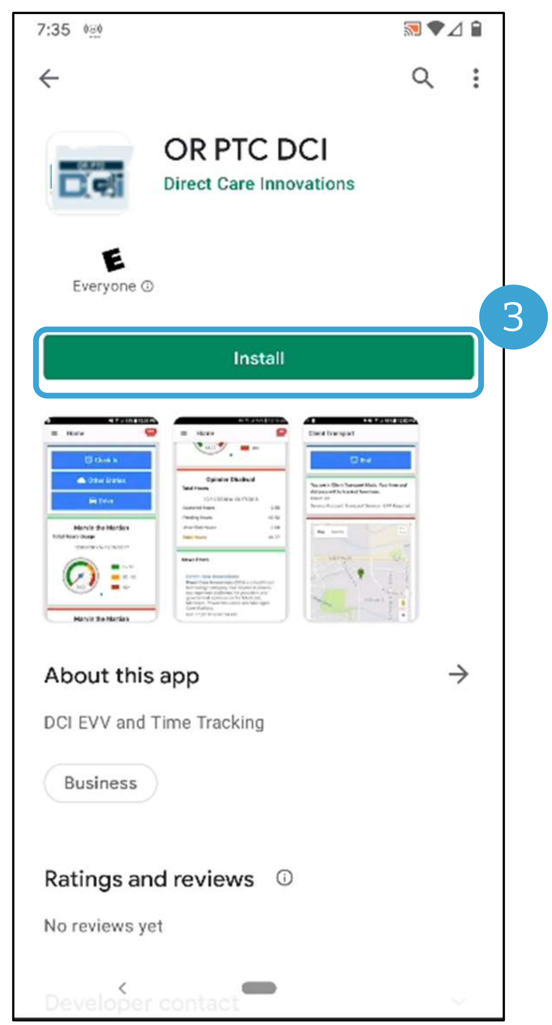
Downloading the Mobile App

1. Type "OR PTC DCI" into the search bar.
2. Select OR PTC DCI from the list of available apps.

Note: There is more than one DCI mobile app, make sure to select the one that is labeled **OR PTC DCI**.

3. Click Install and then open the app when install is complete.

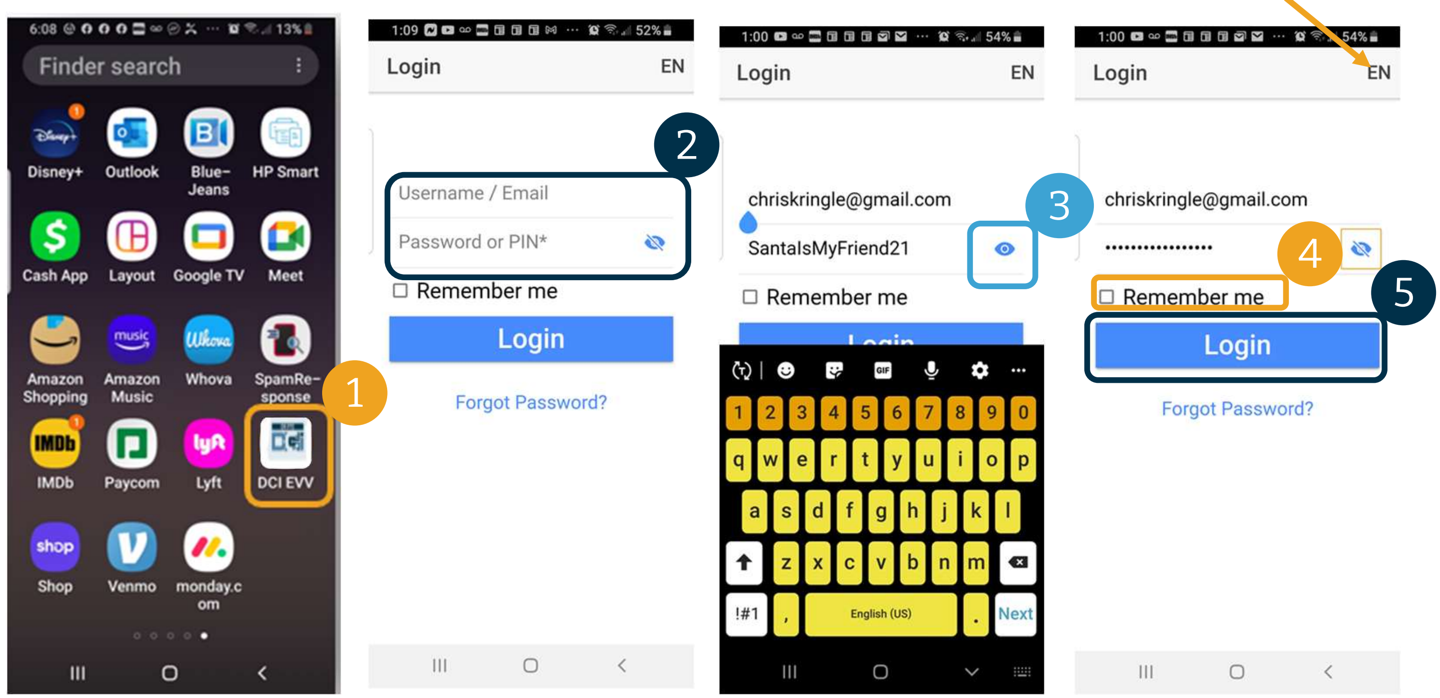




Logging In

1. Open the OR DCI PTC App on your mobile device
2. Enter your Username and password
3. You can tap the eye icon to display or hide what you entered for your password
4. Check Remember me if you would like the system to remember your username
5. Click Login

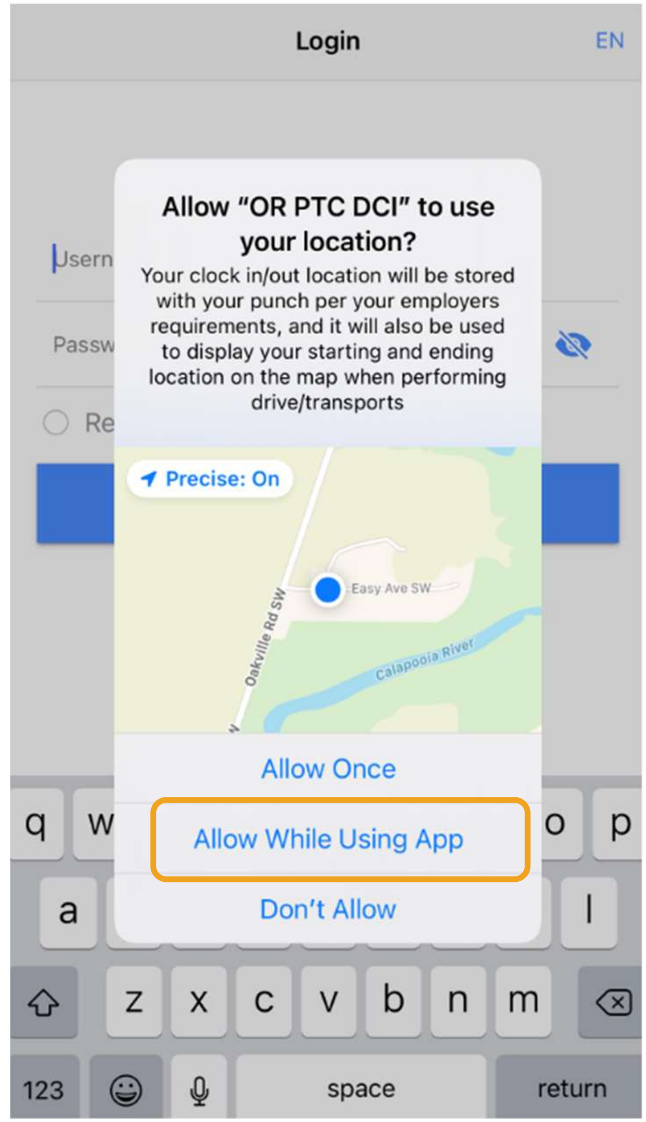
Note: Click the language button in the top right corner to change the language on your login screen!



Logging In

Logging in for the first time will require you to give the app access to the device's location.

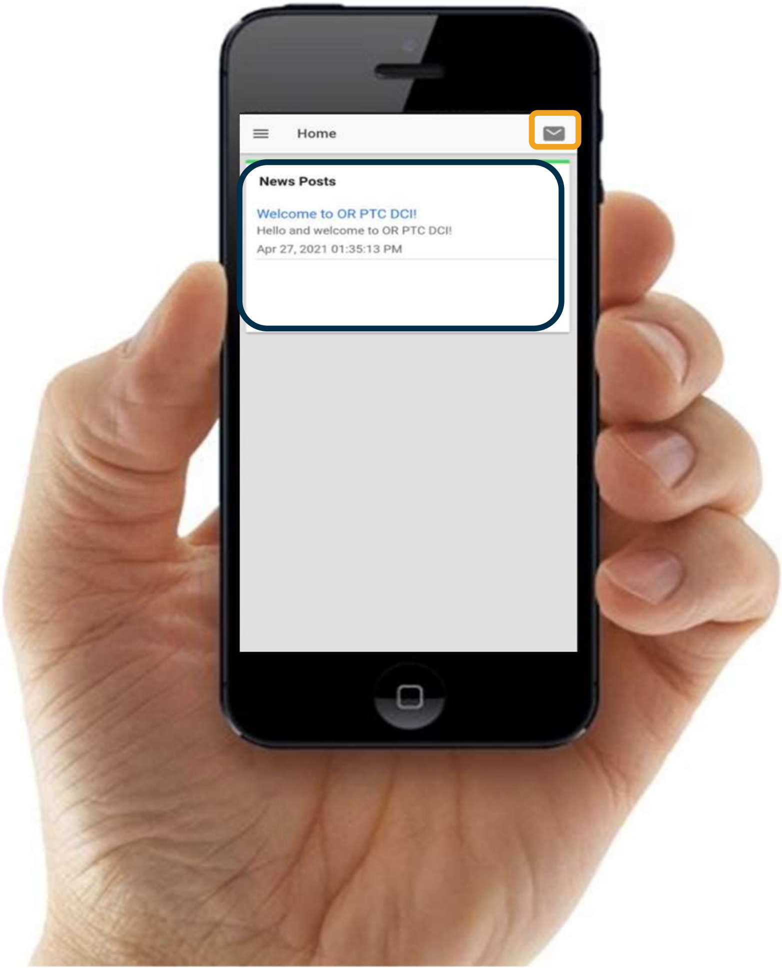
Note: You must choose “Allow While Using App” or the app will not allow you to log in. The app will not track your location (as the Consumer Employer Representative). The app requires location tracking abilities so that Provider time entries are EVV compliant. This message will display only during the first login to the app.



Mobile App Dashboard

Let's review your Mobile App Dashboard:

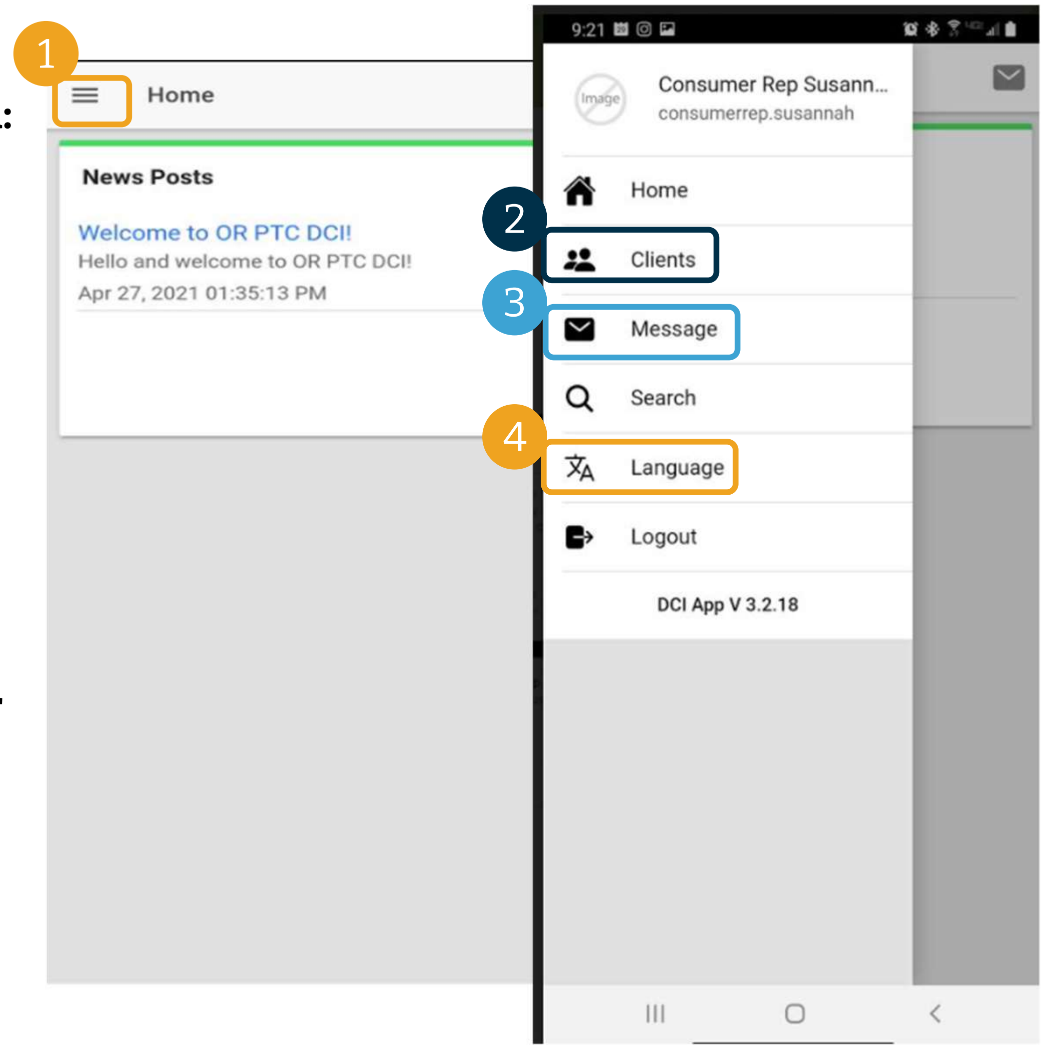
- **Messaging Module:** Click the envelope in the top right corner to view messages in your inbox.
- **News Posts:** Important messages from the Agency. Click on the News Posts to view the details.



Mobile App Menu

Now let's take a look at your menu:

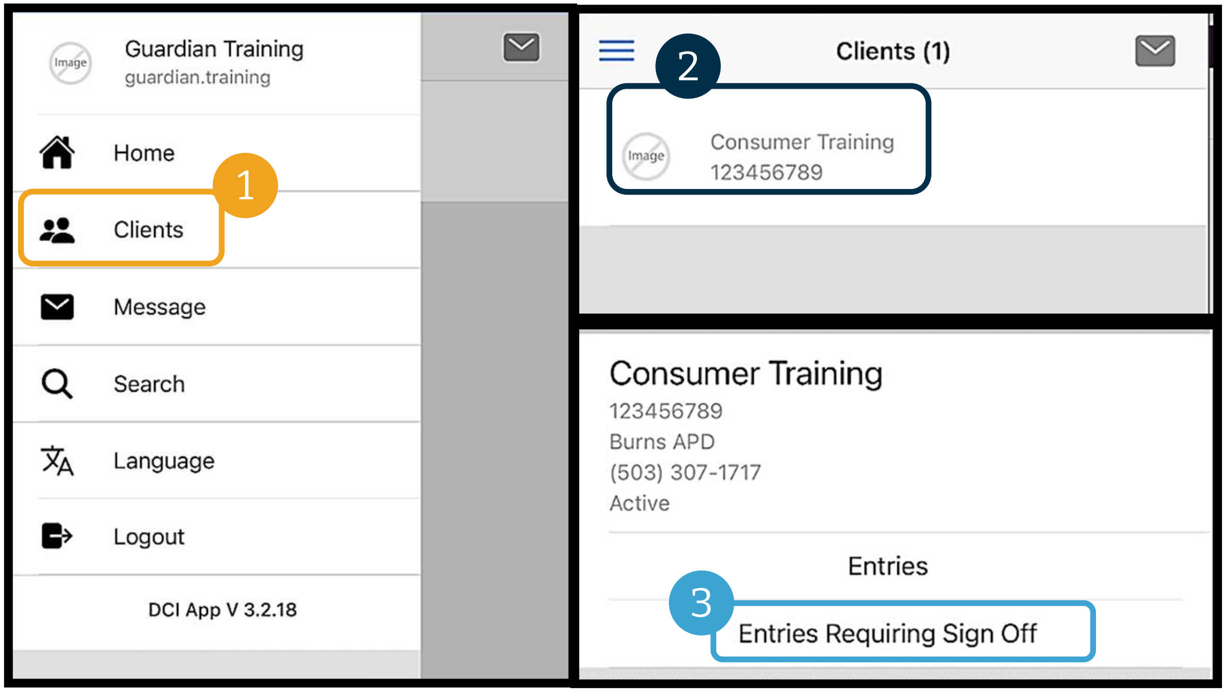
1. Click the icon with three horizonal lines to view your menu
2. Click Clients to view the Consumer(s) you represent
3. Click Message to view your messages
4. Click Language to change your preferred language



Entries Requiring Sign Off

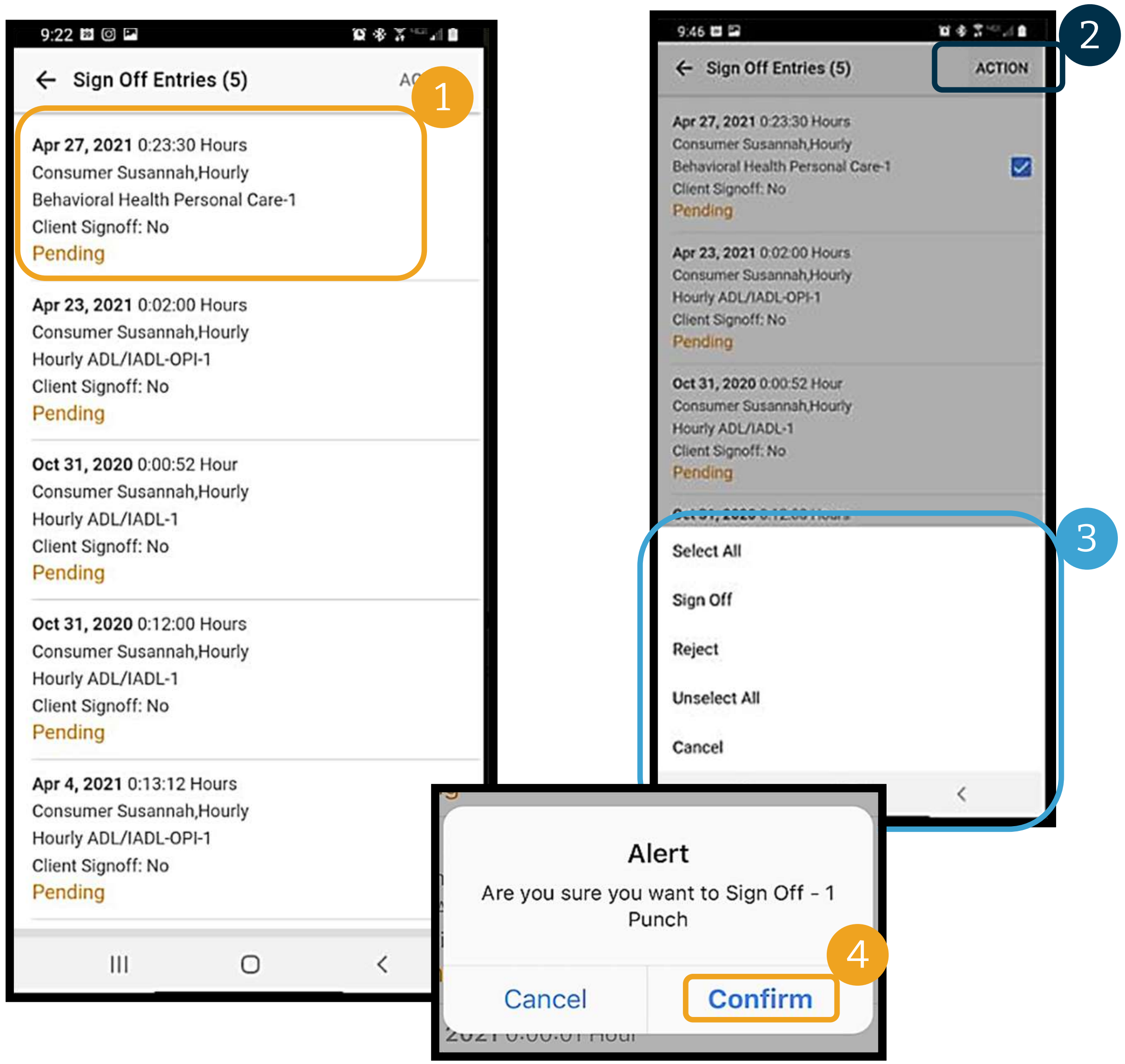
Let's start with Entries Requiring Sign Off. To get there, first click on the Consumer's name

1. From the menu, click Clients
2. Click the Consumer's name to get to client Details
3. Click Entries Requiring Sign Off.



Entries Requiring Sign Off

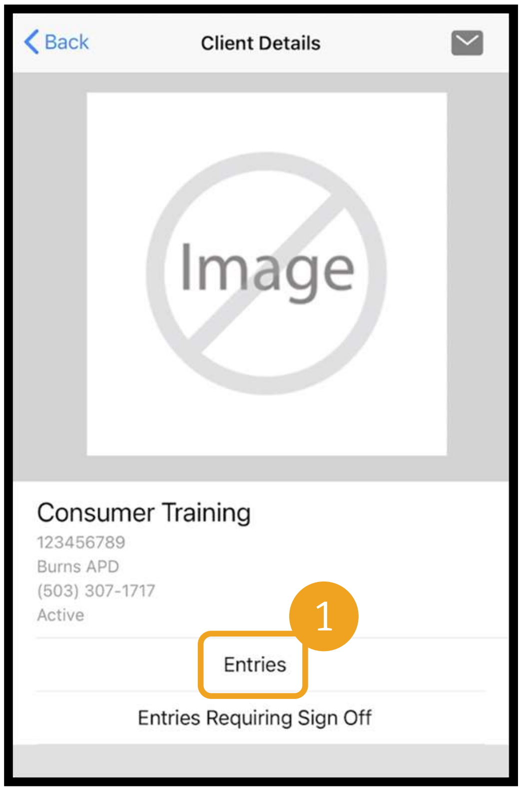
1. Press and hold on an entry to select it. You should see a blue box with a checkmark appear on the right.
2. Click Action
3. From here you can, Select All, Sign Off or Reject selected entries or Unselect All or Cancel
4. If you Click Sign Off or Reject you will get a pop-up alert to confirm, Click Confirm

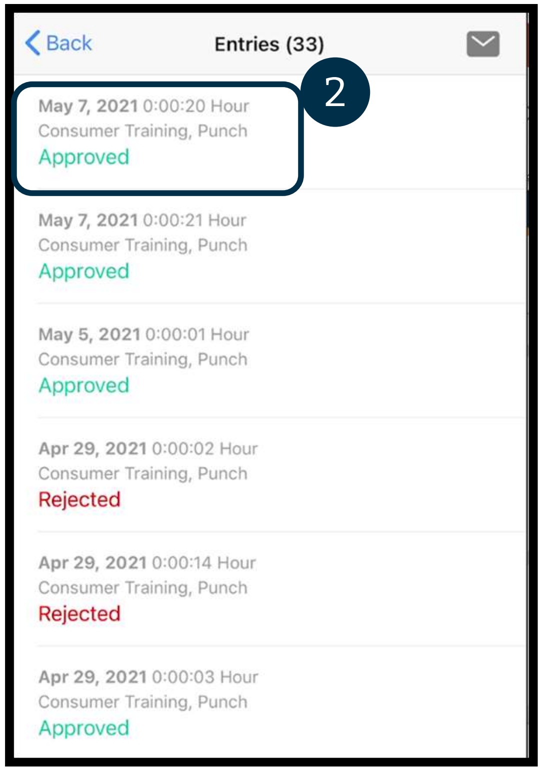


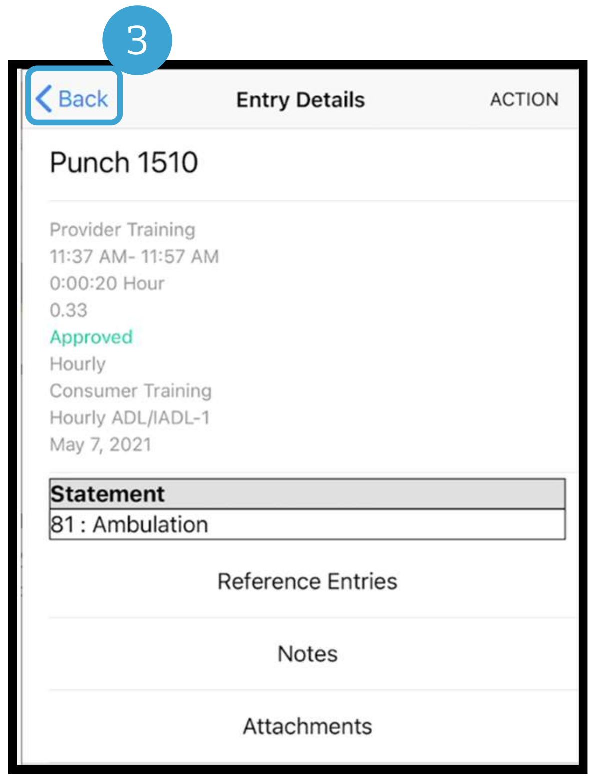
All Entries

Next, let's view all of the entries:

1. From the Client Details, click Entries.
2. Click on any entry to view the details.
3. Click Back to return to the list of entries.







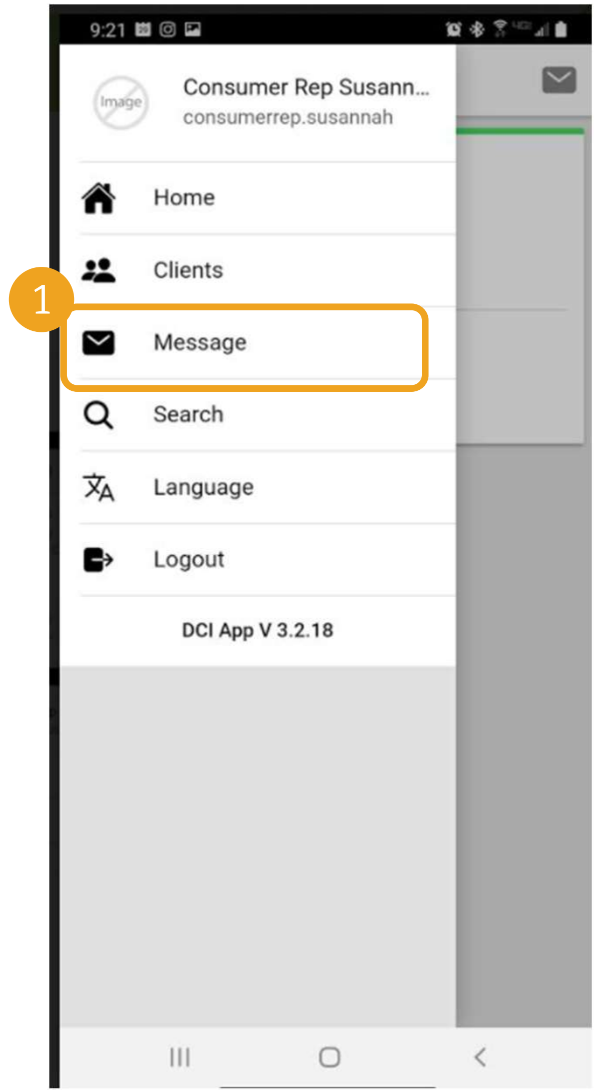
Messaging Module

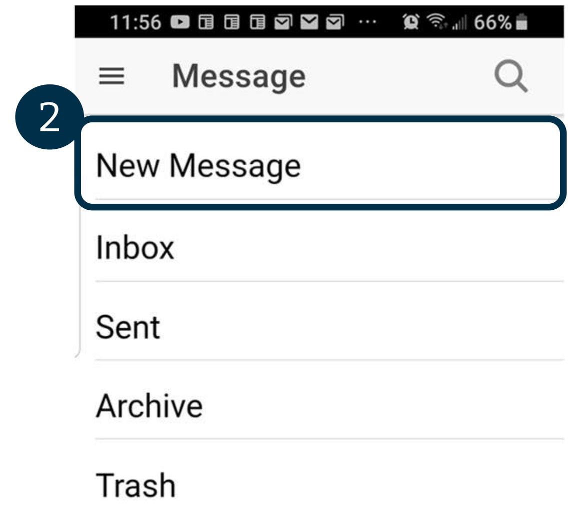
You can use the OR PTC DCI Messaging Module to send non-urgent communication to Provider(s) or your Local Office.

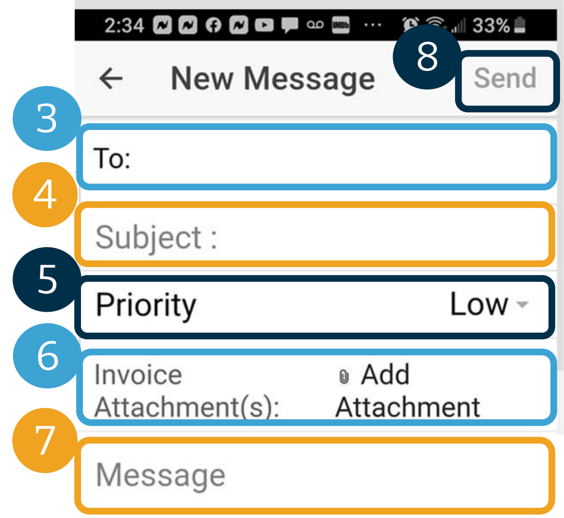
From the menu:

1. Click Message
2. Click New Message
3. Click in the “To:” box Start typing the name of your recipient and select the name when it appears
4. Enter a subject
5. Select a priority
6. Add an attachment if desired
7. Compose your message
8. Click Send

Note: Do not use DCI for emergency communication!







Next Steps

Next Steps

Congratulations! You have completed the OR PTC DCI introductory tutorial. By now, you and the Consumer should have already:

- Selected the Consumer's EVV method(s) and communicated with your Local Office if they wish to use Landline or Fob EVV.
- Created an email address if you didn't already have one

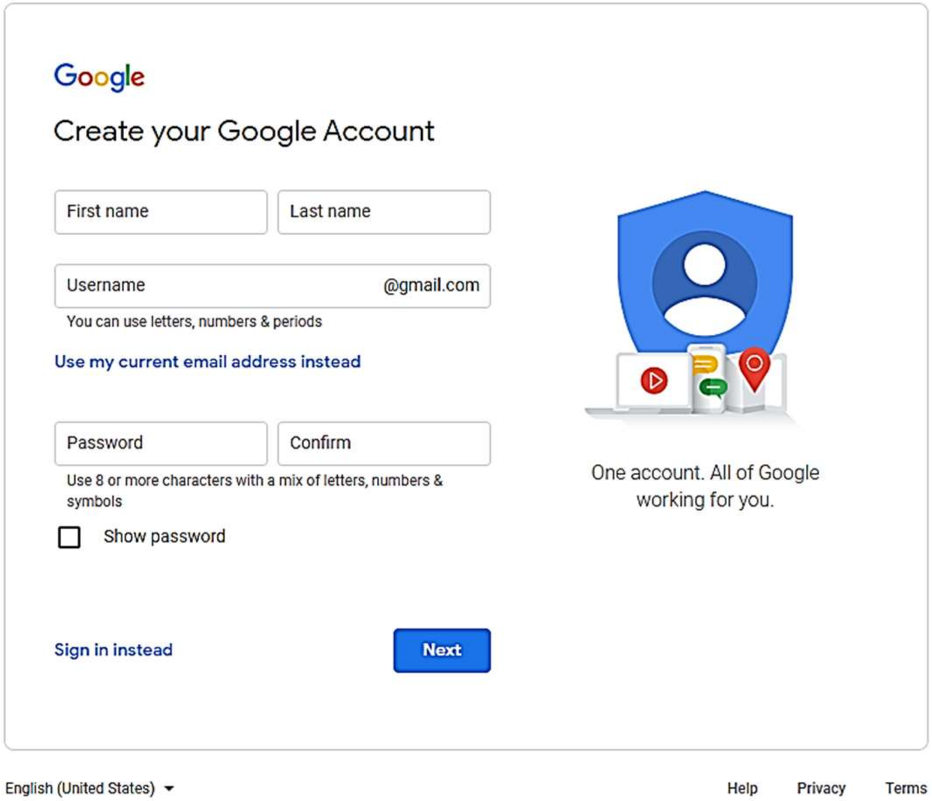
  Note: You must have a personal email address to use OR PTC DCI.

- Make sure you contact the local office to update your email address.

Let's walk through creating an email address, just in case.

Creating An Email Address

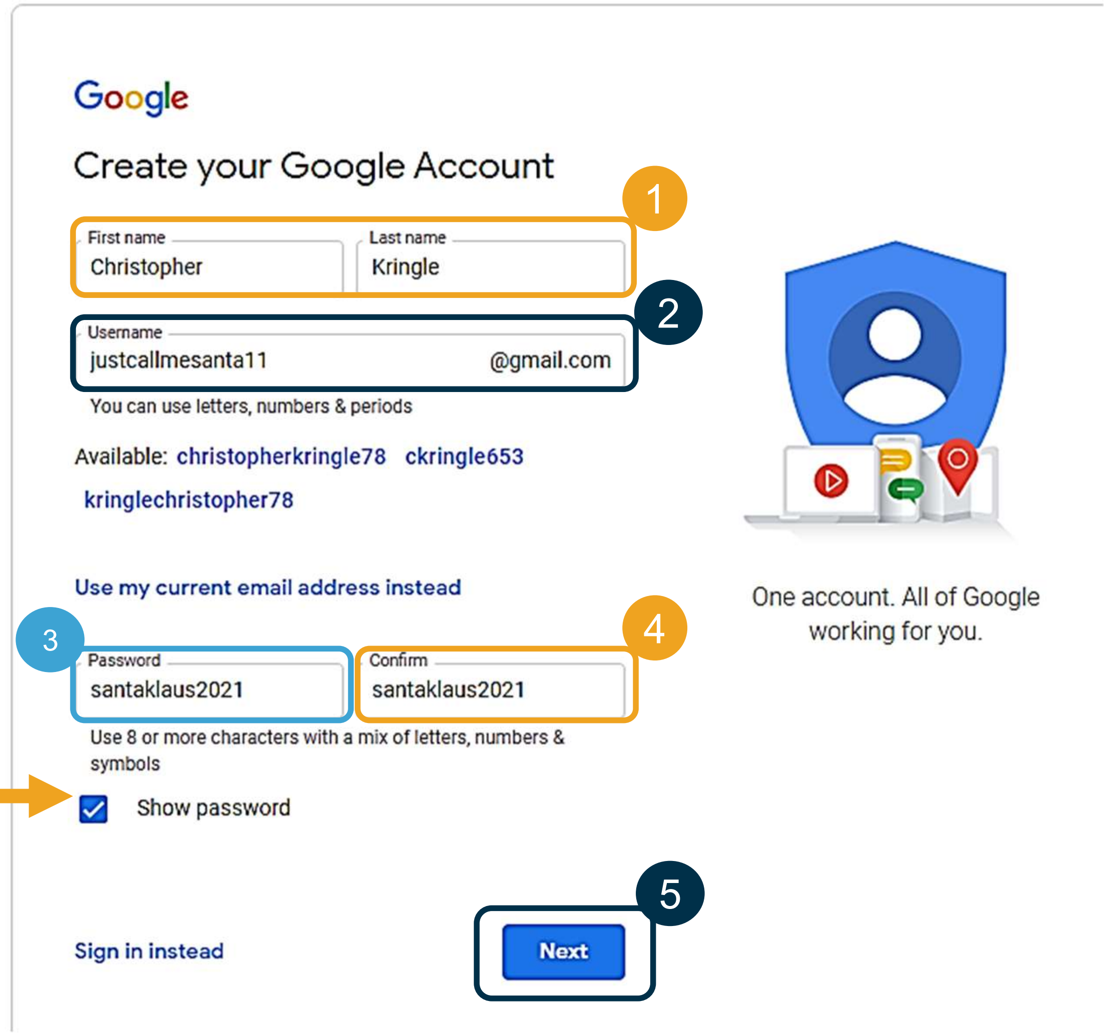
- There are many free email providers. The biggest is Gmail by Google.
- This is a completely free email address that is very user-friendly.
- Gmail is also available on your Android and Apple iOS smart devices.
- Click the following link to register for Gmail:
- https://accounts.google.com/signup/v2/webcreateaccount?flowName=GlifWebSignIn&flowEntry=SignUp



Creating An Email Address

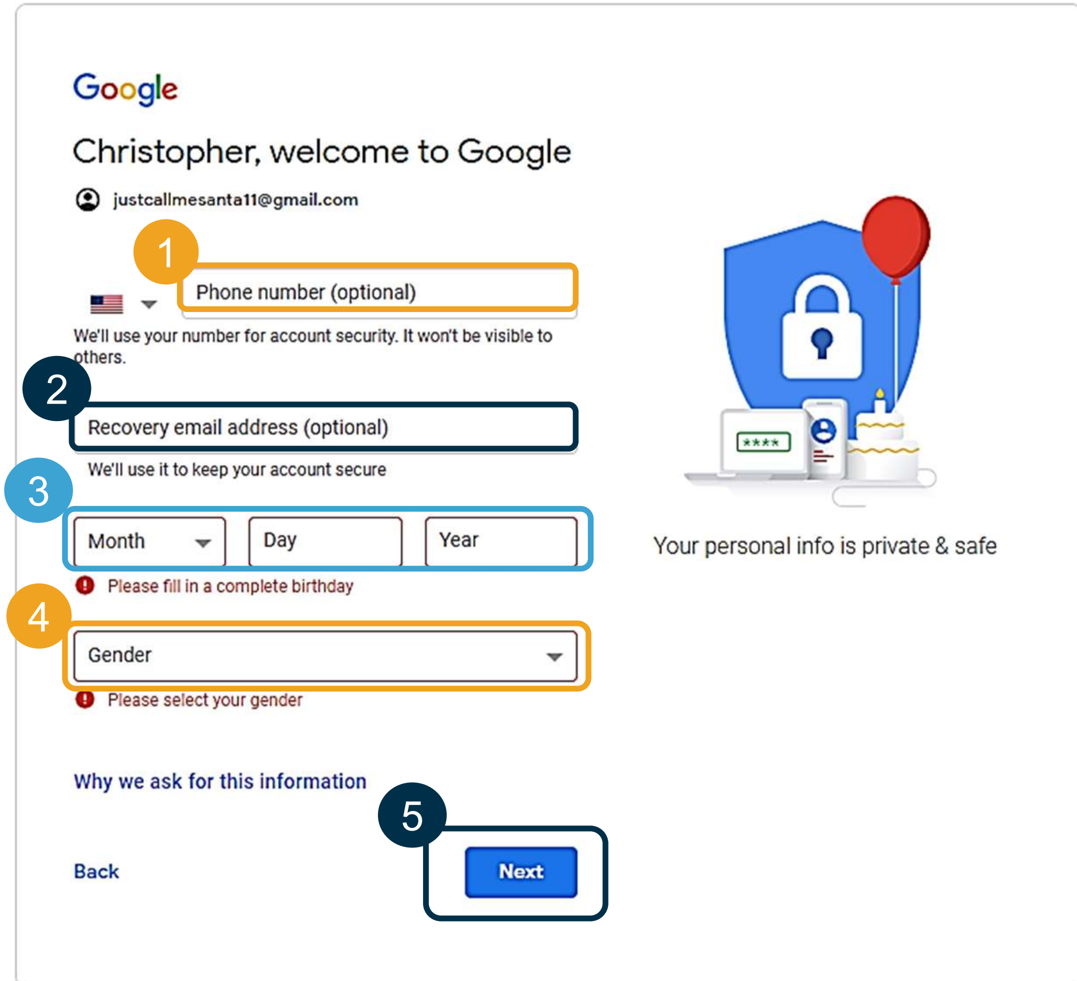
1. Enter First and Last name
2. Create Username
   - Your Username will be your email address
   - Gmail will tell you if the username is already taken
   - You can create another one or use the available usernames Google recommends for you
3. Create Password
   - Google recommends the use of a mix of 8 or more characters
4. Confirm Password
5. Click Next

Note: Check box to show password



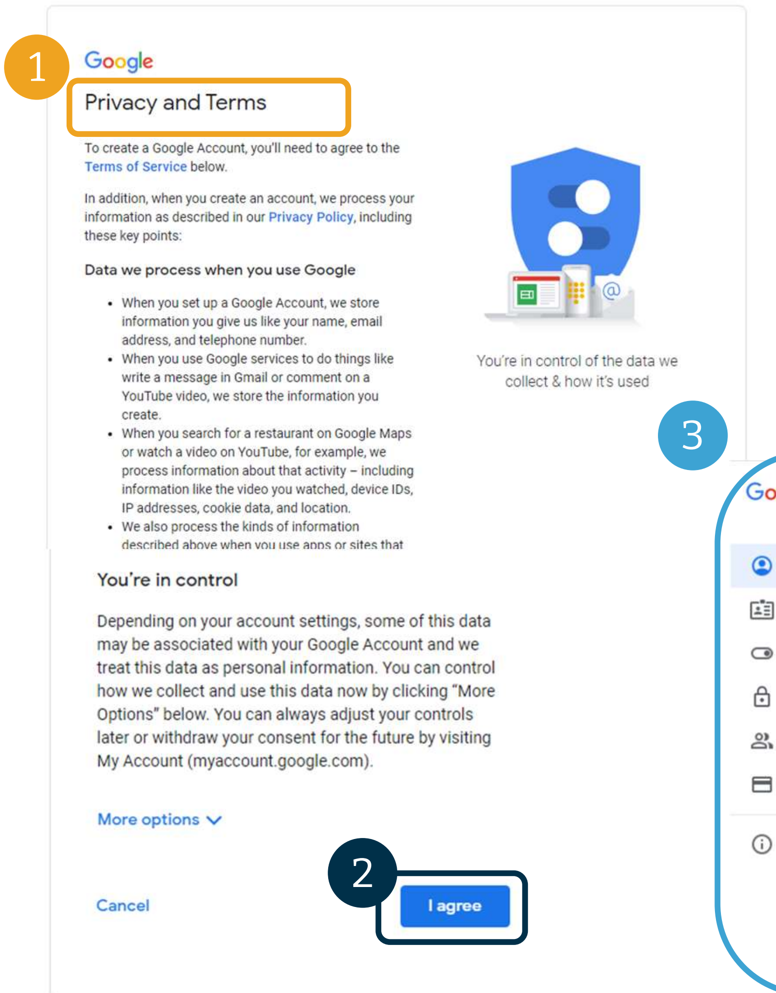
Creating An Email Address

1. Enter your cell phone number
    - Used for added security only
2. Enter another email address you may have
    - Used for added security only
3. Enter your date of birth*
    - Google uses your birthday for added security, ensure you are old enough to have an email, and to personalize services to you.
4. Select your gender or choose not to disclose it*
    - Google uses your gender to address you correctly in messages they may send to you
5. Click Next

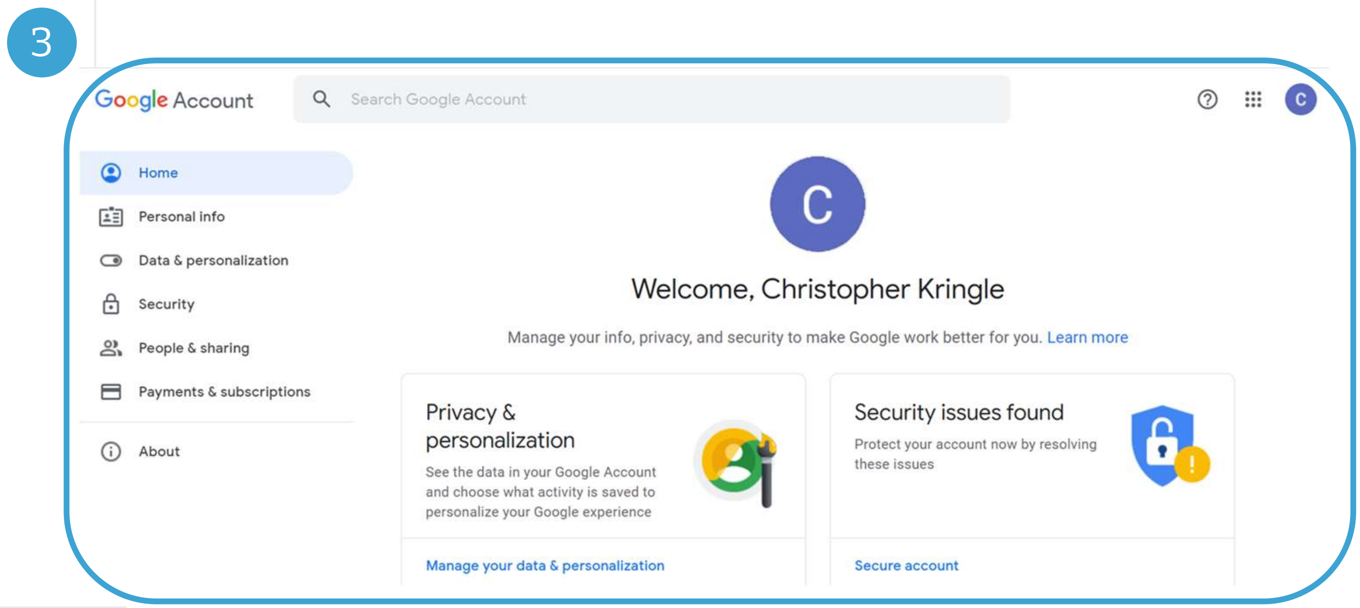


* -Denotes Required field

Creating An Email Address



1. Read Privacy and Terms
2. Click I agree
3. Your email address is now created, you will be taken to your Google Account home page



Next Steps

One more thing!

You will need your OR PTC DCI username, password, and PIN prior using OR PTC DCI. If you have not already received this information, please contact your Local Office as soon as possible.

Support

Need Help?

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

Acumen Call Center (Available 24/7, except on holidays)

Call 1-855-565-0155 or email ORPTCSupport@dcisoftware.com for help with:

- Basic system navigation assistance
- Login assistance

> **Note:** You will need the last 4 digits of your SSN and Date of Birth when requesting login assistance.

- System errors (frozen pages, server errors, etc.)

PTC Support

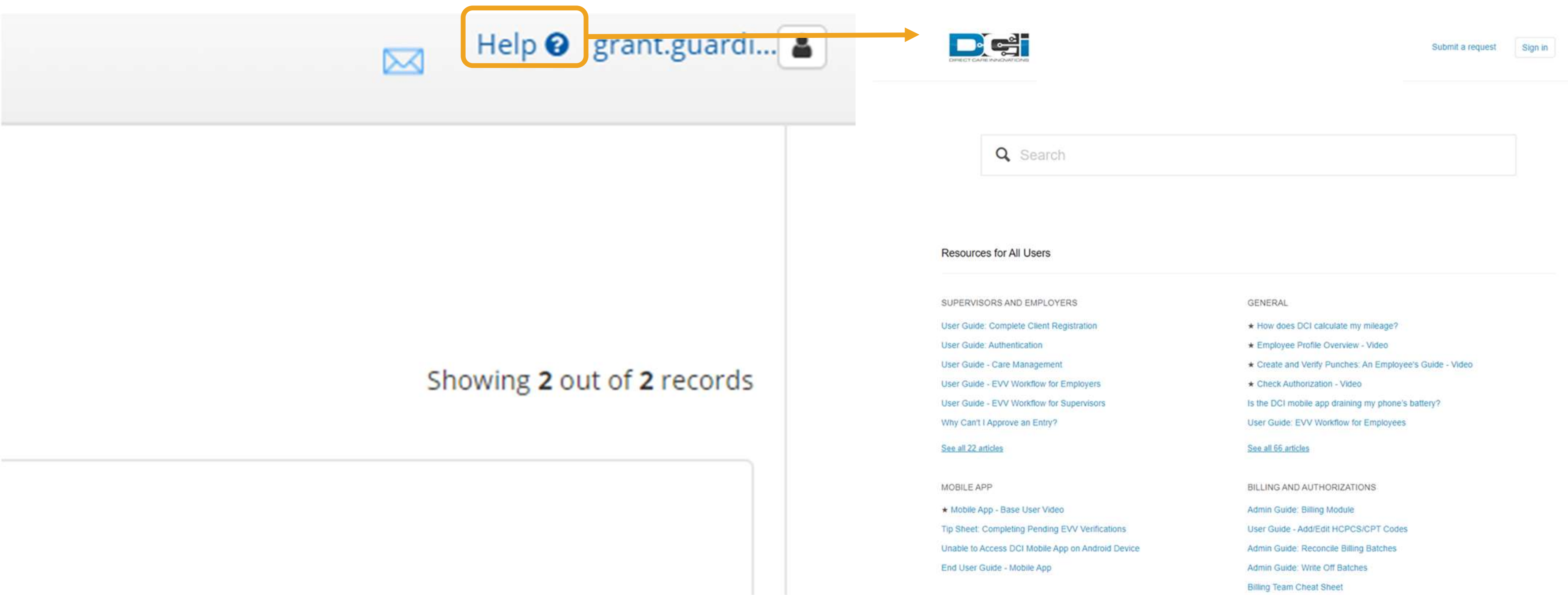
Email PTC.Support@dhsoha.state.or.us or call your Local Office for help with:

- New to OR PTC DCI and getting started
- New, lost, broken or malfunctioning fobs

DCI Help Center

If you are stuck and need help with doing something in OR PTC DCI, you can easily go to the help site.

- Click on the Help button in the top right corner of the Web Portal.
- You will be automatically redirected to the Help Center.
- Search by keyword to find the help resource you're looking for.



DCI Help Center

A note on the DCI Help Center:

The DCI Help Center is not specific to Oregon. You should have received OR PTC DCI support materials from Agency. Contact your Local Office if you did not receive these materials or if you require these materials in a specific format.

Thank you!