OREGON
PROVIDER
Time Capture

Provider Guide

OR PTC DCI

Contents

Disclaimer

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

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).

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?

- OR PTC DCI stands for Oregon Provider Time Capture Direct Care Innovations.
- Direct Care Innovations (DCI) is the electronic time keeping tool.
- You will use OR PTC DCI to enter time worked and mileage.
- The consumer can use OR PTC DCI to review and sign-off on the time you worked. This action is optional, and it is up to the consumer if they are interested in reviewing and signing off on the time you worked.

Common Terms

- **Authorization**: Specifies pay period start and end dates, number of hours and miles the service plan is approved for, and the consumer and provider.
- **Business Rule**: A business rule tells the system whether you may or may not do something. Failing some business rules may cause an entry to not save. Failing other business rules may allow the entry to be saved but to stay in a Pending status.
- **Client**: The consumer's profile in OR PTC DCI is called a Client Profile.
- **Employee**: The provider's profile in OR PTC DCI is called an Employee Profile. This includes Homecare Workers and Personal Care Attendants.
- **Guardian**: If the consumer has a Consumer Employer Representative (CER), they will use a profile in OR PTC DCI called a Guardian Profile.

- **Historical Entry**: A historical entry is any entry added to the OR PTC DCI Web Portal not entered in real time. Historical entries are not EVV compliant. If you, as the provider, live in a different time zone than where you worked, be sure you enter your historical entries according to your own personal time zone.
- **Local Office**: The local office is the ODHS office in your area. If you are a Personal Care Attendant (PCA), you will need to contact the PCA program office instead.
- **OR PTC DCI Fob**: You may use a small device, called a fob, to make real-time entries. This requires you to select a button on the fob at the start and end of your shift, record the code displayed, and enter this code along with other shift information into the OR PTC DCI Web Portal later.
- **OR PTC DCI Mobile App**: You may use the mobile app to clock in and clock out in real time. The consumer can choose to sign off on the services you provide using your mobile app.
- **OR PTC DCI Mobile Web Full Site**: The full OR PTC DCI website can also be accessed on mobile devices. Navigate to the OR PTC DCI website on your mobile device. Then select Go to Full Site beneath the Sign In button. The full site allows you to edit entries, enter historical and fob entries, enter mileage, read, and send messages, and do anything else that can be done in the OR PTC DCI Web Portal.
- **OR PTC DCI Mobile Web**: The mobile web is a mobile-friendly version of the OR PTC DCI Web Portal. Your smart device will default to the mobile web when you navigate to the OR PTC DCI website in a browser. You are not able to edit entries in the OR PTC DCI Mobile Web, nor can you see the information on the dashboard, such as the overtime gauge.
- **OR PTC DCI Landline**: You may use the consumer's landline phone to clock in and clock out, or to enter historical time entries.
- **OR PTC DCI Web Portal**: The full OR PTC DCI website, or web portal, can be accessed from desktop and laptop computers, as well as smart devices (when accessed via a smart device, it defaults to the OR PTC DCI Mobile Web).
- **Password**: The password provided to you by the Agency to access OR PTC DCI. You will be required to update your password the first time you log in and to change it every 60 days after that for security purposes.
- **PIN**: A PIN is a four-digit number you can use to log into the OR PTC DCI Mobile App in place of your password. You will also enter it when clocking in and out using the OR PTC DCI Landline. Consumers are also assigned a PIN that they must enter if you create a
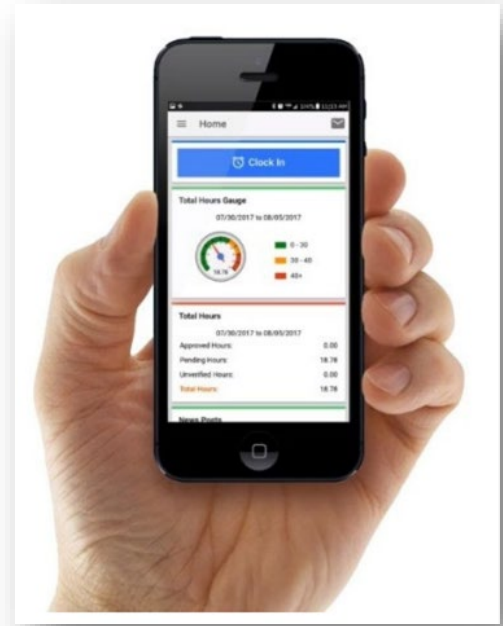
historical entry with the OR PTC DCI Landline. If they wish, they can use it to verify real-time OR PTC DCI Mobile App entries.

- **Punch**: A time entry or a mileage entry.
- **Real-Time Entries**: Real-time entries are made when you, as the provider, clock in and out at the time of your shift. Real-time entries in OR PTC DCI are EVV compliant.
- **Reason Code**: A Reason Code is the reason why an entry was not made in real time. OR PTC DCI will require a reason code when adding a historical entry in the web portal or when you edit an entry. Reason codes are important for the Agency to be able to monitor EVV compliance. Providers should only choose reason codes beginning with Provider from the drop-down list when selecting a reason code.
- **Service Account**: A service account links the provider and consumer in OR PTC DCI. The service account authorizes the provider to create hourly and mileage entries for the consumer.
- **Service Code**: The name of the service you provide to your consumer(s). You will be prompted to select a service code during the time entry process. An example of a service code name is Hourly ADL/IADL-1.
- **Smart Device**: An electronic device running either Android 8.0 (or higher) or iOS 13 (or higher). Examples include smart phones and tablets.
- **Username**: The name provided to you by the Agency to access OR PTC DCI. This can be changed in the Settings (see Change Username for more information).

Logging into the OR PTC DCI Web Portal

Username and Password Information

What is my username?
Your username is your unique identifier as a user in OR PTC DCI. You must enter your username every time you log into OR PTC DCI. You can change your username once logged in by going to the Settings (see Change Username for more information).

Your username was 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. For users with common names, your username may have a number at the end.

What is my password?

You need your password to access OR PTC DCI. Your temporary password was provided to you by the Agency. If you need to confirm your temporary password, please contact your Local Office. Once you log in with the temporary password, you will be asked to change it. After you change your password, you can use the Forgot Password option if you forget your password.

Password Rules

- Must contain at least 10 characters.
- Must contain 1 uppercase letter, 1 lowercase letter, 1 number, and 1 special character (examples of special characters include punctuations marks or other symbols).
- Cannot have more than 2 repeated characters in a row.
- Cannot have more than 2 repeated characters from your username.
- OR PTC DCI will require that you change your password every 60 days for security purposes.
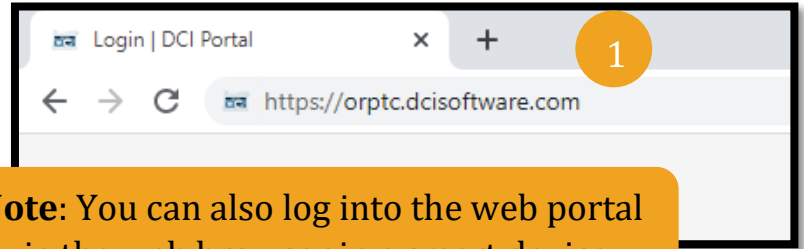- You cannot use any of your previous 24 passwords.

Note: An example password looks like: ILovePTC2021!

Logging In

To log into the OR PTC DCI Web Portal:

1. In a web browser on your desktop or laptop computer, go to orptc.dcisoftware.com.
2. Enter your username.
3. Enter your password.
4. Select Sign In.

Note: You can also log into the web portal via the web browser in a smart device.

**Note**: Forgot your password? See Reset Password for more information.

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 your new password in both password fields.
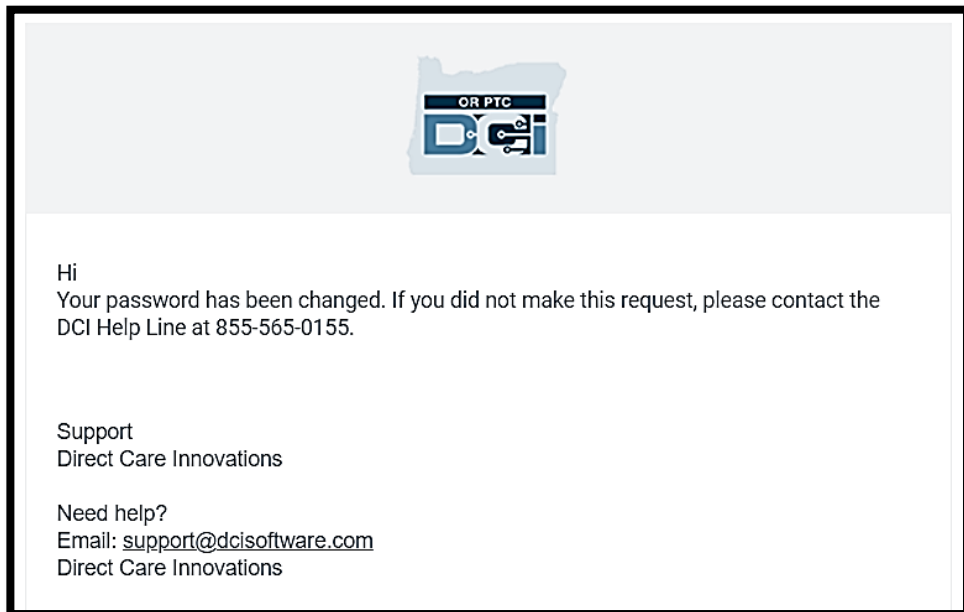3. Select Change Password.

After you change your password, an email will be sent to you from orptcsupport@dcisoftware.com stating that you have changed your password.

Change Password

You're logged in as @dcisoftware.com

Please enter New Password

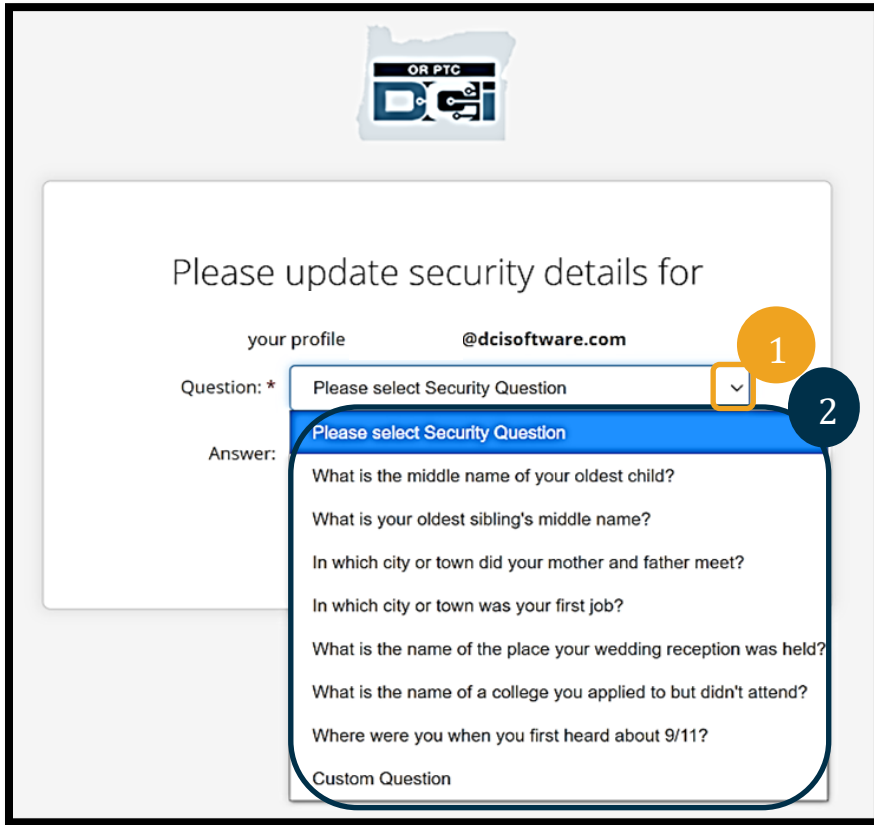Please confirm password

Change Password
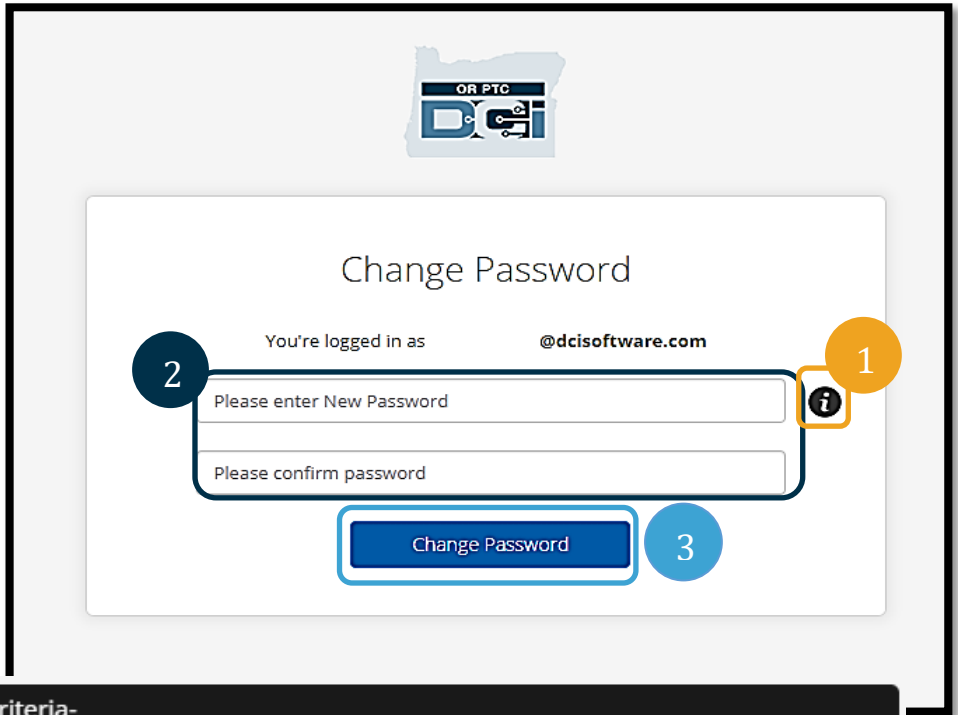
Password Criteria-
1. Must be at least 10 characters.
2. Must contain 1 uppercase letters, lowercase letters, numbers and special characters
3. Must not contain more than two repeated characters in a row.
4. The password should be different from the previous 24 passwords.

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

Security Question

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

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

You will only need to select your security question the first time you log in.

Security Question Requirements

- The answer to the security question must be 5 characters at minimum.
- The username or password cannot be used as the answer to the security question.
- If the answer is found on the commonly used passwords list, you will see this message:
  - The answer you provided was found on a commonly used password list and can be easily guessed. Consider using a different word or phrase.
    - If you would like to continue using the word or phrase you entered, select the Use this Answer Anyway check box.
    - If you would like to enter a different word or phrase, simply update the Answer field with your new response.

An example of an answer that does not meet the requirements is Ohio because it is not 5 characters.

News Posts

After you finish logging in, you will see the Provider Attestation and System Use Notification. The Provider Attestation states that you, as the provider, will enter accurate start and end times and only complete tasks on your approved task list. By checking OK on the Provider Attestation, you are acknowledging that falsifying this information may be Medicaid fraud. When clocking out or creating a time entry, you will acknowledge the Provider Attestation again by checking a box or by pressing 1 for yes when using the landline.

The System Use Notification that appears when you log in indicates that OR PTC DCI is monitored and recorded. The purpose of the system is to track hours worked by approved providers and to make sure state and federal EVV guidelines are followed. OR PTC DCI contains personal and confidential information. Never share your login information with anyone. By using the system, you agree to the above terms.

Please read the Provider Attestation and System Use Notification thoroughly. You may see other News Posts with tips, information about system updates, or other information the State wants you to be aware of.

Review and select OK to acknowledge and accept the content on each News Post.

Preferred Language

To change your preferred language:

1. Select on the language button in the top-right corner.
2. Select your preferred language.

Your screen will now display in the new language each time you log into OR PTC DCI.

Available language options include English, Spanish, Russian, Simplified Chinese, Vietnamese, Arabic, and Somali.

Time Capture Options

Time entries are EVV compliant if you, as the provider, use one of the following time entry methods to clock in and out in real-time:

- OR PTC DCI Mobile App

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- OR PTC DCI Landline
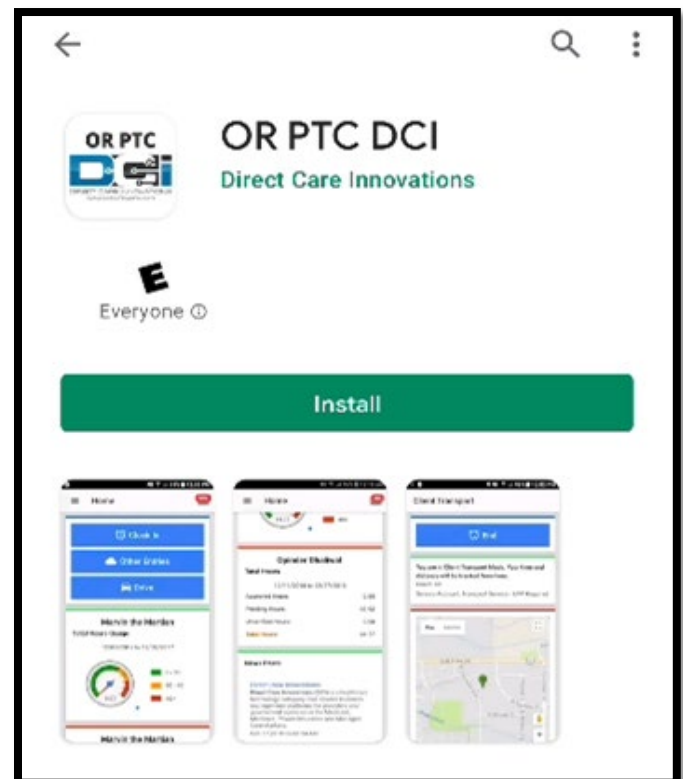- OR PTC DCI Fob

OR PTC DCI Mobile App

The OR PTC DCI Mobile App is a free application that:

- Allows you, as the provider, to easily-clock in and out in real-time.
- Is only 16 megabytes, so it doesn't take up much room on your smart device.

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

- Have a smart device (Android or Apple).
- Have a smart device that runs Android 8.0 or Apple iOS 13 and above operating systems. Otherwise, the device will not be compatible.
- Have the ability to connect to a Wi-Fi network or to use mobile data.

Note: The operating system information can be found in the system settings of your device.
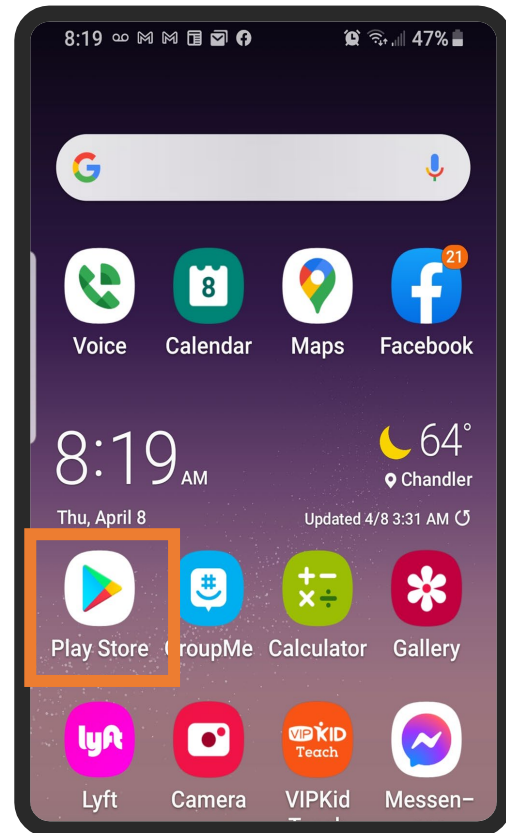
Downloading the OR PTC DCI Mobile App

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

Apple Device

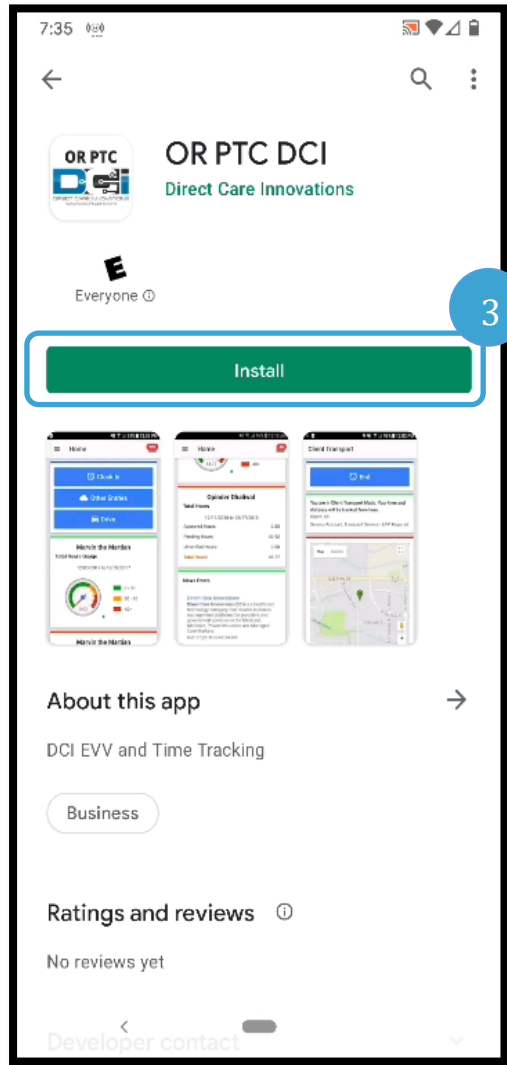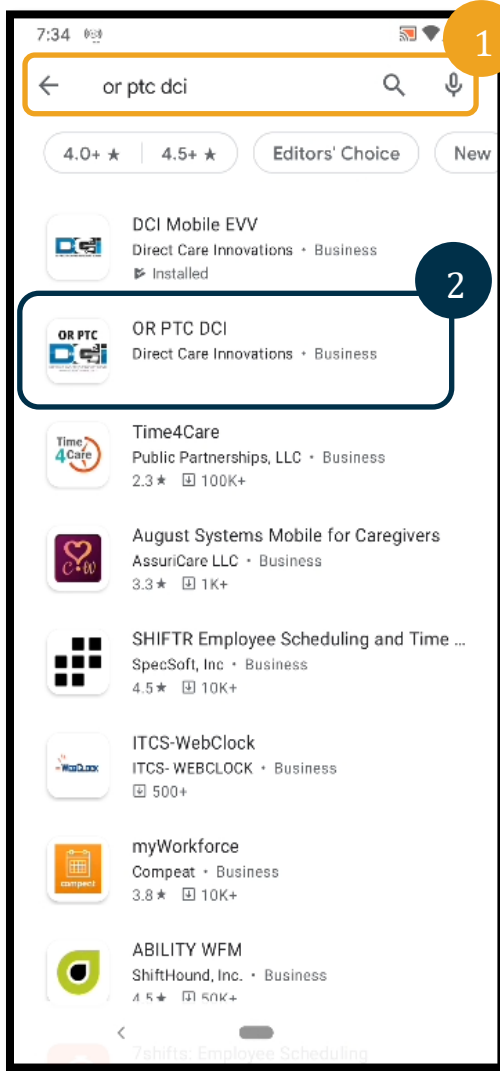**Android Device**

i.e.: iPhone or iPad

i.e.: smartphone or tablet

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. Select Install and then open the app when install is complete.

Logging into the OR PTC DCI Mobile App

1. Open the OR PTC DCI Mobile App on your smart device.
2. Enter your Username and Password or PIN.
3. Tap the eye icon to display or hide what you entered as your password.
4. Check Remember me if you would like the system to remember your username, this will not remember your password.
5. Tap Login.
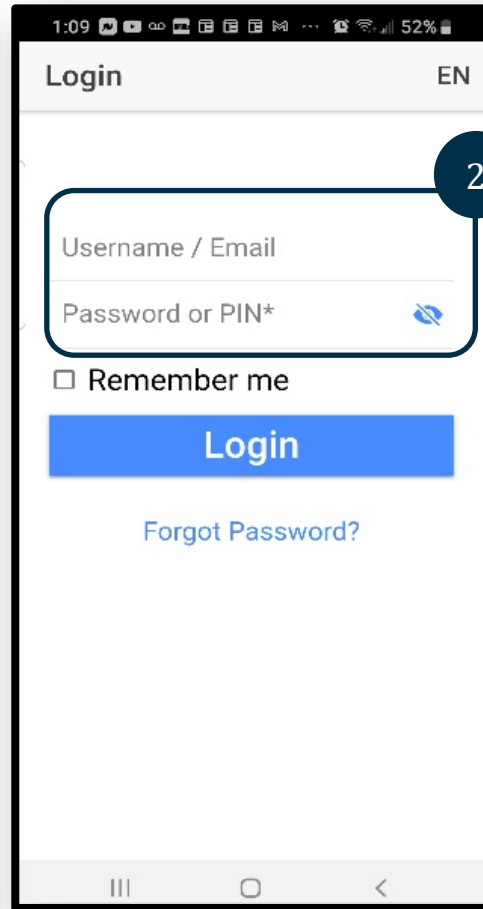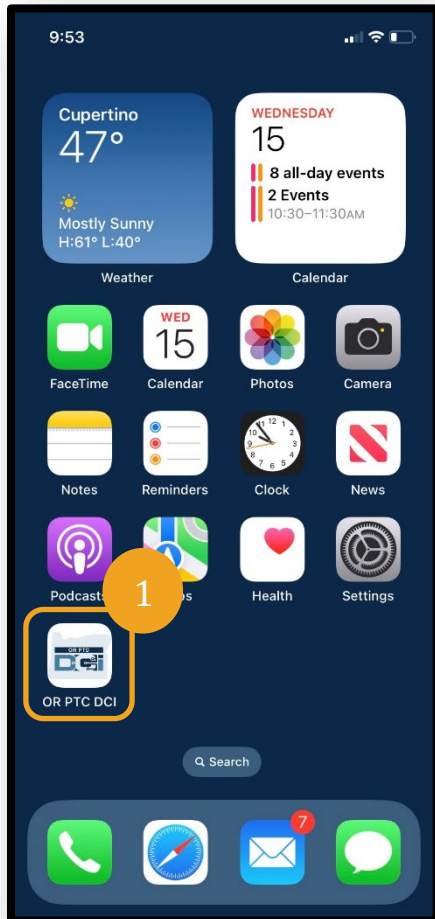
Note: Select the language button in the top right corner to change the language on your login screen!
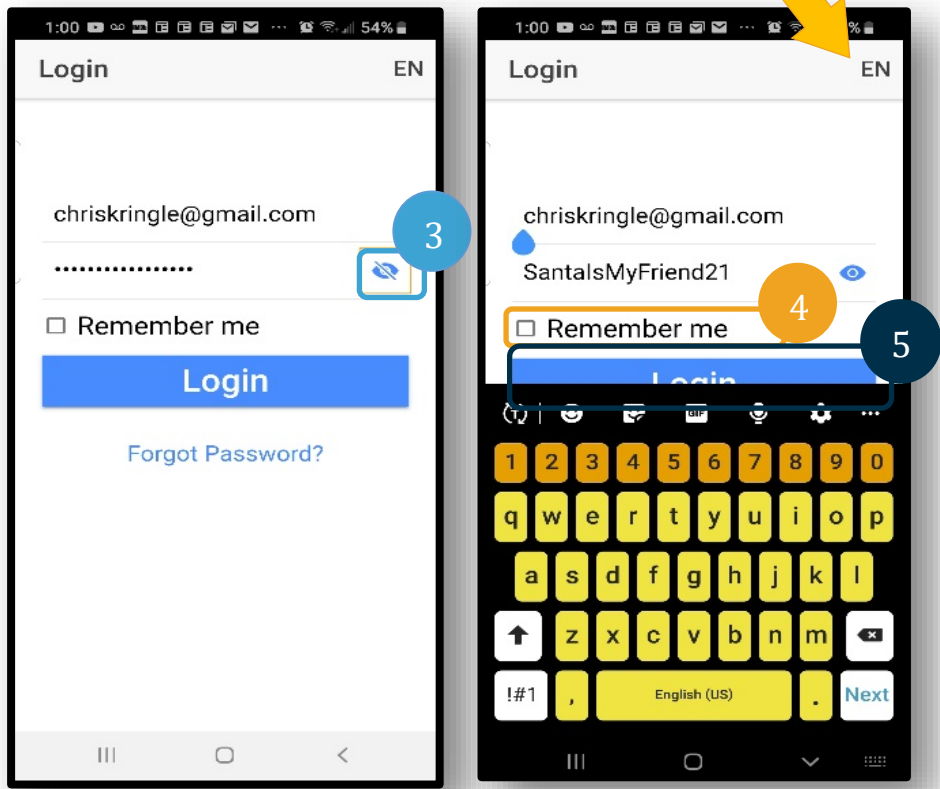
Logging in for the first time will require you to give the app access to the device's location.

Note: You must choose Allow While Using App or the app will not allow you to clock in.

The location will only be captured at clock in and clock out.

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Mobile App News Posts

- After each log in, you will first see the System Use Notification and Provider Attestation. Sometimes you may also see a new post screen with important announcements. See News Posts for more information.
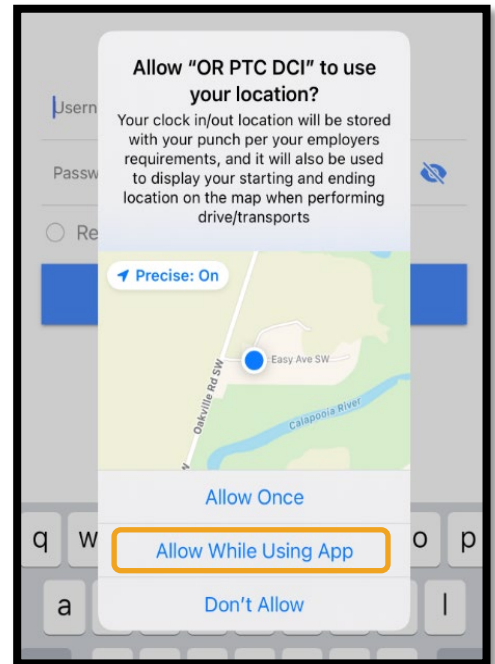- Review each message and tap Ok to continue.

By clicking "OK", I affirm that the reported start and end times accurately represents the times that I provided services/supports for the consumer-employer, I have only performed the tasks which are according to the consumer-employer's task list, and I am following the rules in accordance with the program I am enrolled in. I acknowledge that falsifying this information may be considered Medicaid fraud. I understand that when I clock out, I will check a box affirming my time is correct and falsifying information may be considered Medicaid fraud.

Created Date: Jun 23, 2022 11:06:39 AM

Ok

System Use Notification

The user is accessing a restricted system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and may be subject to criminal, civil, or administrative penalties. Use of the system constitutes consent to monitoring and recording. The intent of the site is to allow authorized participants of Oregon Project Independence, State Plan Personal Care within OHA's Health Systems Division and ODHS's Aging & People with Disabilities

Jan 26, 2021 11:25:10 AM

Ok

Mobile App Dashboard

Now that you have successfully downloaded and logged into the mobile app, let's review your dashboard:

1. You can view your messages by selecting the envelope in the top-right corner.
2. Your Overtime Gauge displays the number of hours you have worked so far in the pay week. This does not indicate the number of hours you are authorized to work.
3. Your Total Hours dashboard displays the hours you have worked in the current week based on status (Approved, Pending, and Unverified).

> **Note**: If you have not worked any hours in the current pay period, this will display 0 hours.

4. Scroll down to see important messages from the Agency called News Posts.
5. Select the News Post to view the full message.
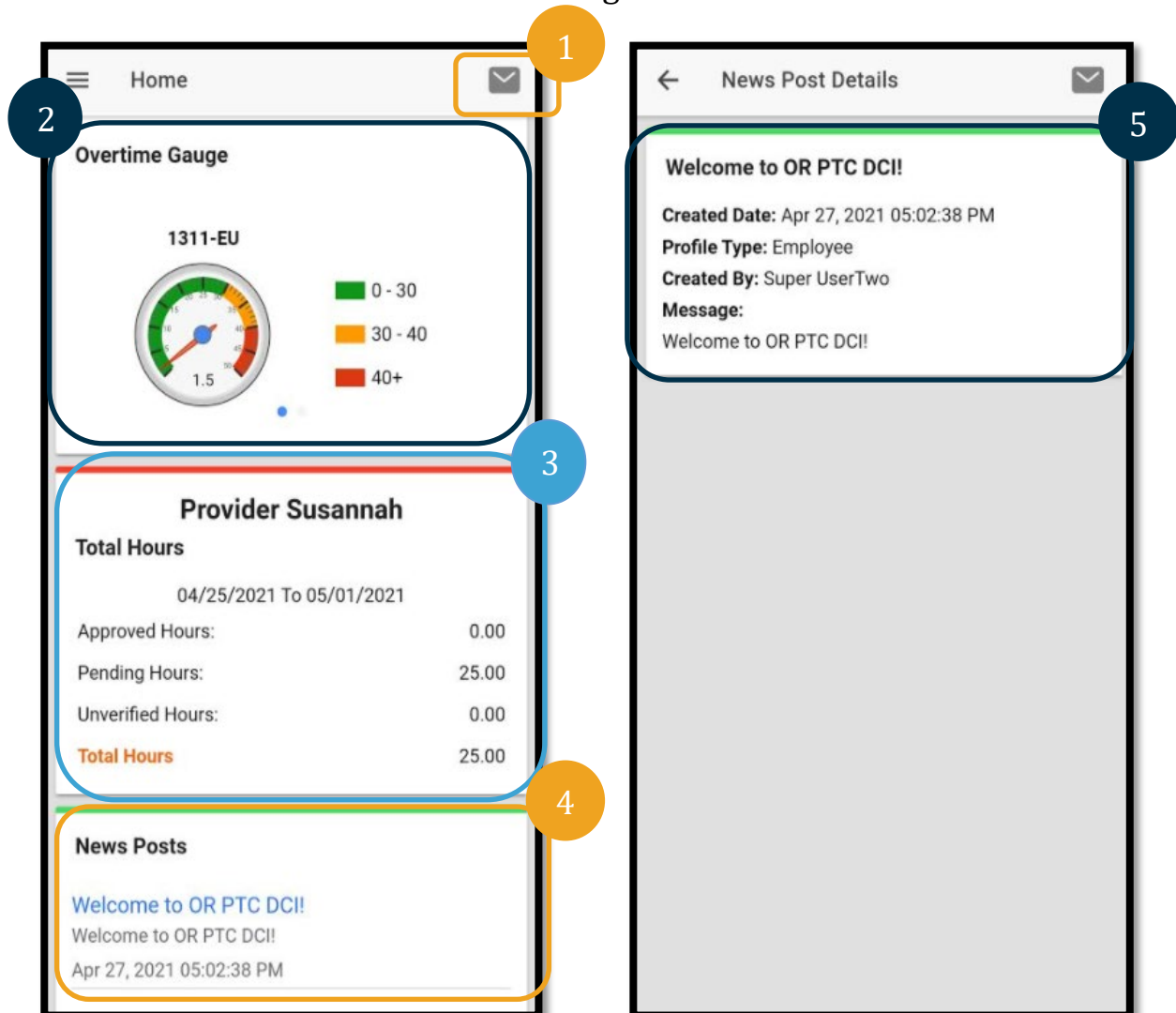
Mobile App Menu

Now let's review your mobile app menu:

1. Select the 3 horizonal lines icon to view your menu options.
2. Home - brings you back to the dashboard.
3. Message - takes you to the OR PTC DCI Messaging Module.
4. Entries - a list of all your time entries.
5. Search - search through the app.
6. Language - change your preferred language.
7. Logout - logs you out of the app and brings you to the login screen.
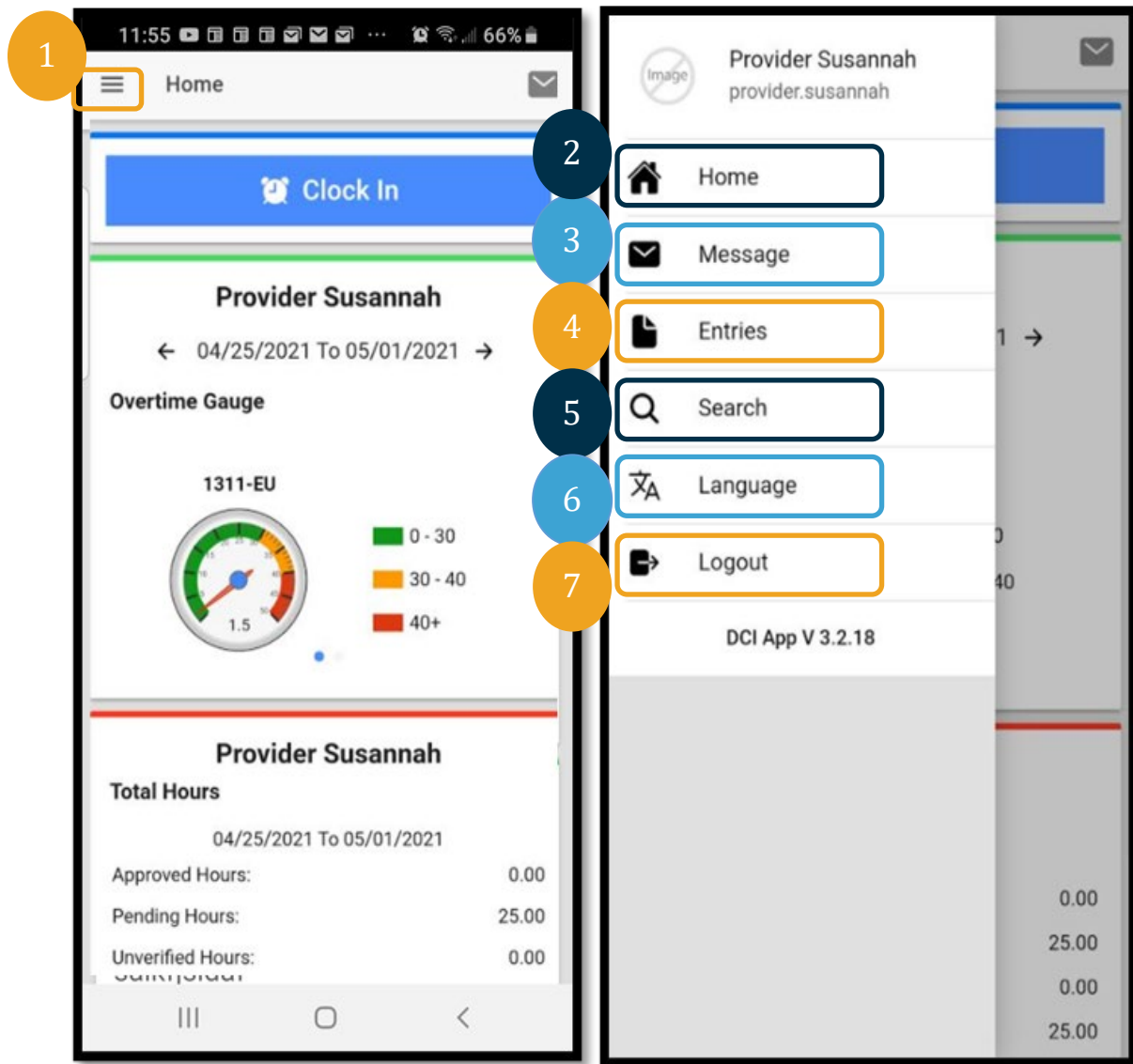
Mobile App Messaging Module

You should only use the OR PTC DCI Messaging Module to communicate with individuals you know, such as your consumer's case manager. This should not be used as a means of urgent communication.

To view a message: From the menu, select Inbox. You will see a list of messages. Select on the one you want to read.

To send a message:

1. From the menu, select Message.
2. Select New Message.
3. Select in the To box and start typing the name of the person you want to send a message to; select the name when it appears.
4. Enter a Subject for the message.
5. Select a Priority.
6. Compose your Message.
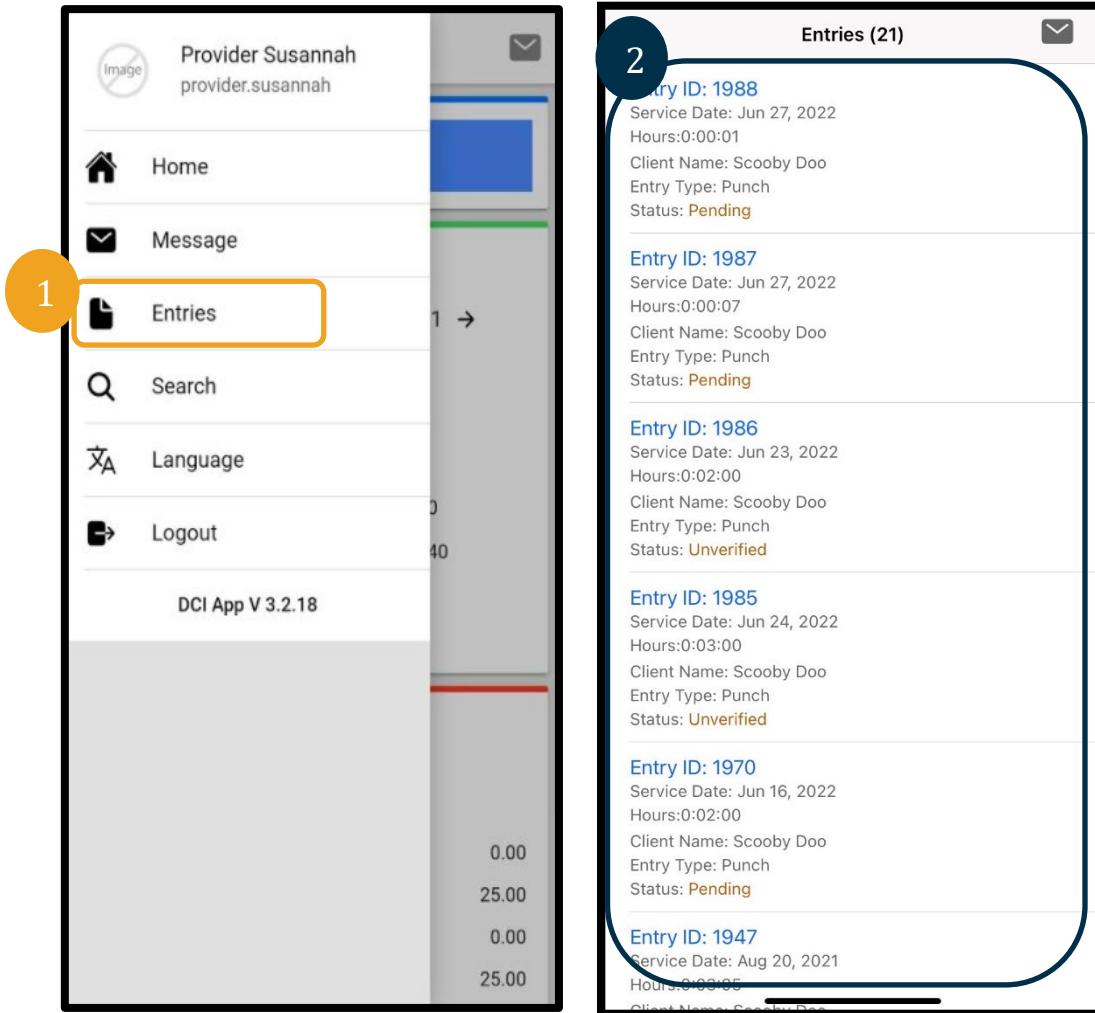7. Add an Attachment if desired.
8. Select Send.
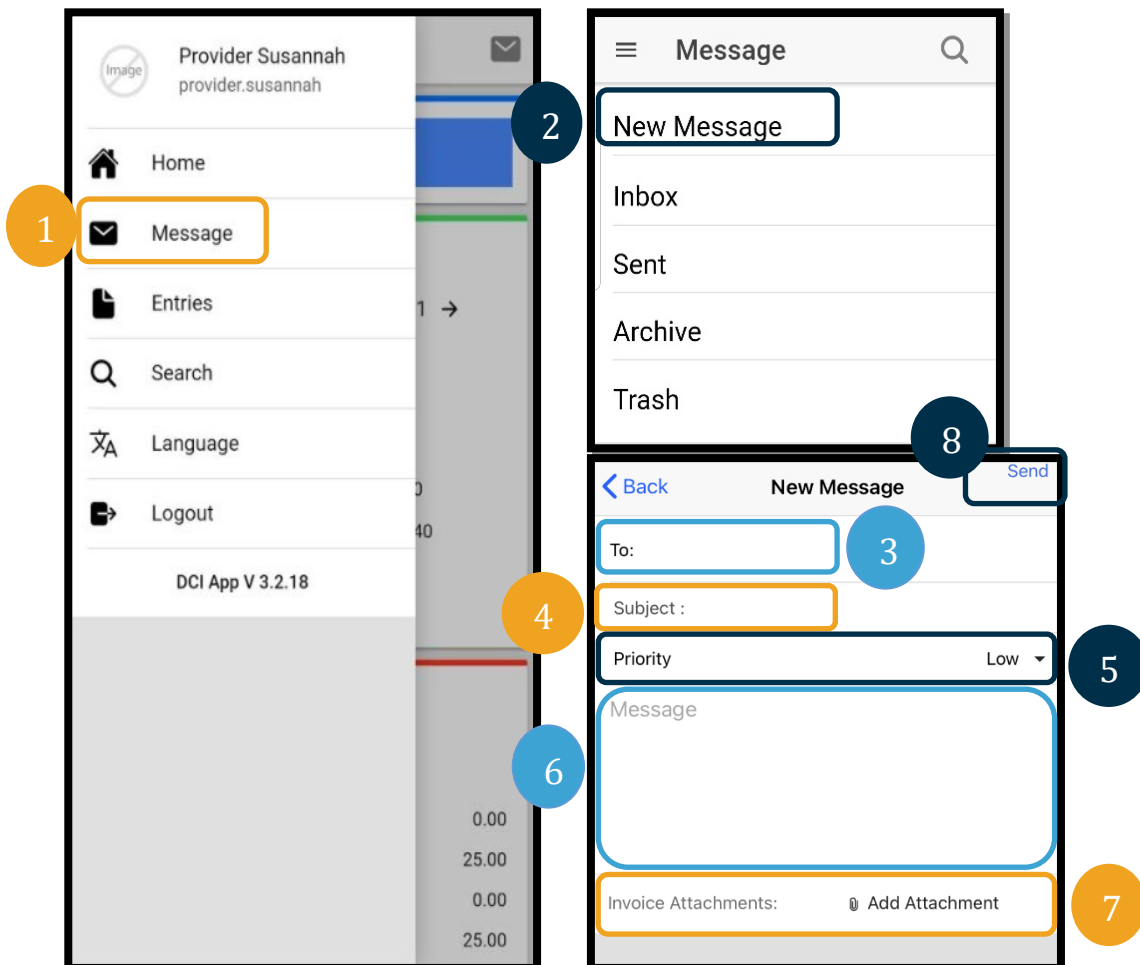
Mobile App Entries

Next, let's review your Entries.

From the menu:

1. Select Entries.
2. Select an entry to view the details.

On the Entries tab, you will find entries in various statuses:

- **Unverified**: Entries that a Local Office staff member enters on behalf of a provider. It is important to resolve the unverified entries, or they will not be paid. See Unverified Entries.
- **Pending**: All entries will be in Pending status after they are first entered. An entry in a pending status can be edited by a provider.
- **Rejected**: Entries that have been rejected by the consumer, your Local Office, or a system process. These entries cannot be edited by the provider. It is a good practice to review entries in a rejected status. You will not be paid for entries in a rejected status.

- **Approved**: Entries that have been approved by the Agency and are ready to be processed. These entries cannot be edited by the provider. Contact your Local Office to edit these, if needed.
- **Processed**: Entries that have processed and are ready for payroll or have already been paid. These entries cannot be edited by the provider. Contact your Local Office to edit these if needed.
- **Canceled**: Entries that were either manually canceled by a staff member after previously being approved or an entry that crossed the midnight hour. Once approved, entries crossing midnight are canceled by the system and two new entries are created (one for the starting time to 11:59 pm, and another for 12:00 am to the ending time).
- **Open**: An active entry (clock in has occurred but not clock out).

From your Entries tab, you can:

- Verify entries in a status of Unverified.
- Reject entries in a status of Pending that were made in error.

To edit entries in a status of Pending that contain errors, you must use the OR PTC DCI Web Portal or OR PTC DCI Mobile Web Full Site.

For entries in an Approved or Processed status that need to be edited, please reach out to your Local Office for help.

For entries in a Rejected status, you must create a new historical entry to correct the error resulting in the rejection.

For entries in an Open status, you much clock out and then edit the entry or contact your Local Office for help.
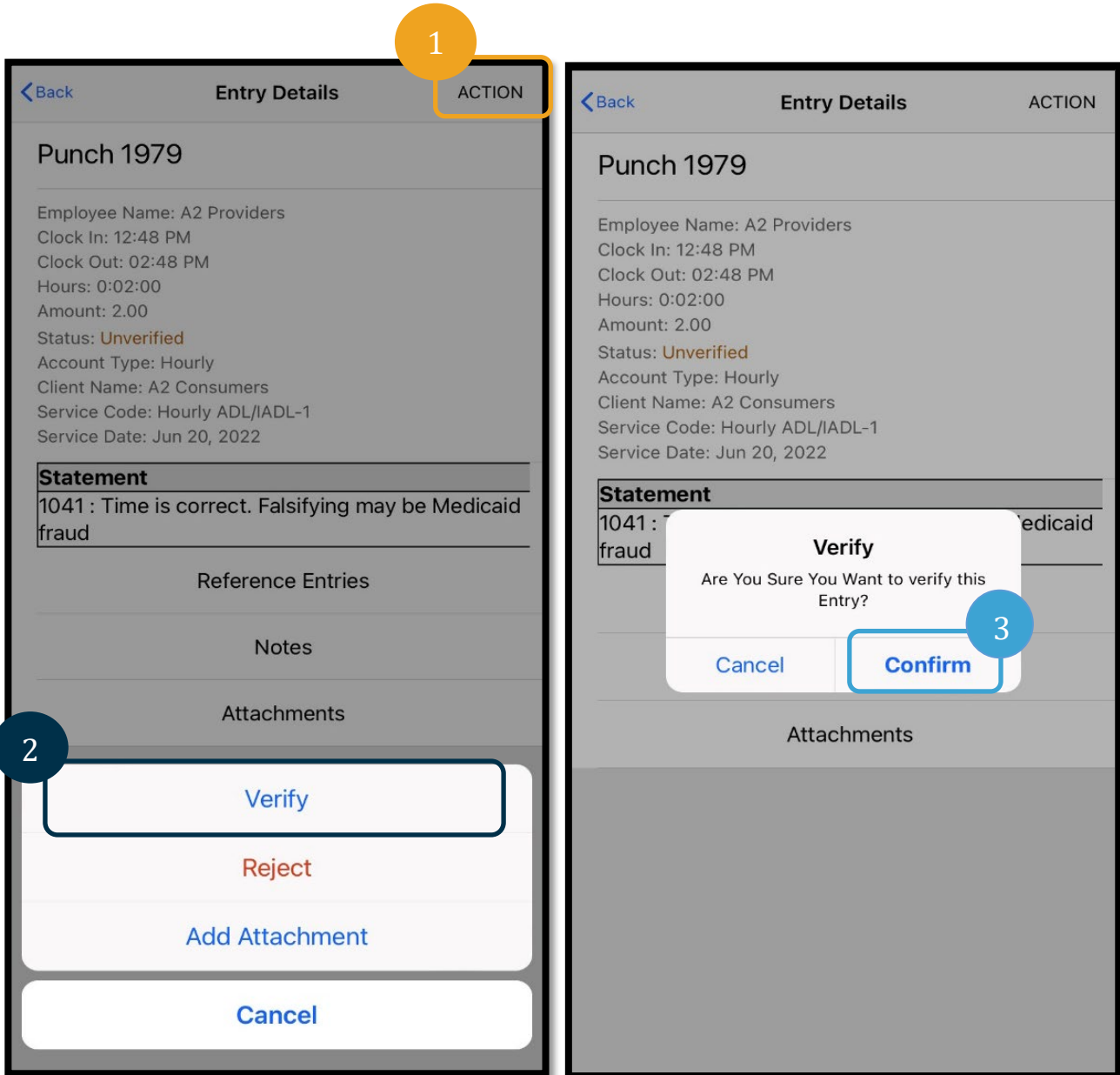
Mobile App: Verify an entry

You will receive a notification to your email and to your OR PTC DCI Messaging Module inbox if you have an entry that needs to be verified.

To verify an entry, select the entry, then:

1. Select ACTION.
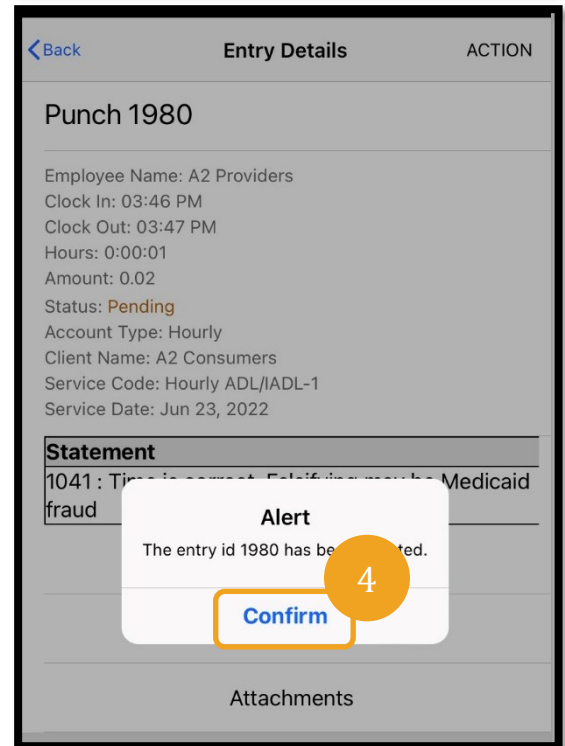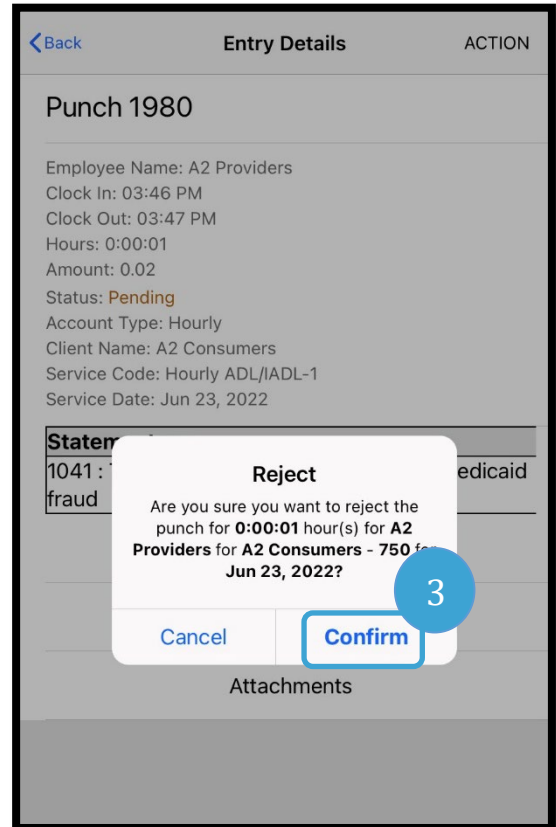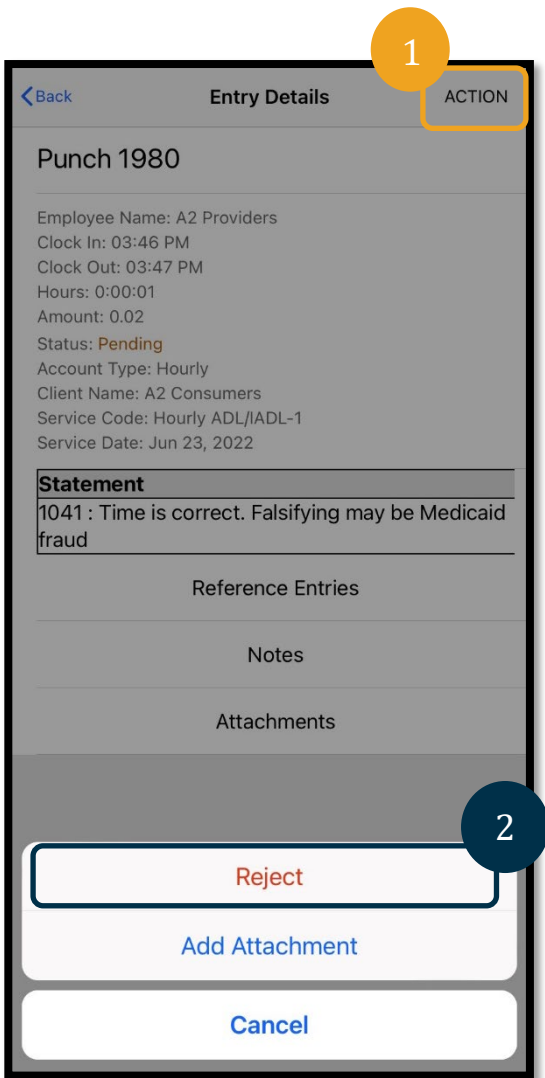2. Select Verify.
3. Select Confirm.

Mobile App: Reject an Entry

If the time entered on your behalf is not accurate, you will reject the entry.

To reject an entry, select the entry, then:

1. Select ACTION.
2. Select Reject.
3. Select Confirm.
4. Select Confirm.

Mobile App Preferred Language

To change your preferred language:

1. Select the icon with three horizonal lines to view your menu.
2. Select Language.
3. Select your preferred language.
4. Select OK.

Your screen will now display in the new language each time you log in to OR PTC DCI.
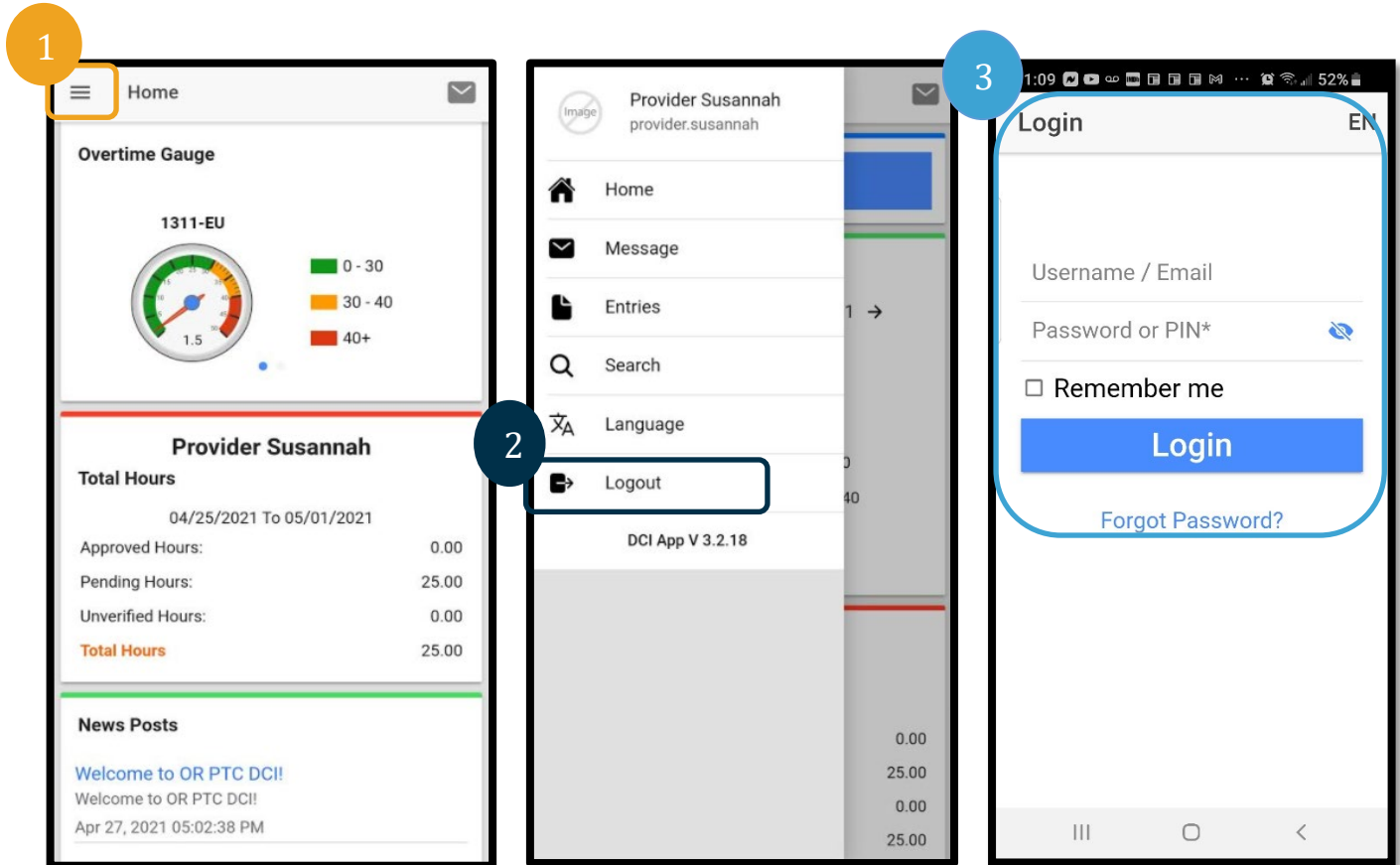
Available language options include:

English, Spanish, Russian, Simplified Chinese, Vietnamese, Arabic, and Somali.
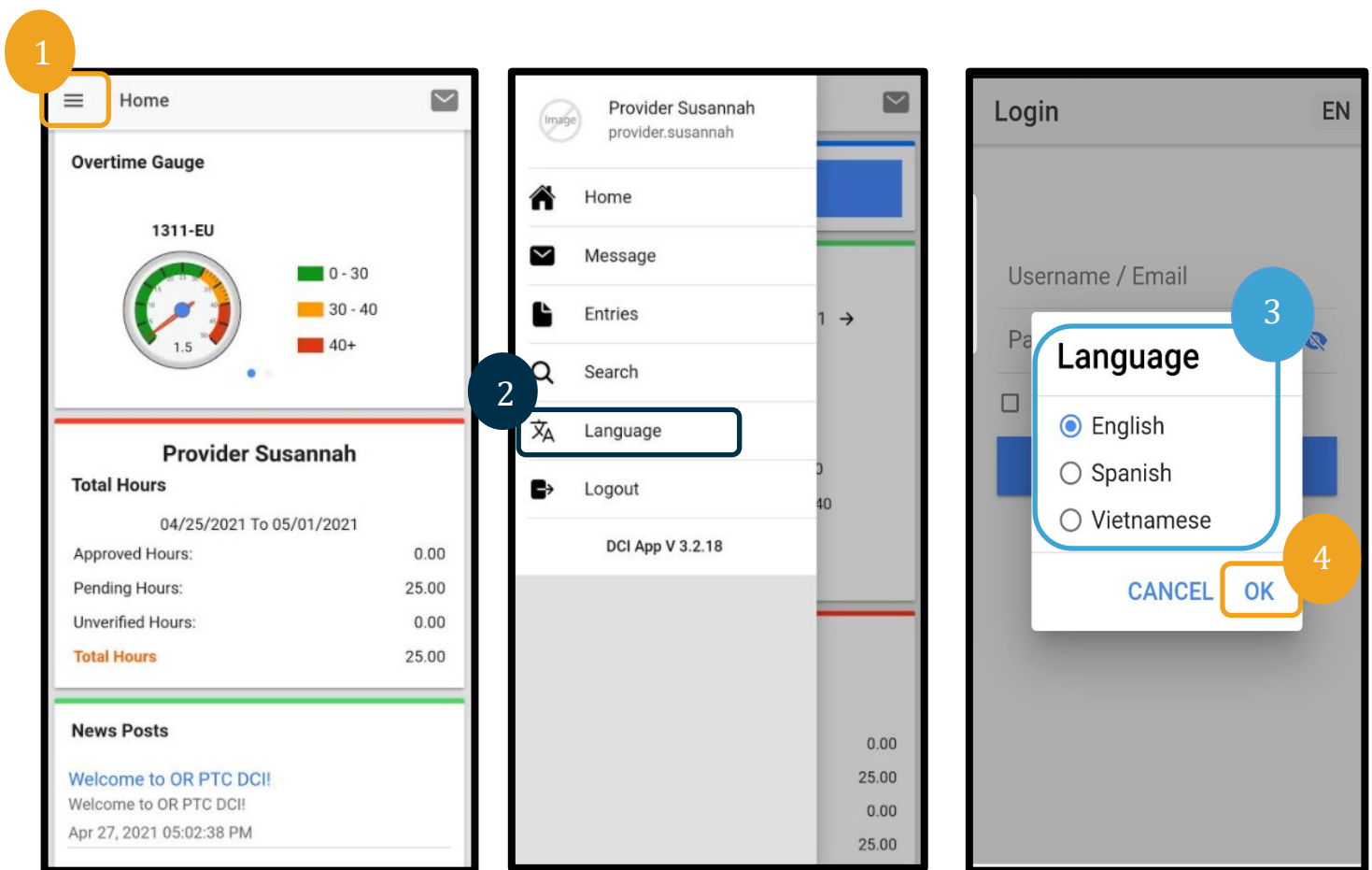
Mobile App Logout

To log out:

1. Select the 3 horizonal lines icon to view your menu options.
2. Select Logout.
3. You will be taken back to the Login screen.

OR PTC DCI Real-Time Entries

Now that we know how to download and navigate the OR PTC DCI Mobile App, let's look at how to make real-time entries. Follow these steps once you are logged in to the OR PTC DCI Mobile App to Clock In:
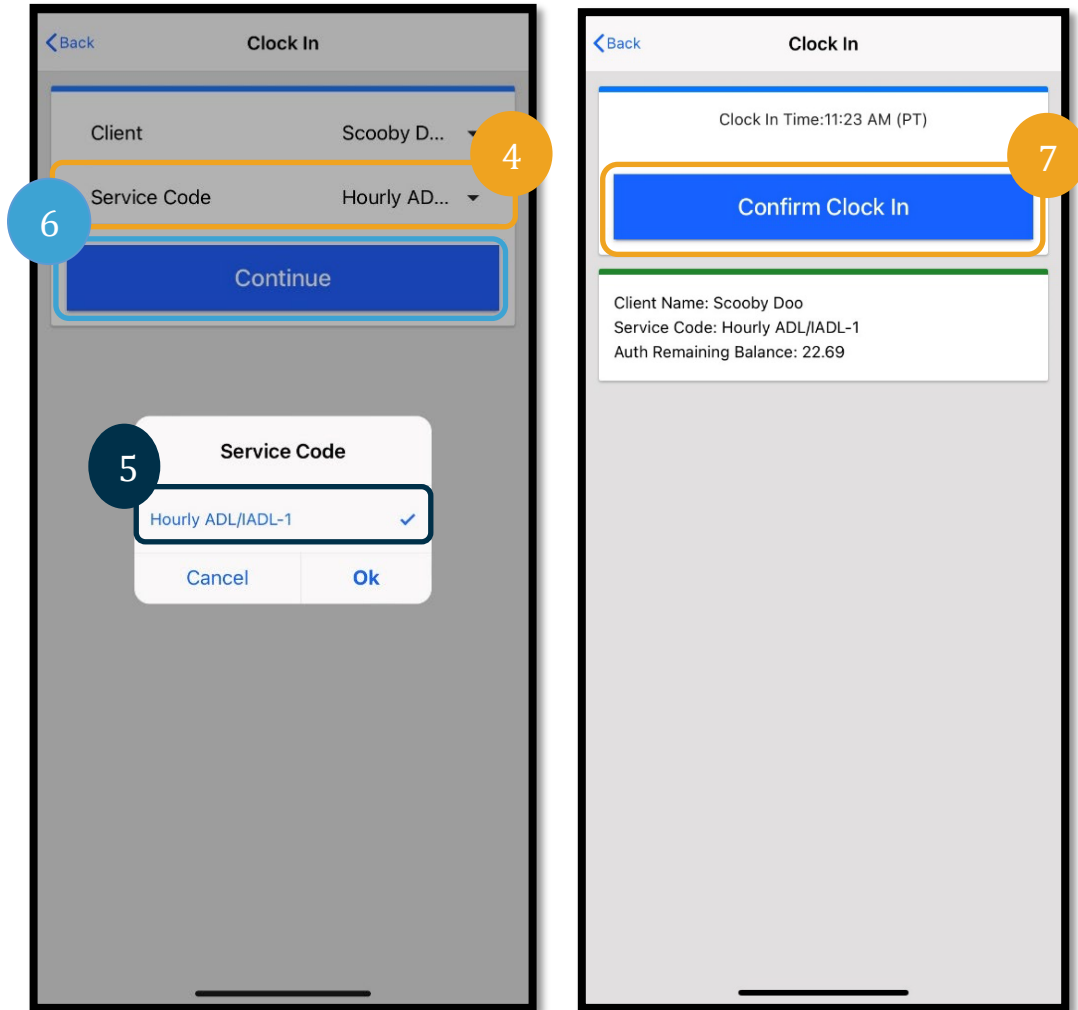
1. Select Clock In.
2. Select the arrow on Client to show options.
3. Select consumer name from the drop-down menu.
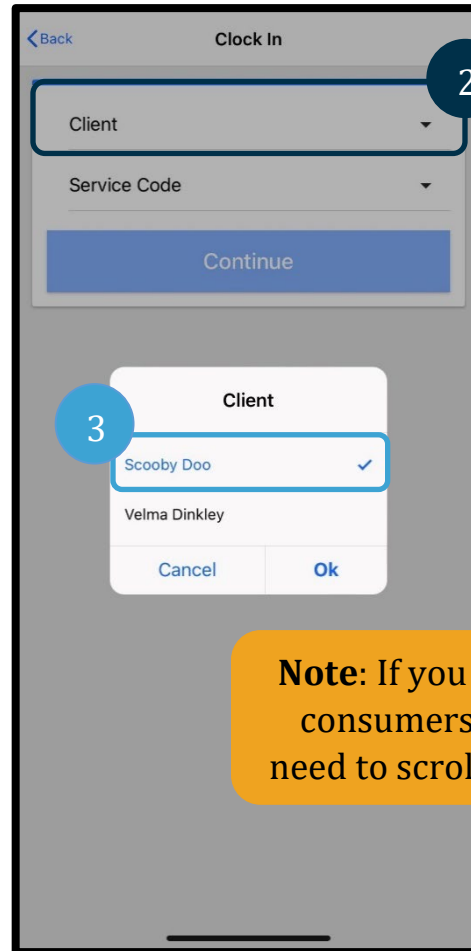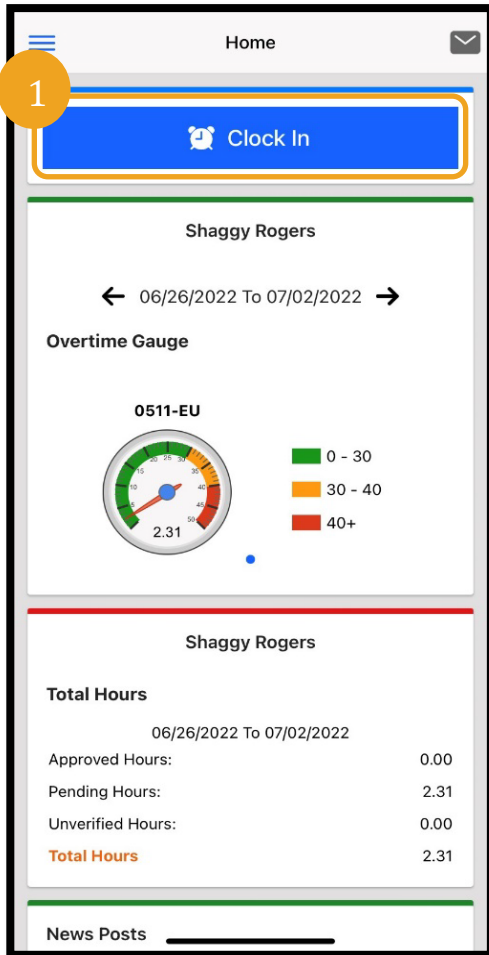
Note: If you have many consumers, you may need to scroll in this list.

4. Select the arrow on Service Code to show options.
5. Select the correct Service Code and select Ok (if it is not already selected).
6. Select Continue.
7. Select Confirm Clock In.

When you complete your shift, simply log back into the OR PTC DCI Mobile App and follow the steps to clock out.

1. Select Continue to Clock Out.
2. Select Confirm.

After confirming, you will be taken to Clock Out Verification. Clock Out is not completed until you complete Clock Out Verification and finalize the attestation.
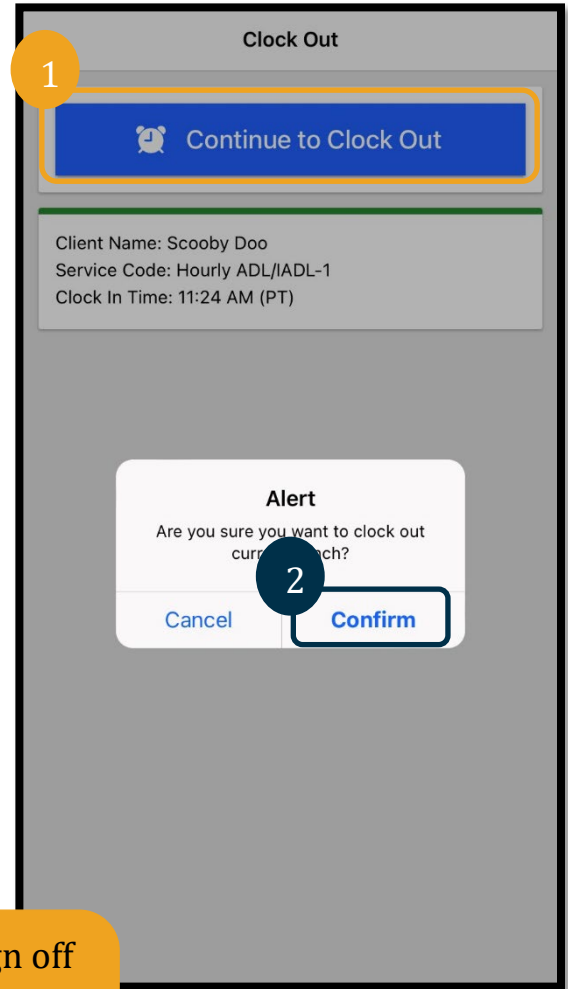
Mobile App Clock Out Verification

Upon clock out, you will have three consumer signoff options to select from. These are also known as verification options in the OR PTC DCI Mobile App.

1. PIN/Password
2. Signature
3. Portal Signoff

Let's review these one at a time.

Note: Your consumer is not required to sign off on your shift, the choice is up to them if they wish to do so. If the consumer decides not to sign off on the time entry, simply select option 3.
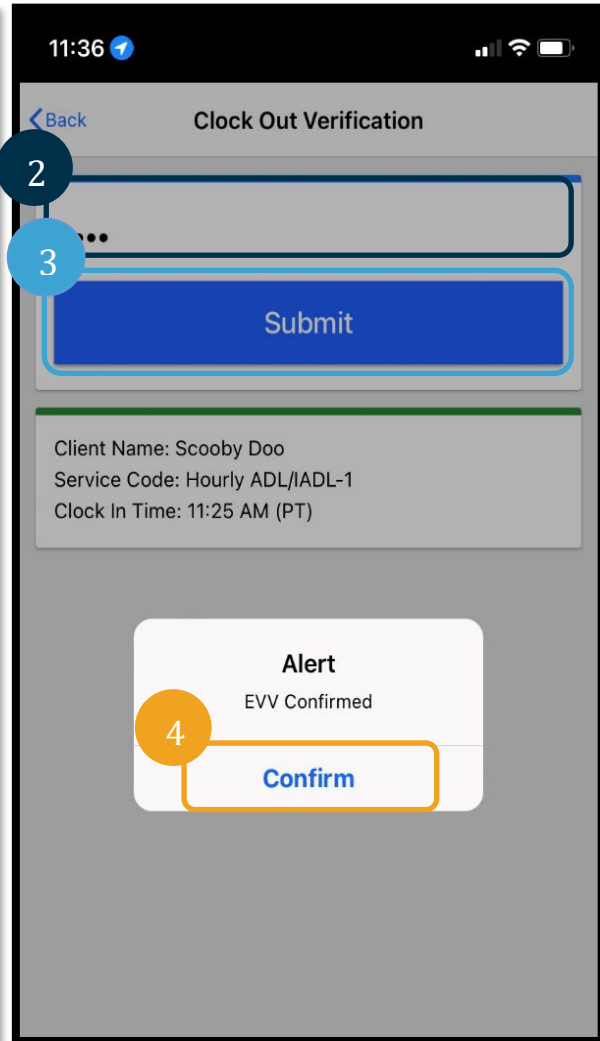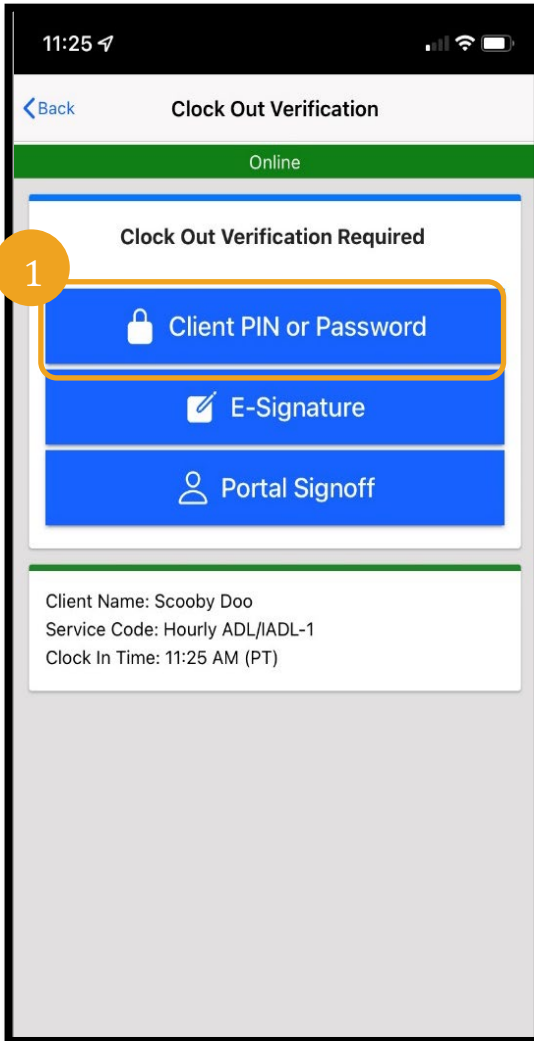
Clock Out

1

Continue to Clock Out

Client Name: Scooby Doo
Service Code: Hourly ADL/IADL-1
Clock In Time: 11:24 AM (PT)

Alert
Are you sure you want to clock out currently such?

2

Cancel   Confirm

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Mobile App Clock Out: PIN/Password

1. Select Client PIN or Password and hand the device to the consumer.
2. Consumer enters their PIN or Password.
3. Select Submit.
4. Select Confirm.

Note: If the PIN or Password is entered wrong three times, you will receive a message that says that you have exceeded the maximum attempts allowed. It will direct you back and you will need to use another verification method.

Mobile App Clock Out: E-Signature

1. Select E-Signature and hand the device to the consumer.
2. Consumer signs their name on the screen.
3. Select Save.
4. Select Confirm.

Note: If the consumer doesn't like their signature, they can select Clear and try again.
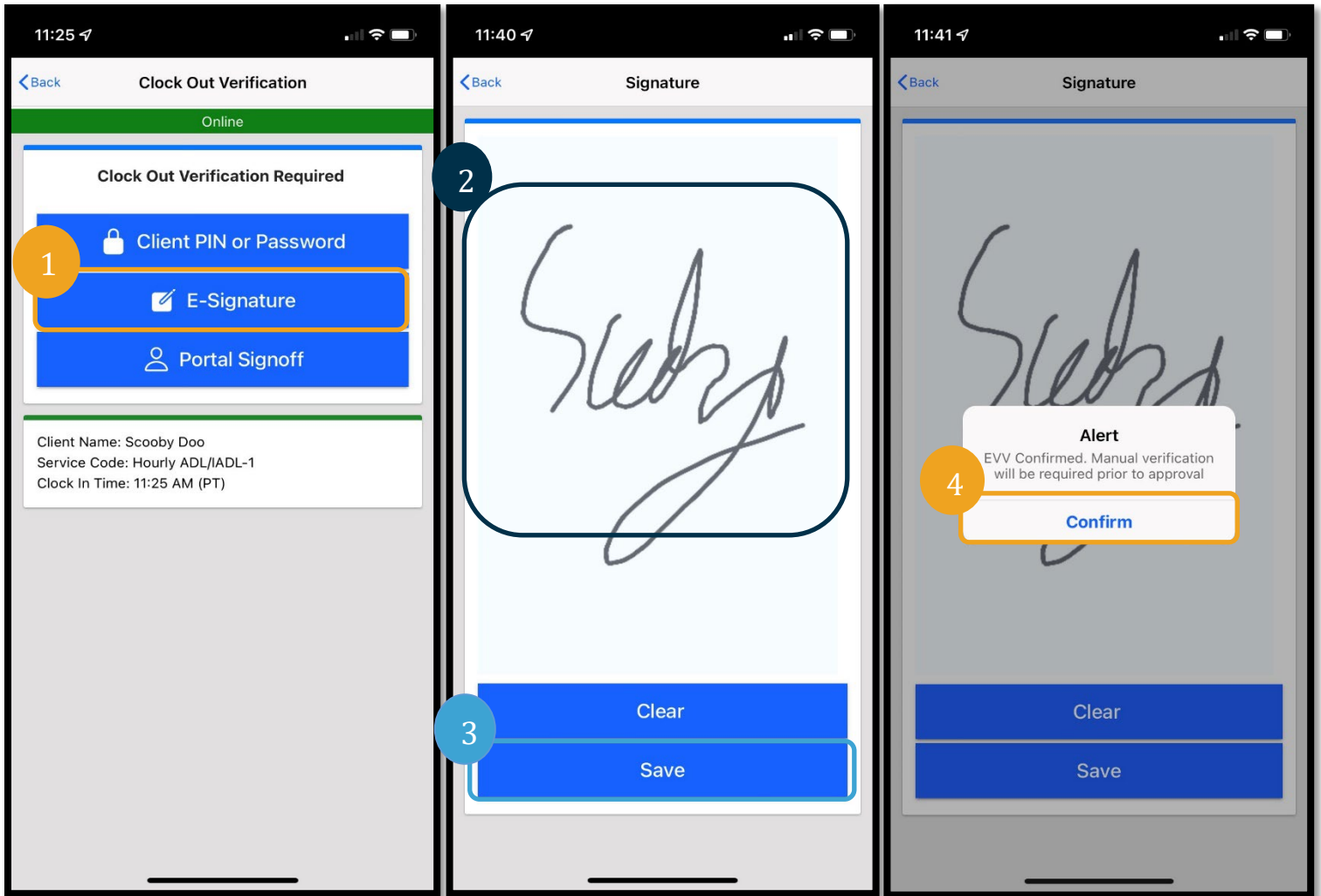
Mobile App Clock Out: Portal Signoff

If the consumer is not able to sign off on the entry or does not want to sign off on the entry or if the consumer has a consumer employer representative (CER), select Portal Signoff. Making this selection will not impact the timeliness of your paycheck.

Note: The consumer/CER is not required to take any follow up action with this selection, but you still must select a verification option.

1. Select Portal Signoff.
2. Select Confirm.
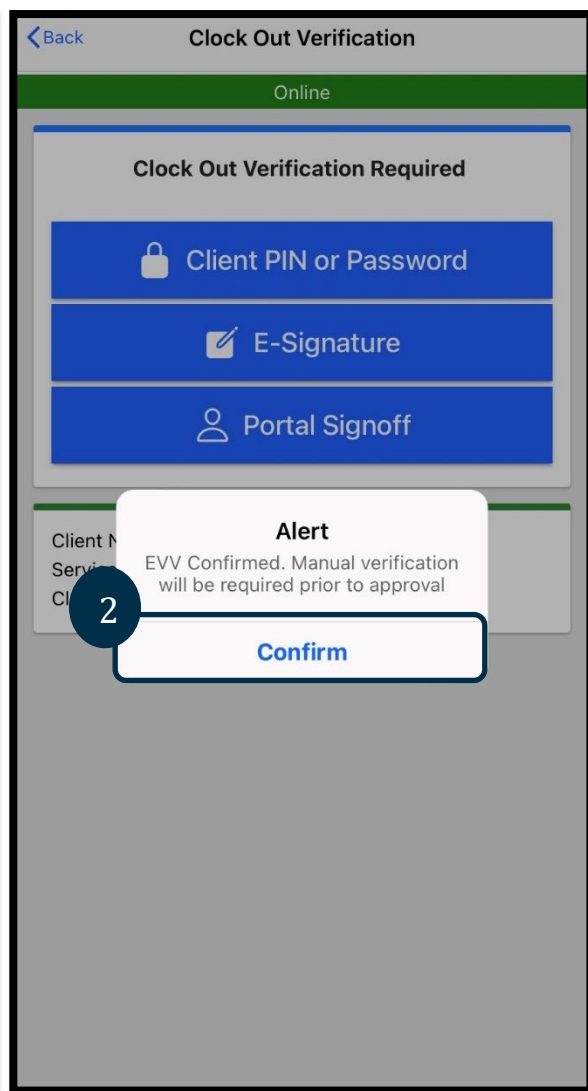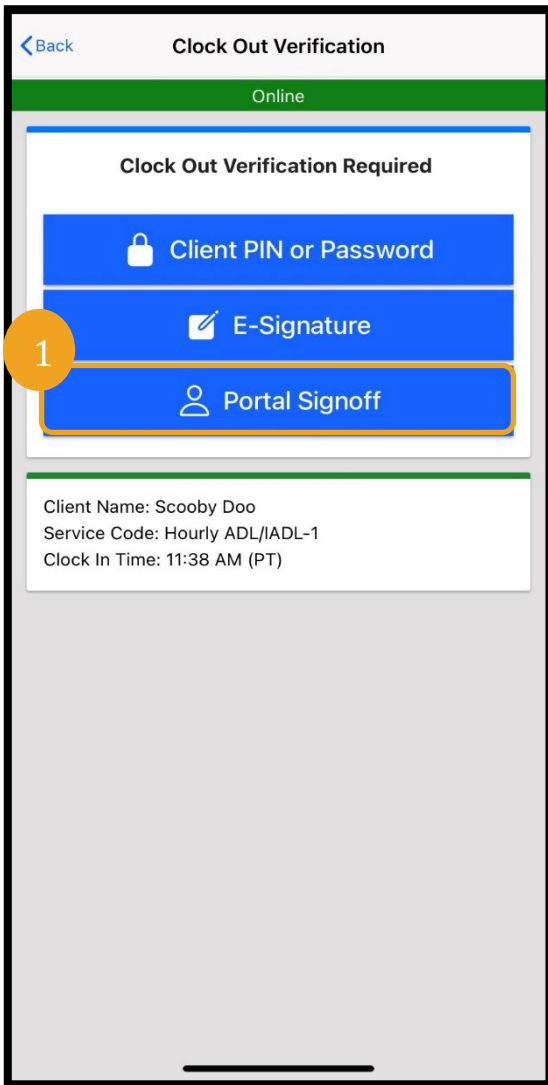
Mobile App Clock Out

After completing one of the three verification methods, you will complete the clock out process.

1. You can add Notes and Attachments. The notes feature works using the keyboard of your smart device (meaning you can type out the message or use talk-to-text if you have this option on your smart device). Notes and Attachments are optional and should not be used for emergency messages.
2. Select the check box next to the attestation verifying that your time is correct.

Note: To clock out successfully, you must check the attestation box.

3. Select Confirm Clock Out to complete the clock out process. You MUST complete this step to clock out.
4. The punch information will show after successfully clocking out. If you do not see this, you have not clocked out.
5. Select Home to return to the Dashboard.
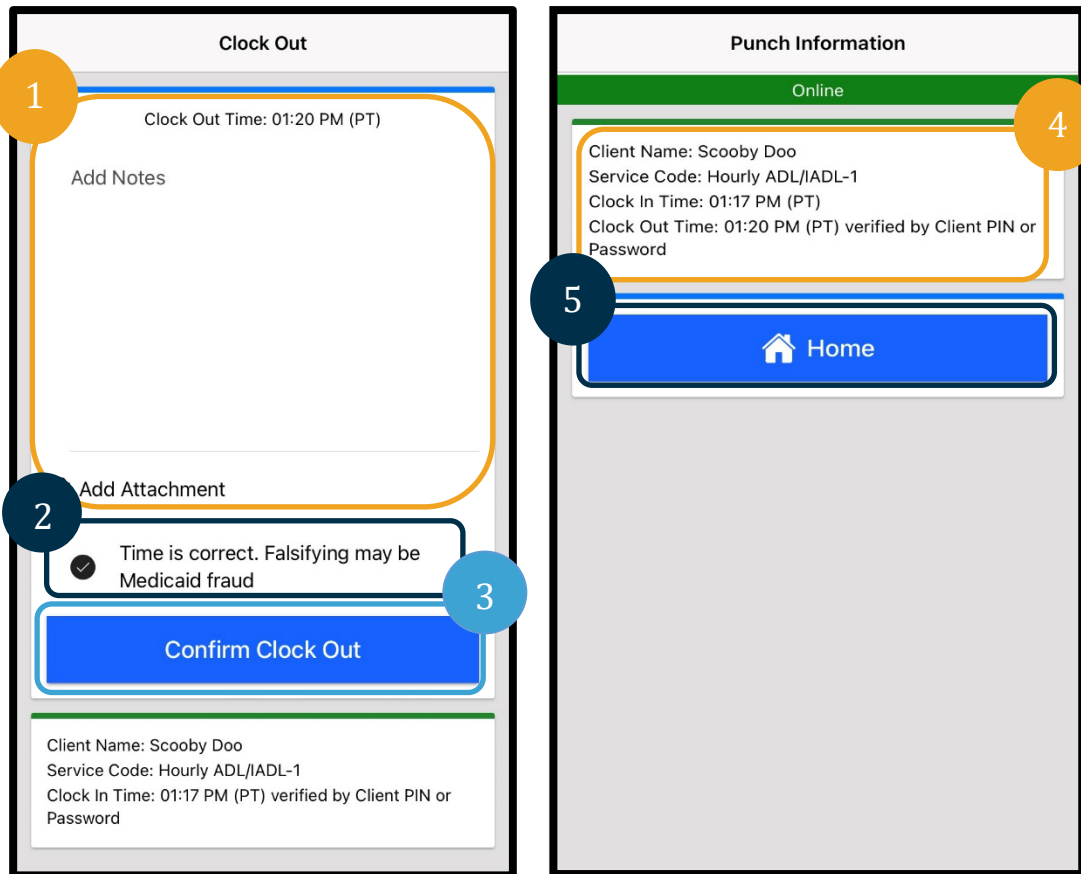
OR PTC DCI Mobile App Q&A

What should I do if I do not see the Clock In button on my dashboard?
If you see a Continue to Clock Out button when you expect it to say, "Clock In," this means you are still clocked in for a previous shift. If you do not have a Clock In or Clock Out button, this means you do not have an active service account. (For a definition of service account, see Common Terms.) Call your Local Office for assistance or send an email to PTC.Support@odhsoha.oregon.gov.

What if I do not see the correct Consumer Name or Service Code while clocking in?
Please make sure you have selected the arrow next to Client/Service Code to see the full list. If they are not showing on this list, this means you do not have an active service account for the consumer and/or Service Code. Call your Local Office for assistance or send an email to PTC.Support@odhsoha.oregon.gov.

When clocking out, I saw an Alert that says the Authorization Remaining Balance business rule was violated, what does that mean?
This means your entry went over your authorized hours for the current pay period.

You must select Cancel. This will reject the entry, giving a second alert that states "The entry id xxxx has been rejected." At this point the only option is to select Confirm. This will redirect you to the dashboard. You will not be paid for this rejected entry.
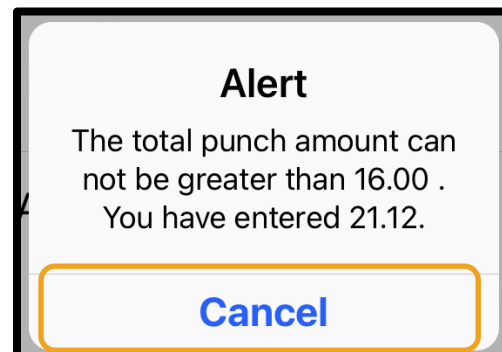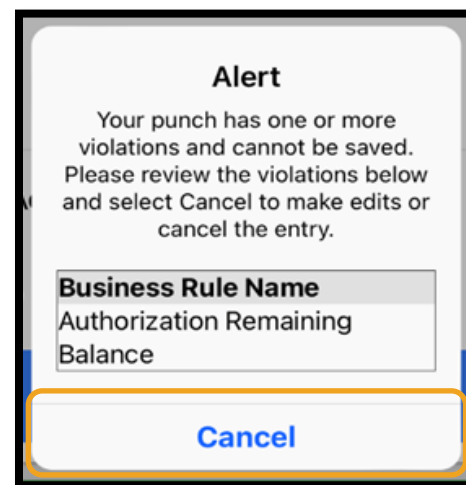
To be paid for this time, you will need to enter a historical entry to report your time for that shift. Make sure this historical entry is within your authorized hours. See Add Historical Entries using the Web Portal for more information.

Contact your Local Office if you need assistance.

For other potential business rule failures and explanations of what they mean, see the Common Entry Errors and Business Rule Violations Tip Sheet.

When clocking out, I saw an Alert that says "The total punch amount can not be greater than 16. You entered xxx." What does that mean?
OR PTC DCI prevents you from creating entries for 16 hours or more. If you attempt to create an entry that is longer than 16 hours, you will see this error during clock out. Upon seeing this error, you must select Cancel. After selecting Cancel,

A second alert will appear that says, "The entry id xxxx has been rejected." This entry is rejected. At this point the only option is to select Confirm. This will redirect you to the dashboard. You will not be paid for this rejected entry.
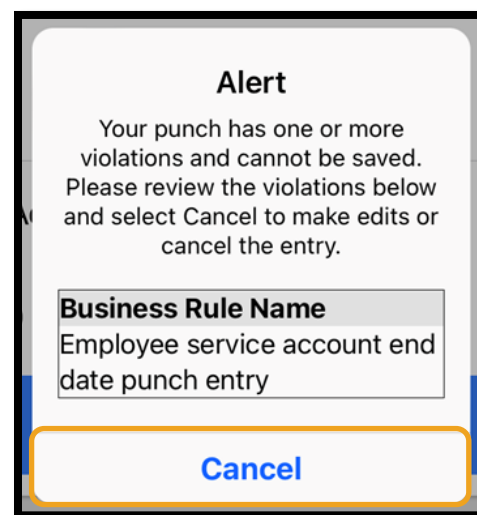
To be paid for this time, you will need to enter a historical entry to report your time, making sure the entry is less than 16 hours. See Add Historical Entries using the Web Portal for more information.

When clocking out, I saw an Alert that says the Employee Service Account End Date Punch Entry business rule was violated, what does that mean?
This means there is a date in OR PTC DCI indicating you are no longer working with this consumer. You will not be able to enter time for a date after the date entered as your last day working with the consumer.

You must select Cancel. This will reject the entry, giving a second alert that states "The entry id xxxx has been rejected." At this point the only option is to select Confirm. This will redirect you to the dashboard. You will not be paid for this rejected entry.

If you are working for this consumer, contact your Local Office to notify them that you are working for this consumer. Specify that there is an end date in OR PTC DCI. The Local Office will then contact the PTC Support Team to remove the date. After this is complete, you will be able to enter time for this consumer.

Once you are reconnected to your consumer, to be paid for this time, you will need to enter a historical entry to report your time for that entire shift. See Add Historical Entries using the Web Portal for more information.

When clocking in, I receive a message that says there is no active authorization for this account. What should I do?
This means there is no authorization (which houses your authorized hours or miles) for this consumer and Service Code in OR PTC DCI. Contact your Local Office for assistance.

How do I change my preferred language using the mobile app?
For mobile app users, once logged into the OR PTC DCI Mobile App, select Menu and then Language to set your preferred language.
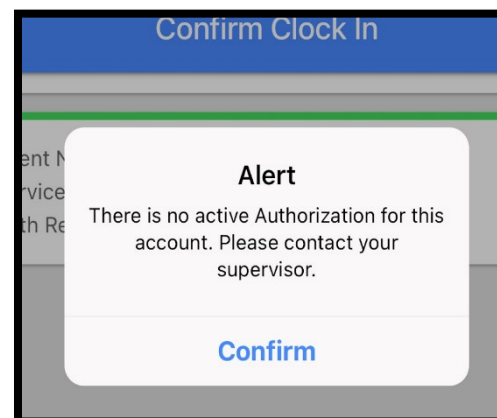
What if I forgot to clock out, then go to clock out later knowing the punch is incorrect and needs to be corrected. I still must check the attestation saying my time is correct when I know it isn't. What do I do?

When clocking out, you will need to check the attestation. Leave a note stating what happened and that you will immediately go in and correct the entry. After clocking out, log into the OR PTC DCI Web Portal and edit the entry to have the correct clock out time (see To Edit an Entry).

OR PTC DCI Mobile App Offline
Mobile App Offline allows you to create up to 10 entries in the OR PTC DCI Mobile App for up to 5 days in a row without needing to connect to a cellular or Wi-Fi network.

Getting Started with Mobile App Offline
To get started with Mobile App Offline, you will need cellular data or Wi-Fi. The first time you log into the OR PTC DCI Mobile App from a mobile device (such as a tablet or smart phone) while connected to the internet, OR PTC DCI will automatically register your device. You must use this device for Mobile App Offline to work.

Can I register more than one device for Mobile App Offline?
Mobile App Offline will only work from your one registered device. You can only have one registered device, and a device can only be registered to one user. If you need to change which device is registered, please contact your Local Office for assistance.

My device is registered. Now what?

While you are logged into the OR PTC DCI Mobile App, the mobile app will check for an internet connection. If there is no internet connection, the mobile app will automatically switch to Mobile App Offline. An "Offline" banner will display across the top of the mobile app screen when it is offline. Your dashboard will display the Clock In button. All other features and information on the dashboard are not available.

What Can You Do in Mobile App Offline?

You, as the provider, can clock in and clock out in Mobile App Offline. This includes:

- Logging into the OR PTC DCI Mobile App
- Selecting Clock In
- Selecting Clock Out
- Completing clock out verification
- Adding notes during clock out
- Logging out of the OR PTC DCI Mobile App
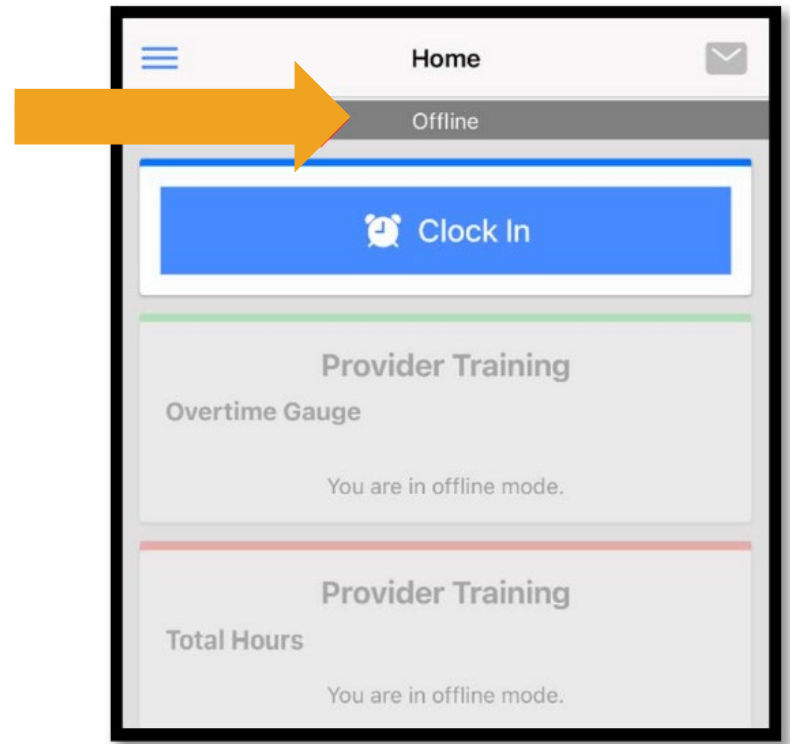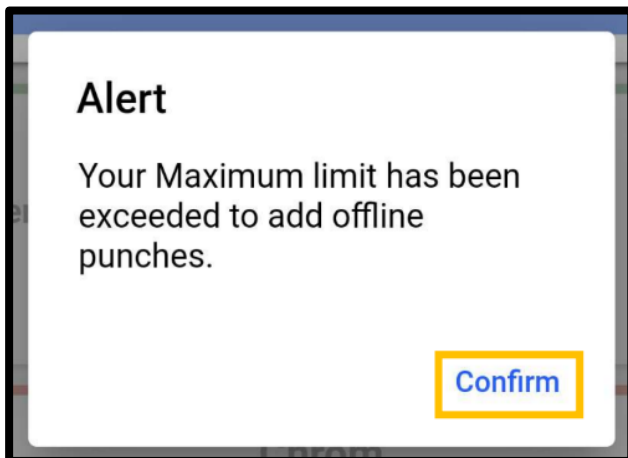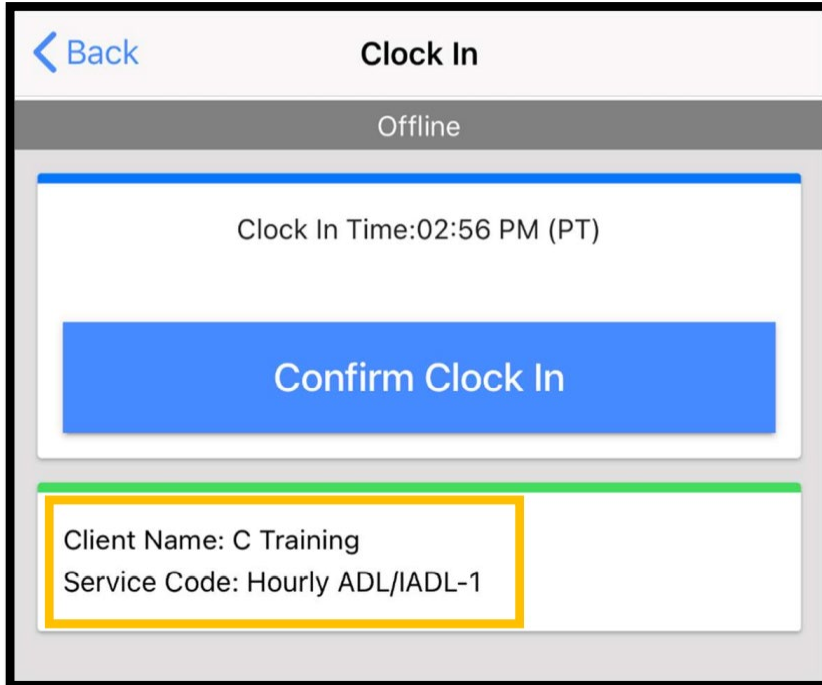
For security reasons, some information will be shortened or blank. You will see the consumer's first initial and last name only. You will not be able to see the Authorization Remaining Balance (the number of authorized hours left in the service period).

Nothing changes about how you clock in and clock out in Mobile App Offline. Follow your normal steps to enter time.

How Long Can You Be Offline?

A device can only be offline for 5 days in a row. You can only make up to 10 offline punches before going back online again. If you are offline for more than 5 days or try to make more than 10 punches, you will receive a message that says: "Your maximum limit has been exceeded to add offline punches." Select Confirm on this alert.

You will not be able to clock in again until you log into the OR PTC DCI Mobile App while your device is connected to the internet.

What happens when I log into the mobile app when I'm back online?

Your entries will be saved in the mobile app while offline. Once your device is back online, you will receive an alert that reads: "You are back online. Please select on confirm to synchronize your data."
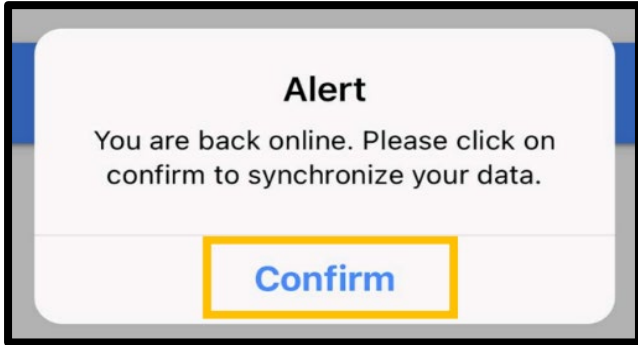
To sync your entries after you are back online:

1. Select confirm on the alert to load your entries into OR PTC DCI.
2. While your entries are loading, you will see a message that reads: "Your offline data is syncing. Please do not disconnect the internet or kill the application otherwise your data will be lost."
3. It may take a few moments for your entries to load. When this is complete, your entries will appear in the Entries tab in your menu.
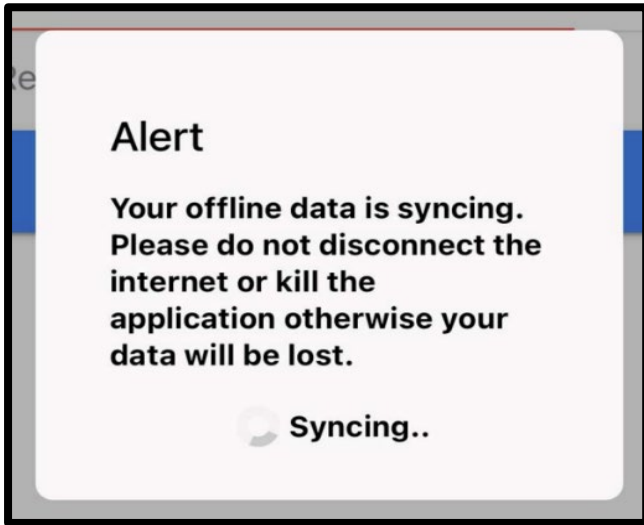
Note: Your entries must be loaded into OR PTC DCI to be paid. You must load your entries prior to the end of the grace period established in the Collective Bargaining Agreement to be paid in the current pay period.

I'm getting an internet connection error; what should I do?

When trying to access the OR PTC DCI Mobile App, you may receive an error that reads: "Please check your Internet Connection." Select Confirm on the alert. If this happens, something is wrong with your device registration. Call your Local Office for assistance. In the meantime, you must be connected to the internet to log into the OR PTC DCI Mobile App.
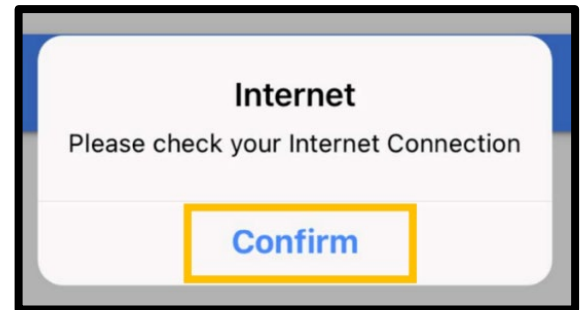
Note: A device can only be registered to one user and a user can only have one registered device.

- If you have logged into the OR PTC DCI Mobile App on a different device, the other device is likely registered to you and must be unregistered before a new device can be used for offline mode. Contact your Local Office for assistance unregistering a device.
- If someone else has logged into OR PTC DCI on your device, the device may be registered to that user for Mobile App Offline.

Troubleshooting Offline Mode

If the OR PTC DCI Mobile App is spinning when attempting to clock in or out in Offline Mode or the app will not kick into Offline Mode, try the following:

1. Ask the local office to deregister your device to resolve any device registration issues.
   a. If your device was ever used to log into a different provider's profile, it must be deregistered from that profile. You must notify the staff of any other providers who have logged in on your device.
   b. A staff member will deregister your device from any provider who has logged into the app from the device, including you.
   c. After the device is deregistered from all profiles, you can log into OR PTC DCI to register the device.

Note: If you ever get a new device, your old one will need to be deregistered from your profile for the new device to be registered on their next login. This means you must notify your local office if you switch devices you are using.

2. Disable Wi-Fi/cellular data.
   a. If your device is connected to a weak Wi-Fi or cellular data signal, Offline Mode will not kick in. Turn off the device's Wi-Fi and cellular data by going to Settings on the device prior to logging into the mobile app. Only do this if and when you intend to use Offline Mode. You will need to re-connect to Wi-Fi or cellular data within 5 days or 10 offline punch entries to sync the data.
3. Ensure you are not attempting to select items not available in Offline Mode.
   a. If your device connects to Offline Mode but then suddenly freezes or spins, you may have attempted to view an item that is not viewable in Offline Mode. While in Offline Mode, the only functions available are clocking in, clocking out, and logging out.

Selecting another function, such as Messages or Entries, may cause the mobile app to freeze. Do not attempt to use any functions other than clocking in/out or logging out while in Offline Mode.

OR PTC DCI Landline

The OR PTC DCI Landline option is perfect for a consumer who has a landline at their home and a provider who does not have access to a smart device.

This is also a good option for someone who lives in an area where cell phone reception/internet isn't reliable and prefers to not use the OR PTC DCI Mobile App, including Mobile App Offline. The landline can be used for real-time and historical time entries.

To be able to use the OR PTC DCI Landline option:

- The consumer must have a landline phone at the address you provide services, and this landline phone must be listed as the primary phone on the consumer's OR PTC DCI profile.

OR PTC DCI Landline Real-Time Entries

Using the OR PTC DCI Landline option in real-time is an EVV compliant way to clock-in and out at the beginning and end of your shift.

- To use the OR PTC DCI Landline option, the consumer must have their landline phone number added to their profile in the system; they can contact their Local Office for more information.
- Real-Time OR PTC DCI Landline EVV requires you to call before the shift and call again after the shift. The numbers available for various languages are:
  - o English/Spanish: 1-844-856-9560
  - o English/Vietnamese: 1-833-640-1295
  - o English/Russian: 1-844-334-7318
  - o English/Mandarin: 1-844-331-0241
  - o English/Arabic: 1-844-311-4160

Note: For English you can call any of these numbers.

Before calling to make a real-time entry:

- Make sure you are calling from the consumer's registered landline telephone.
- Have your PIN ready. (Tip: By default, your PIN is the last 4 digits of your primary phone number. If there is not a primary phone number on file, your PIN will be 0000.)
- In some situations, you may need to enter your date of birth.

Note: Clocking in takes about 4-6 minutes and clocking out takes about 3-4 minutes. Make sure you have enough time to clock in and clock out.

Note: If the phone is restricted or blocked, you cannot use the landline option.

Landline – Clocking In

To clock in at the start of your shift:

1. **Dial** the OR PTC DCI Phone Number for your language.
2. Follow the prompts to **select your language**.
3. When prompted, **enter** the last four digits of your social security number.
4. After the attestation message (displayed in the note callout bubble on this page), **enter** your four-digit PIN (Hint: By default, your PIN is the last four digits of your primary phone number).
5. **Press 1** for Hourly.
6. The system will read the names of consumers associated with the landline phone number from which you are calling. **Select** the correct Consumer.
7. **Press 1** for real time.
8. **Press 1** to confirm the service code. (Example: Hourly ADL/IADL-1)
9. The system will read how many hours are left on the current authorization. If you wish to continue, **Press 1**. Otherwise, **Press 2** to end the call.
10. **Press 1** to save the entry.

Note: The attestation message reads "By entering my PIN, I affirm that the reported start and end times accurately represents the times that I provided services/supports for the consumer-employer, I have only performed the tasks which are according to the consumer-employer's task list, and I am following the rules in accordance with the program I am enrolled in. I acknowledge that falsifying this information may be considered Medicaid fraud. I understand that when I clock out, I will press 1 affirming my time is correct and falsifying information may be considered Medicaid fraud."

Landline – Clocking Out

To clock out at the end of your shift:

1. **Dial** the OR PTC DCI Phone Number for your language.
2. Follow the prompts to **select your language**.
3. When prompted, **enter** the last four digits of your social security number.
4. After the attestation message, **enter** your four-digit PIN (Hint: By default, your PIN is the last four digits of your primary phone number).

5. The system will state there is an open punch with this consumer, would you like to close it. **Press 1** to close the entry.
6. The recording will say, "There are no active EVV locations for this client, would you like to continue?" **Press 1** to continue.
7. You will now hear: "Canned statements are linked to this service code. Please select at least one canned statement. For 'Time is correct. Falsifying may be Medicaid fraud,' please select 1 for yes and 2 for no." You must **press Yes (1)** for this attestation.
8. You will hear: "To open new punch, press 1, or press 2 to disconnect." **Press 2** to end the call.

OR PTC DCI Landline Historical Entries

Historical Landline entries allow you to log time after your shift has already occurred (example: you forgot to clock in or out for last Monday's shift).

- To make a historical time entry using the OR PTC DCI Landline, you must have the consumer, or their representative, present at the time you make the call.
- You must use the consumer's landline phone to make the call.
- Unlike Real-time Phone EVV, you will only call once instead of twice.
- Historical Landline Phone entries are not EVV compliant.
- Historical OR PTC DCI Landline EVV requires you to call the same number as you use for real-time:
  - English/Spanish: 1-844-856-9560
  - English/Vietnamese: 1-833-640-1295
  - English/Russian: 1-844-334-7318
  - English/Mandarin: 1-844-331-0241
  - English/Arabic: 1-844-311-4160

Note: For English you can call any of these numbers.

To record a historical entry:

1. **Dial** the OR PTC DCI phone number for your language.
2. **Enter** the last 4 digits of your SSN.
3. After the attestation message, **enter** your four-digit PIN .
4. **Press** any key to continue.
5. **Press 1** for Hourly.
6. **Confirm** Consumer Name when prompted.
7. **Select 2** for Historical Punch.
8. **Select** proper Service Code with the prompts given (Example: Hourly ADL/IADL-1).
9. **Listen** as system reads available number of hours on the authorization, **Press** 1 to continue or 2 to cancel.
10. **Enter** Date of Service in MMDDYYYY format (Example: August 1, 2021 is 08012021).
11. **Enter** Clock-In Time in HHMM format (Example: 8:30 is 0830).

12. **Press** 1 for AM or 2 for PM.
13. **Enter** Clock-Out time in HHMM format (Example: 4:45 is 0445).
14. **Press** 1 for AM or 2 for PM.
15. Recording will read back Punch Details, **Press** 1 to Confirm.
16. The recording will say "There are no active EVV locations for this client, would you like to continue?". **Press** 1 to continue.
17. **Listen** to the canned statement attestation "Canned statements are linked to this service code. Please select at least one canned statement. For 'Time is correct. Falsifying may be Medicaid fraud,' please select 1 for yes and 2 for no.**"**
18. **Press** 1 for Yes.
19. **Listen** while system reviews punch details. **Press** 1 to confirm or 2 to edit.
20. **Start** Consumer Validation, Hand the phone to the consumer.
21. Consumer **Press** 1 when ready.
22. Consumer listens to punch details, **Press** 1 to Accept or 2 to Reject.
23. Consumer **Enters** their PIN to validate.
24. The call will end automatically.

Your historical punch has been created.

OR PTC DCI Landline Q&A

The system does not recognize my PIN. What do I do?

Your PIN was originally set as the last four digits of your primary phone number. If you did not have a phone number on file when your profile was created, your PIN is 0000. You can change your PIN on the Web Portal in the Settings. See Change PIN for more information.

When clocking in, I receive a voice message that says there is no active authorization for this account. What should I do?

This means there is no authorization (meaning no hours and/or miles) for this consumer and Service Code in OR PTC DCI. Contact your Local Office for assistance.

When clocking out, I receive a voice message that says this punch will be rejected, what does that mean?

There are a few different reasons your entry may be rejected. Each has a different message.

Option one, if you hear the following message during clock out after confirming the attestation statement, it means you violated the Authorization Remaining Balance business rule.

"This punch will be rejected, as there are not enough units or dollars available on the authorization to support this punch. Please contact your supervisor. Thank you for calling the Oregon Provider Time Capture system. Goodbye."

This means your entry went over your authorized hours for the current pay period. The entry will automatically be rejected, and you will not be paid for it. To be paid for the time you did work, you must create a historical entry for an amount of time within your authorized amount. Contact your Local Office if you need assistance.

Option two, if you hear the following message during clock out after confirming the attestation statement, it means you tried to claim more than 16 hours in a single punch.

"This punch will be rejected as the total punch amount cannot be greater than 16.00. You have entered xx. Thank you for calling the Oregon Provider Time Capture system. Goodbye."

This means your entry was longer than 16 hours. The entry will automatically be rejected, and you will not be paid for it. To be paid for the time you did work, you must create a historical entry for an amount of time less than 16 hours. Contact your Local Office if you need assistance.

Option three, if you hear the following message during clock out after confirming the attestation statement, it means you violated the Employee Service Account End Date Punch Entry business rule.

"This punch will be rejected, as you are attempting to enter a punch for a date of service that is past the end date on your employee service account. Please contact your supervisor. Thank you for calling the Oregon Provider Time Capture system. Goodbye."

This means there is a date in OR PTC DCI indicating you are no longer working with this consumer. You will not be able to enter time for a date after the date entered as your last day working with the consumer. If you are working for this consumer, contact your Local Office to notify them that you are working for this consumer. Specify that there is an end date in OR PTC DCI. The Local Office will then contact the PTC Support Team to remove the date. After this is complete, you will be able to enter time for this consumer.

Once you are reconnected to your consumer, to be paid for this time, you will need to enter a historical entry to report your time for that entire shift. See OR PTC DCI Landline Historical Entries for more information.

What can cause the call to disconnect/end when trying to clock in/out?

The following are potential causes for the call to be disconnected:

- Hesitating, or waiting too long, to press a button after a prompt
- Not pressing 1 on the attestation/canned statement

- Entering the wrong PIN or last four of your SSN
- Not entering your PIN after the attestation
- The consumer's landline phone number is blocked or restricted

OR PTC DCI Fob

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

- The fob is a small device that must be kept in the consumer's home.
- You must be able to access the internet at least once per pay period to enter your fob times in the OR PTC DCI Web Portal.

> **Note**: Pressing the button does **not** record time. The code displayed is used to verify you started working when you said you did.

Using an OR PTC DCI Fob

1. At the beginning of the shift, you will locate the OR PTC DCI Fob that is in a fixed place in the consumer's home. Press the red button on the fob at the start of the shift. Write down the 6-digit code and your start time on the paper timesheet.
2. At the end of the shift, locate the OR PTC DCI Fob once more. Press the red button on the fob at the end of the shift. Write down the 6-digit code and your end time on the paper timesheet.

It's 7:59AM, the fob code is xxxxxxx

> **Note**: If you press the button and the numbers do not display long enough for you to record the number, press the button again and record the new number that displays. This second number is the one you will enter when creating the fob entry.

OR PTC DCI Fob Timesheet

- The Agency has created an optional paper timesheet for you to use to help you track your fob tokens. These are also accessible on PTC.Oregon.gov (select Learning Materials from the left-hand side). The Fob Timesheet **cannot** be turned into the Local Office for payment.
- You must enter the fob data collected on the timesheet(s) into the OR PTC DCI Web Portal.

- Before the end of the pay period, log into the OR PTC DCI Web Portal from a web enabled device to enter your time. Examples of web enabled devices include computers, laptops, smartphones, and tablets.

Note: You will still have the same grace period to submit your time entries to the Agency as you did with the paper voucher process to ensure timely payment. See the HCW/PCA Payroll Calendar for details.

Revision Date: 4/29/2021

OR PTC DCI Fob Timesheet

Provider Name:_____

Consumer Name:_____

Service Period:_____Mileage:_____

*Do not submit fob timesheets. These are for your records only. Shift information must be entered into the OR PTC DCI Web Portal (https://orptc.dcisoftware.com/) no later than 3 business days after the service period ends for timely payment.

Service Date	Clock-in Time		Clock-out Time	
MM/DD/YY	HH:MM	AM/PM	HH:MM	AM/PM

Clock-in Fob: | | | | | | Clock-out Fob: | | | | |

Tasks Provided: _____

Service Date	Clock-in Time		Clock-out Time	
MM/DD/YY	HH:MM	AM/PM	HH:MM	AM/PM

Clock-in Fob: | | | | | | Clock-out Fob: | | | | |

Tasks Provided: _____

OR PTC DCI Fob Q&A

I pressed the button, but the number disappeared before I could write it down! What do I do?
The fob has a built-in timer. This displays on the left side of the numbers as a set of lines (see blue arrow in the picture). When the red button is pushed, the timer displays, and the lines will disappear as time runs out. If you push the red start button and there are only one or two lines, let the timer run out and the display go blank. Push the red start button again and a new code will display with more time for you to write down the code.

I accidentally pressed the button more than once! What do I do?
If you press the button again and a new fob code will display. Previously displayed fob codes will not show again once they disappear. Write down the new fob code that displays.

OR PTC DCI Web Portal

As a provider, you will use the OR PTC DCI Web Portal to:

- View your dashboard.
- Use the OR PTC DCI Messaging Module.
- Add fob time entries (if you are using the fob option).
- Add historical time entries.
- Add mileage entries.
- View, edit, and manage your entries.
- Access the DCI Help Center.

Let's review these one at a time.
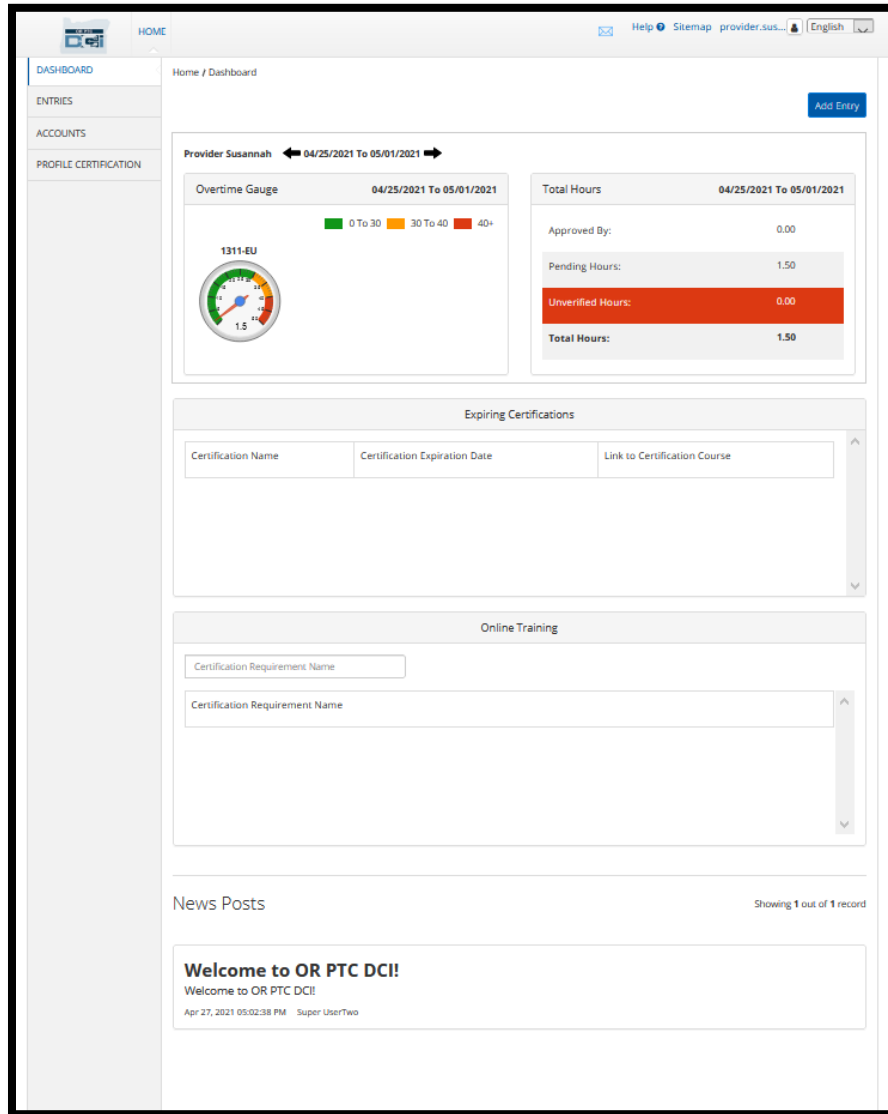
OR PTC DCI Web Portal Logging in

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

1. Navigate to orptc.dcisoftware.com.
2. Enter the username and password provided to you (see Username and Password Information).
3. Select Sign In.
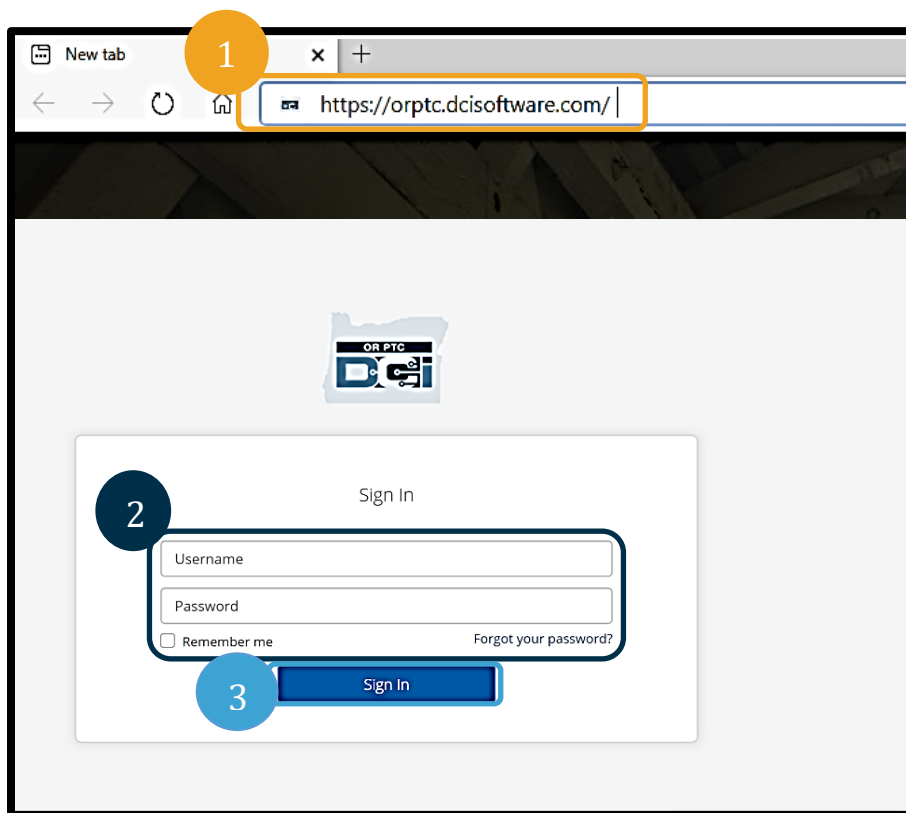
After you finish logging in, you will see the Provider Attestation and System Use Notification. The Provider Attestation states that you, as the provider, will enter accurate start and end times and only complete tasks on your approved task list. By selecting OK on the Provider Attestation, you are acknowledging that falsifying this information may be Medicaid fraud. When clocking out or creating a time entry, you will acknowledge the Provider Attestation again by checking a box or by pressing 1 for yes when using the landline.

The System Use Notification that appears when you log in indicates that OR PTC DCI is monitored and recorded. The purpose of the system is to track hours worked by approved providers and to make sure state and federal EVV guidelines are followed. OR PTC DCI contains personal and confidential information. Never share your login information with anyone. By using the system, you agree to these terms. Please read the Provider Attestation and System Use Notification thoroughly. You may see other News Posts with tips or information about system updates.

Review and select OK to acknowledge and accept the content on each News Post.

News Posts

Subject - Provider Attestation

Message:
By clicking "OK", I affirm that the reported start and end times accurately represents the times that I provided services/supports for the consumer-employer, I have only performed the tasks which are according to the consumer-employer's task list, and I am following the rules in accordance with the program I am enrolled in. I acknowledge that falsifying this information may be considered Medicaid fraud. I understand that when I clock out, I will check a box affirming my time is correct and falsifying information may be considered Medicaid fraud.

Created Date: Jun 23, 2022 11:06:39 AM
Created By:

[Ok]
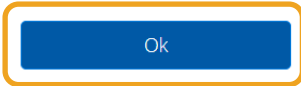
News Posts

System Use Notification

The user is accessing a restricted system. System usage may be monitored, recorded, and subject to audit. Unauthorized use of the system is prohibited and may be subject to criminal, civil, or administrative penalties. Use of the system constitutes consent to monitoring and recording. The intent of the site is to allow authorized participants of Oregon Project Independence, State Plan Personal Care within OHA's Health Systems Division and ODHS's Aging & People with Disabilities division, and the In-Home Consumer Employed Provider program to track delivery of authorized services.
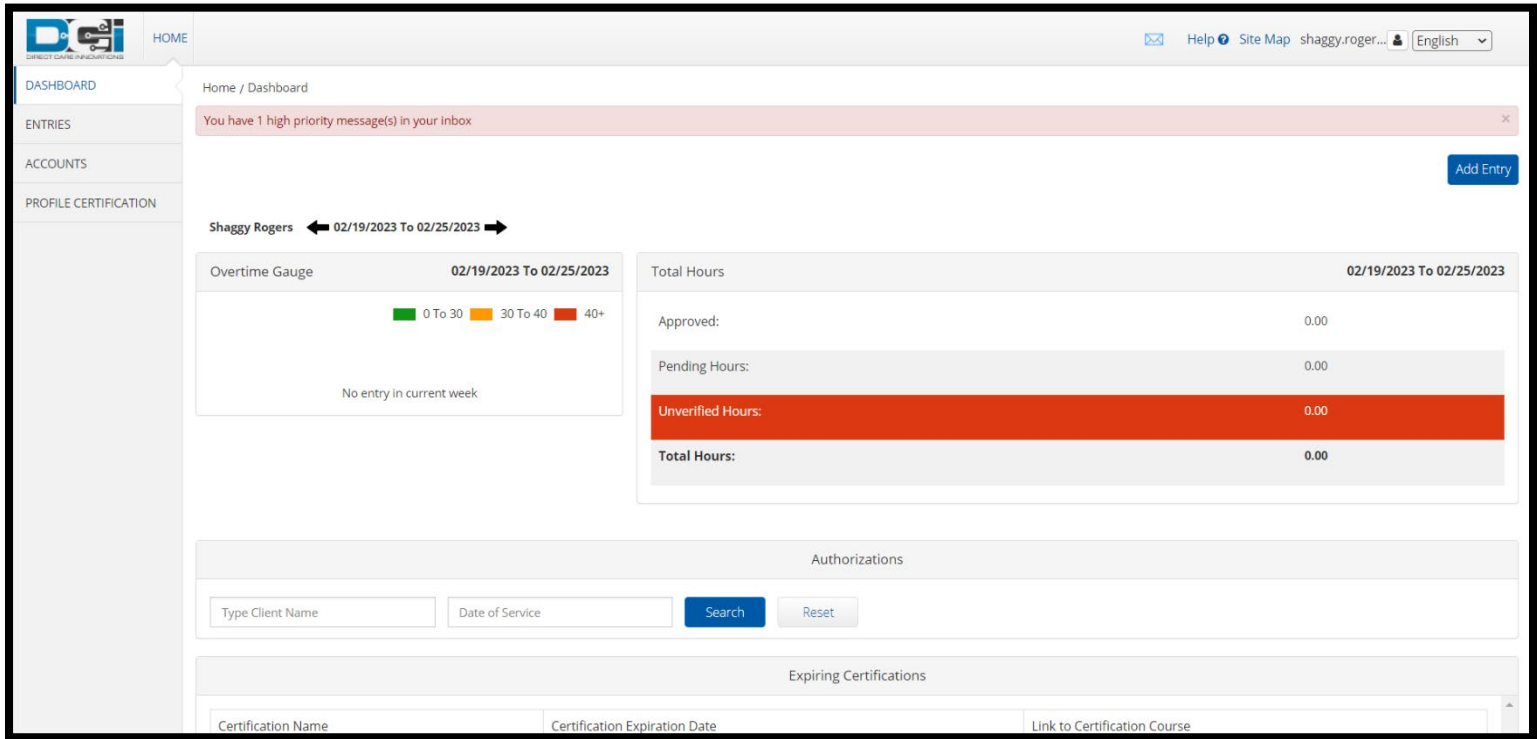
You are only authorized to use this site, or any information accessed through this site, for its intended purpose. Unauthorized access or unauthorized sharing of personal and confidential information may be punishable by fines under state and federal law. Unauthorized access or unauthorized sharing may also be criminally punishable. The State of Oregon follows federal and state law and regulations to protect the information from misuse or unauthorized access.

Jan 26, 2021 04:25:24 PM   DCI Implementation

[Ok]
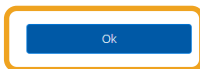
OR PTC DCI Web Portal Dashboard Overview

The Dashboard is the first thing you will see after the News Posts. Let's review each part of your Dashboard one at a time.

Note: The Agency will not be using the Expiring Certifications or the Online Training portions of the Dashboard at this time.

On your Dashboard you will see the following:

1. A dropdown menu with your preferred language
2. Your username
3. A hyperlink to the DCI Help Center
4. An envelope icon that will take you to the Messaging Module
5. Important messages from the Agency called News Posts
6. Entries tab – Select on this menu item to see all the time entries you have ever made
7. Accounts tab – Select on this menu item to see a list of the consumers you work for and if you are assigned hours, miles, or both
8. Profile Certification – This menu item will not be used at this time
9. Overtime Gauge - This section will show how many hours you have worked during the current work week
10. Total Hours - This will show how many hours you have entered that passed all business rules (Approved); how many hours you have entered that are not yet approved

(Pending); the number of hours that were entered on your behalf which you need to verify (Unverified); and the total hours you've worked during the current work week

11. Authorizations Widget – This shows you how many hours you were authorized and how many you have still available to claim for a specific consumer for a given pay period

Note: The Overtime Gauge and Total Hours only shows hours in a week. These sections do not indicate how many hours the Case Manager has authorized you to work or the weekly cap you have been assigned. If you need to know that information, contact the Local Office.

How 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. Once 3 or more characters have been typed, a drop-down will appear. Select the consumer's name from the drop-down list.

3. Select the Date of Service field. From the calendar, select a date within the pay period in question. For example, if you want to know what your Remaining 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. The Service Code shows whether it is for hours or miles.
6. The Current Available Balance for this period is listed to the right of Pre-Authorizations Holds.

OR PTC DCI Web Portal Accounts

On the Accounts tab, you will see all consumers you work for. This tab is informational only. You do not need to take any action here.
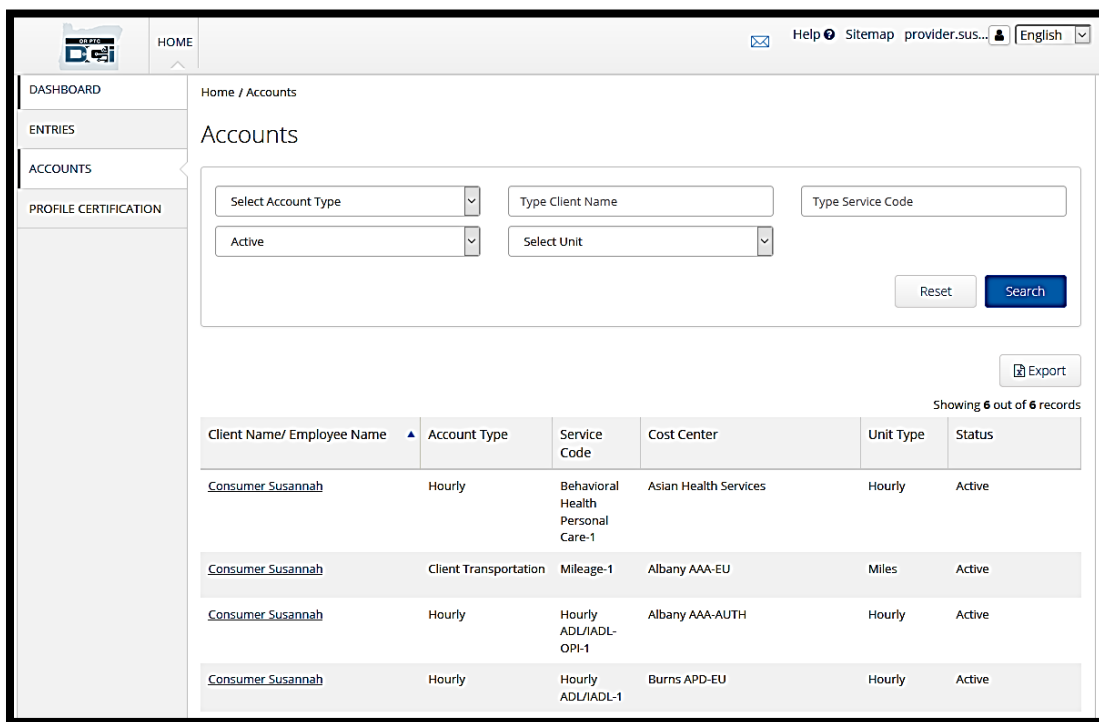
OR PTC DCI Web Portal Messaging Module Overview

OR PTC DCI has its own messaging system. This allows you to send secure messages to your contact at your Local Office. You may also receive system-generated messages from OR PTC DCI. At the top of your dashboard, you will see a red alert if you have a high priority message. You will not get an alert for messages not indicated as high priority. To see your messages, select the envelope icon and select See All Messages.

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

To see your messages in the messaging module, log in to OR PTC DCI then follow these steps:

1. Select on the envelope in the upper right corner of the screen.
2. Select See All Messages

Note: High Priority messages will cause a red alert to appear at the top of the OR PTC DCI Dashboard when they log in.

You will be taken to the Messaging Module.
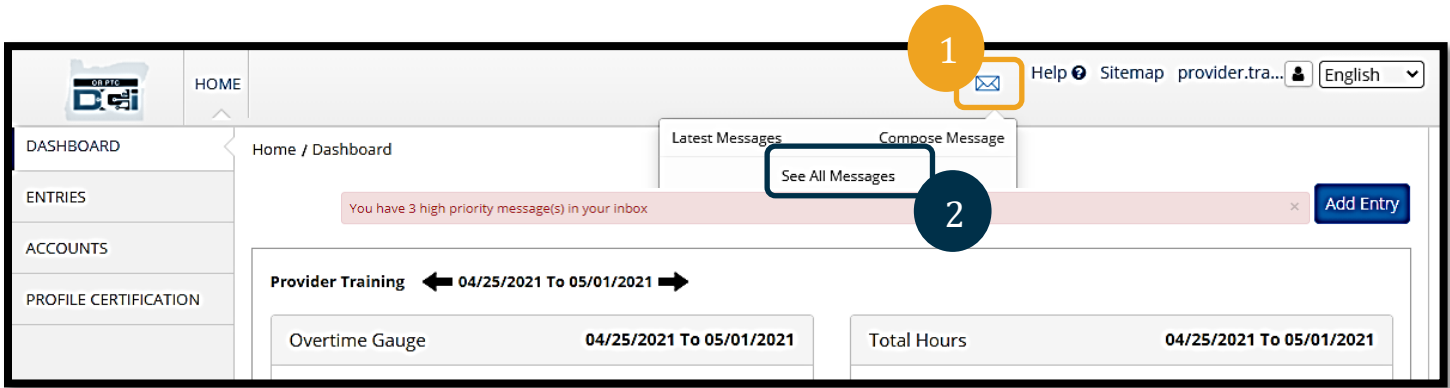
To read a message in the Inbox:

1. Select on the message
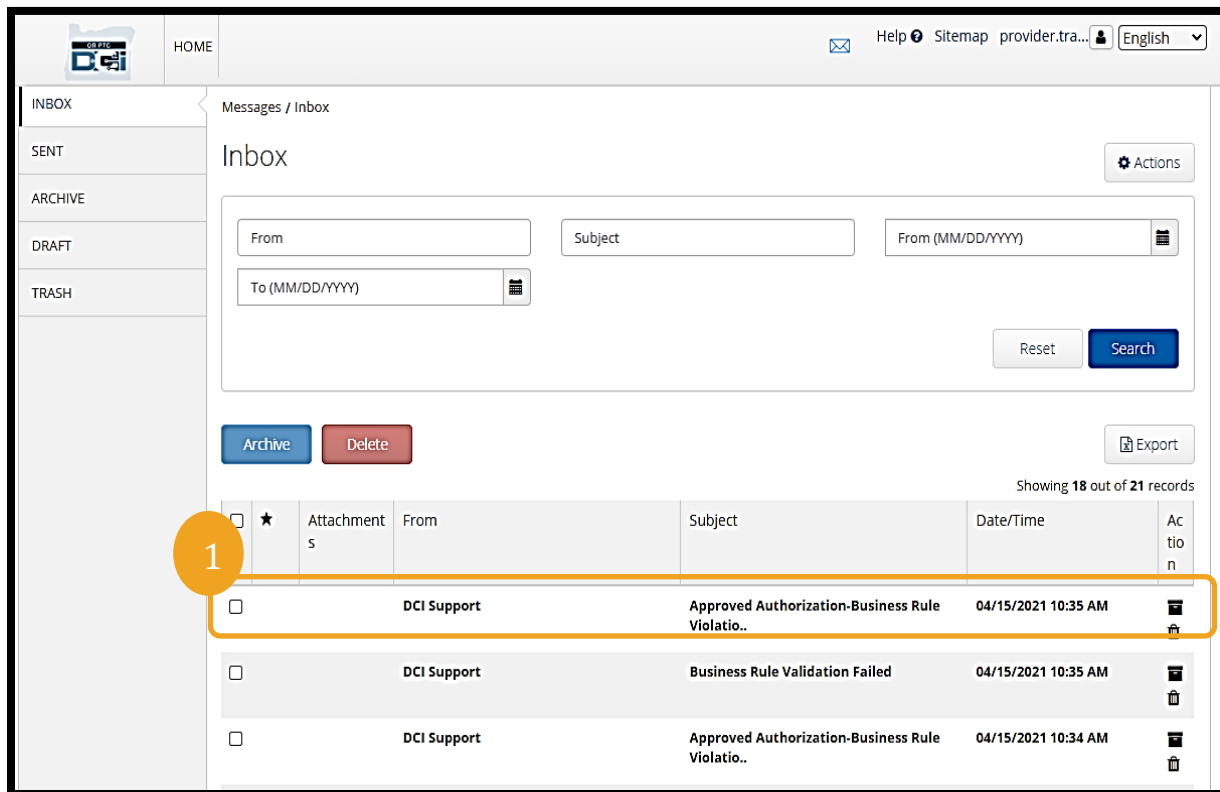
2. Read your message in the Message Details page
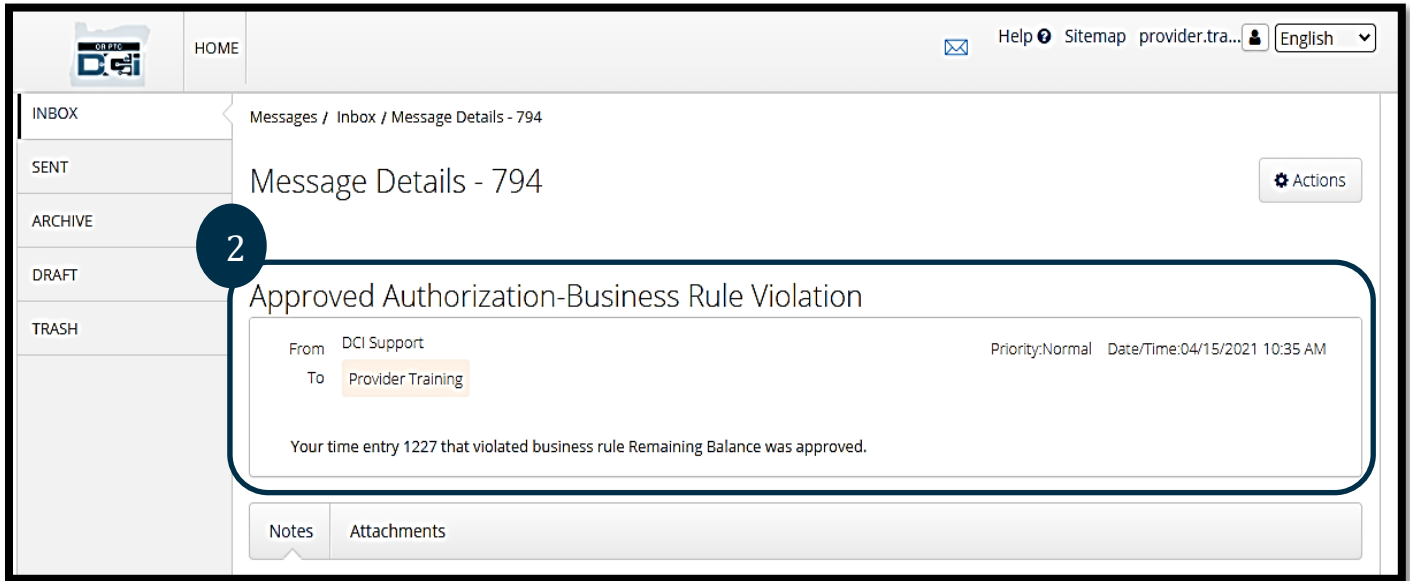
Now, let's learn how to send a message to your Local Office from the Messaging Module.

To send a message:

1. Select Actions
2. Select New Message
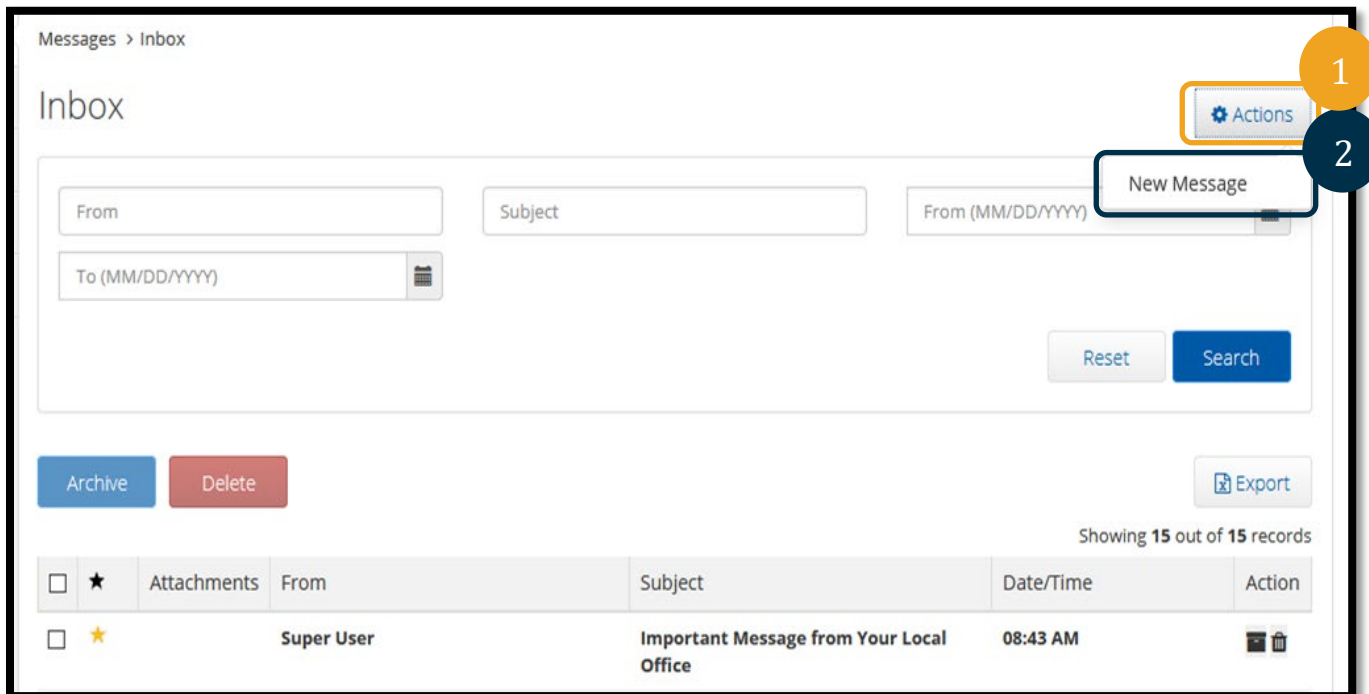
3. Next, fill out the following fields:
   a. To: Start typing the first 3 letters of the first or last name of the person you want to send a message to and select a name from the dropdown menu when it appears.
   b. Subject: Type the subject of the message in the Subject box.
   c. Priority: Select the priority level from the dropdown menu.
        i. Select Low, Medium, or High from the dropdown menu in the Priority box.
   d. Type the message in the Body box.
   e. Select the Send button.
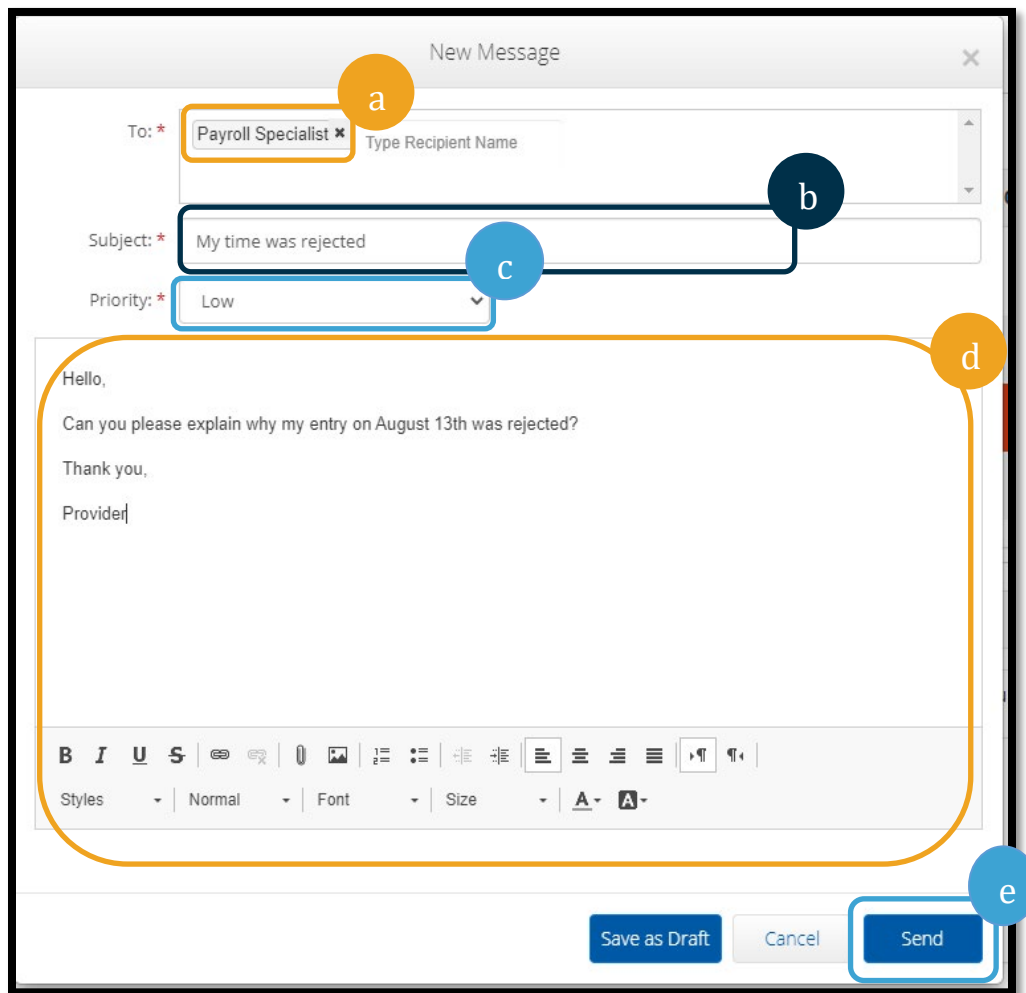
OR PTC DCI Web Portal Q&A

How do I change my preferred language using the OR PTC DCI Web Portal?
Using the OR PTC DCI Web Portal, your preferred language screen can be changed by selecting the language dropdown located in the upper right-hand corner of the screen.

Why do I have to change my password?
Passwords must be changed every 60 days for security purposes.

How do I send a message?
Select the envelope icon, then Actions, then New Message in the web portal. For the mobile app, select on the envelope icon and then the blue, New Message icon in the lower right-hand corner.

How do I check my messages?
Select the envelope icon and then select on the message that you would like to view.

How can I make sure I receive text notifications?
In the OR PTC DCI Web Portal, select on settings and then verify mobile. Enter your mobile phone number and select Update Mobile Number. See Verify Mobile Phone Number for more information.

OR PTC DCI Web Portal Adding an Entry

Web Portal Add Fob Entry
Use the OR PTC DCI Web Portal to enter your fob timesheet entries. This can be done at the end of the pay period; they do not have to be entered daily.

Note: Fob entries need to be entered into the web portal before the submission deadline for that pay period to ensure on time payment.

Start by **selecting** Add Entry from the Dashboard
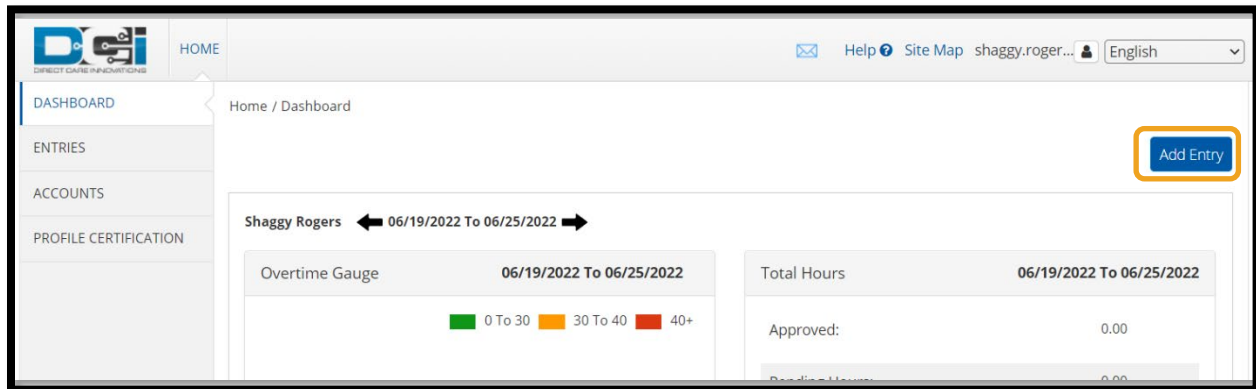
Complete the following fields to add a fob entry:

1. **Account Type**: Select Hourly
2. **Client**: Start typing the consumer's name and select the name when it appears
3. **Service Code**: Select the correct service code based on the consumer's program for which you are claiming hours
4. **Service Date**: Date you worked
5. **Check in**: Start of shift (to the minute)
6. **Check Out**: End of shift (to the minute)

Note: To enter time to the minute, select in the box to place your cursor, then backspace and type the correct time.

7. **EVV Method**: Select Secure FOB
8. **Start Token**: Six-digit code from clock-in
9. **End Token**: Six-digit code from clock-out
10. **Add Notes** and **Attachments** if desired
11. **Check** the attestation to confirm the time you are entering is correct.
12. **Select** Save to submit time
13. **Repeat** steps 1 – 12 for each fob entry

Add New Entry

Entry Type: * Punch
Employee Name: Shaggy Rogers
Account Type: * Hourly
Client: * Scooby Doo - PrimeNumber00010
Service Code: * Hourly ADL/IADL-1
Service Date: * 06/21/2022
Remaining Balance: 8
Check In: * 10:00 AM
Check Out: * 11:00 AM
EVV Method: * Secure FOB
Start Token: * 598742   End Token: * 628495
Check Out Date: 06/21/2022
Diagnostic Code: Diagnostic Code
Notes: Add Notes for Punch
Attachment: Choose File
Statements: * ☑ Time is correct. Falsifying may be Medicaid fraud

Note: Time will display in military time for all languages except English.

Cancel   Save

Fob Entries - Invalid Tokens

If you enter a time that does not match up with the Fob token, the following will occur:

You will see the error: "FOB Start and End Tokens are invalid. Do you want to continue with Portal Sign Off?"

1. Select No to return to the Add New Entry screen.
2. If possible, correct your Fob tokens.
3. If you are unable to correct the Fob tokens, select Yes. This is now a non-EVV compliant entry. Follow Add Historical Entries using the Web Portal.
4. Follow remaining steps of Add New Entry process.
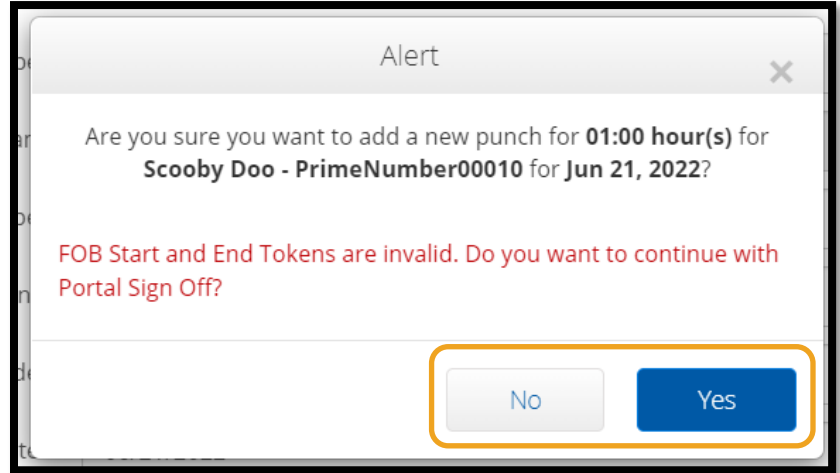
Note: If when entering a fob entry, you receive a different alert stating you violated a business rule, correcting the error will likely result in changing the start and end times or date of service. If any of these occur, you will need to change the entry to a historical entry and remove the fob codes. Follow Add Historical Entries using the Web Portal. To learn more about errors when creating entries on the web portal, see Historical Entries –

Web Portal Adding Historical Entries

Sometimes, you may need to add a time entry after you work a shift. This is called a "Historical Time Entry". Historical time entries are not EVV compliant and should only be used if something prevents you from entering your time using one of the other methods, such as no internet connection or you forgot to clock in.

To add a historical time entry, select Add Entry from the Dashboard.
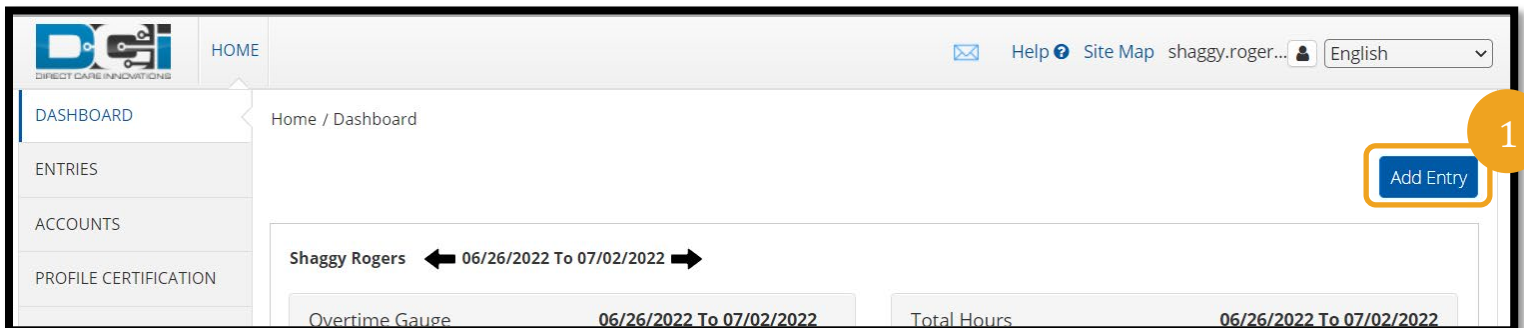
To add a Historical Time Entry, complete the following fields:

1. Account Type: Hourly
2. Client: Consumer Name
3. Service Code: This should auto-generate to match what you are authorized for that consumer. If the consumer recently switched programs, select the correct service code based on the program for which you are claiming hours
4. Service Date: Date you worked
5. Check in: Start of shift
6. Check Out: End of shift
7. EVV Method: Portal Signoff

Add New Entry

Entry Type: * Punch

Employee Name: Shaggy Rogers

Account Type: * Hourly ①

Client: * ② Scooby Doo - PrimeNumber00010

Service Code: * Hourly ADL/IADL-1 ③

Service Date: * ④ 06/16/2022

Remaining Balance: 3

Check In: * ⑤ 1:30 PM   Check Out: * 2:30 PM ⑥

EVV Method: * ⑦ Portal Signoff

Check Out Date: 06/16/2022

Reason Codes

Reason Codes help explain why an entry does not meet the EVV requirements. Choose the Reason Code that most closely explains why you were you not able to use an EVV compliant time entry method. Select from the Reason Codes that begin with the word Provider.

Adding a Reason Code

On the Add New Entry Form:

1. Select the blue plus sign next to the word Reason.
2. Choose a Reason Code from the drop-down list beginning with Provider.
   a. If you select Provider-Other, a notes section will appear to add the explanation as to why you are creating a historical entry or editing the entry.
3. Select the blue plus sign to the right of the Reason Code. You **must** select this to save the reason code.
4. Select Yes.
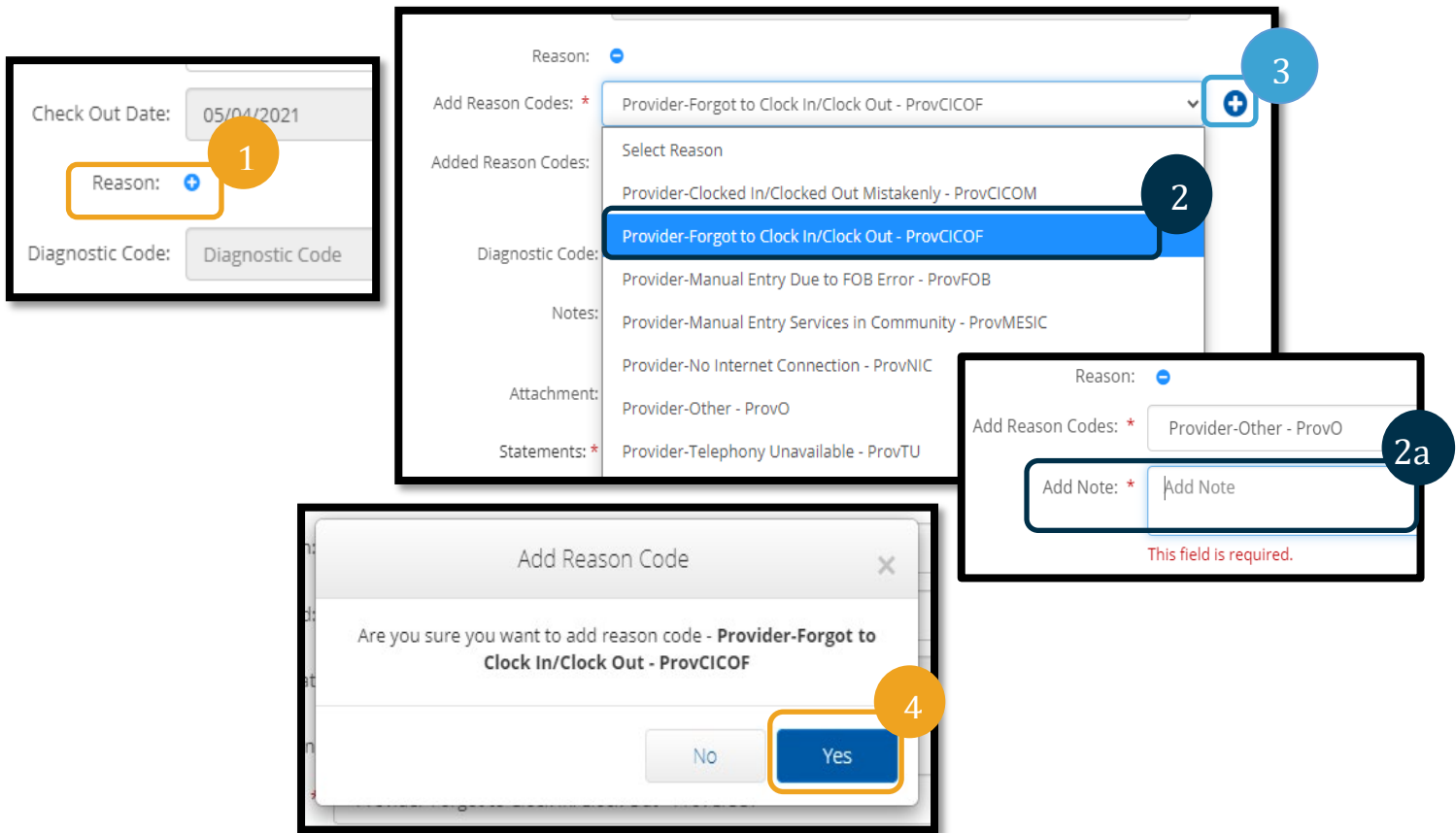
To Verify You Added a Reason Code

After selecting Yes to add the reason code, you will see the reason code populate under the Added Reason Codes. If you do not see your reason code in the Add Reason Codes section, the reason code was not added successfully.

To Remove the Reason Code

1. Select the blue negative sign next to the reason code.
2. Now you can add a new reason code by following the steps on the previous page.

After adding a Reason Code, finish your entry as follows:

1. Add Notes or Attachments. This is optional - please follow all policies regarding shift notes.
2. Check the attestation confirming the time you entered is correct.
3. Select Save.
4. Select Yes.
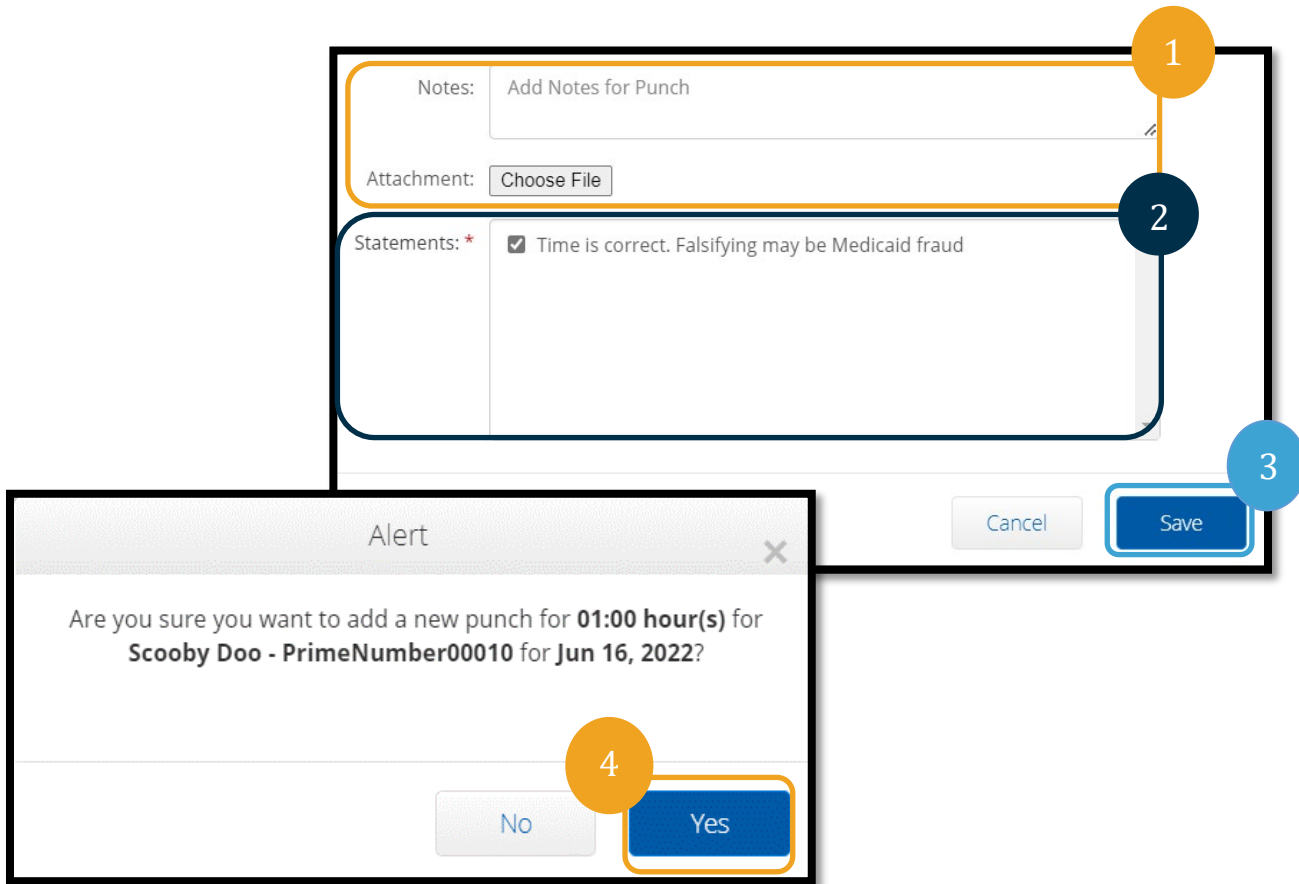
Historical Entries – Q&A
What if I get a popup that says Authorization Remaining Balance business rule was violated while making a historical entry on the web portal?
Upon selecting Save, you get a popup alert that says, "Your punch has one or more violations and cannot be saved. Please review the violations below and select Return to make edits of cancel the entry." Below this will show the business rule(s) violated. This will list Authorization Remaining Balance.
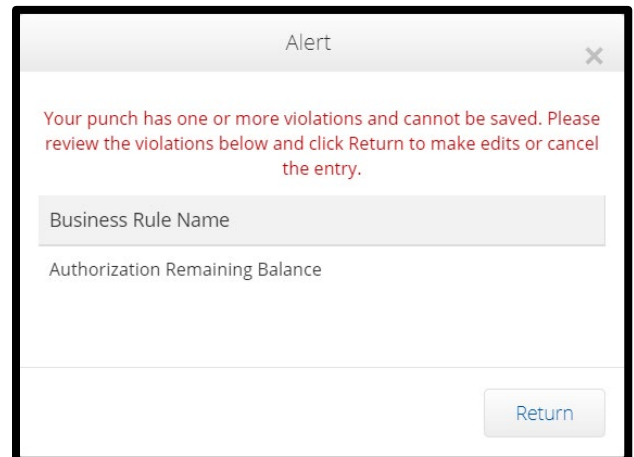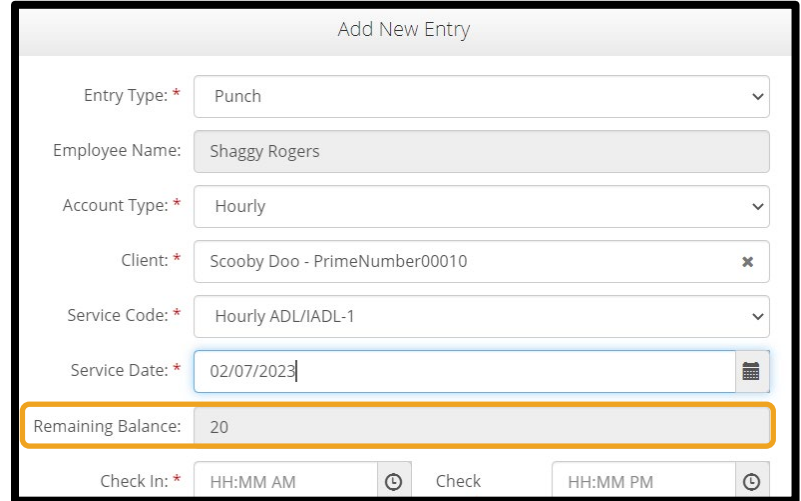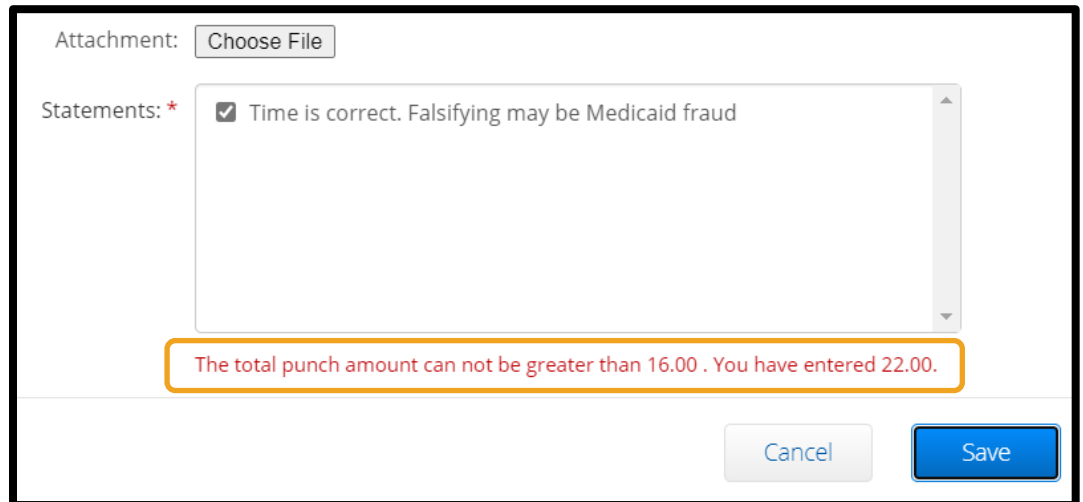
This means you are attempting to claim more hours than you are authorized to work. The entry you are trying to save pushed you over your authorized hours and cannot be saved.

Select Return on the alert. From there you will be brought back to the Add New Entry form where you have the option to edit the amount of time you are claiming. You can see how many hours you have remaining on the Add New Entry form under the Service Date field. Change the start or end time to be within the Remaining Balance and select Save again.

What if I get an alert at the bottom of the screen that says, "The total punch amount can not be greater than 16.00. You have entered xx" while making a historical entry on the web portal?

Upon selecting Save, you get an alert at the very bottom of the screen above the Save button that says, "The total punch amount can not be greater than 16.00. You have entered xx."

This means you are attempting to claim more than 16 hours. This is not allowed in OR PTC DCI.

You now have the option to edit the amount of time you are claiming. Change the start or end time to make sure the total hours claimed on the entry are less than 16 and select Save again.

What if I get a popup that says Service account end date punch entry business rule was violated while making a historical entry on the web portal?

Upon selecting Save, you get a popup alert that says, "Your punch has one or more violations and cannot be saved. Please review the violations below and select Return to make edits of cancel

the entry." Below this will show the business rule(s) violated. This will list Service account end date punch entry.

This means there is a date in OR PTC DCI indicating you are no longer working with this consumer. You will not be able to enter time for a date after the date entered as your last day working with the consumer.

Select Return on the alert. From there you will be brought back to the Add New Entry form where you have the option to edit the date on the entry you are claiming. Then you can attempt to save again.
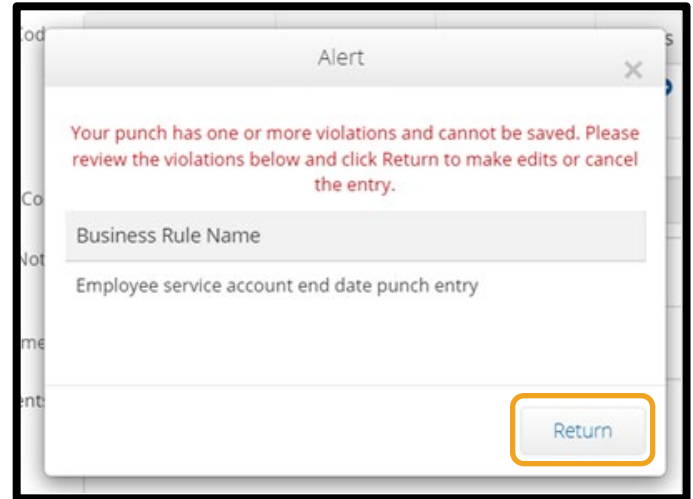
If the original date you entered for the punch was correct and you are working for this consumer, contact your Local Office to notify them that you are working for this consumer. Specify that there is an end date in OR PTC DCI. The Local Office will then contact the PTC Support Team to remove the date. After this is complete, you will be able to enter time for this consumer.

Once you are reconnected to your consumer, to be paid for this time, you will need to enter a historical entry to report your time for that shift.

OR PTC DCI Web Portal Adding Mileage Entries

If you provide mileage services, you will need to use the OR PTC DCI Web Portal to add mileage entries. Mileage entries must be entered in the OR PTC DCI Web Portal. The Agency's optional paper fob timesheets have a section to track mileage prior to entering mileage into the OR PTC DCI Web Portal (if desired). You do not need to use this timesheet. This timesheet cannot be turned into the Local Office for payment.

To start adding a mileage entry select Add Entry.
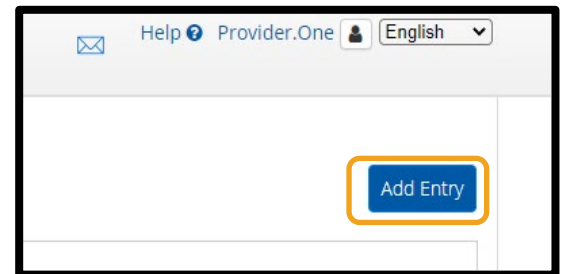
Complete the Add New Entry form:

1. Entry Type: Punch (default)
2. Employee Name: Provider's name (auto-populates)
3. Account Type: Client Transportation
4. Client: Consumer Name
5. Service Code: Mileage

Note: Mileage only needs to be entered into the web portal once per pay period.

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6. Service Date: mm/dd/yyyy
7. Start Odometer Reading: Enter 0
8. End Odometer Reading: Enter number of miles you are claiming for the Authorization period.
9. Select Save.

Note: For odometer readings, enter 0 and the number of miles you want to claim, not the real odometer readings.

Add New Entry

Field	Value	
Entry Type: *	Punch	1
Employee Name:	Shaggy Rogers	2
Account Type: *	Client Transportation	3
Client: *	Scooby Doo - PrimeNumber00010	4
Service Code: *	Mileage-1	5
Service Date: *	07/04/2022	6
Remaining Balance:	19	
Start Odometer Reading: *	0	7
End Odometer Reading: *	10	8
Calculated No. Of Miles:	10.00	
Diagnostic Code:	Diagnostic Code	
Notes:	Add Notes for Punch	
Attachment:	Choose File	

Cancel   Save   9
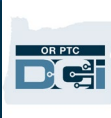
OR PTC DCI Web Portal View an Entry from the Dashboard

You have successfully added an entry in the OR PTC DCI Web Portal! You can find your entry in the Entries tab. Your hourly entries will show a status of pending. This just means the system is running some checks to ensure your entry meets all requirements. Entries in a pending status are the only entries that can be corrected by providers. Entries that are still in a Pending status after the end of the pay period will not be paid. For information on other entry statuses see Mobile App Entries.

OR PTC DCI Mobile Web

You can access the OR PTC DCI Web Portal on your mobile device. This is called the Mobile Web!

Accessing the OR PTC DCI Mobile Web

To get to the OR PTC DCI Mobile Web:

1. Open your phone's web browser (Safari, Chrome, etc.).
2. Navigate to the site: orptc.dcisoftware.com.
3. Log in with your Username and Password/PIN.
4. Select Sign In.

Note: If you will use this same device for this login, select the Remember Me box to save your username.

5. Read the provider attestation and select Ok.
6. Read the System Use Notification and select Ok.
7. Once you are logged into the site, all news posts will appear on the front screen. You can select each to view details or load more to review all news posts.
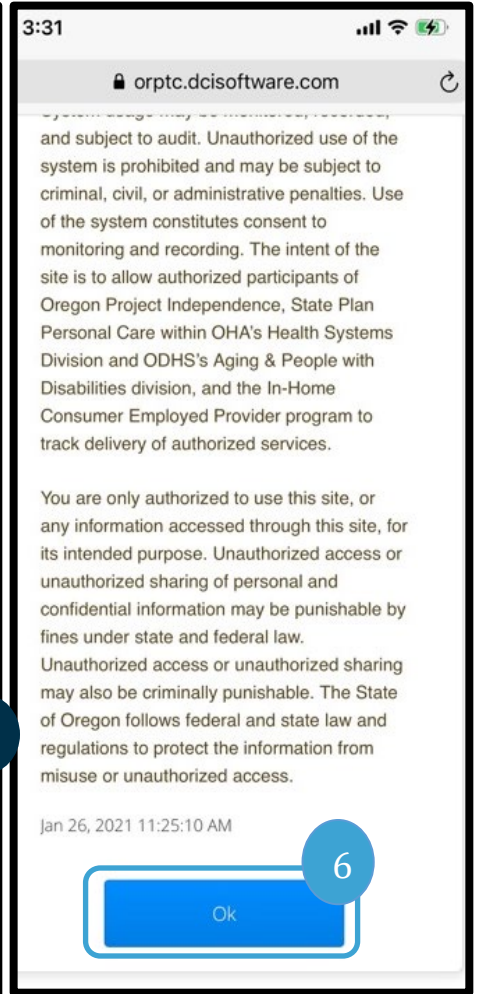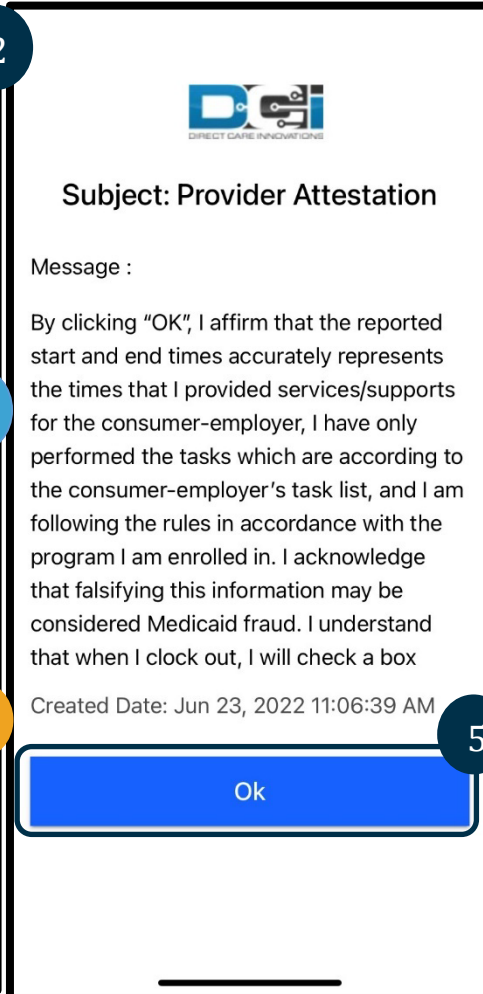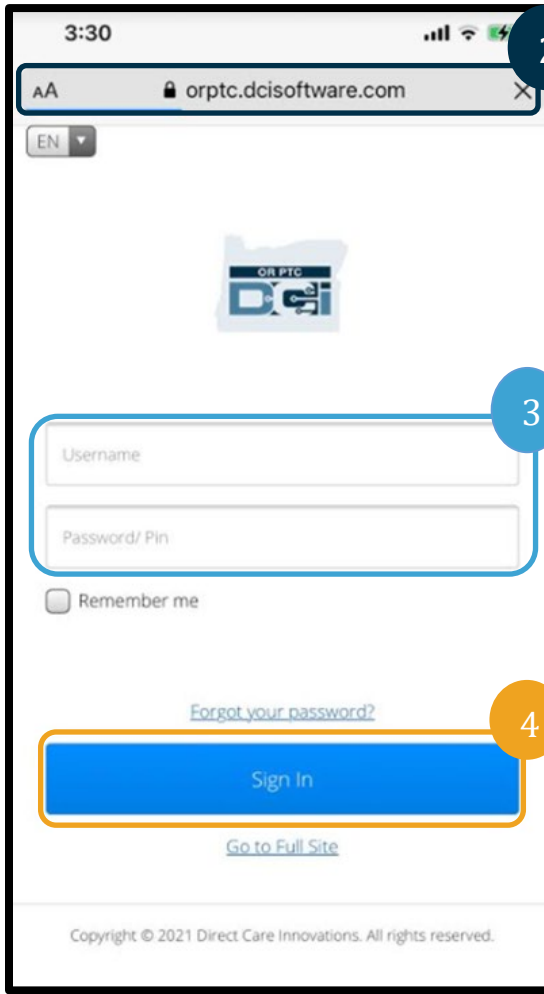
OR PTC DCI Mobile Web Navigation

1. In the top-right corner of the screen, you will see three straight lines. This is your menu icon.
2. Once you select the menu, you will see the following options:
    a. Home
    b. New Entry
    c. Authorization Check
    d. Entries
    e. Message
    f. Search
    g. Log Out

OR PTC DCI Mobile Web Adding a New Punch Entry

1. To add a New Entry, select New Entry on the menu.
2. Complete the New Entry form. Ensure the punch type is Hourly.
3. Begin typing your consumer's name in the Client box, then select their name when the drop down appears.
4. Ensure the proper service code is selected, if needed (this will likely auto-populate).
   a. If the consumer has switched programs recently, you may see two service codes. Make sure you have selected the correct service code based on the consumer's program for which you are claiming hours.
5. Select the date for the entry.
6. You will see the number of available hours on the authorization for the service period in question. Make sure you have enough hours for the entry you are claiming.
7. Check In Time: if you tap the box, if will give a dropdown. To enter a specific time, tap again where you want the cursor. Then you can backspace and type the correct start time.
8. Check Out Time: enter the end time using either the dropdown list or by typing the time.
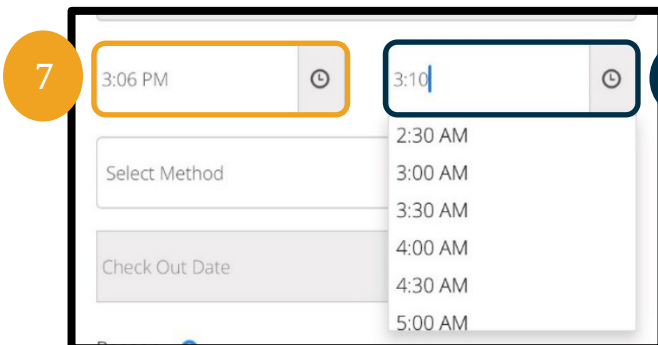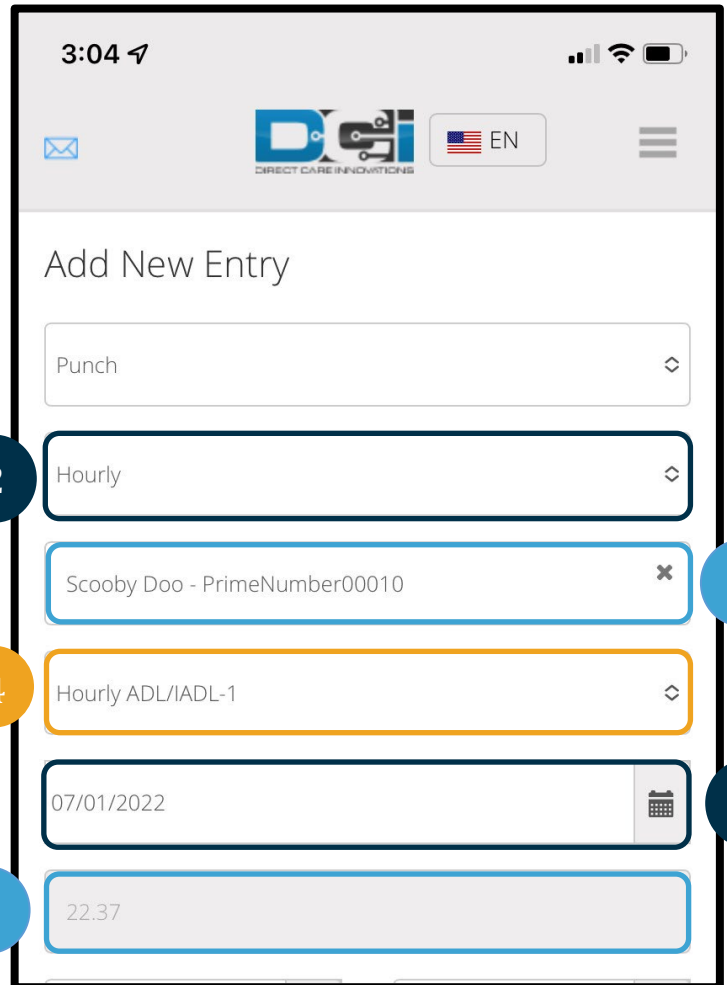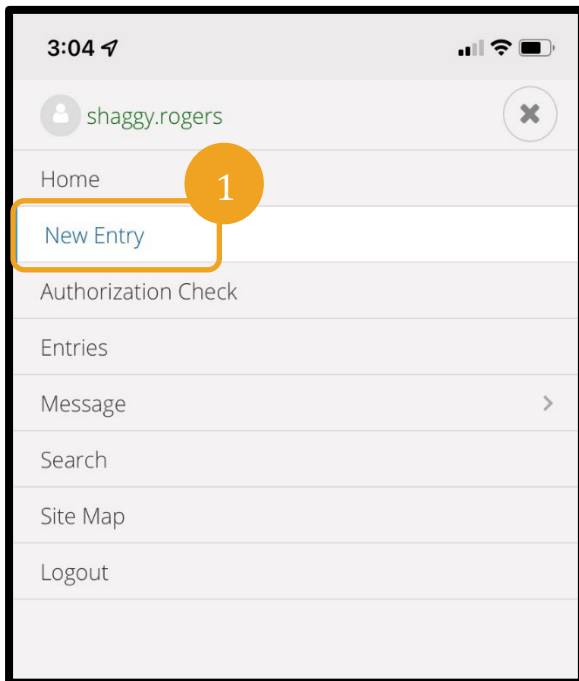
9. Select Portal Signoff.

10. Add a reason code beginning with Provider for why you are creating this historical entry.
    a. Select the blue plus sign.
    b. Select the reason code from the dropdown list that best represents why you are creating this historical entry. As a provider, you should only select a reason code beginning with Provider.
    c. Tap the large blue plus sign. If you do not press this, the reason code is not properly added to the entry, and it will not save.
    d. If the reason code was added to the entry, it will be listed below the Select Reason box.

3:06 PM   3:10 PM

Portal Signoff   **9**

07/01/2022

Reason: **10a**

Reason:

10b   Provider-Forgot to Clock In/Clock Out - ProvCICOF   **10c**

Reason:

Select Reason

10d

Name : Provider-Forgot to Clock In/Clock Out

Code : ProvCICOF

Note :

Action :

Diagnosis Code

11

Add Notes for Punch

Choose File

Statements

Time is correct. Falsifying may be Medicaid fraud   **12**

Cancel

13

Save

11. Add Notes and Attachments. This is optional.
12. Check the box next to the attestation statement to confirm your time is correct.
13. Tap Save.
14. Tap Yes on the alert to finish saving.

Alert   ✕

Are you sure you want to add a new punch for **00:04** hour(s) for **Scooby Doo - PrimeNumber00010** for **Jul 01, 2022**?

No   Yes   **14**

OR PTC DCI Mobile Web View, Verify, Reject Entries

1. On your menu, select the Entries option from the list.
2. You will then be able to open and view entries, where you will be able to verify or reject entries, if needed.
3. Select a specific entry you would like to review.
4. If the punch is in a pending status, you will see a red reject button.
5. If the punch is unverified, you can verify or reject the punch.
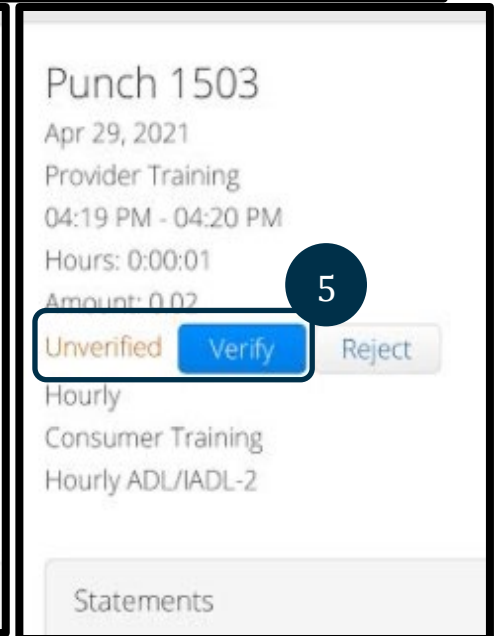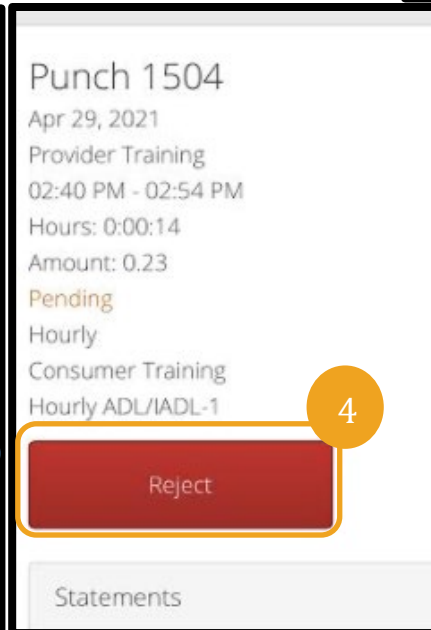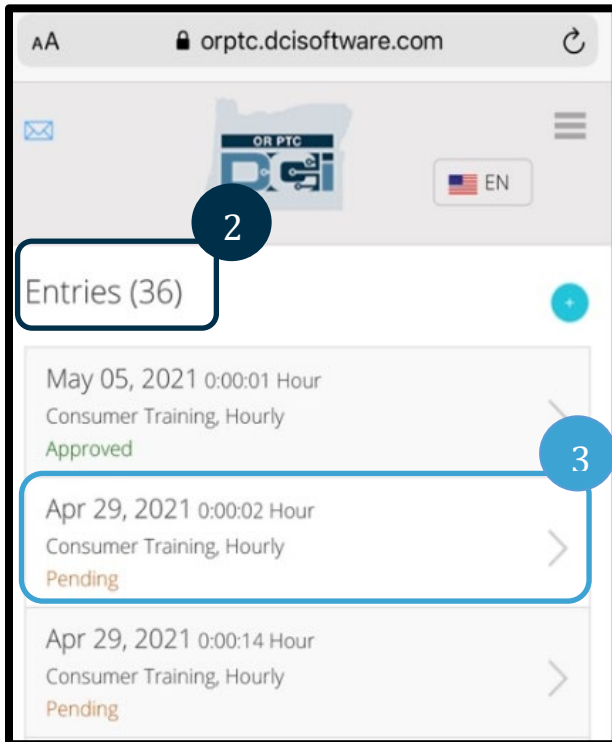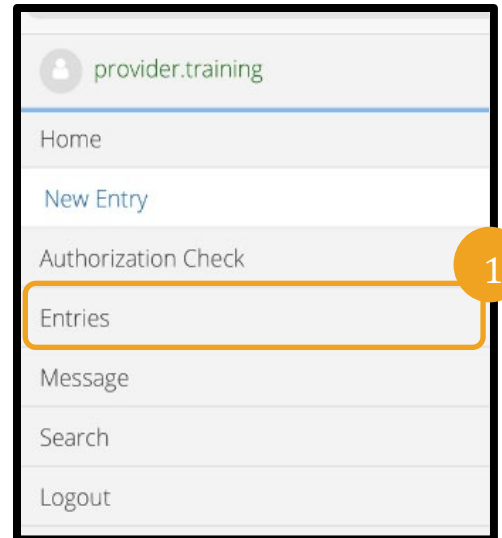
OR PTC DCI Mobile Web Messages/Inbox

1. Inside the menu icon, you will also find a section where you can read messages or alerts.
2. Using the drop down under messages, you will also have access to write a new message or to view your Sent/Archive/Trash boxes.
3. To view all new messages, select Inbox. All messages in your inbox will appear.
4. From here, you can view the message details.
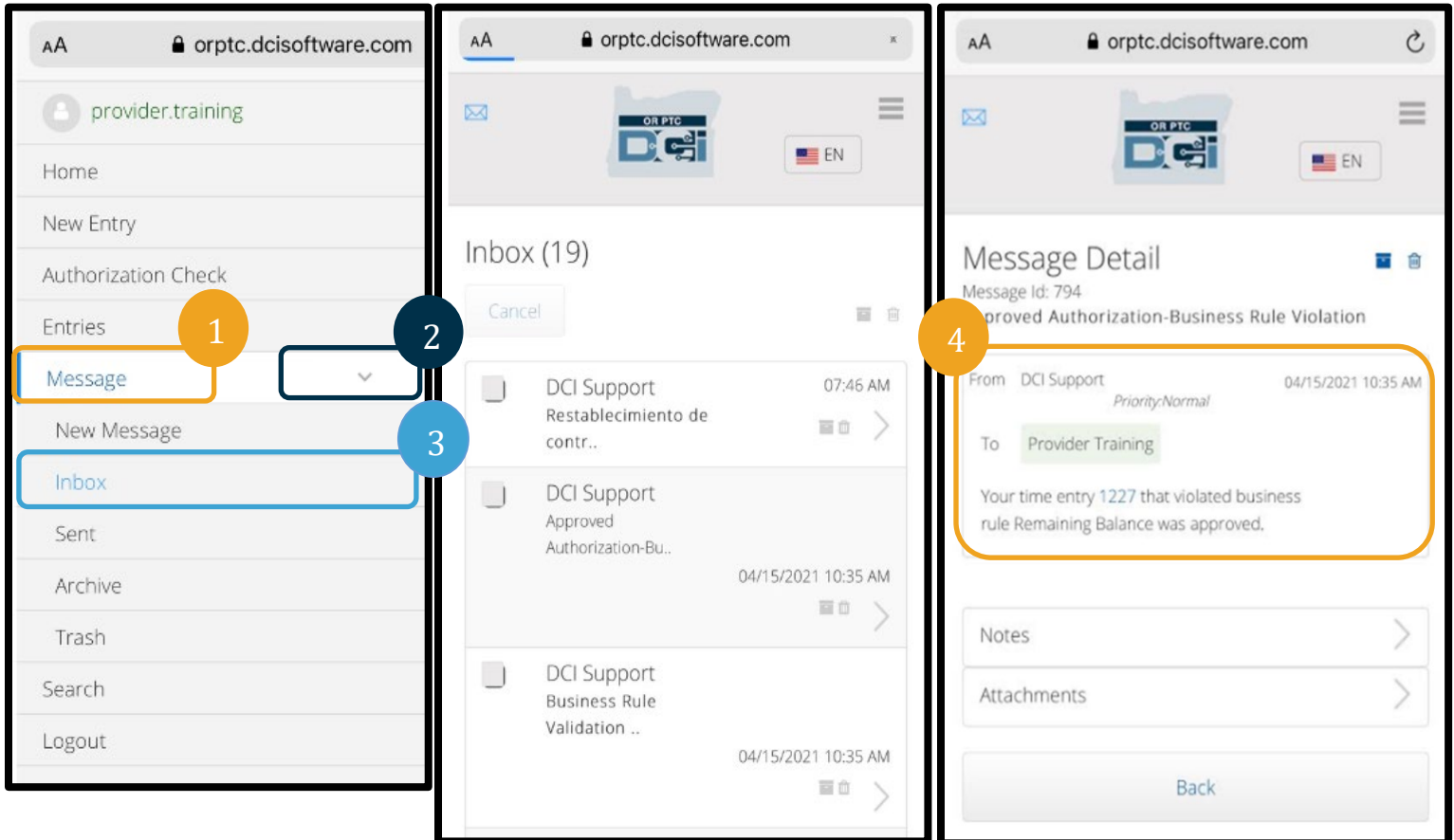
OR PTC DCI Mobile Web Entering Mileage

1. Using the browser on your mobile devise, search for OR PTC DCI and open log-in screen. (Type orptc.dcisoftware.com into the search bar.)
2. The OR PTC DCI log in screen will display. Enter your username and password.
3. Select Sign In.
4. After the news posts, the home screen will display. Select on the three bars in the upper-right corner to display the menu.
5. Select New Entry.
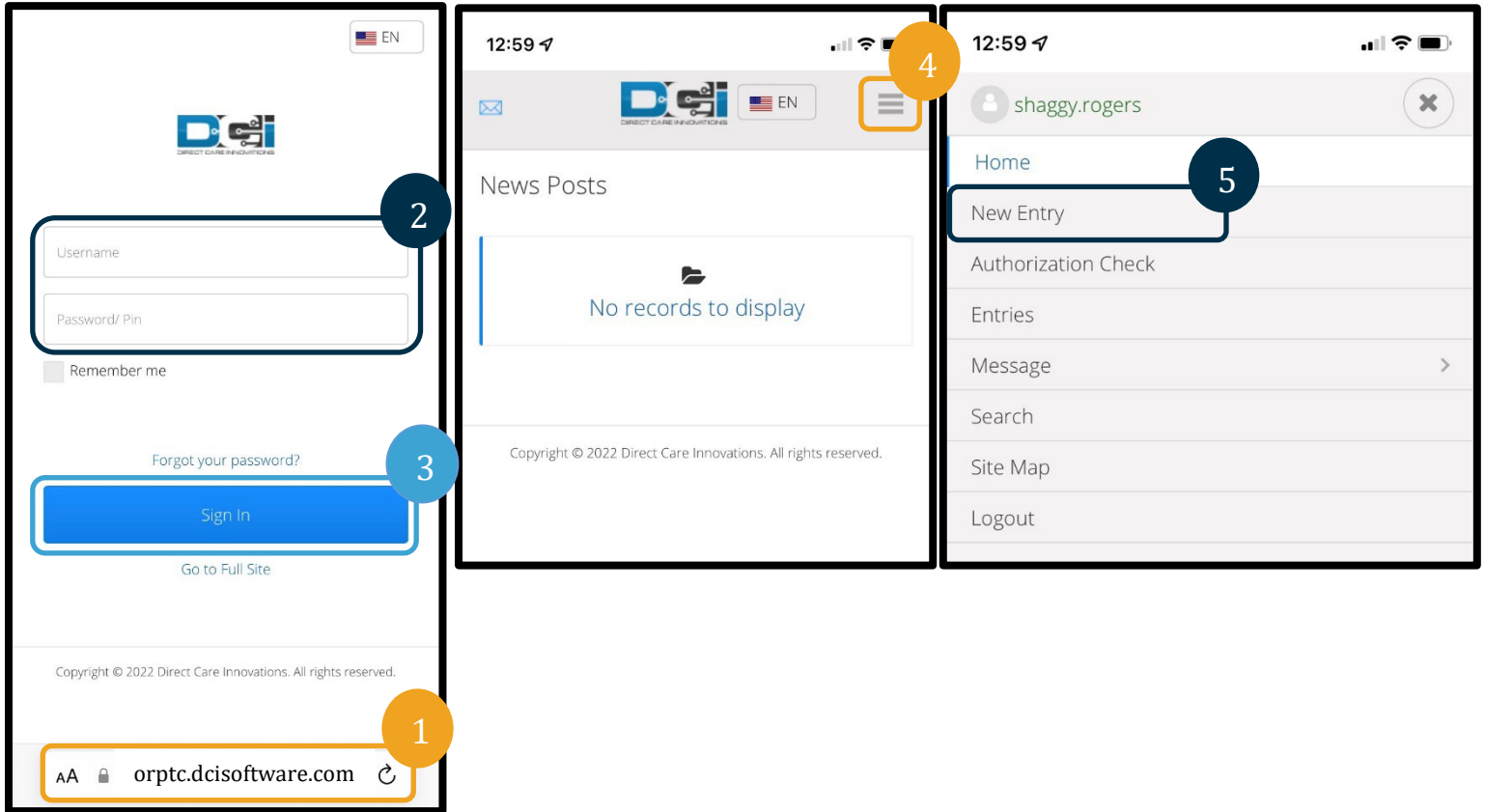
The 'Add New Entry' form will display. Fill it out as follows:

6. Entry Type: Will auto display Punch.
7. Account Type: Select Client Transportation from the drop-down menu.
8. Client: Type in your consumer's name and select to fill in text box.
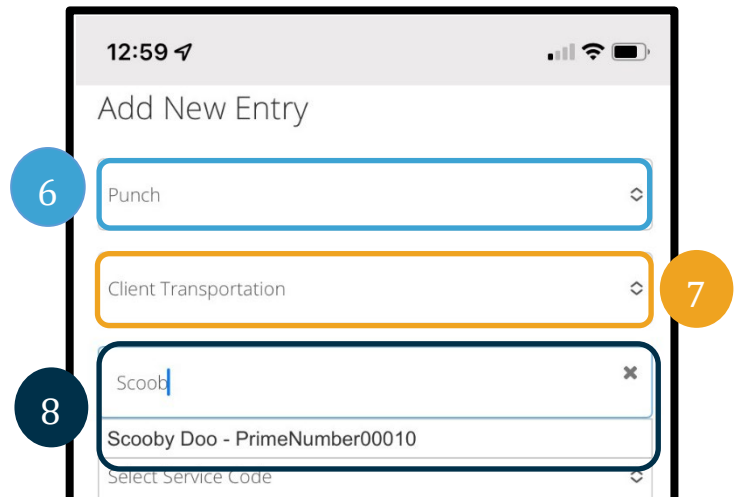
9. Service Code: Will auto display the service code for this consumer.
    a. If the consumer has switched programs recently, you may see two service codes. Make sure you have selected the correct service code based on the consumer's program for which you are claiming mileage.
10. Service Date: Enter the date of service.
11. Remaining balance: This displays the remaining miles you have left to claim.
12. Start Odometer Reading: Enter 0.
13. End Odometer Reading: Enter the total miles driven.
14. Calculated No. of Miles: Displays the miles entered.
15. Notes: Optional
16. Attachment: Optional
17. Select Save.

Note: You may need to enter one decimal for the odometer readings, meaning 0.0 for the start and 10.0 (if claiming 10 miles) for the end.

Note: You do not have to enter the odometer reading from your vehicle. You can enter 0 for the start odometer reading and up to the authorized miles in the end odometer reading field. You only need to enter your authorized mileage once a pay period.

18. An alert will display, "Are you sure you want to add a new punch for…" Select Yes.
19. Your entry will now display.
   a. If something is incorrect, you may select reject or you can log into the OR PTC DCI Mobile Web Full Site or OR PTC DCI Web Portal to edit it (see Entry Corrections for more information).
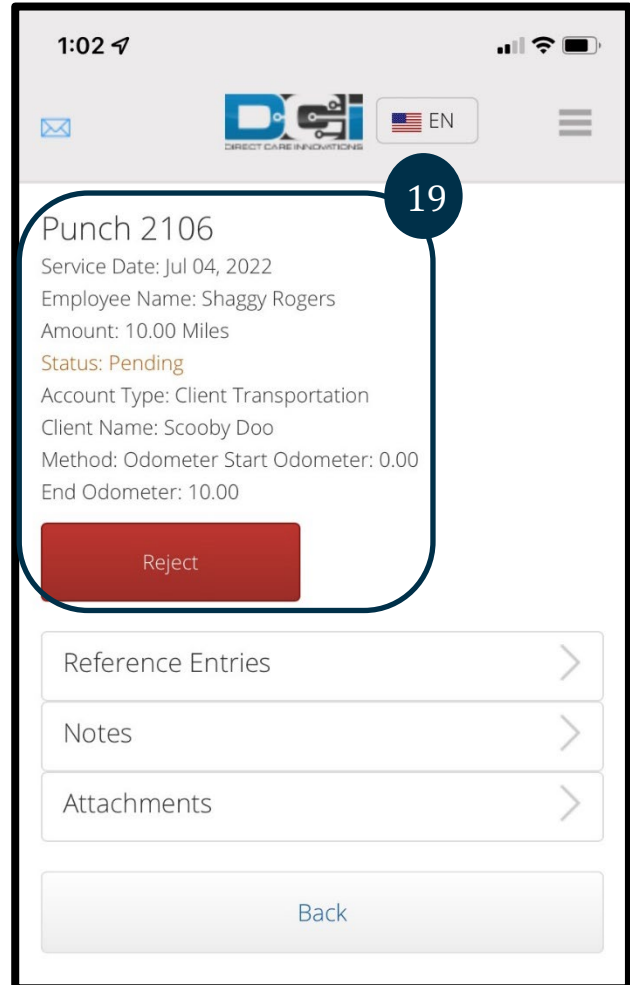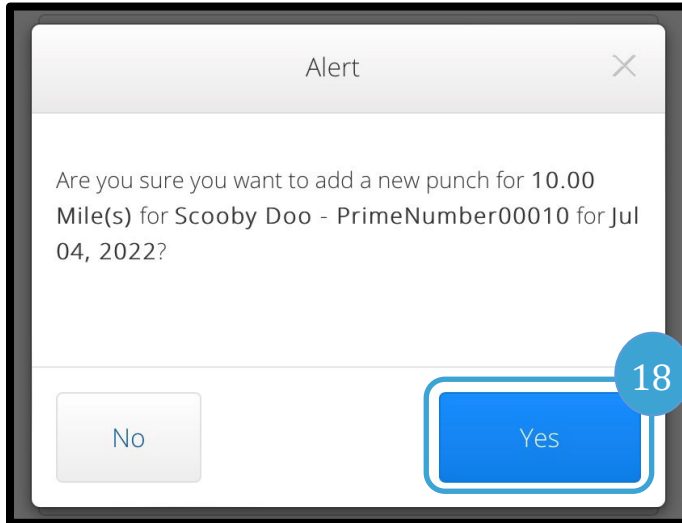
OR PTC DCI Mobile Web How to Add a Historical Entry

1. Using the browser on your mobile device, search for OR PTC DCI and open the login screen orptc.dcisoftware.com.
2. The OR PTC DCI log in screen will display; enter your username and password.
3. Select Sign In.
4. The home screen will display; select the three lines in the upper-right corner to display the menu.
5. Select New Entry.

The Add New Entry form will display. Fill it out as follows:

6. Entry Type: Will auto display Punch
7. Account Type: Select Hourly from the drop-down if it does not auto display.
8. Client: Type in your consumer's name and select it from the drop down to fill in text box.
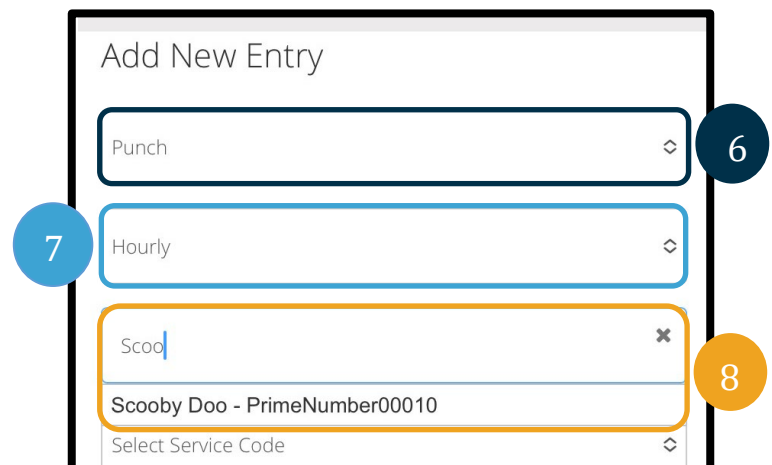
9. Service Code: Will auto display the service code for this consumer.
   a. If the consumer has switched programs, you may need to ensure the proper service code is selected to match the program for which you are claiming time. To do so, select the service code box and select the proper one from the drop-down menu.
10. Service Date: Enter the date of service.
11. Remaining balance: The remaining hours you have left to claim
12. Check In: Enter your start time.
13. Check Out: Enter your end

> **Note**: The check in and check out field has a drop-down menu that displays time on the half hour. **To enter the exact time you started and ended your shift**, place your cursor in the time field and delete the time that displays and type in your start and end times. Remember to add AM or PM.

time.

14. EVV Method: Select Portal Signoff.

15. Enter a reason code beginning with Provider, indicating why you are creating a historical entry.
    a. Reason: Select on the small blue plus sign.
    b. Select Reason: From the drop-down menu that displays select the reason that best described your historical entry (make sure to select one that begins with Provider).
    c. Add Reason Code: Select the larger blue plus.
    d. The reason will display in the Added Reason Codes section.

16. Notes: Optional
17. Attachment: Optional
18. Statements: This is the provider attestation. Check the box confirming the time entered is correct.
19. Select Save.

20. An alert will display, "Are you sure you want to add a new punch for…" Select Yes.
21. Your entry will display on the screen.
   a. If something is incorrect, you may select reject or you can log into the OR PTC DCI Mobile Web Full Site or OR PTC DCI Web Portal to edit it (see Entry Corrections for more information).

Punch 2108
Service Date: Jul 04, 2022
Employee Name: Shaggy Rogers
Start Time: 10:23 AM
End Time: 02:12 PM
Hours: 0:03:49
Amount: 3.82
Status: Pending
Account Type: Hourly
Client Name: Scooby Doo
Service Code: Hourly ADL

21

Reject

Statements

1. Time is correct. Falsifying may be Medicaid fraud

Reference Entries

Alert

Are you sure you want to add a new punch for **03:49 hour(s)** for **Scooby Doo - PrimeNumber00010** for **Jul 04, 2022**?

20

No   Yes
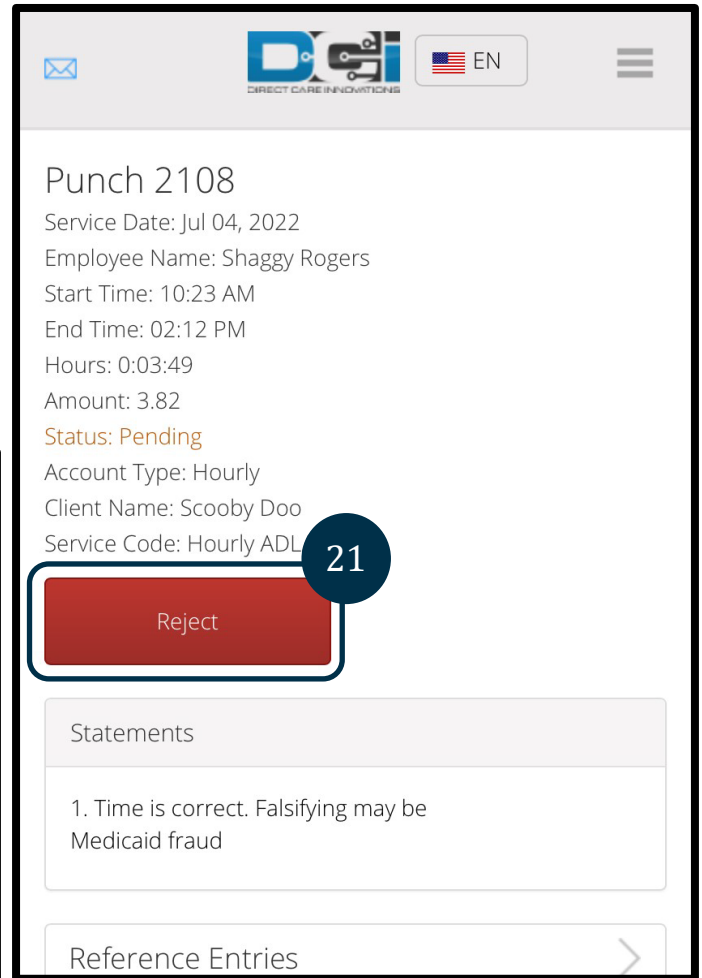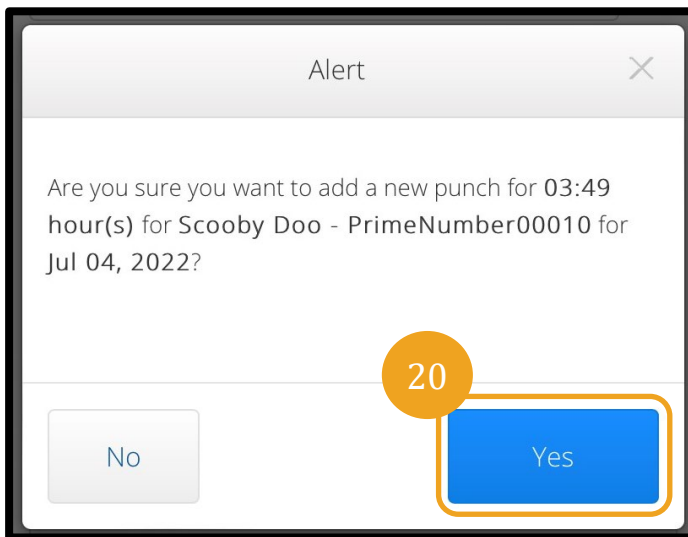
OR PTC DCI Mobile Web Full Site

The OR PTC DCI Mobile Web Full Site allows you all the same functionality of the OR PTC DCI Web Portal. It differs from the OR PTC DCI Mobile Web because it allows you to edit entries. Some may choose to use the mobile web full site so they can do all web portal functions from a smart device.

OR PTC DCI Mobile Web Full Site Edit an Entry

To edit an entry, either hourly or mileage, you will:

1. Navigate to the OR PTC DCI Web Portal on your smart device (type orptc.dcisoftware.com into the web browser on your smart device).
2. Select Go to Full Site under the Sign In button.
3. Enter your username and password. Select Sign In.

83
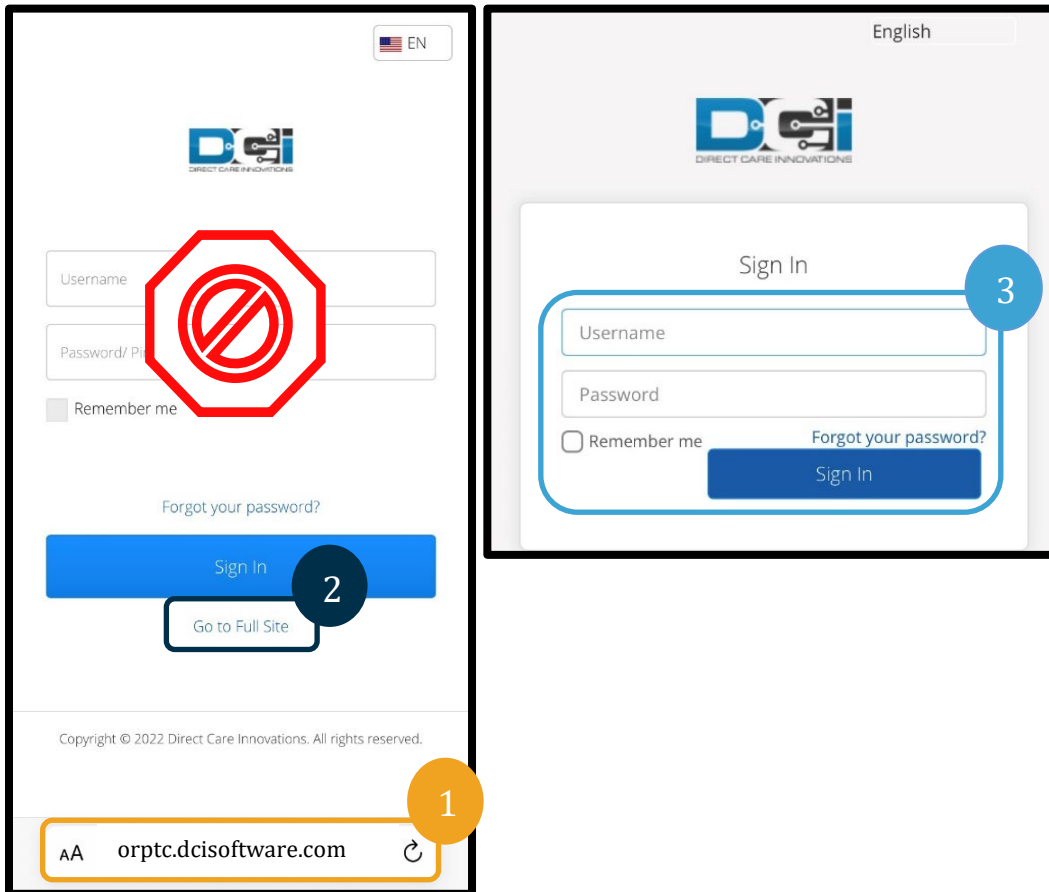
4. Read and select Ok on the Provider Attestation, System Use Notification, and any other News Posts displayed.
5. Select Entries.
6. Select the entry you would like to edit. You can use the search filters to find the entry or you can scroll down. If the entry you would like to edit is in an Approved or Processed status, you are not able to edit it and must reach out to the Local Office for assistance. If the entry is in a Pending status, you can edit it.
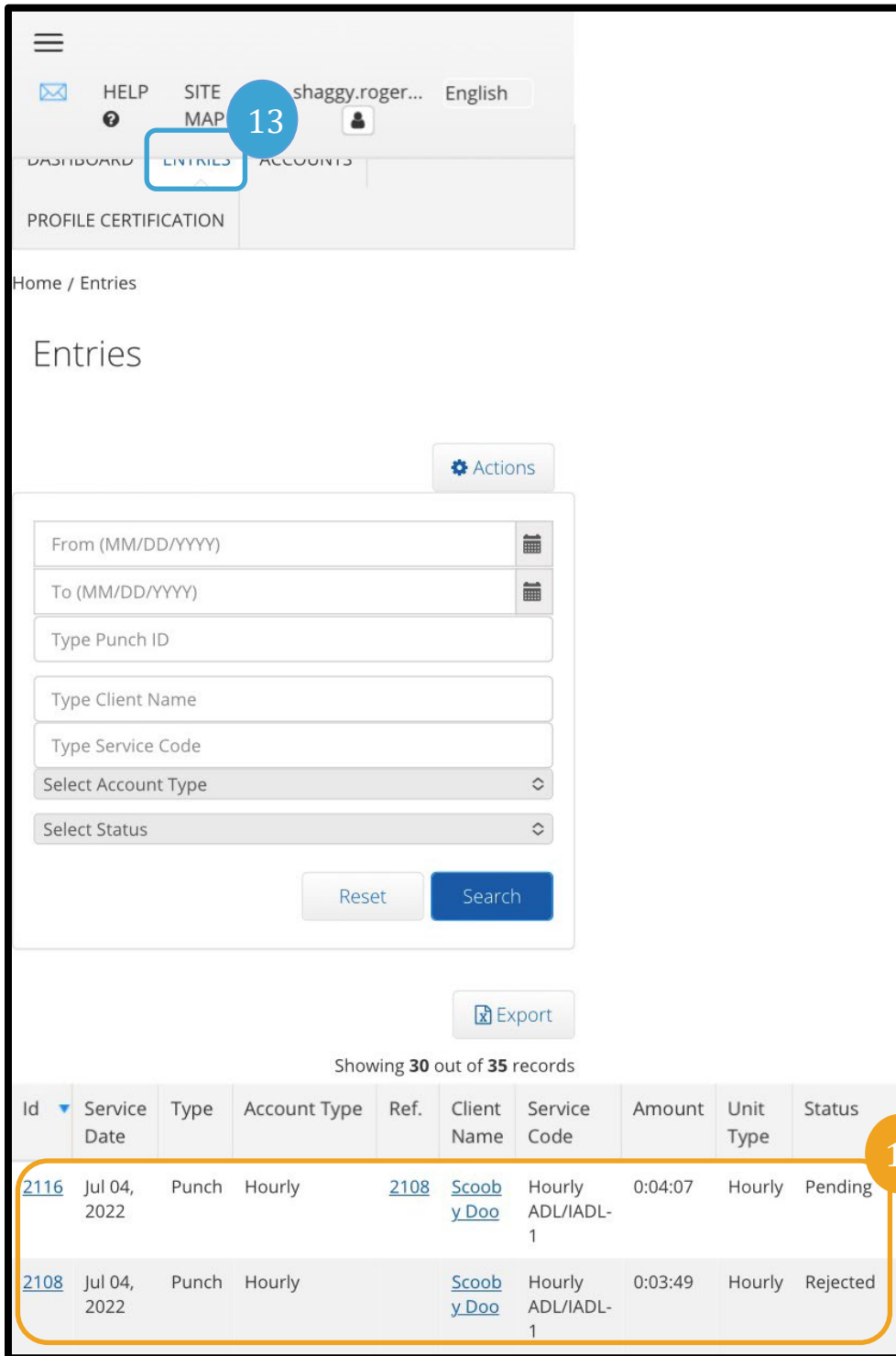
7. Select Actions.
8. Select Edit Entry.
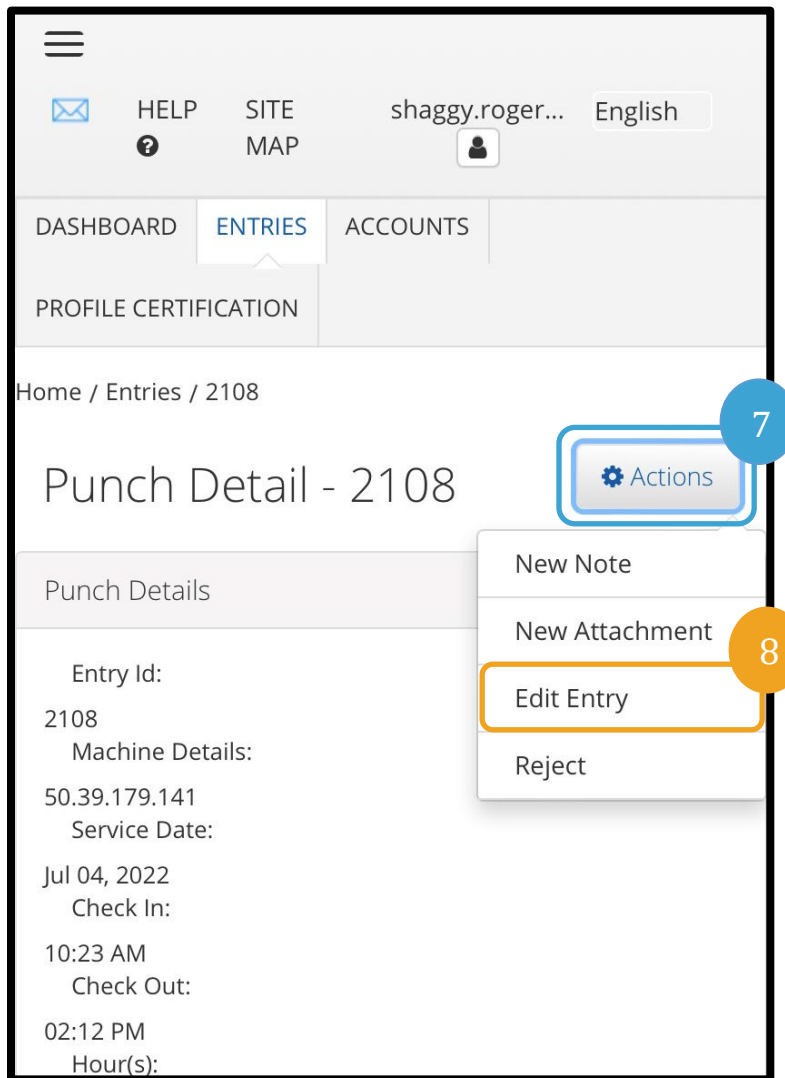
9. Make the edit(s).
10. Add a Reason Code. See Add a Reason Code for more information.
11. Select Save.
12. Select Yes on the alert.
13. You will be brought to the original entry you edited. It is now in a Rejected status. A new entry has been created to reflect the edit(s). To view the new entry, select Entries.
14. You can either use the search filters to find the edited entry or you can scroll
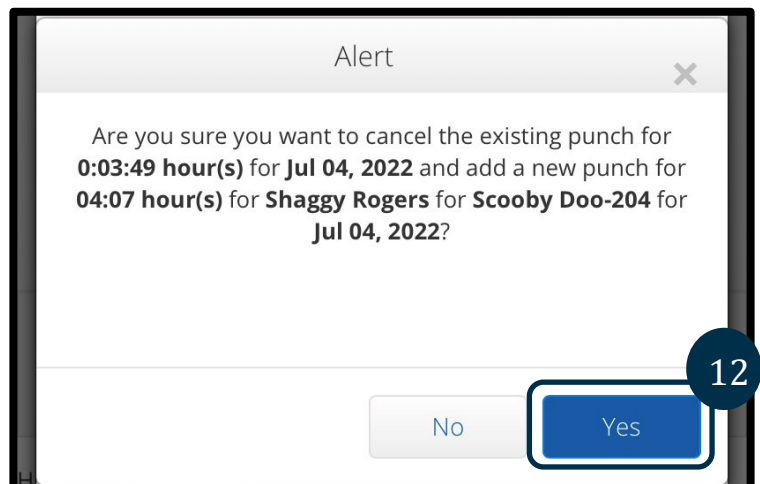
down. You will see the original entry in a rejected status and the new entry in a Pending status.

OR PTC DCI Mobile Web Full Site Entering Mileage

1. Using the browser on your mobile devise, search for OR PTC DCI and open log-in screen (type orptc.dcisoftware.com into the search bar).
2. The OR PTC DCI log in screen will display. DO NOT enter your username and password, you will do this on Step 3. Under the Sign In banner, you will see Go to Full Site, select here.
3. Enter your username and password. Select Sign-In.
4. After the news posts, the home screen will display. Select on the Add Entry button.
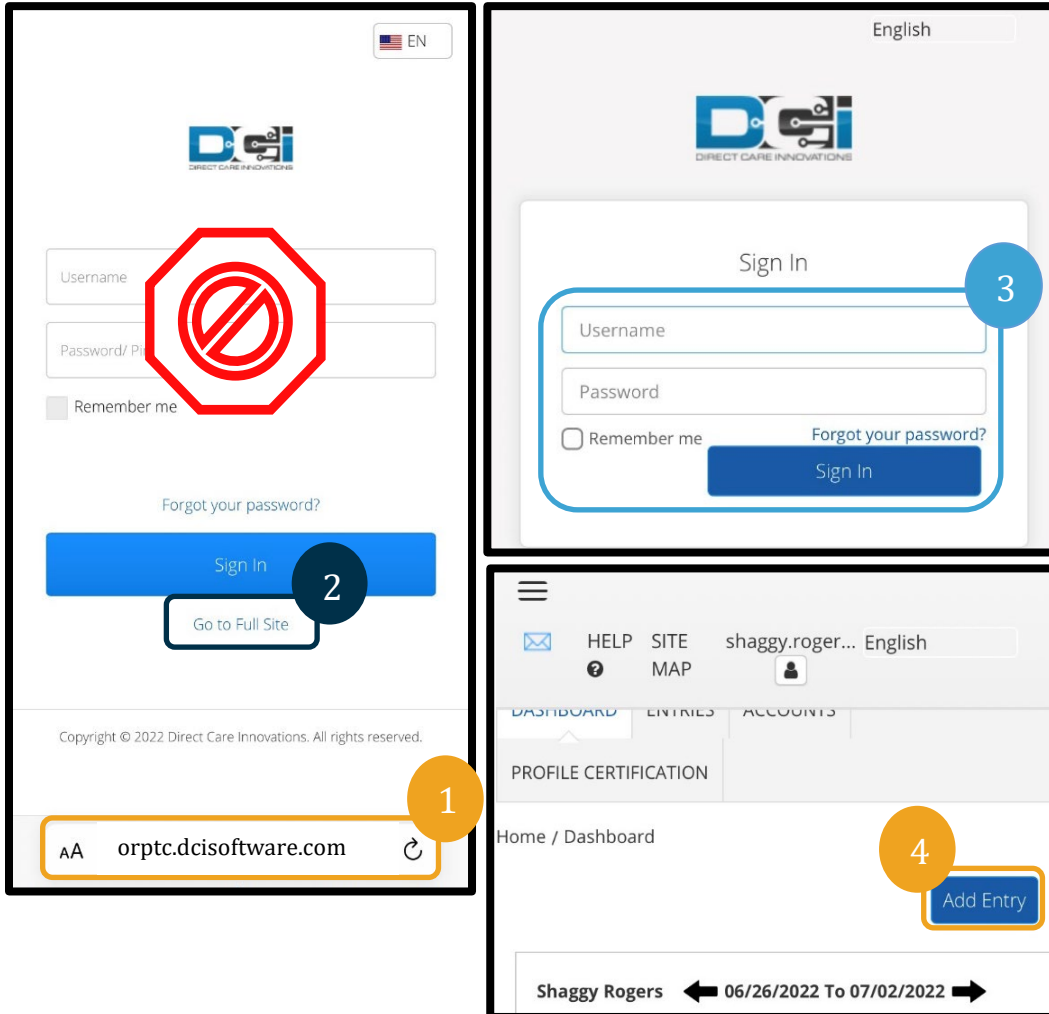
The Add New Entry form will display. Complete it as follows:
5. Entry Type: Will auto display Punch.
6. Employee Name: Will auto display your name.
7. Account Type: Select Client Transportation from the drop-down menu.
8. Client: Type in your consumer's name and select it once it appears in a drop-down.

9. Service Code: Will auto display the service code for this consumer.
    a. If the consumer has switched programs recently, you may see two service codes. Make sure you have selected the correct service code based on the consumer's program for which you are claiming mileage.
10. Service Date: Enter the date of service.

11. Remaining balance: The remaining miles you have left to claim.
12. Start Odometer Reading: Enter 0.
13. End Odometer Reading: Enter the total miles driven.

> **Note**: You do not have to enter the odometer reading from your vehicle. You can enter 0 for the start odometer reading and up to the authorized miles in the end odometer reading field. You only need to enter your authorized mileage once a pay period.

14. Calculated No. of Miles: Displays the miles entered.
15. Notes: Optional
16. Attachment: Optional
17. Select Save.
18. An alert will display, "Are you sure you want to add a new punch for…" Select Yes.

> **Note**: You may have to scroll up to see this alert. It will display at the top of the entry form.

Service Date: *
06/26/2022

Remaining Balance:
30

Start Odometer Reading: *
0

End Odometer Reading: *
11

Calculated No. Of Miles:
11.00

Diagnostic Code:
Diagnostic Code

Notes:
Add Notes for Punch

Attachment:
Choose File

Cancel   Save

Alert

Are you sure you want to add a new punch for **11.00 Mile(s)** for **Scooby Doo - PrimeNumber00010** for **Jun 26, 2022**?

No   Yes

89

19. To view your mileage entry, select on the Entries tab from the home screen.
20. The Entries page will display. You have the option to filter by the service date you are looking for, the consumer's name, or a certain punch entry if you know the punch ID number. The mileage entry will display as Pending. Auto approval will run daily causing the mileage entry to change from a status of Pending to Approved.

OR PTC DCI Mobile Web Full Site How to Enter a Historical Entry

1. Using the browser on your mobile device, search for OR PTC DCI and open the login screen orptc.dcisoftware.com.
2. The OR PTC DCI login screen will display. DO NOT enter your username and password, you will do this on Step 3. Under the Sign In banner, select Go to Full Site.
3. Enter your username and password; select Sign In.
4. The home screen will display; select Add Entry.
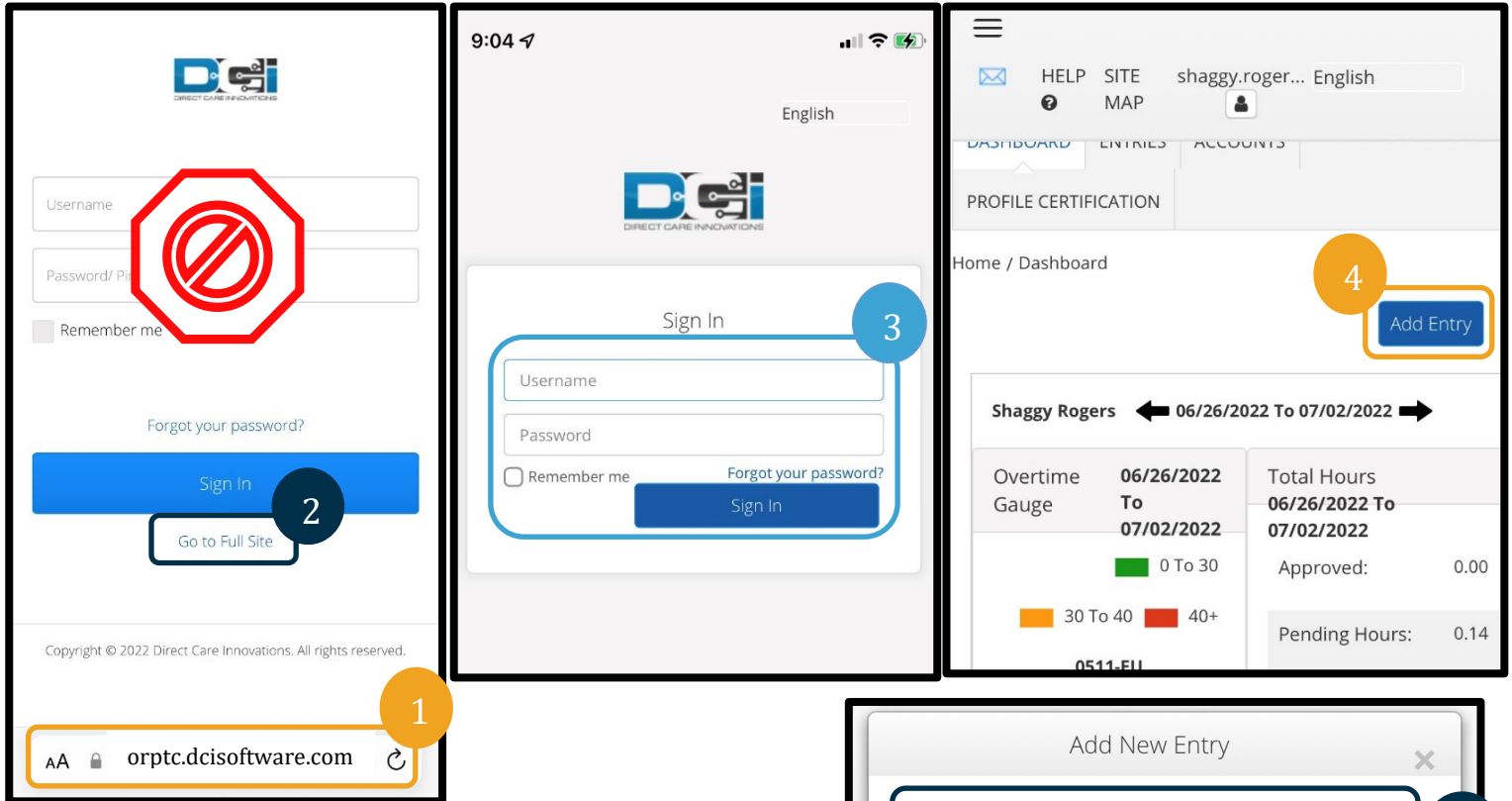
The Add New Entry form will display. Complete it as follows:

5. Entry Type: Will auto display Punch
6. Employee Name: Will auto display your name
7. Account Type: Select Hourly from the drop-down if it does not auto display.
8. Client: Type in your consumer's name and select to fill in text box.
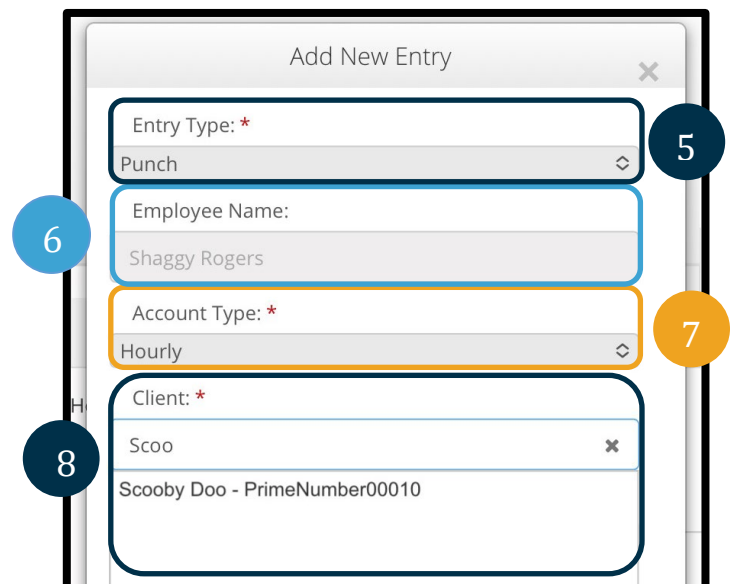
9. Service Code: Will auto display the service code for this consumer.
   a. If the consumer has switched programs recently, you may see two service codes. Make sure you have selected the correct service code based on the consumer's program for which you are claiming hours.
10. Service Date: Enter the date of service.
11. Remaining balance: The remaining hours you have left to claim.
12. Check In: Enter your start time.
13. Check Out: Enter your end time.

Note: The check in and check out field has a drop-down menu that displays time on the half hour. **To enter the exact times you started and ended your shift**, tap the time field to place your cursor, delete the time that displays, and type in your start and end times. Remember to add AM or PM.

14. EVV Method: Select Portal Signoff.

15. You must enter a reason code, beginning with Provider, explaining why you need to do a historical entry.
    a. Reason: Select on the small blue plus.
    b. Select Reason: From the drop-down menu, select the reason that best described why you are making the historical entry.
    c. Add Reason Code: Select the larger blue plus sign.
    d. Add Reason Code alert will display "Are you sure you want to add reason code?" Select Yes.
    e. The reason will display in the Added Reason Codes section.
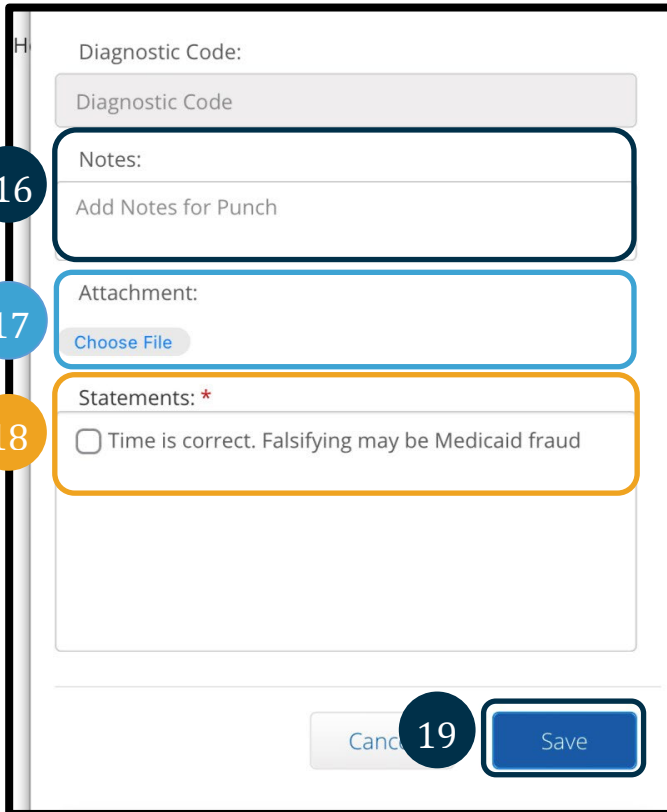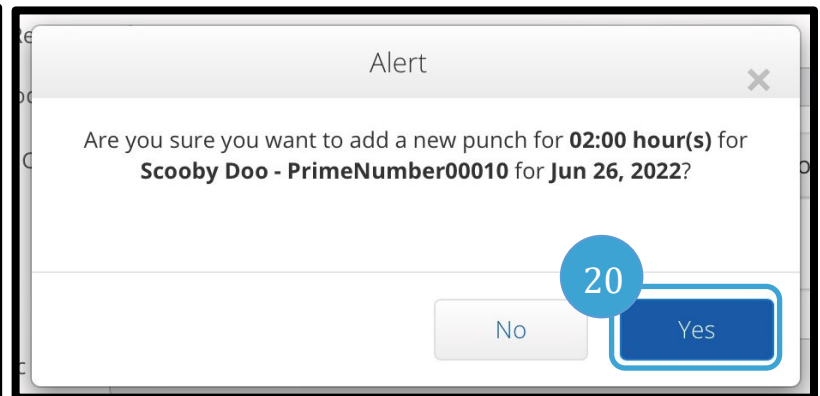
16. Notes: Optional
17. Attachment: Optional
18. Statements: This is the provider attestation. Check the box to confirm that the time entered is correct.
19. Select Save.
20. An alert will display, "Are you sure you want to add a new punch?" Select Yes.

Note: You may have to scroll up to see this alert. It will display at the top of the entry form or your screen.

21. To view your entry, select on the Entries tab on the home screen.
22. The Entries page will display. You have the option to filter by the service date you are looking for, the consumer's name, or a certain punch entry if you know the punch ID number. The mileage entry will display as Pending. Auto approval will run daily causing the mileage entry to change from a status of Pending to Approved if it passes all business rules (such as being within the authorized hours).

Entry Corrections

Entry Edits

Providers are responsible for entering and correcting their own time in OR PTC DCI.
This means that if you enter your time and realize you clocked in or out late or any other reason which causes the entry to be incorrect, you must fix the entry. Additionally, entries that exceed the max units per punch are auto rejected and you must create a historical entry. Any entries still in a pending status will not be paid, so correcting them is key to getting paid on time.

Providers Should Contact the Local Office for Help Editing an Entry
- When you need help calculating how much to reduce the entry to be within the total authorized hours.
- When you need to correct an entry no longer in a pending status (i.e. approved or processed).

Navigating to Your Entries
To get to the Entries, first go to orptc.dcisoftware.com in your web browser.

- Sign in with your username and password.
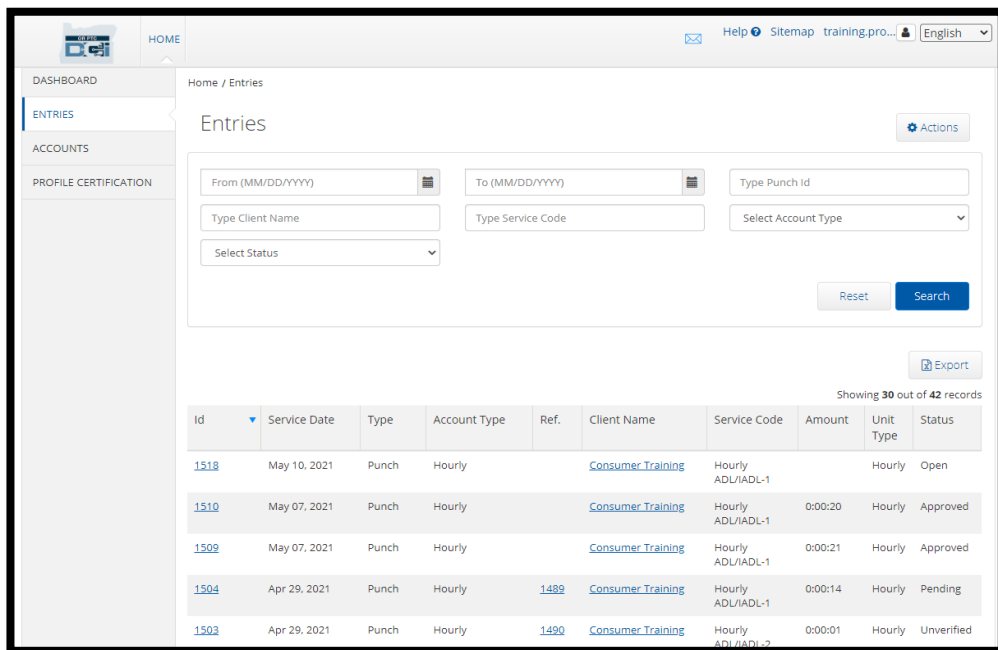
- If you are using a tablet or phone, tap Access Full Site below the login button. See OR PTC DCI Mobile Web Full Site Edit an Entry for more information.

Once you are logged in, select on the Entries tab.

On the Entries tab, you will be able to see all the entries you have ever made. You can search for specific entries using the search fields or sort by selecting on specific columns.

Come here to:

- Review your entries and their status.
- Edit entries.
- Reject entries.
- Verify entries.

Let's look at editing entries. You may need to edit an entry to correct an error, such as going over your authorized hours. You may only edit an entry that has a status of Pending. An edited entry no longer meets the EVV requirements.

To Edit an Entry
1. From the Entries tab, select on the entry you wish to edit
   a. If the entry says Pending it will let you either edit the time or reject the entry.
   b. If it says something other than Pending, reach out to your Local Office for help correcting it.

2. Select Actions.
3. Select Edit Entry.
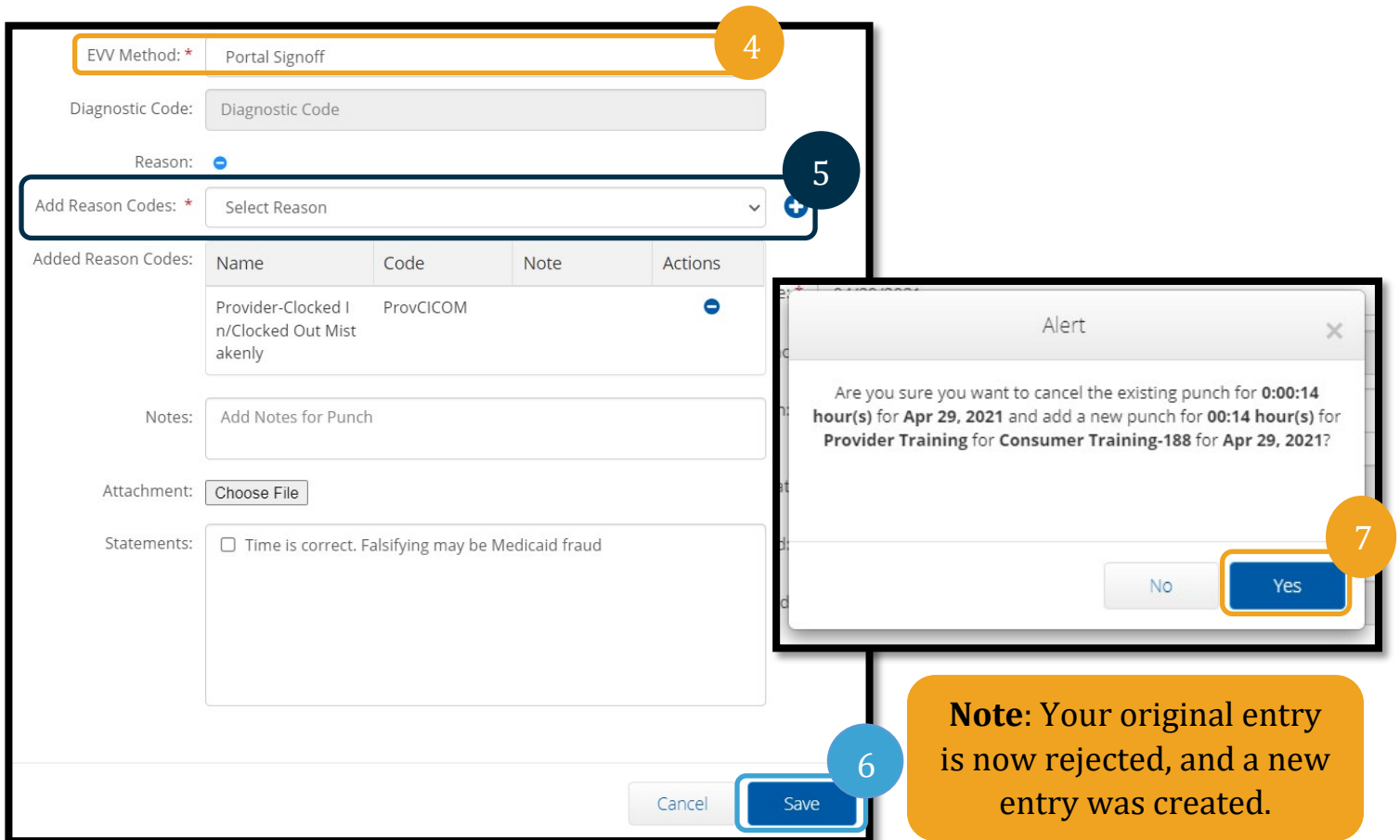
Note: Allowed edits include
- Date
- Check In/Check Out Time

Note: If it does <u>not</u> give you the option to Edit, but does give the option to Reject, select Reject to start over and create a historical time entry. See Reject Entries for more information.

Make your edit(s). Then:

4. **Select** Portal Signoff as the EVV Method.
5. **Add** a Reason Code using the steps shown in How do I add a Reason Code?. Be sure to select the Plus sign in the blue circle to add the reason code to the entry.
6. **Select** Save.
7. **Select** Yes to confirm.

Note: Your original entry is now rejected, and a new entry was created.

Reject Entries

If an entry was added in error, you can reject the entry if it has a status of Pending.

From the Entries tab:

1. **Select** the entry you wish to reject.
2. **Select** Actions.
3. **Select** Reject.

Unverified Entries
What does it mean when an entry has a status of Unverified?

An unverified entry is an entry that was added or edited on your behalf by your Local Office. Unverified entries will not be paid. Staff will sometimes verify entries on your behalf, but you should look for these entries to ensure proper payment.

To Verify an entry, from your Entries tab:

1. Select the Unverified status from the Status filter.
2. Select Search to see all Unverified entries.
3. Select on the Entry you wish to verify.
4. Select Verify if the entry looks correct.
5. Select Reject if it is not correct.

Note:

- Selecting Reject will change the status of the entry to Rejected and the entry cannot be edited or approved and will not be paid.
- Contact your Local Office if you have questions about the entry.

OR PTC DCI Entries Q&A

Why does my entry status say Unverified?
An unverified entry happens when a Local Office user edits an entry on behalf of a provider. It is important to verify the unverified entries, or they will not be paid.

Why can't I clock in?
You may not be able to clock in if you forgot to clock out from a previous shift. There may also be other reasons that you can't clock in such as if you do not have a current authorization. If you cannot clock in, contact your Local Office.

How do I know how many hours I can work?
OR PTC DCI mobile app and web portal store your remaining hours, so you can see how many hours you have left during a given pay period. The hours in the system are all based on the hours you were authorized for each pay period. If you have questions, please contact your Local Office. In the mobile app, you can see the remaining hours upon clock in. In the web portal, you can see the remaining hours on the Add New Entry form or on the Authorizations Widget on the dashboard. See How to Use the Authorizations Widget for more information.
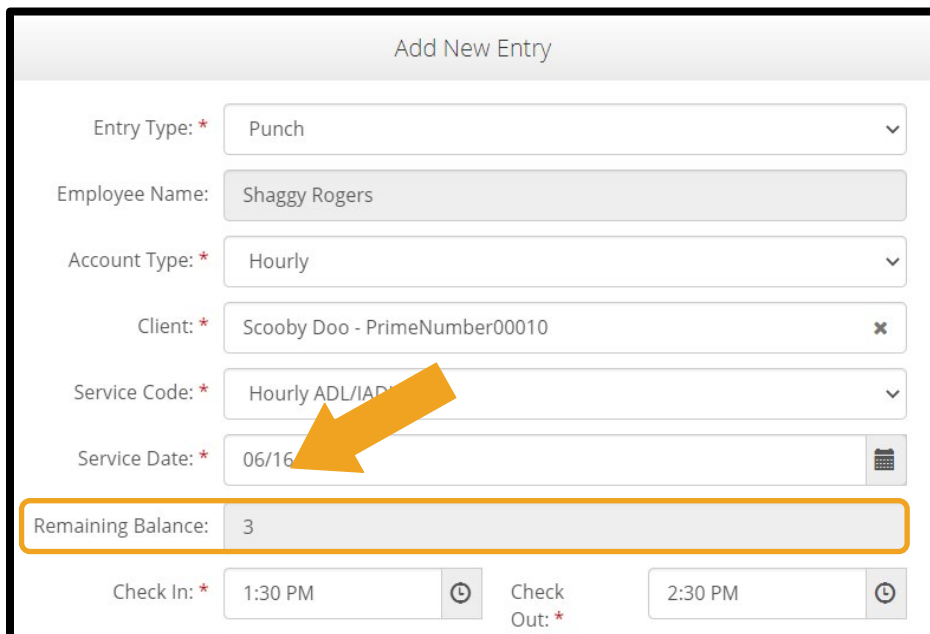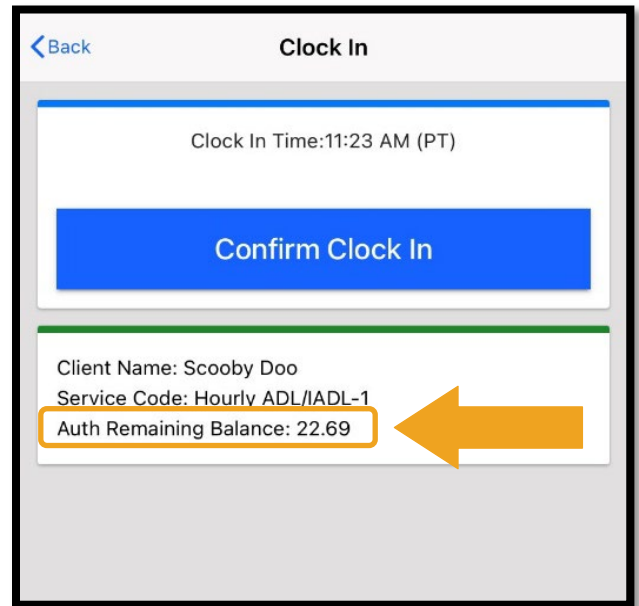
User Settings
When logged into the OR PTC DCI Web Portal, you can change your password, PIN, security question, email, and username. You can also verify your mobile phone number. If you cannot log into the OR PTC DCI Web Portal, you can reset your password or ask for help resetting it. We will cover each of these separately.

Change Password
You may wish to change your OR PTC DCI password.

Note: To change your password, you must know your current password.

To change your password:

1. Select the icon next to your username.
2. Select Settings.

3. Enter current password.
4. Enter new password according to password criteria,
   a. Must be at least 10 characters.
   b. Must contain 1 uppercase letter, lowercase letter, number, and special character.
   c. Must not contain more the two repeated characters in a row.
   d. Must be different from your last 24 passwords.
5. Confirm new password.
6. Select Change Password to complete change.
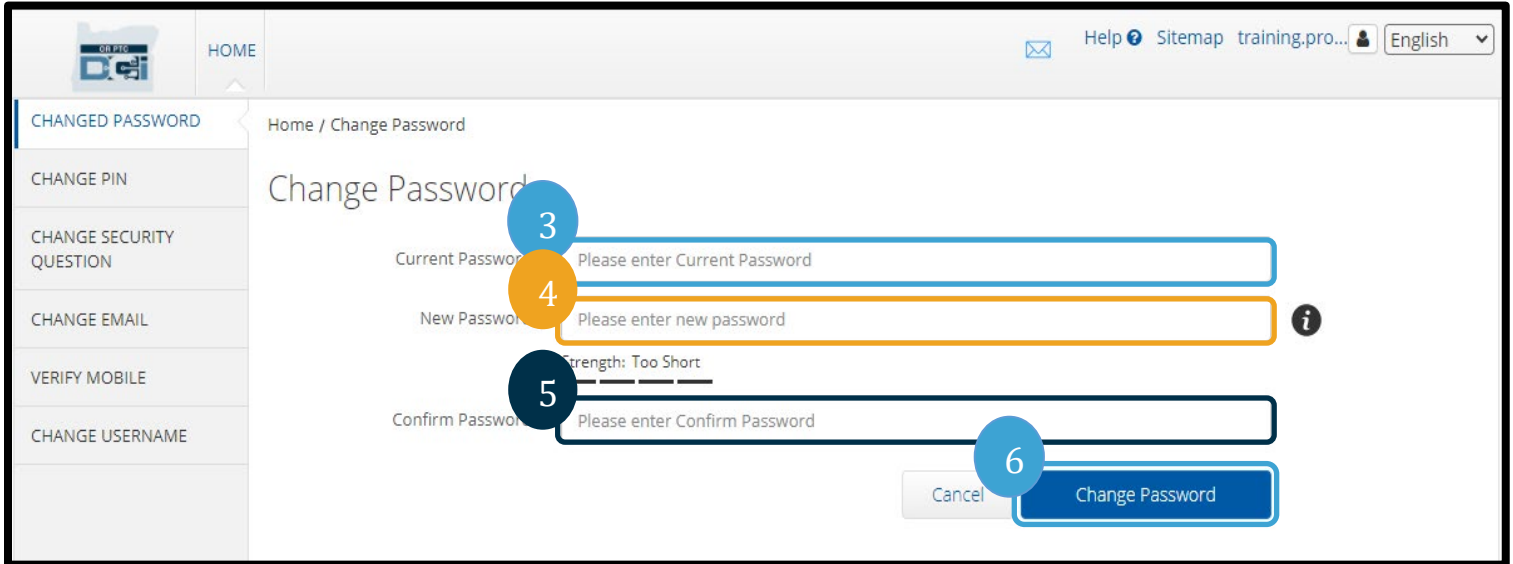
7. Select Yes to confirm the password change.
8. You will then see a green banner that reads, "Password Changed Successfully!" Your password is now updated, and no further action is needed.
9. Select Home or the OR PTC DCI icon to return to the home screen.
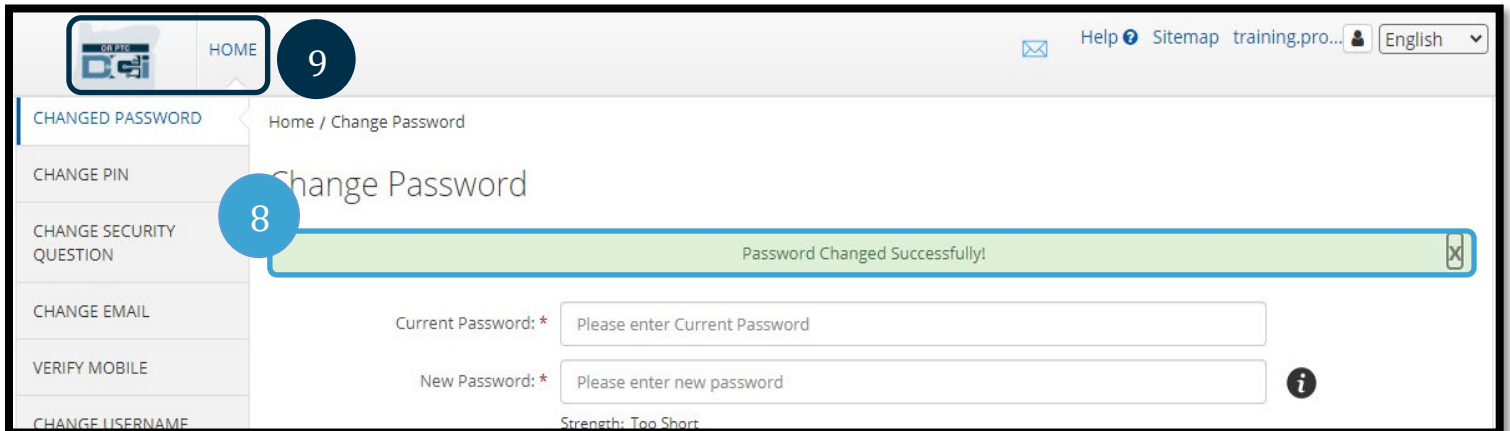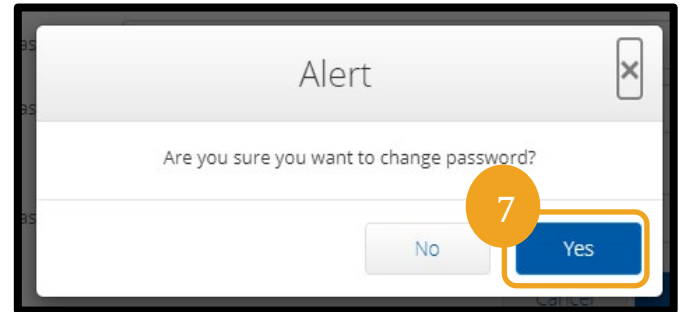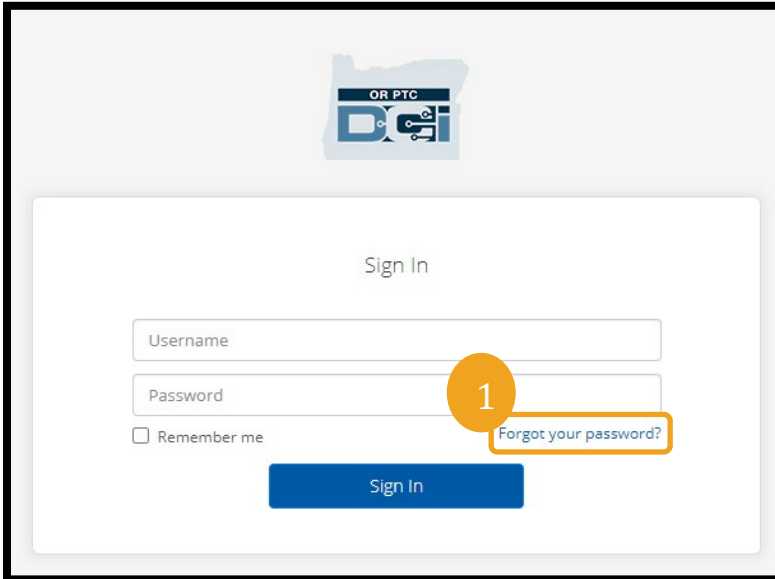
Forgot Password

If you forgot your password, you may reset your own password.

To reset your password:

1. Select the Forgot your password? on the login screen.
2. Enter your email address into the email field.
3. Select Send Reset Email.
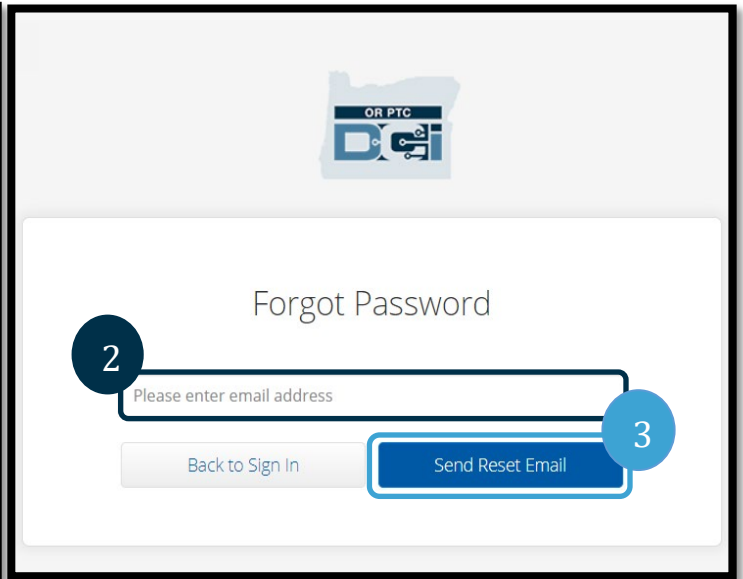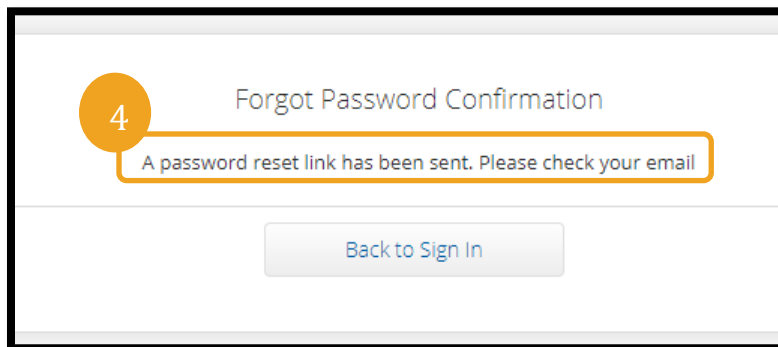
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4. You will then see a confirmation alert. Go to your email (the email for you on file in OR PTC DCI).

5. Open the reset email from orptcsupport@dcisoftware.com.
6. Select Reset Password.
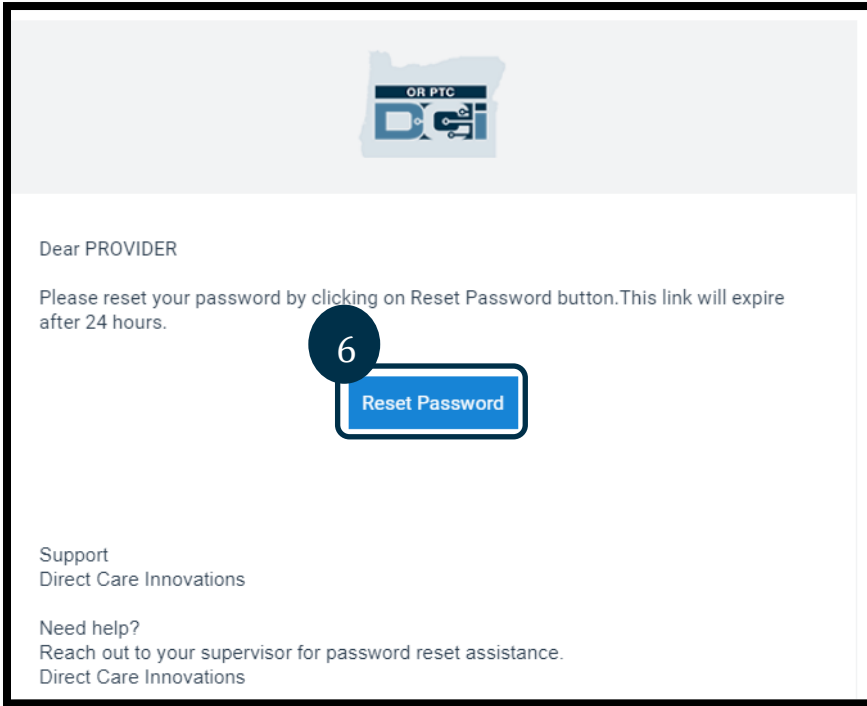
Note: If you do not receive the email:

• First, check your spam folder.

• Then, call your Local Office to make sure the correct email address is on file for you.

7. In order to reset the password, you must provide either:
   a. The answer to your security question, **or**
   b. The last 4 digits of your social security number <u>and</u> your date of birth.
8. Enter a response to one of the two options, then select Verify.
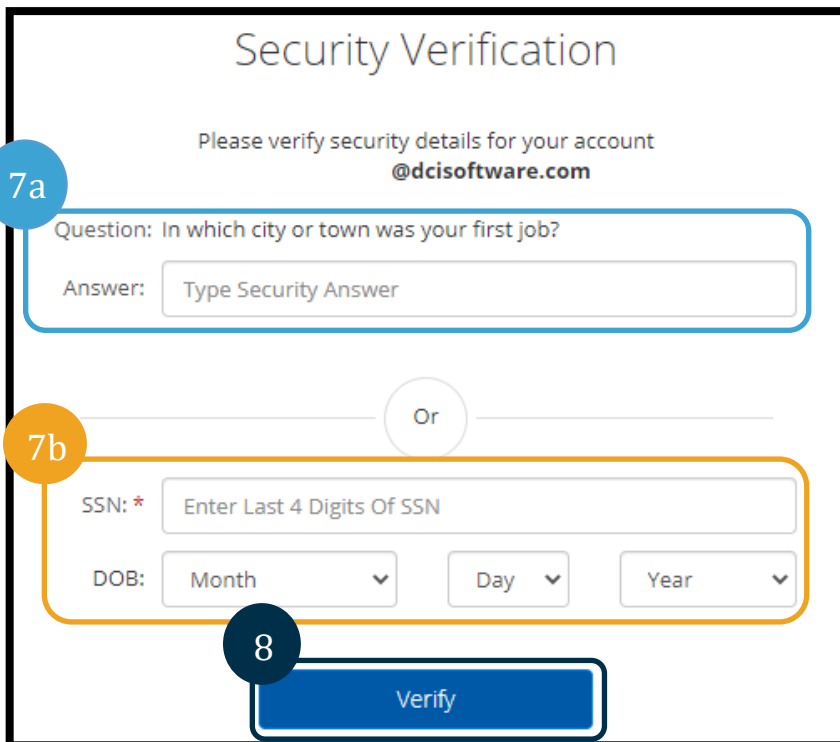
Note: Option b may not be available if OR PTC DCI does not have the required information on file for you.

9. Enter the new password you want to use.
10. Re-enter the new password.
11. Select Reset to complete the password reset.

Reset Password

Please enter and confirm your new password for your account
I@dcisoftware.com

9

10

11
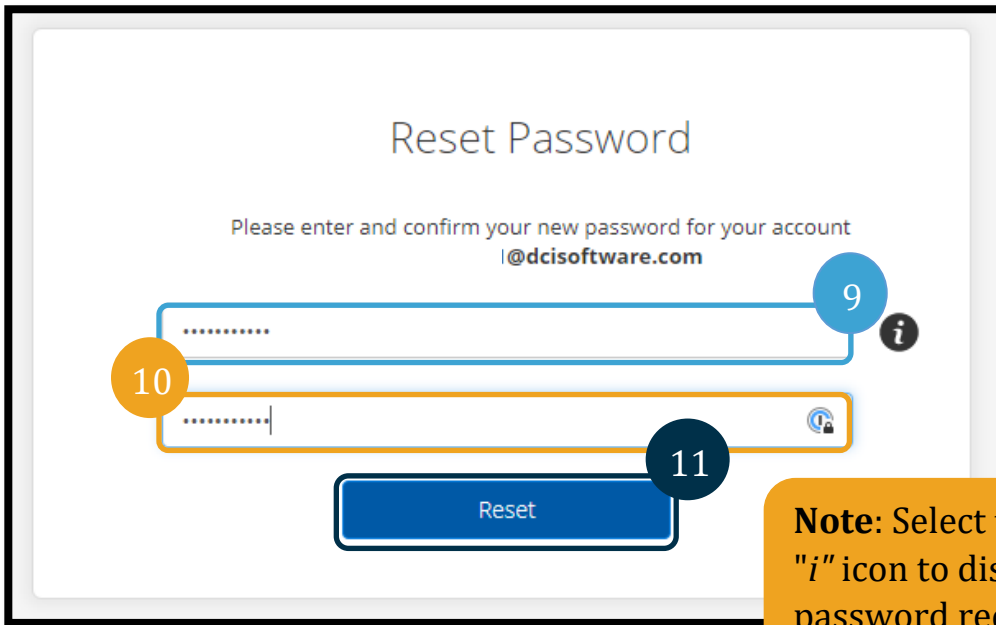
Reset

Note: Select the black "*i*" icon to display the password requirements.

12. Select Yes to confirm the new password. You will be returned to the OR PTC DCI login screen. Enter your username and new password to log in.

Alert ✕

Are you sure you want to reset the password?

12

No | Yes
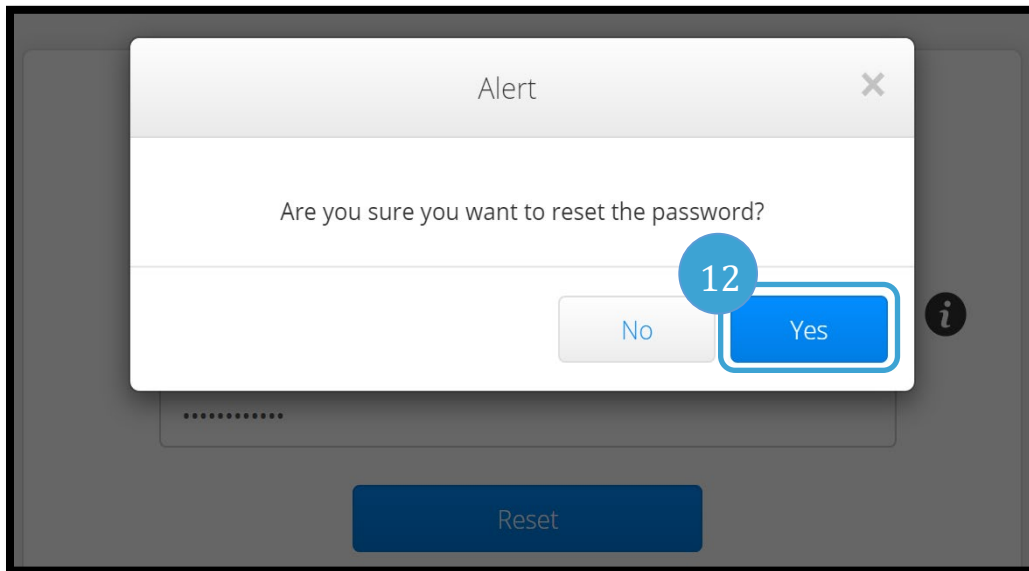
Reset

Reset Password

If you are unable to verify yourself using the Forgot Password link, contact your Local Office to request a password reset or email PTC Support at PTC.Support@odhsoha.oregon.gov. You must have an active email listed in OR PTC DCI to have your password reset.

Once the password is reset, follow these steps:

1. Open the reset password email from ORPTCSupport@dcisoftware.com and select the Reset Password button to launch OR PTC DCI.

Note: If you do not receive the email:

- First, check your spam folder.
- Then, call your Local Office to make sure the correct email address is on file for you in OR PTC DCI.

Dear MATT BASE,

Please reset your password by clicking on Reset Password button.

Reset Password **1**

Support
Direct Care Innovations

Need help?
Reach out to your supervisor for password reset assistance.
Direct Care Innovations
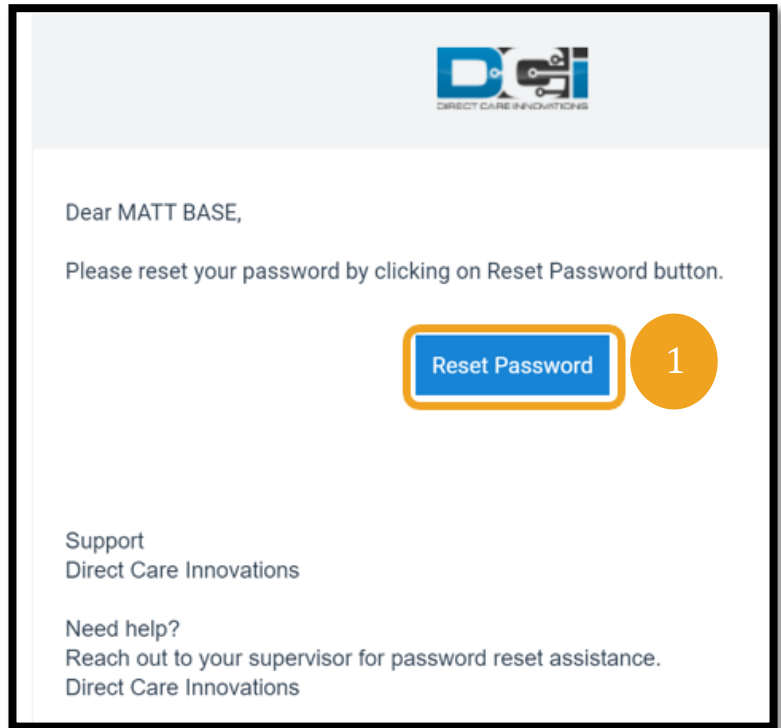
2. Enter the new password you would like to use.
3. Reenter the new password.
4. Select the Reset button to complete the password reset.

Note: Select the black "*i*" icon to display the password requirements.

Reset Password

Please enter and confirm your new password for your account @dcisoftware.com

2

3

4
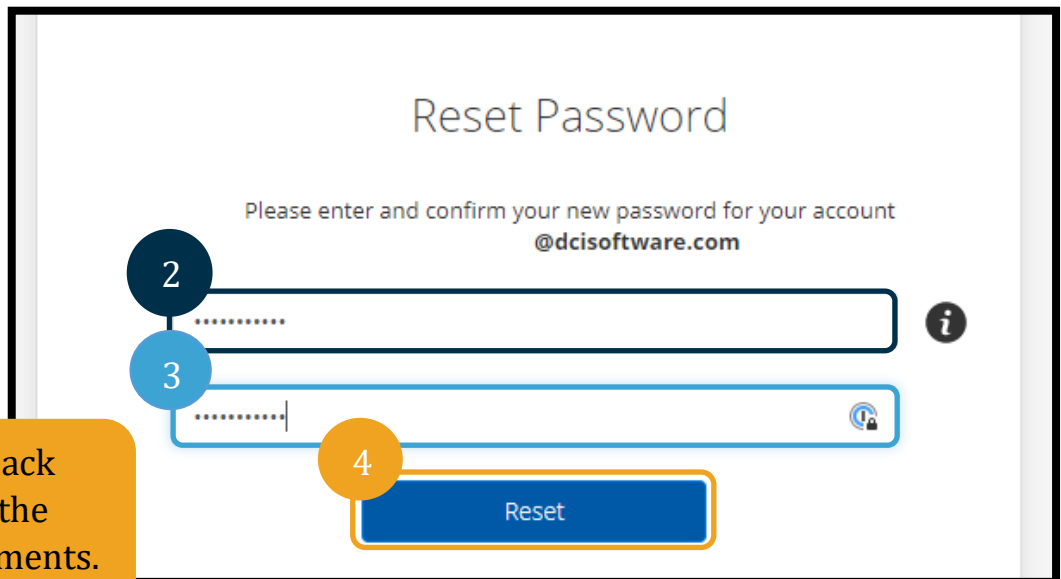
Reset

5. Select Yes to confirm password reset.
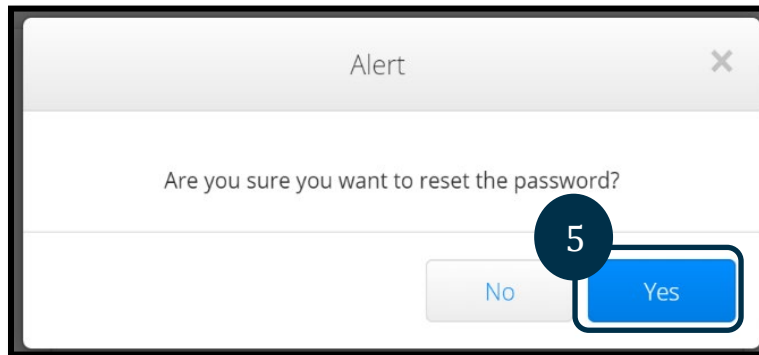
The next time you log into OR PTC DCI, you will be prompted to update your security details.

1. Select new security question.
2. Enter new security question answer.
3. Select Save to update security question details.
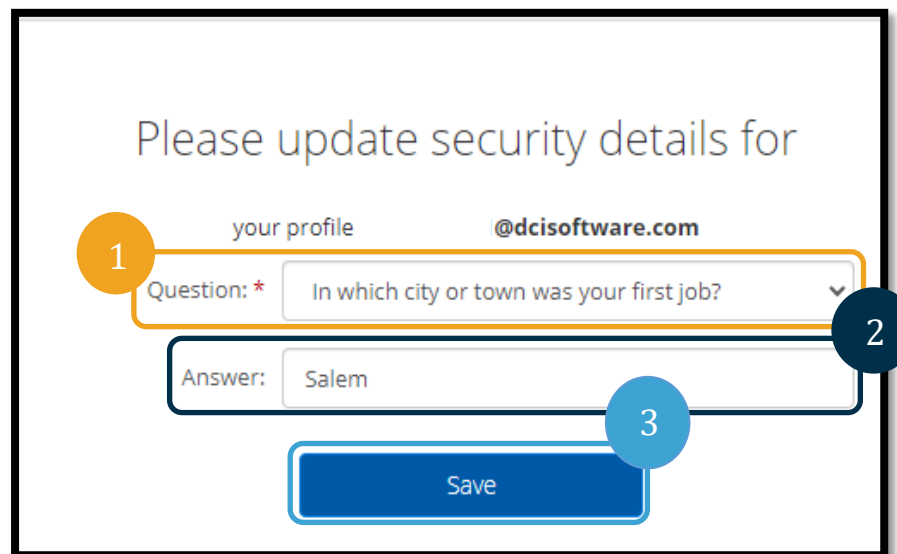
Note: If you **do not** use a PIN, finishing step 3 completes the password reset. If you **do** use a PIN, you must add a new PIN (see Add PIN for instructions) because resetting your password in this manner removes your PIN.

Add PIN

If you contact support for password assistance, you may need to add a new PIN.

1. Select the icon next to your username.
2. Select Settings.
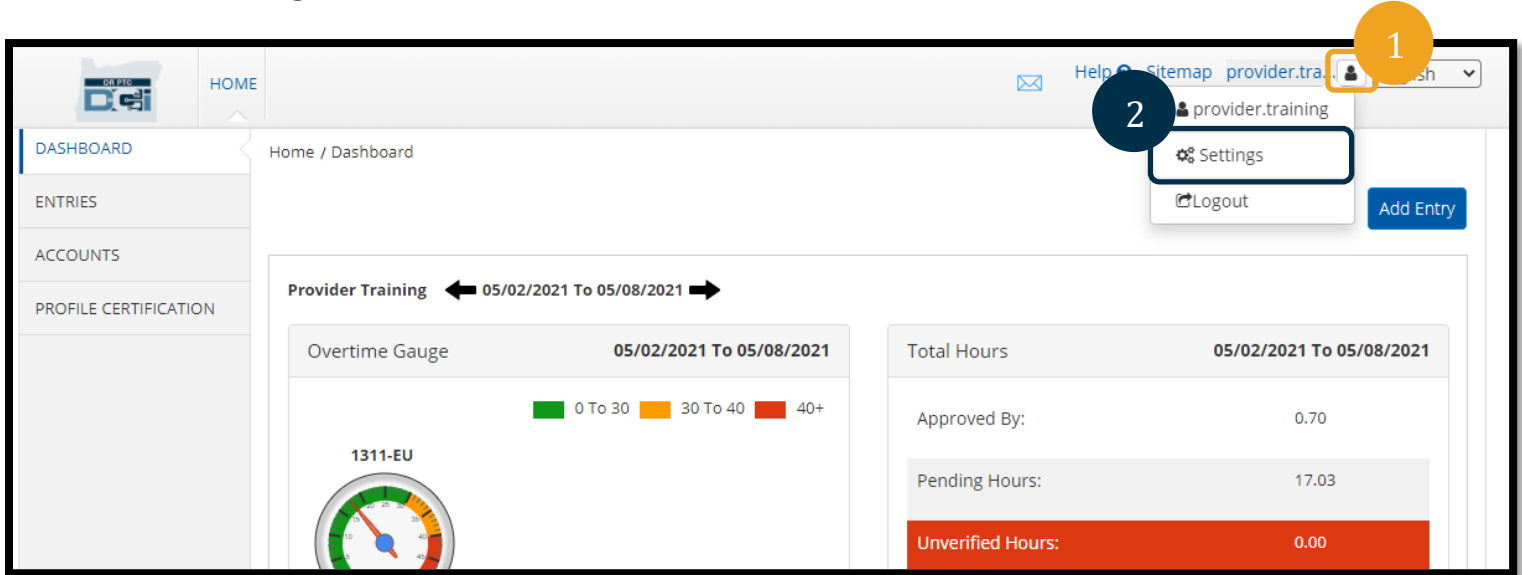
3. Select Add New PIN.
4. Enter new PIN.
5. Confirm PIN.
6. Select Add New PIN.
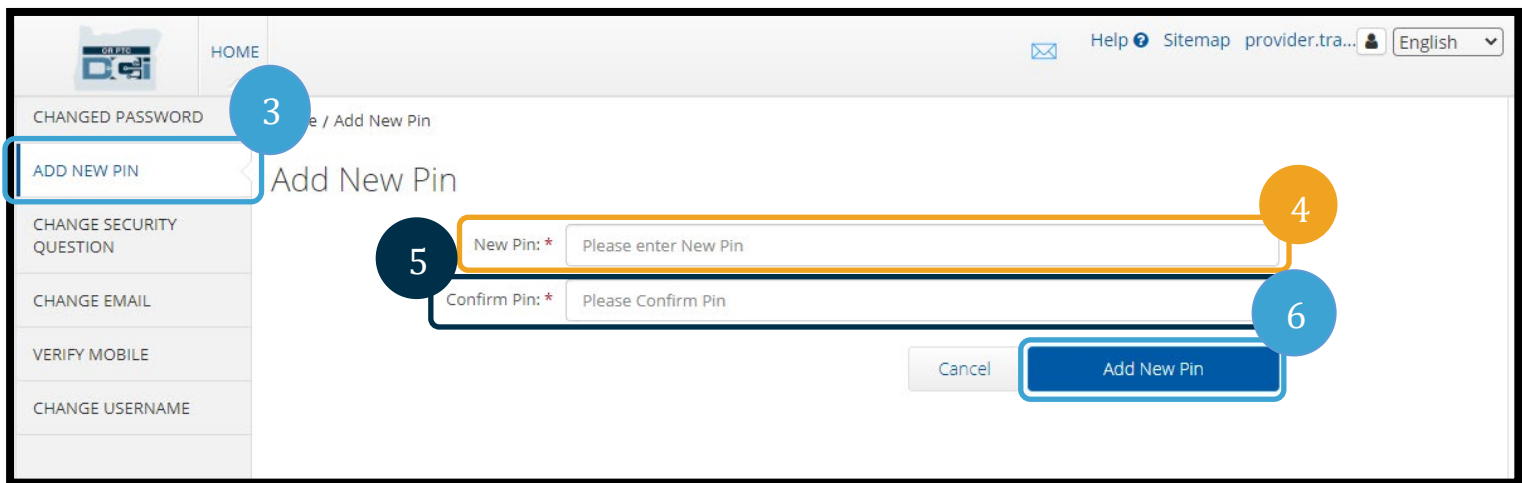
7. Select Yes to confirm new PIN.
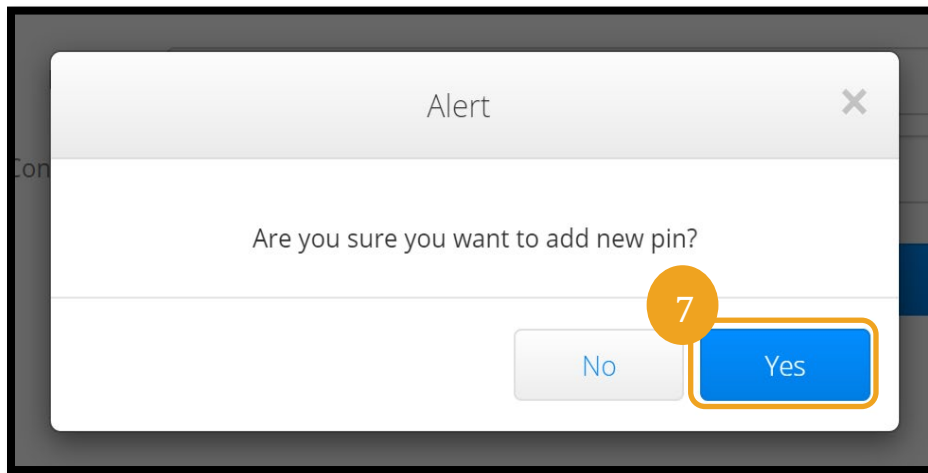
The PIN has been successfully updated!

Change PIN
OR PTC DCI allows the user the ability to change their PIN.

1. Select the person icon next to your username.
2. Select Settings.
3. Select Change PIN.
4. Enter OR PTC DCI password.
5. Select Verify.
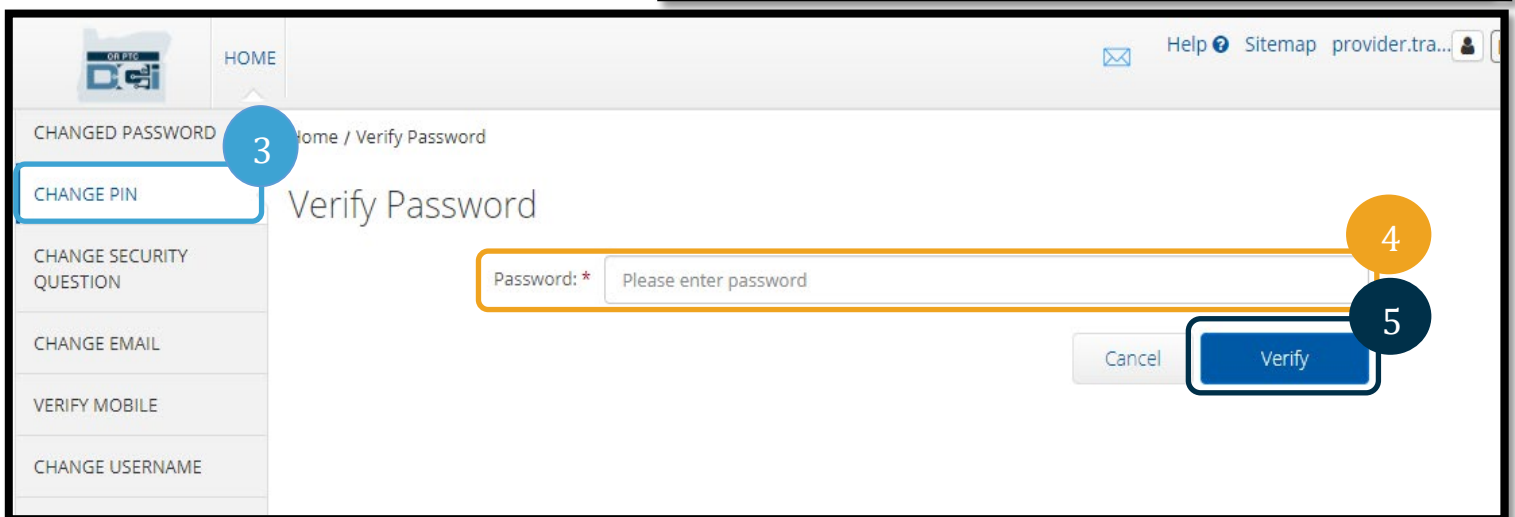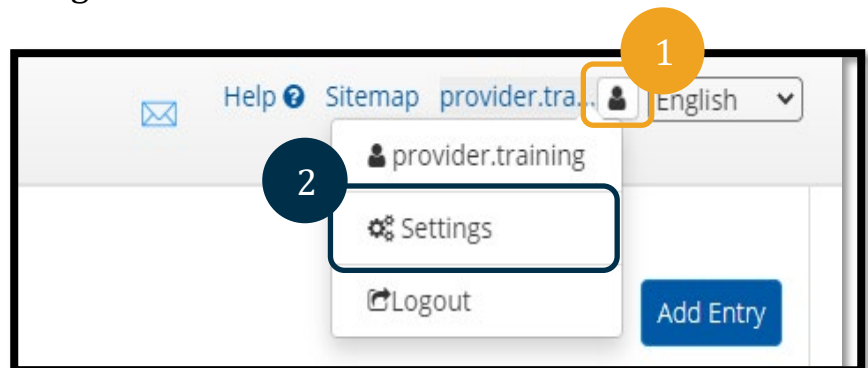
6. Enter New PIN.
7. Reenter New PIN.
8. Select Change PIN to Save.
9. Select Yes to confirm PIN change.

10. You will then see a green banner that reads, "Pin Changed Successfully!" Your PIN is now updated, and no further action is needed.
11. Select Home or the OR PTC DCI icon to return to the home screen.

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Change Security Questions

You may wish to change your security question or answer. These questions are used when resetting your password. Please ensure that you select questions and answers that you will remember.

1. Select the person icon next to your username.
2. Select Settings.
3. Select Change Security Question tab.
4. Enter your current password.
5. Select Verify.
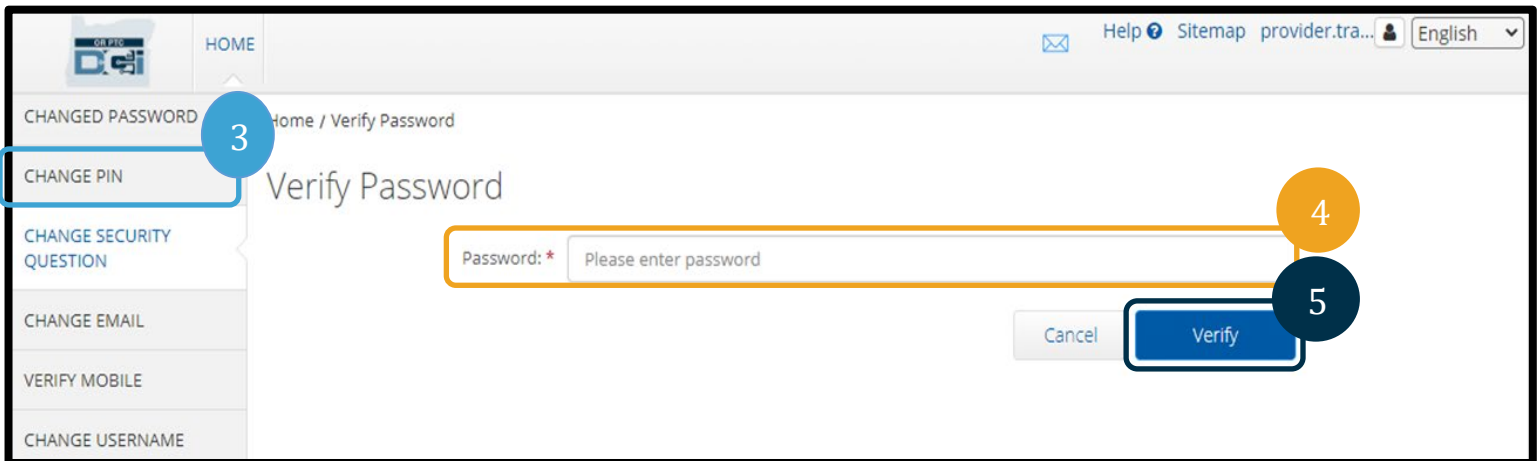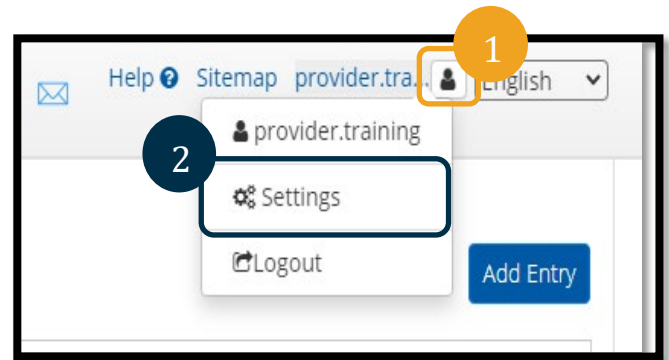
6. Select security question from the drop-down list.
7. Enter the answer.
8. Select Submit to save the security question.
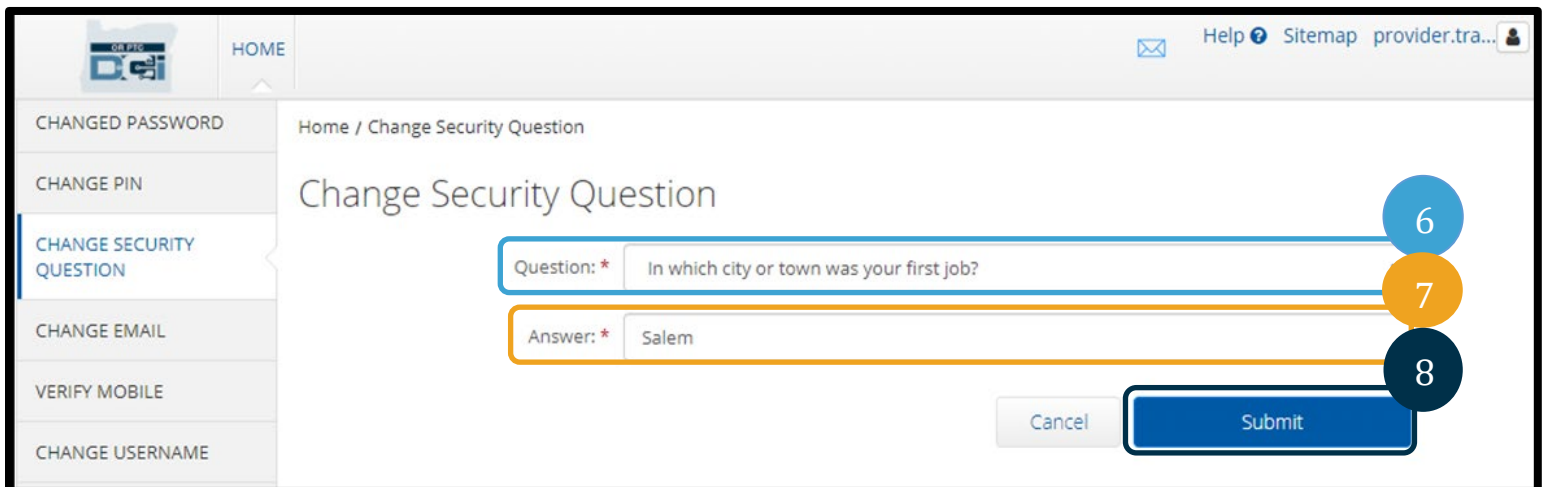
9. You will then see a green banner that reads "Security Question Changed Successfully!" The security question is now updated, and no further action is needed.
10. Select Home or the OR PTC DCI icon to return to the home screen.
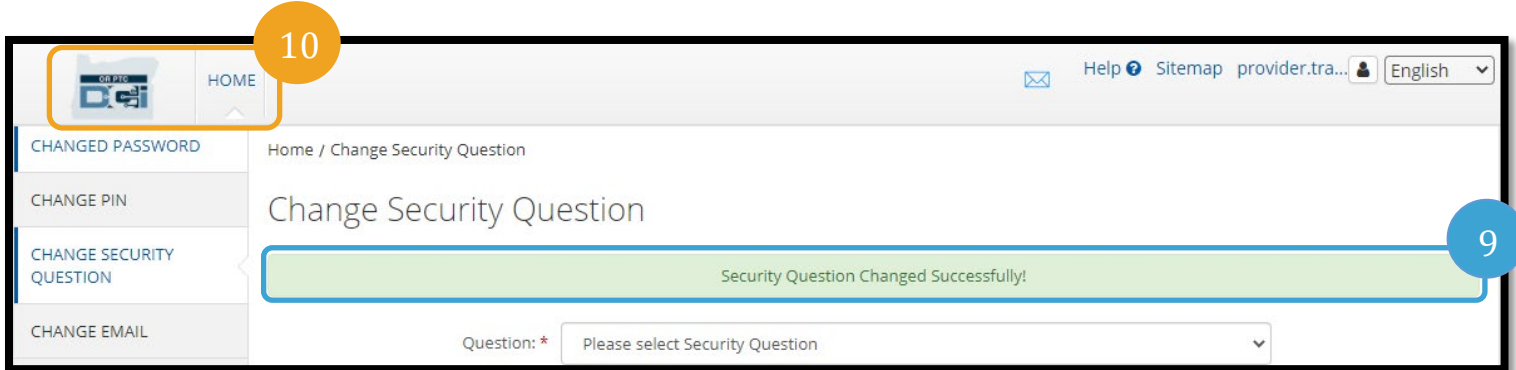
Change Email
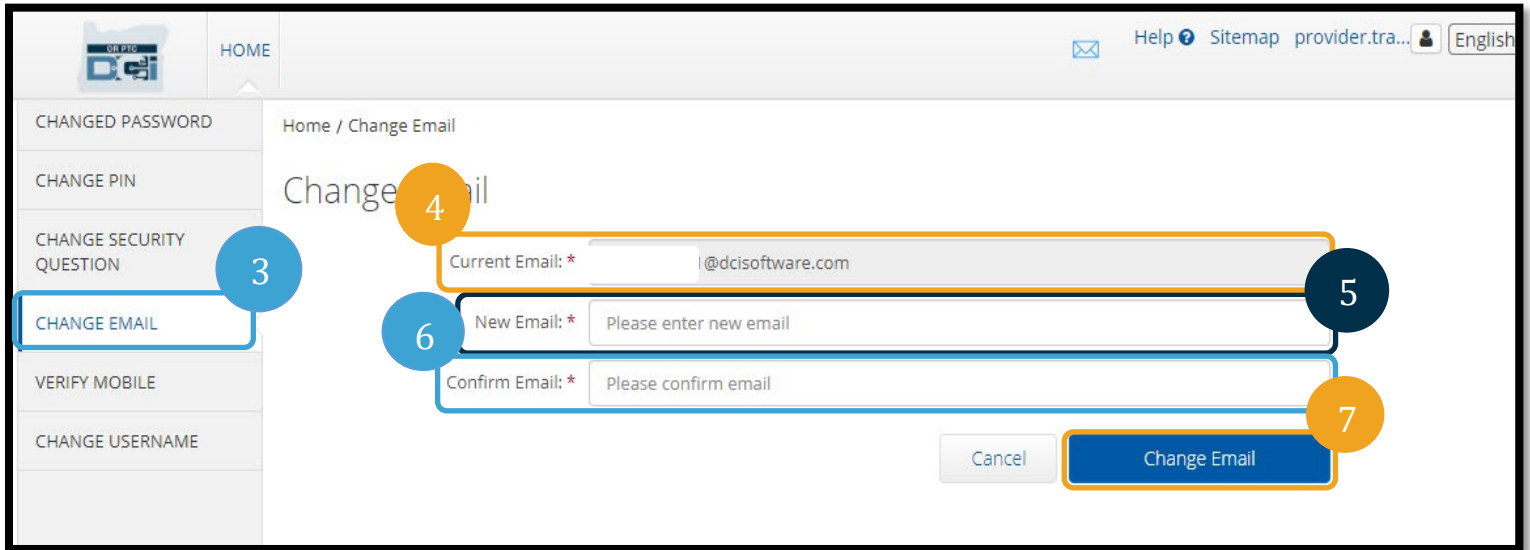
You may wish to change your email address in OR PTC DCI.

1. Select the person icon next to your username.
2. Select Settings.
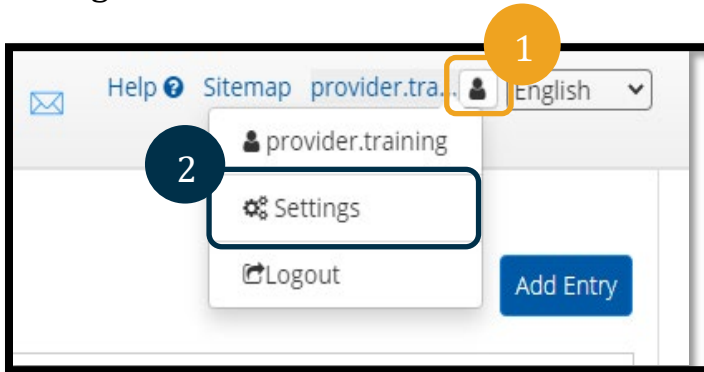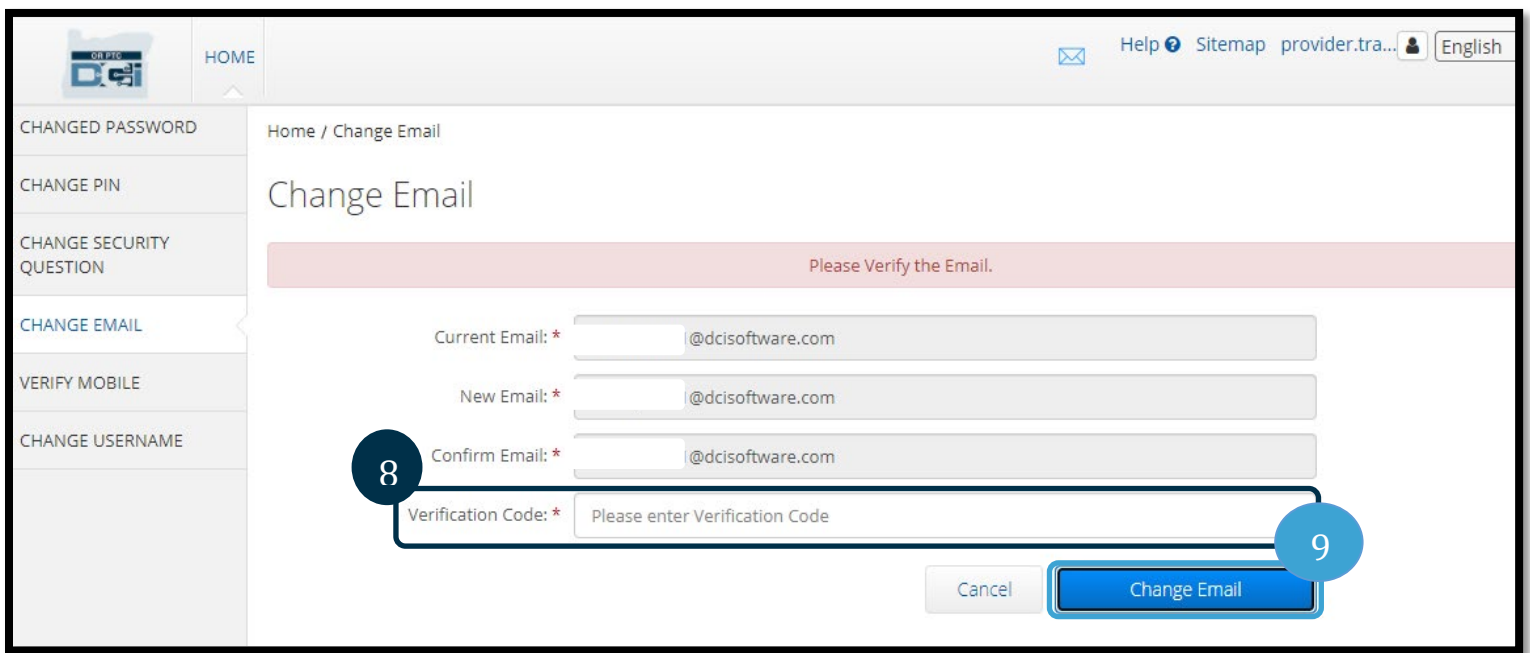
Note: If you update your email, please notify your Local Office.

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3. Select Change Email tab.
4. Current email is populated.
5. Enter new email.
6. Confirm new email.
7. Select Change Email to save the new email.

8. A verification code is in the new email account that was added. Enter the verification code here.
9. Select Change Email.

10. Select Yes to confirm email change.
11. A green banner will then display that reads "Email Changed Successfully!" Your email address is now updated, and no further action is needed.
12. Select Home or the OR PTC DCI icon to return to the home screen.
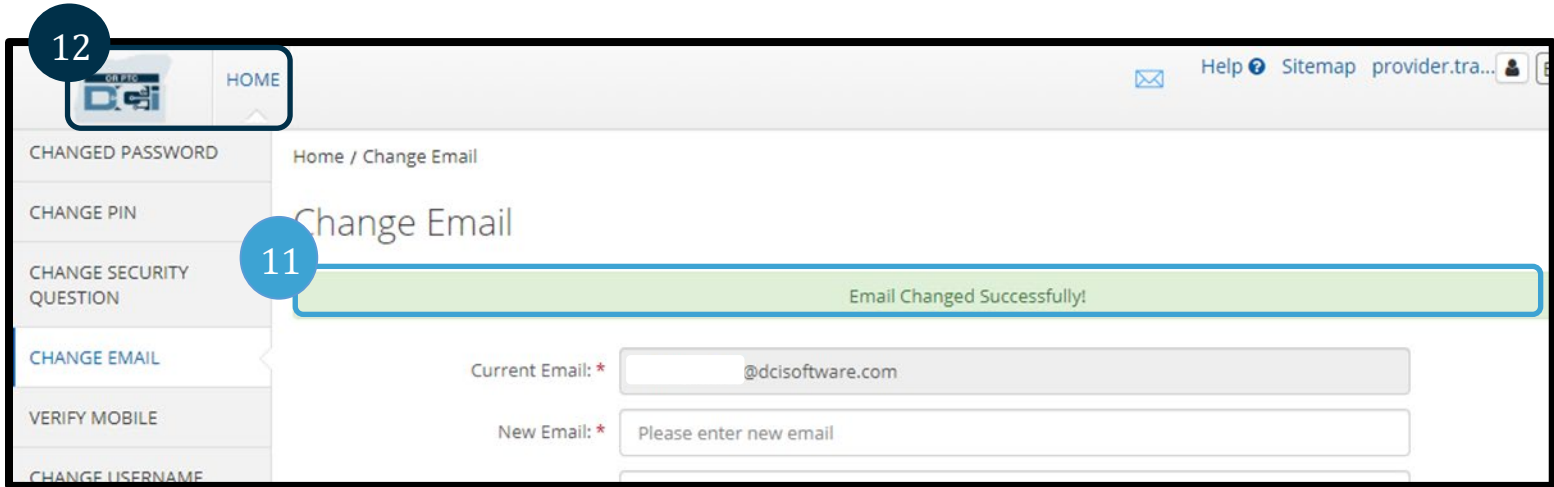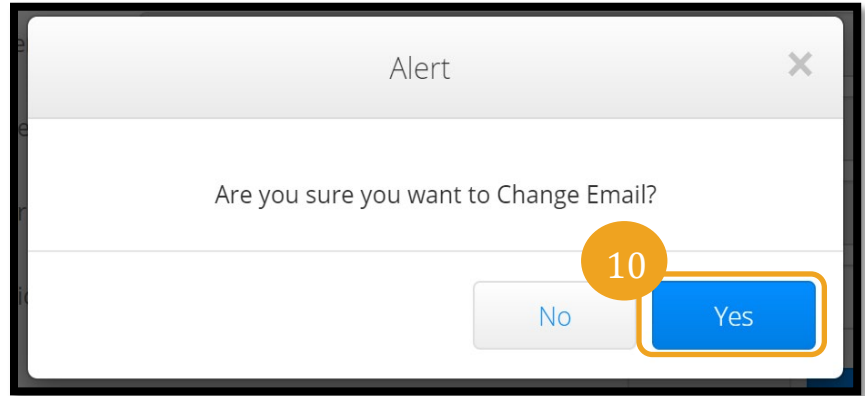
Verify Mobile Phone Number

You must verify your mobile phone number to receive important text messages from OR PTC DCI.

1. Select the person icon next to your username.
2. Select Settings.
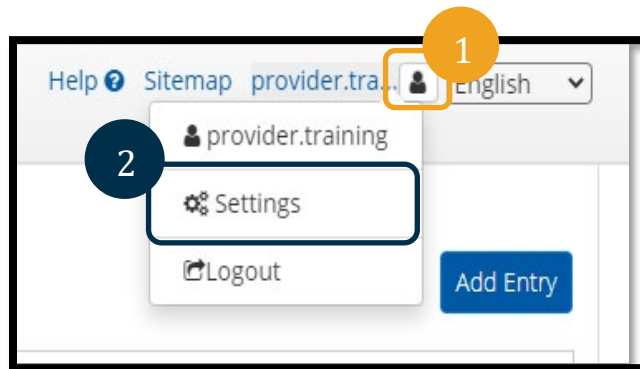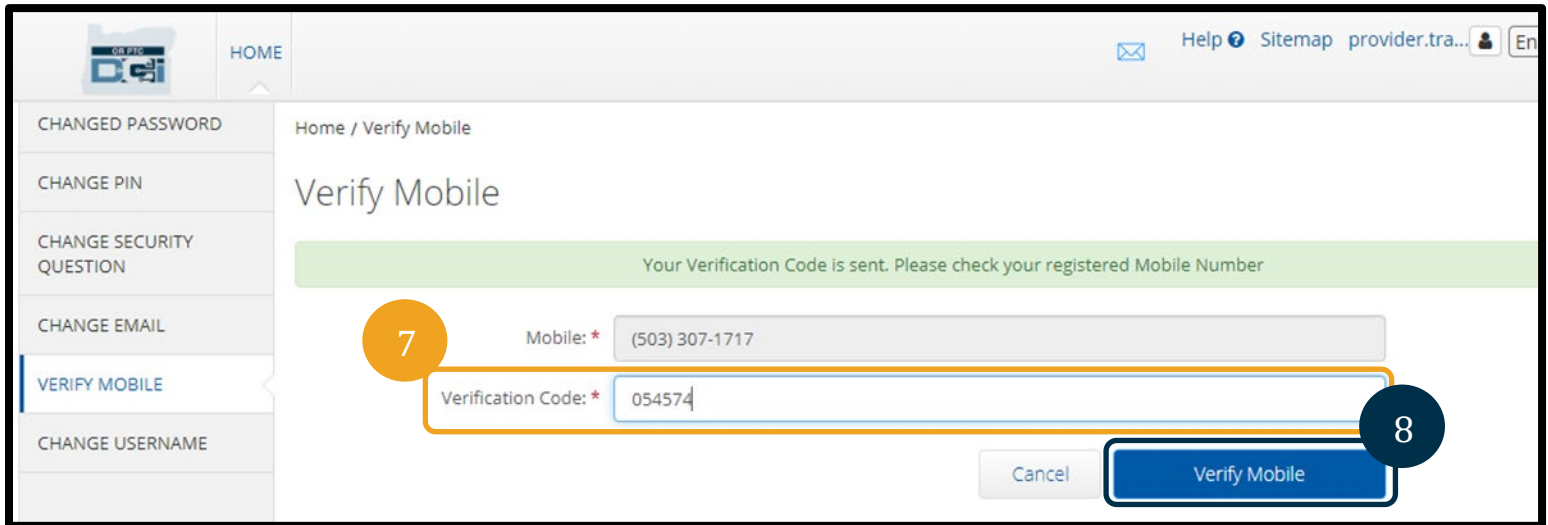
3. Select Verify Mobile tab.
4. Enter mobile phone number.
5. Select Update Mobile Number.
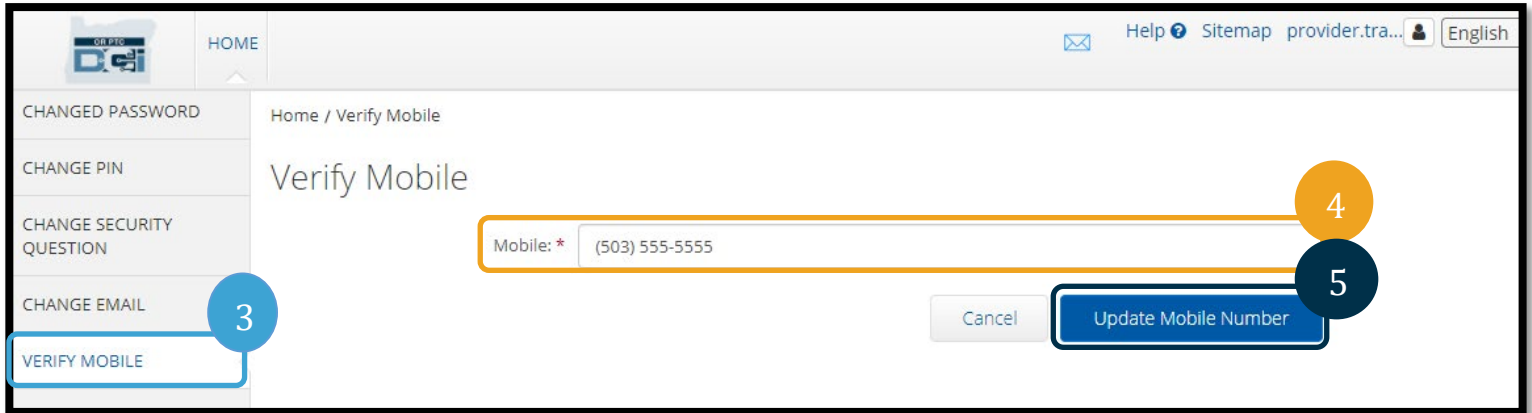
6. Select Send Verification Code.
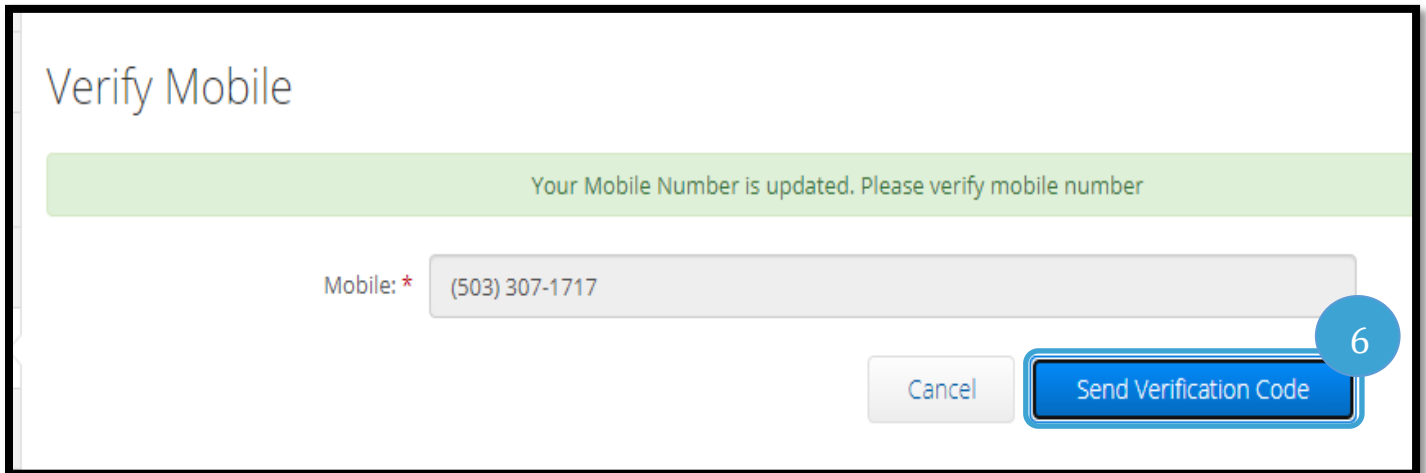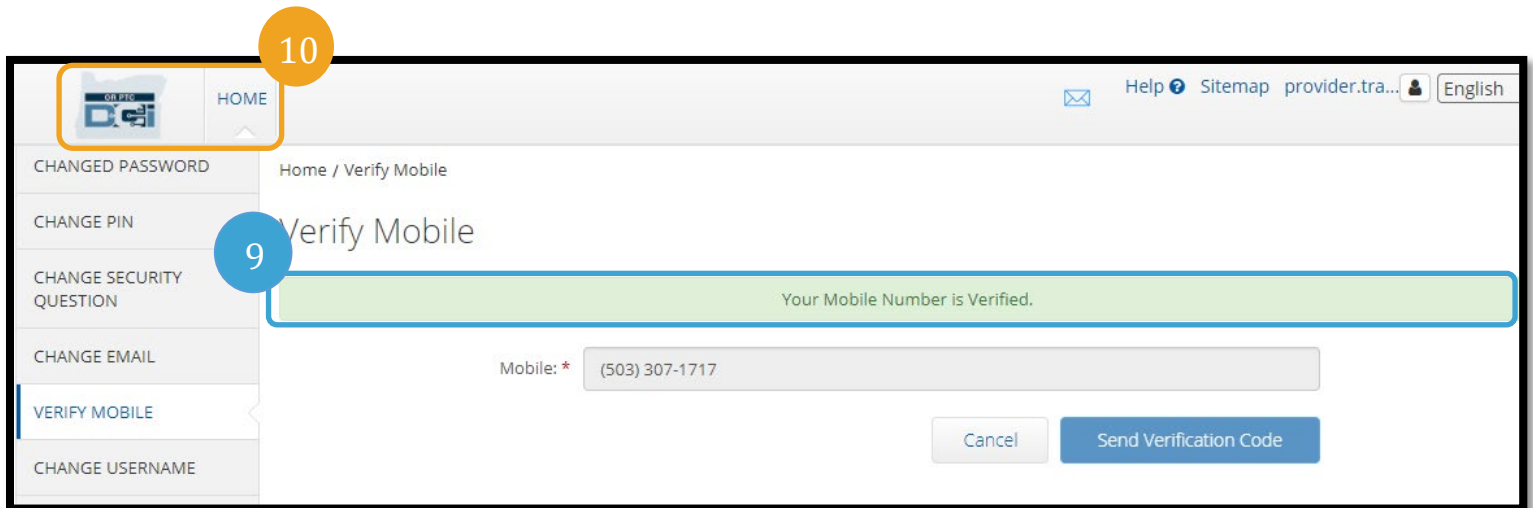
7. You will receive a text message with the verification code. Enter the code in the box labeled "Verification Code".
8. Select Verify Mobile.

9. A green banner will then display that says, "Your Mobile Number is Verified." The mobile number is now verified, and no further action is needed.
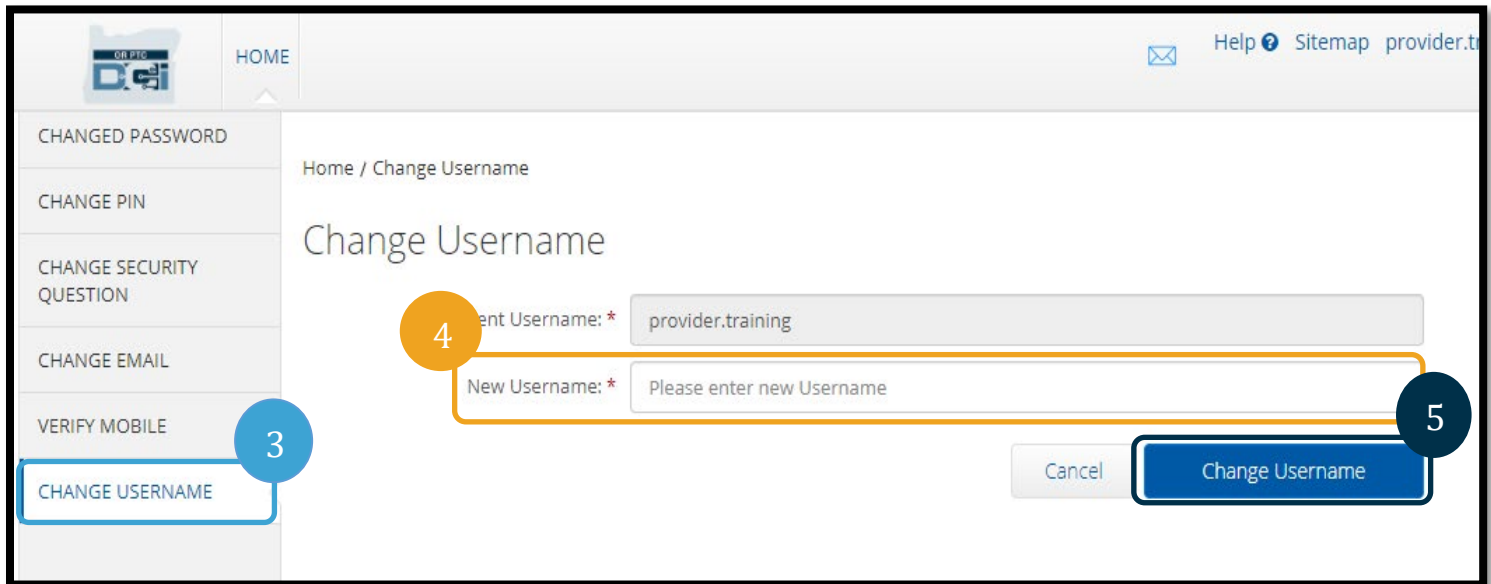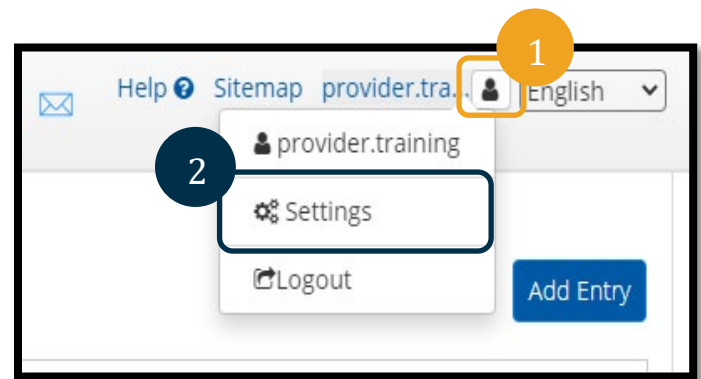10. Select Home or the OR PTC DCI icon to return to the home screen.
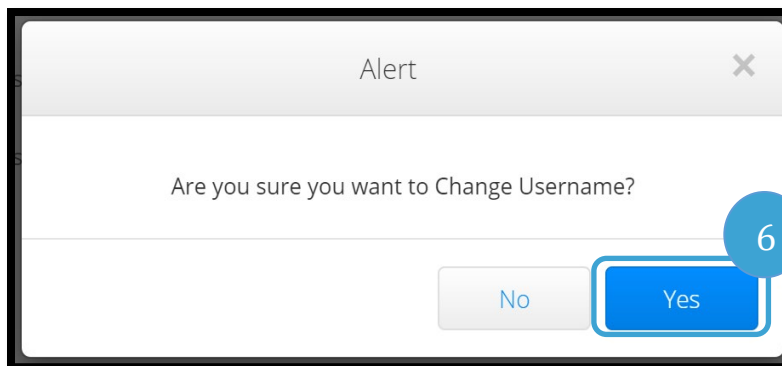
Change Username

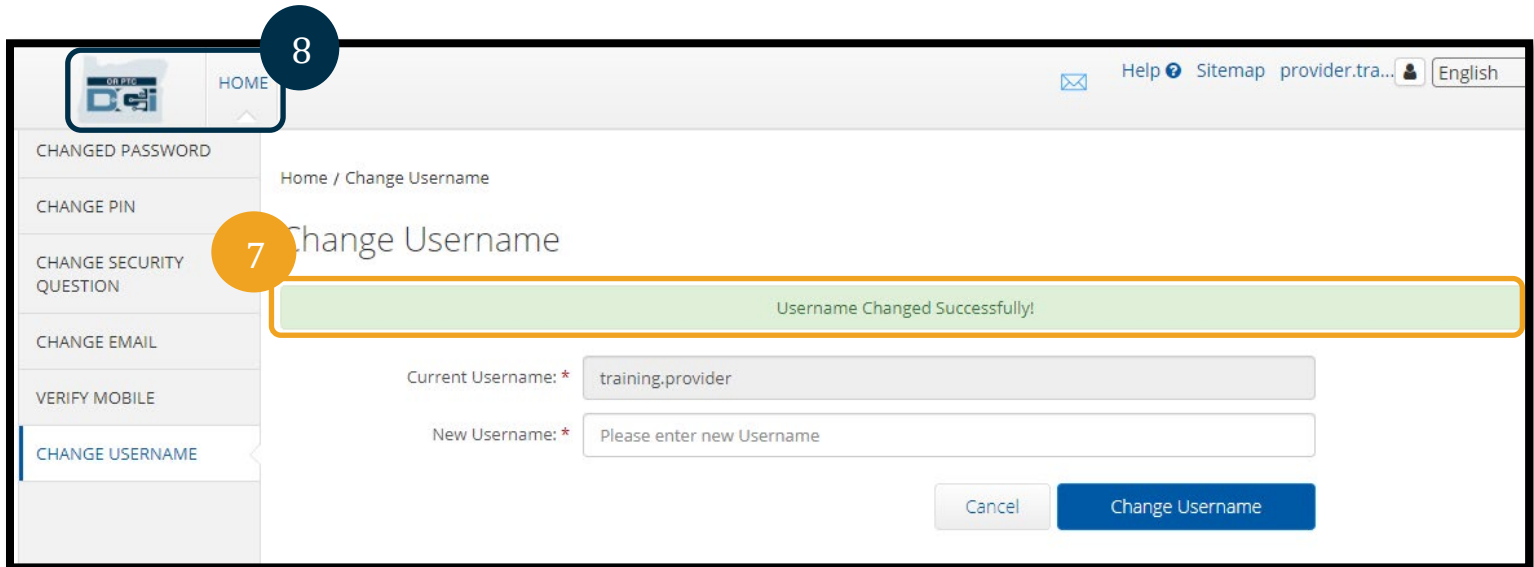You may wish to change your OR PTC DCI username.

1. Select the person icon next to your username.
2. Select Settings.
3. Select Change Username tab.
4. Enter New Username.
5. Select Change Username to save.

6. Select Yes to confirm username change.

7. A green banner will then appear that says, "Username Changed Successfully!" Your username has now been changed, and no further action is required.
8. Select Home or the OR PTC DCI icon to return to the home screen.

Support

Congratulations! You have completed reviewing the OR PTC DCI Provider Guide.

By now, you should have already:

- Selected an EVV method(s) and informed the Local office of your selection.
- Created an email address if you didn't already have one (Note: You must have a personal email address to use OR PTC DCI).
- Ensured the Agency has up-to-date contact information for you. If you need to update your contact information, please see resources below:
  o **Homecare Workers**, please contact your Local Office to update your contact information. This form can be found on the Seniors & People with Physical Disabilities Offices website: https://www.oregon.gov/dhs/offices/pages/seniors-disabilities.aspx
  o **Behavioral Health Personal Care Attendants (PCAs)**, please update contact information using form 2521 and fax it to provider enrollment per the instructions on the form. This form can be found on the Provider Enrollment website: https://www.oregon.gov/oha/HSD/OHP/Pages/Provider-Enroll.aspx

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

DCI Help Desk (Available 24/7, except on holidays)
Call 1-855-565-0155 or email ORPTCSupport@dcisoftware.com for help with:

- Basic system navigation assistance
- System errors (frozen pages, server errors, etc.)
- Login assistance

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

PTC Support
Email PTC.Support@odhsoha.oregon.gov or call your Local Office for help with:

- New to OR PTC DCI and getting started
- Issues with clocking in or out
- New, lost, broken, or malfunctioning fobs

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

- Once logged into OR PTC DCI, select on the Help button in the top right corner.
- You will be automatically redirected to the DCI Help Center.
- Search by keyword to find the help resource you're looking for.
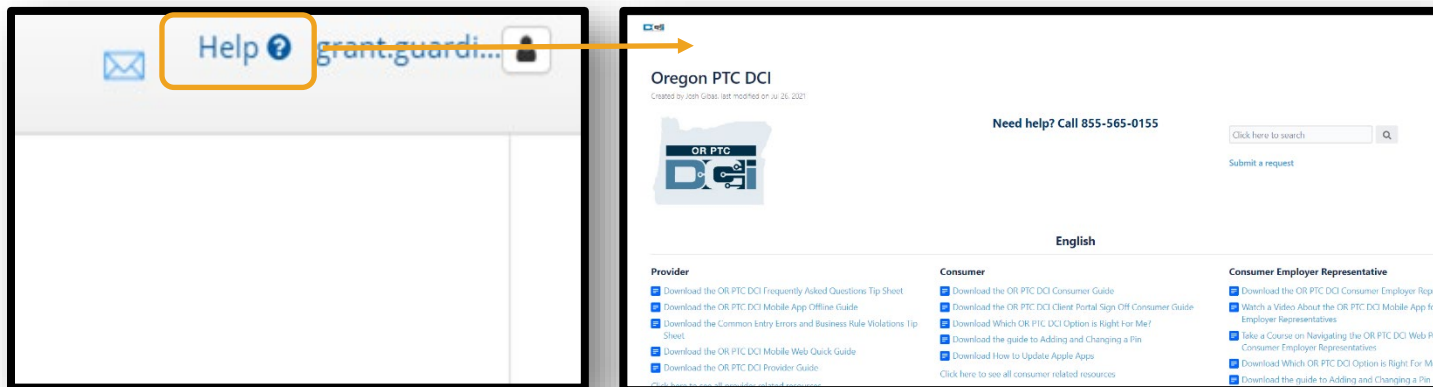
General Q&A
I'm locked out. Who can help?
You can contact your Local Office during normal business hours. If you are locked out due to too many unsuccessful login attempts, your account with automatically unlock after 24 hours.

I need to reset my password but I'm not getting email notifications. Who can help?
Contact your Local Office to verify that the email address we have on file is correct. You can also update your own email address in OR PTC DCI, instructions for this are found in Reset Password.