



Profile Management Guide

OR PTC DCI
VERSION 2.2



Profile Management Guide

Contents

Disclaimer	2
Consumer (Client) Profile Overview	2
How are Consumer Profiles Created?	2
Update Consumer Information	3
Consumer Information to Update	3
View/Edit Consumer Details	4
Consumer Basic Demographics Tab	5
Client Information Tab	6
Consumer Authentication Information Tab	7
Consumer Employer Representative (Guardian) Profile Overview	8
Request the PTC Support Team Create a New CER Profile	8
Consumer Employer Representatives get Guardian Profiles in OR PTC DCI	9
Update Consumer Employer Representative Information	9
View/Edit Guardian Details	10
Guardian Basic Demographics Tab	11
Guardian Authentication Information	12
Linking Client and Guardian Profiles	13
Provider (Employee) Profile Overview	13
How to Create a Provider Profile	13
Update Provider Information	14
View/Edit Provider Details	14
Provider Basic Demographics Tab	16
Finding the Provider Number on the Employee Details Page	18
Change Provider Status	19
Linking, Unlinking, and Relinking Providers and Consumers	22
State User Profile Overview	22
How to Create and Update a Staff Profile	22
Unlocking Profiles	23



Profile Management Guide

Authentication Details & Status.....	25
Profile Authentication Status.....	25
Resources.....	25

Disclaimer

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

Consumer (Client) Profile Overview

How are Consumer Profiles Created?

Consumers will only be added to OR PTC DCI once they have been approved for in-home services and have an active service plan with authorizations set up in Mainframe/DHR.

The consumer profiles will be created by the PTC Support Team.

The authorization process is initiated by local office staff member using the 546 to enter the authorization in Mainframe to create the voucher. Authorization information will be sent in real time from Mainframe to OR PTC DCI once the voucher is created in Mainframe. Please do not send the 546 to the PTC Support Team.

If an authorization fails to go to OR PTC DCI, it goes to a queue for the PTC Support Team to fix. The queue will indicate if the consumer and/or provider associated with the authorization are not in OR PTC DCI; this will prompt the PTC Support Team to create all the necessary profiles related to that specific authorization. Once those are added, the PTC Support Team will resend the authorization to OR PTC DCI.

If more than two full business days have passed since the voucher was created in Mainframe and the consumer has not been added to OR PTC DCI, local office staff can request the profile and associated account information be setup by the PTC Support Team by submitting a [Consumer/Provider Profile Maintenance Form](#) to PTC.Support@odhsoha.oregon.gov. Once the profile and associated account information has been created, the PTC Support Team will respond to the requestor.

The voucher number and voucher created date are required fields on the [Consumer/Provider Profile Maintenance Form](#). These request forms can be found on the PTC website ptc.oregon.gov by clicking AAA/APD Staff, then click New User Forms.

See business process [3.1 Add a New Consumer](#) for more details.



Profile Management Guide

Note: Before submitting a request, you must wait two full business days and check the system to make sure a profile does not already exist for that consumer.

Update Consumer Information

There are times a consumer's information will need to be updated in OR PTC DCI. Below are the steps to take to make the update.

1. If the local office was notified of the update by the consumer, go to step 3.
2. If the local office was notified of the update via the Change Email/Phone report, case manager contacts the consumer to verify the updated information.
3. Staff member verifies and updates information in Oregon Access, if needed.
4. Staff member verifies and updates information in OR PTC DCI, if needed
5. State user has information in ONE updated per local office procedures.
6. State user narrates what tasks were completed in Oregon Access.

Consumer Information to Update

Information local office staff may need to update on a consumer's profile in OR PTC DCI:

- Consumer's name
- Primary phone number (this must be the consumer's landline)
- Alternate phone number
- Mobile phone number
- Physical Address
- Email Address

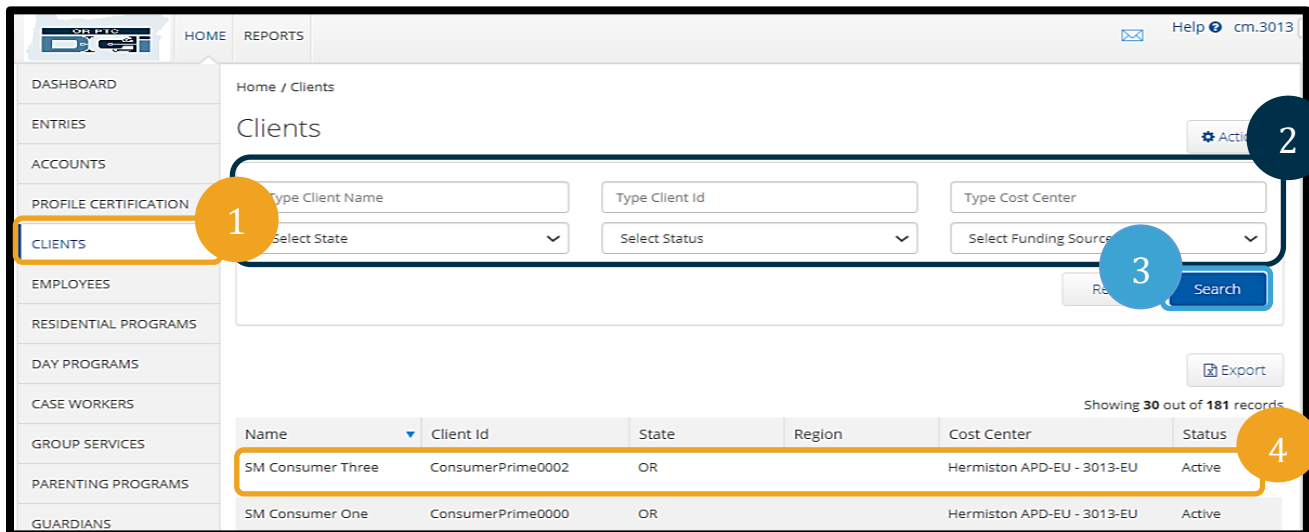
See business process [3.2 Update Consumer Information](#) for more details.

Profile Management Guide

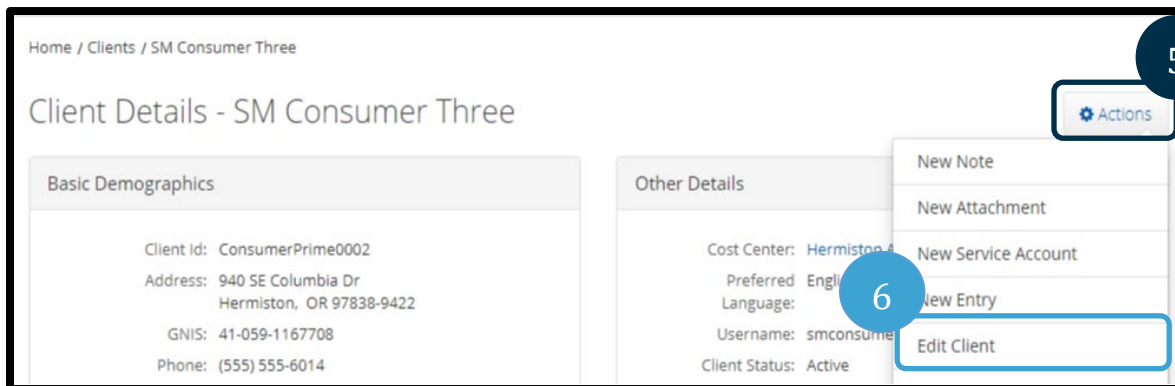
View/Edit Consumer Details

Updating consumer information happens from the Client Details screen.

1. Click Clients from the left sidebar.
2. Enter consumer information in search field(s).
3. Click Search to display results.
4. Click on the correct consumer from the results to access the Client Details.



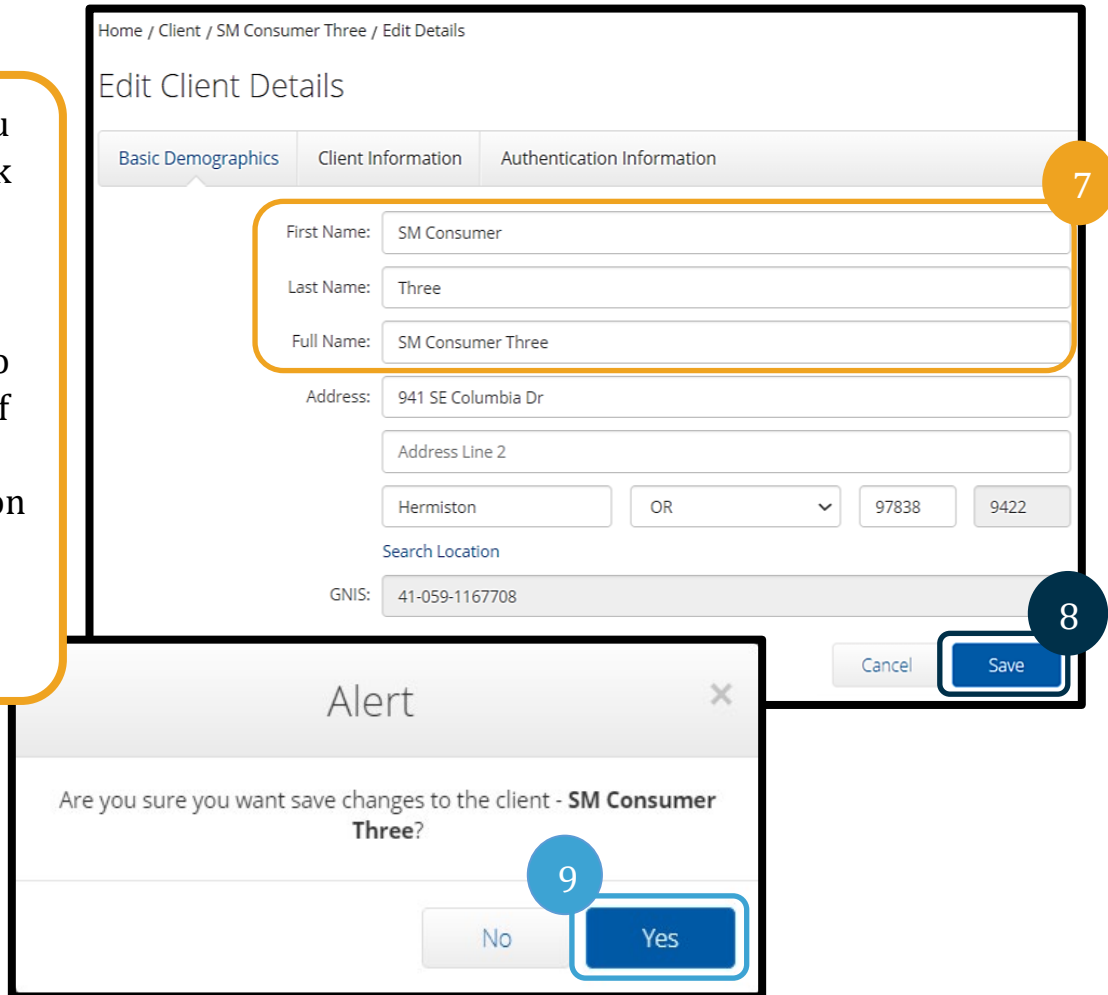
5. Click Actions.
6. Select Edit Client from the drop-down.



Profile Management Guide

7. Update information (for descriptions of information on each tab, see the next sections).
8. Click Save.
9. Click Yes on the Confirmation Alert.

Note: You must click save on each tab before moving to the next if making updates on multiple tabs.



Home / Client / SM Consumer Three / Edit Details

Edit Client Details

Basic Demographics | Client Information | Authentication Information

First Name: SM Consumer

Last Name: Three

Full Name: SM Consumer Three

Address: 941 SE Columbia Dr

Address Line 2

Hermiston | OR | 97838 | 9422

Search Location

GNIS: 41-059-1167708

Cancel | Save

Alert

Are you sure you want save changes to the client - **SM Consumer Three?**

No | Yes

Consumer Basic Demographics Tab

Consumer information is divided into tabs. Each tab contains different information you may need to update. The first tab is Basic Demographics. This tab contains the following:

1. **First Name:** Consumer's first name
2. **Last Name:** Consumer's last name
3. **Full Name:** Consumer's full name
 - a. **Note:** If any part of the consumer's name changed the **Full Name field** must also be updated, otherwise the change will not save
4. **Address:** Consumer's home address
5. If you change the home address:
 - a. Click **Search Location** – this populates the GNIS field below.
 - b. **Time Zone:** Select the correct time zone from the drop-down.

Profile Management Guide

6. **Phone, Alternate Phone, and Mobile Number:** Consumer's primary phone number is their landline. If they do not have a landline number, enter 000-000-0000. The alternate phone number and mobile number may also be updated.
7. **Email:** Consumer's email. This is required for the consumer to be able to log into the system. If the consumer does not have an email address, PTC.Support@odhsoha.oregon.gov must be used as a default email.
8. **Select Save.**

Edit Client Details

Basic Demographics
Client Information
Authentication Information

1

2

3

4

4

4

4

4

4

5

6

7

Yes No

8

Client Information Tab
The second tab is Information. You

Client will likely

Profile Management Guide

not update anything on this tab.

9. **Client Id:** The consumer’s prime number.



Edit Client Details

Basic Demographics | **Client Information** | Authentication Information

Client Id: prime21

Medicaid No: Leave Blank

Insurance Group No: Leave Blank

Insurance Plan No: Leave Blank

Insurance Payer No: Leave Blank

Insurance Number: Leave Blank

Certification Template: Leave Blank

Cost Center: St Helens APD-EU - 0511-EU

Preferred Language: English

Received Date: Leave Blank

Packet Mailed: Leave Blank

Client Status: Active

Discharge Date: Leave Blank

Suspended Date: Leave Blank

Code: Leave Blank

Region: Leave Blank

Consumer Authentication Information Tab

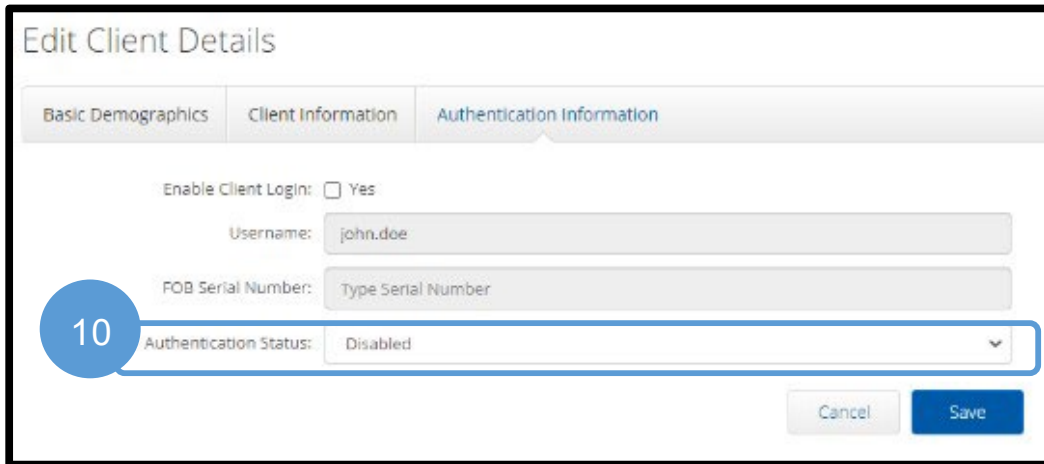
The third tab is Authentication Information.

10. **Authentication Status**

- This defaults to Active if “Enable Client Login” is checked and defaults to Disabled if “Enable Client Login” is not checked.
- If a consumer is no longer receiving services, this field will be changed to Disabled by the PTC Support Team. Local office staff should NOT make this change; instead email the PTC Support Team that the consumer is no longer receiving services.

Profile Management Guide

- c. If the consumer is locked out, this will show Locked. If the consumer must be unlocked, local office staff can change this back to Active. The consumer's profile can remain locked, and the provider will still be able to enter time. To unlock a profile, see [Unlocking Profiles](#).



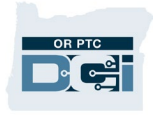
Consumer Employer Representative (Guardian) Profile Overview

Once a consumer has selected a Consumer Employer Representative (CER) and completed all the proper documentation, the CER will need to be added to the OR PTC DCI System. The CER will be added to the system by the PTC Support Team.

Note: Check the system before requesting an account to make sure that one does not already exist.

Request the PTC Support Team Create a New CER Profile

1. Local office staff will submit a New User Form to PTC.Support@odhsoha.oregon.gov. These request forms can be found on the [PTC website](#) by clicking on AAA/APD Staff at the top left. From there, click New User Forms and then [Consumer Employer Representative Profile Maintenance Form](#).
2. Narrate the request was sent in Oregon Access.
3. The PTC Support Team creates a profile for the CER and links the CER to the consumer indicated on the form.
4. The PTC Support Team will send the CER their username, temporary password, and instructions to complete account setup.
5. The PTC Support Team emails the requestor notifying them the account has been created.



Profile Management Guide

See business process [4.1 Add or Remove Consumer Employer Representative](#) for more information.

Consumer Employer Representatives get Guardian Profiles in OR PTC DCI

A Guardian Profile can:

- View their assigned consumer(s).
- View authorizations for their consumer(s).
- View entries for their consumer(s).
- Sign off on entries on behalf of the consumer(s).
- Access the messaging module.

Update Consumer Employer Representative Information

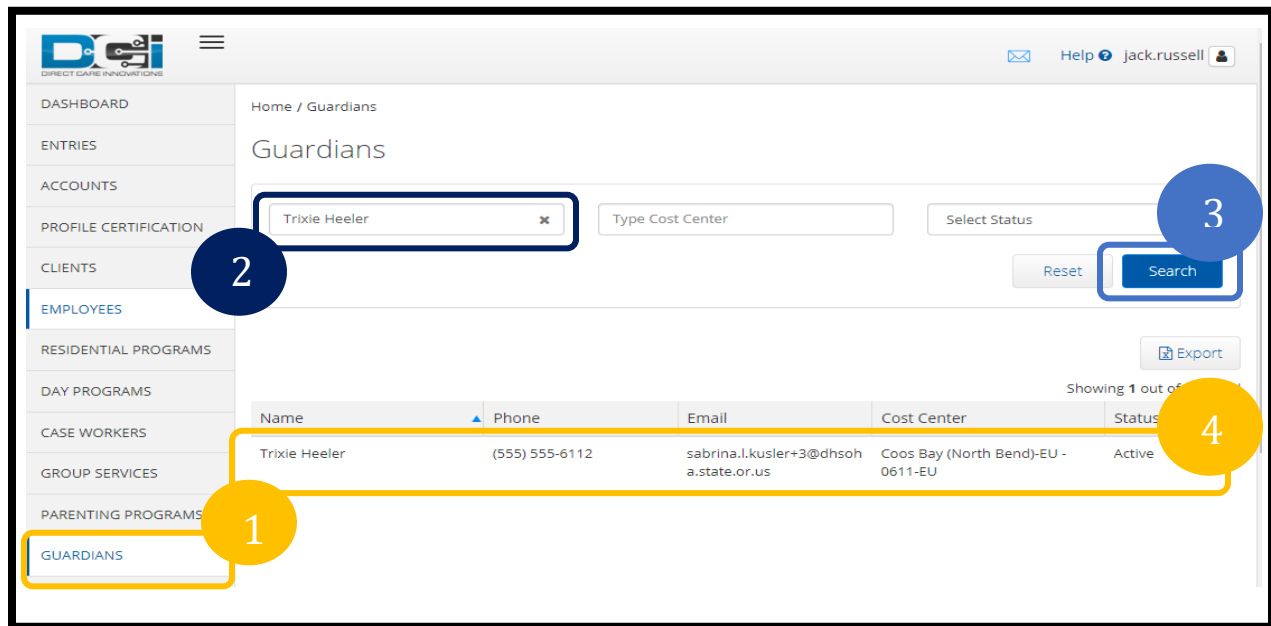
1. If the local office was notified of the update by the CER, go to step 3.
2. If the local office was notified of the update via the Change Email/Phone report, case manager contacts CER to verify the updated information.
3. Staff member verifies and updates information in Oregon Access, if needed.
4. Staff member verifies and updates information in OR PTC DCI, if needed.
5. Staff member has information in ONE updated per local office procedures.
6. Staff member narrates what tasks were completed in Oregon Access.

See business process [4.2 Update Consumer Employer Representative Information](#) for more details.

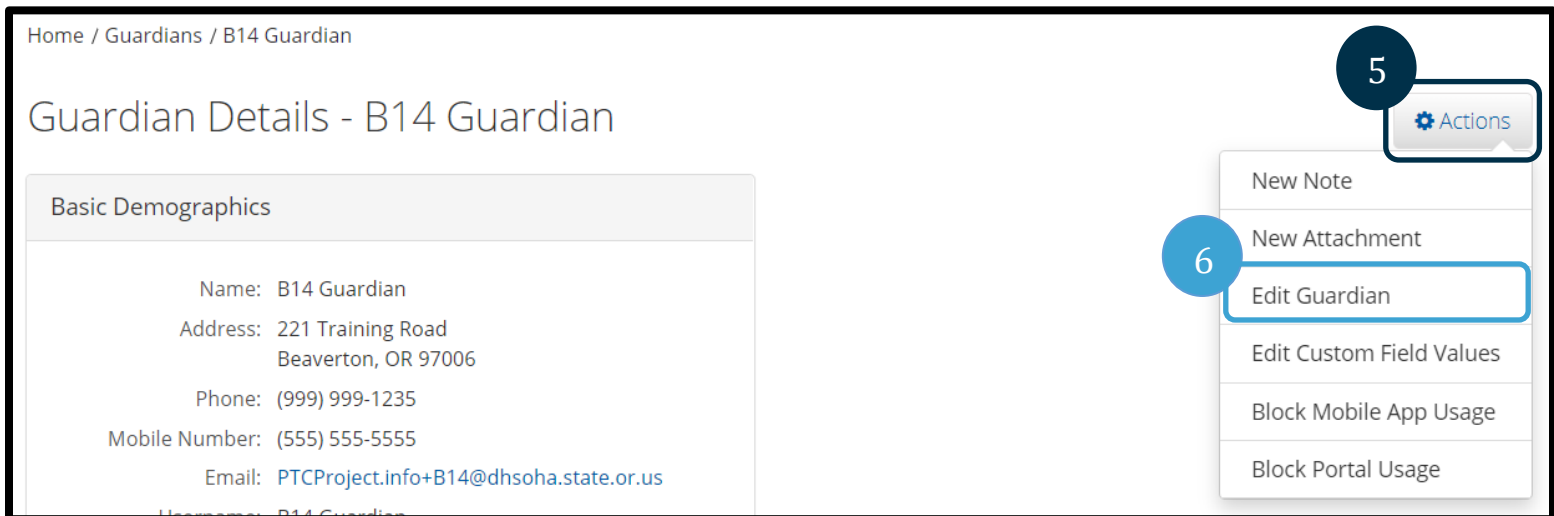
Profile Management Guide

View/Edit Guardian Details

1. Click Guardians from the sidebar.
2. Enter Guardian information in the search fields.
3. Click Search.
4. Click the correct Guardian in the results. This will display the Guardian Details page where edits can be made.



5. Click Actions.
6. Select Edit Guardian from the drop-down.





Profile Management Guide

Guardian Basic Demographics Tab

The Basic Demographics tab is where you will find information you may need to update.

1. **First Name:** Guardian's First Name
2. **Last Name:** Guardian's Last Name
3. **Phone, Alternate Phone, Mobile Number:** Guardian's Primary, Alternative, and Mobile Phone Number
4. **Email:** Guardian's email address
5. **Profile Reference:** The unique ID for the consumer employer representative is the consumer's Prime Number with the number 1 at the end.
6. **Status:** Status should be active if the Guardian is acting as a CER. If the Guardian has no consumers, this should be inactive. The status field should only be updated by the PTC Support Team, please send an email to the PTC Support Team requesting the CER be inactivated or reactivated.

Profile Management Guide

Edit Guardian Details

Basic Demographics

Authentication Information

1
First Name:

2
Last Name:

Address:

Address Line 2

Beaverton
OR
97006

USA

Time Zone: PT (UTC-8)

3
Phone:

Alternate Phone:

Mobile Number:

4
Email:

Cost Center: The Dalles APD-EU - 3311-EU

5
Profile Reference:

6
Status: Active

Cancel

Save

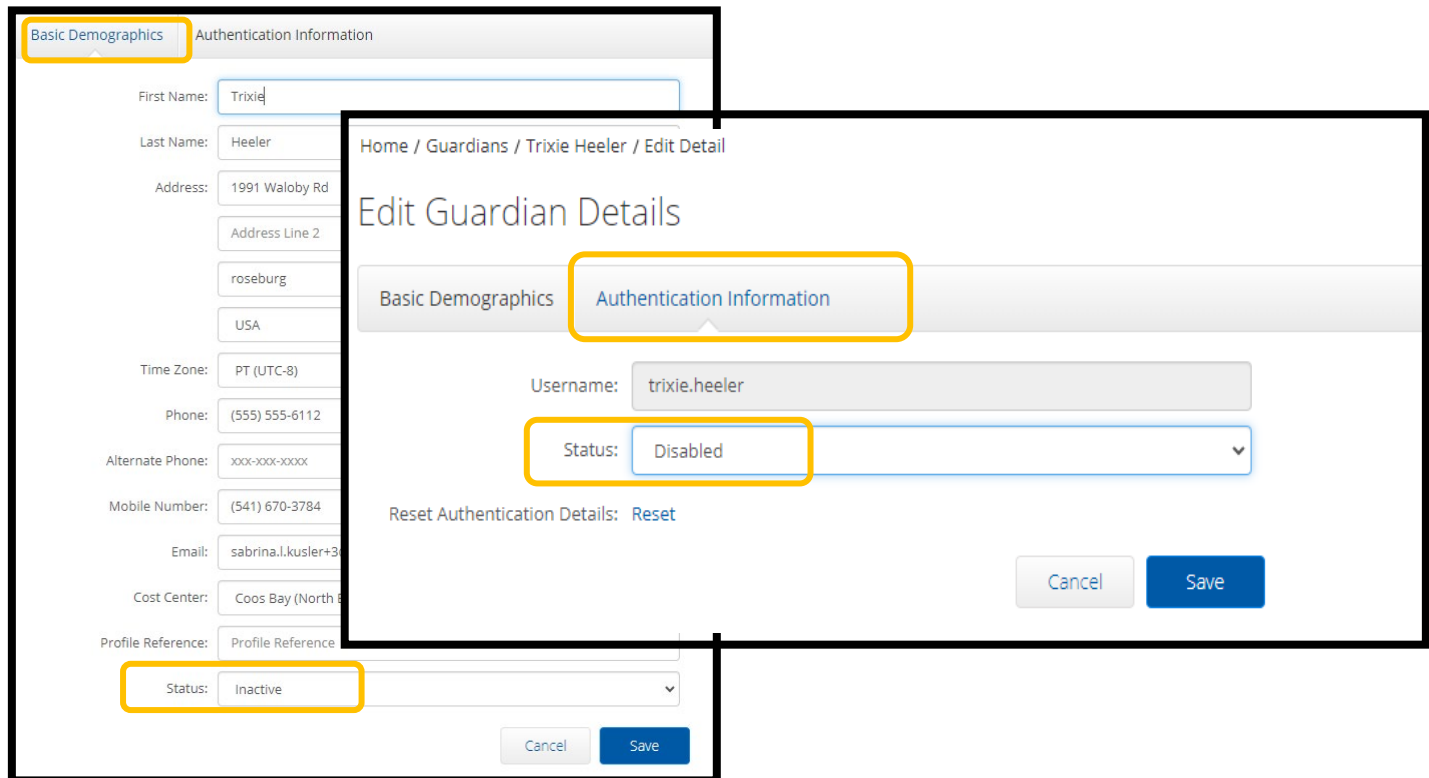
Guardian Authentication Information

The Authentication Information tab shows if the CER's profile is active or inactive. This tab should only be updated by the PTC Support Team. If local office staff see that a Guardian's status is inactive, please send an email to the PTC Support Team requesting they reactivate the Guardian.

1. **Status:** Status should be active if the Guardian is acting as a CER. If the Guardian has no consumers, this should be showing Inactive on the Basic Demographics Tab.

Profile Management Guide

Note: If the user shares the same first and last name as an existing user, the system will add a number behind the last name as part of their username. Ex: john.smith1



The image shows two overlapping screenshots of a web application interface for profile management.

The background screenshot shows a profile form with the following fields:

- First Name: Trixie
- Last Name: Heeler
- Address: 1991 Waloby Rd
- Address Line 2: roseburg
- Country: USA
- Time Zone: PT (UTC-8)
- Phone: (555) 555-6112
- Alternate Phone: xxx-xxx-xxxx
- Mobile Number: (541) 670-3784
- Email: sabrina.l.kusler+3
- Cost Center: Coos Bay (North)
- Profile Reference: Profile Reference
- Status: Inactive

The foreground screenshot is titled "Edit Guardian Details" and shows the "Authentication Information" tab selected. It displays:

- Username: trixie.heeler
- Status: Disabled
- Buttons: Cancel, Save

Linking Client and Guardian Profiles

Linking and unlinking a guardian to or from a consumer should only be completed by the PTC Support Team. Please send an email to the PTC Support Team requesting the link, relink, or unlink of a guardian to or from a consumer.

Provider (Employee) Profile Overview

How to Create a Provider Profile

Provider profiles will be created by the PTC Support Team. The PTC Support Team will receive a daily report of new consumer and provider combinations. From these reports, they will be able to create all necessary profiles.

The authorization process is initiated by entering the 546 authorization information in Mainframe to create the voucher. Authorization information will be sent in real-time from



Profile Management Guide

Mainframe to OR PTC DCI once the voucher is created in Mainframe. If the authorization fails to go to OR PTC DCI, it goes to a queue so the PTC Support Team can fix the failures. The queue will indicate if the consumer and/or provider associated with the authorization are not in OR PTC DCI, which will prompt the PTC Support Team to create the necessary profiles. Once all profiles are created, the PTC Support Team will resend the authorization to OR PTC DCI.

If more than two full business days have passed since the voucher specialist created the voucher in Mainframe and the provider has not been added to OR PTC DCI, the local office can request the profile and associated account information be setup by the PTC Support Team by submitting the [Consumer/Provider Profile Maintenance Form](#), to PTC.Support@odhsoha.oregon.gov. The request form can be found on the PTC website at ptc.oregon.gov by clicking AAA/APD Staff from the menu on the left. From there, click New User Forms and open the Consumer Provider Profile Maintenance Form.

See business process [2.1 Add a New Provider](#) for more information.

Note: Prior to sending a request to have a Provider added to the system, ensure they do not already have a profile in OR PTC DCI.

Update Provider Information

There are times a consumer's information will need to be updated in OR PTC DCI. Below are the steps to take to make the update.

1. If the local office was notified of the update by the provider, go to step 3.
2. If the local office was notified of the update via the Change Email/Phone report, state user contacts the provider to verify the updated information.
3. Case manager verifies and updates information in Oregon Access, if needed.
4. Case manager verifies and updates information in OR PTC DCI, if needed
5. State user adds a note in OR PTC DCI specifying what tasks were completed.

See business process [2.2 Update Provider Information](#) for more information.

View/Edit Provider Details

1. Click Employees.
2. Enter the provider's information in search fields.
3. Click Search.
4. Click the correct provider from the search results to display the provider details page.

Profile Management Guide

The screenshot shows the 'Employees' management interface. Callout 1 points to the 'EMPLOYEES' menu item in the left sidebar. Callout 2 points to the 'Actions' gear icon in the top right. Callout 3 points to the search filters, including 'Select Employee Type', 'Select State', and 'Select Status'. Callout 4 points to the table of employee records.

Name	Employee #	Phone #	Email	Time Zone	Type	Cost Center	Status
SM Provider One	UNIID0000	(555) 555-6006	Provider1Email@gmail.com	PT (UTC-8)	Hourly Non Exempt	Hermiston APD-EU - 3013-EU	Active
SM Provider Three	UNIID0002	(555) 555-6012	Provider2Email@gmail.com	PT (UTC-8)	Hourly Non Exempt	Provider Default Cost Center-EU - 0001-EU	Active

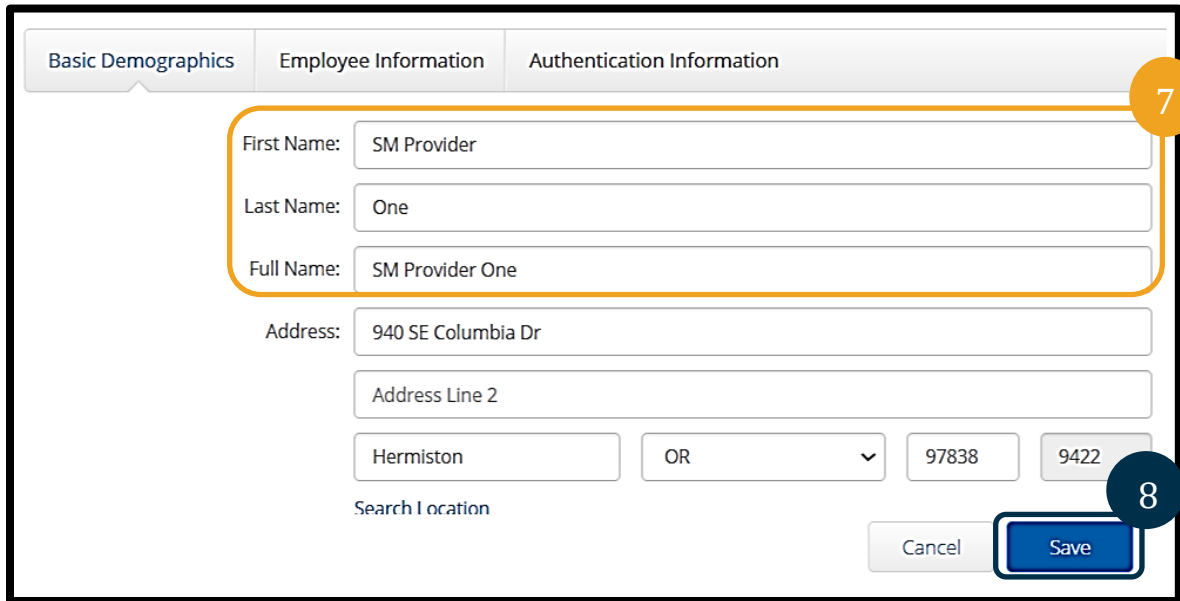
5. Click Actions.
6. Click Edit Employee from drop-down.

The screenshot shows the 'Employee Details - SM Provider One' page. Callout 5 points to the 'Actions' gear icon in the top right. Callout 6 points to the 'Edit Employee' option in the dropdown menu.

Basic Demographics	Other Details
<p>Address: 940 SE Columbia Dr Hermiston, OR 97838-9422</p> <p>GNIS 41-059-1167708</p> <p>Phone: (555) 555-6006</p>	<p>Average Caregiver 0 Rating:</p> <p>Type: Hourly Non Exempt</p> <p>Domestic Worker: No</p>

7. Update new information (for descriptions of information on each tab, see the next sections).
8. Click Save.
9. Click Yes on the Confirmation Alert.

Profile Management Guide



Basic Demographics | Employee Information | Authentication Information

First Name: SM Provider

Last Name: One

Full Name: SM Provider One

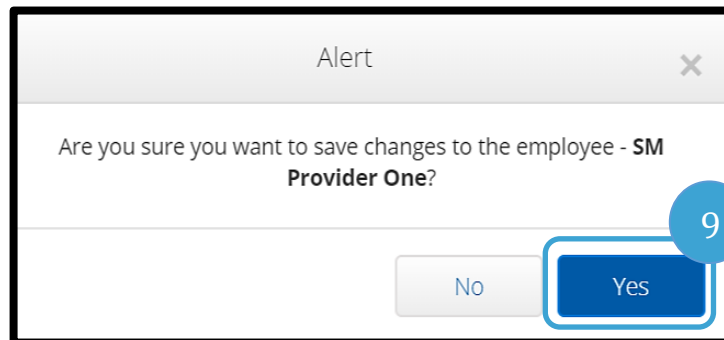
Address: 940 SE Columbia Dr

Address Line 2

Hermiston OR 97838 9422

Search Location

Cancel Save



Alert

Are you sure you want to save changes to the employee - SM Provider One?

No Yes

Provider Basic Demographics Tab

The Basic Demographics tab has a lot of provider information you may need to update.

1. **First Name:** Provider's First Name
2. **Last Name:** Provider's Last Name
3. **Full Name:** Provider's full name.
 - a. **Note:** If any part of the consumer's name changed the **Full Name field** must also be updated, otherwise the change will not save
4. **Address:** Provider's Physical Address
5. **Phone, Alternate Phone, and Mobile Number:** Provider's Primary, Alternate, and Mobile Phone Numbers
6. **Email:** Provider's Email Address

Profile Management Guide

Edit Employee Details

Basic Demographics | Employee Information | Authentication Information

1 First Name: B14

2 Last Name: Providers

3 Full Name: B14 Providers

4 Address: 221 Training Road
Address Line 2
Beaverton OR 97006 0000

Search Location

GNIS: 41-067-0004551809112288688
USA
Time Zone: PT (UTC-8)

5 Phone: (999) 999-6353
Alternate Phone: xxx-xxx-xxxx
Mobile Number: (555) 555-5555

6 Email: PTCProject.info@dhsosha.state.or.us

Date of Birth: December 31 1953

Profile Reference: Leave Blank

Training System Reference: Leave Blank

Type: Hourly Non Exempt

SSN:
Verify SSN:

Allow SSN Retrieval: Yes No

Photo: Add Photo

Status: Active

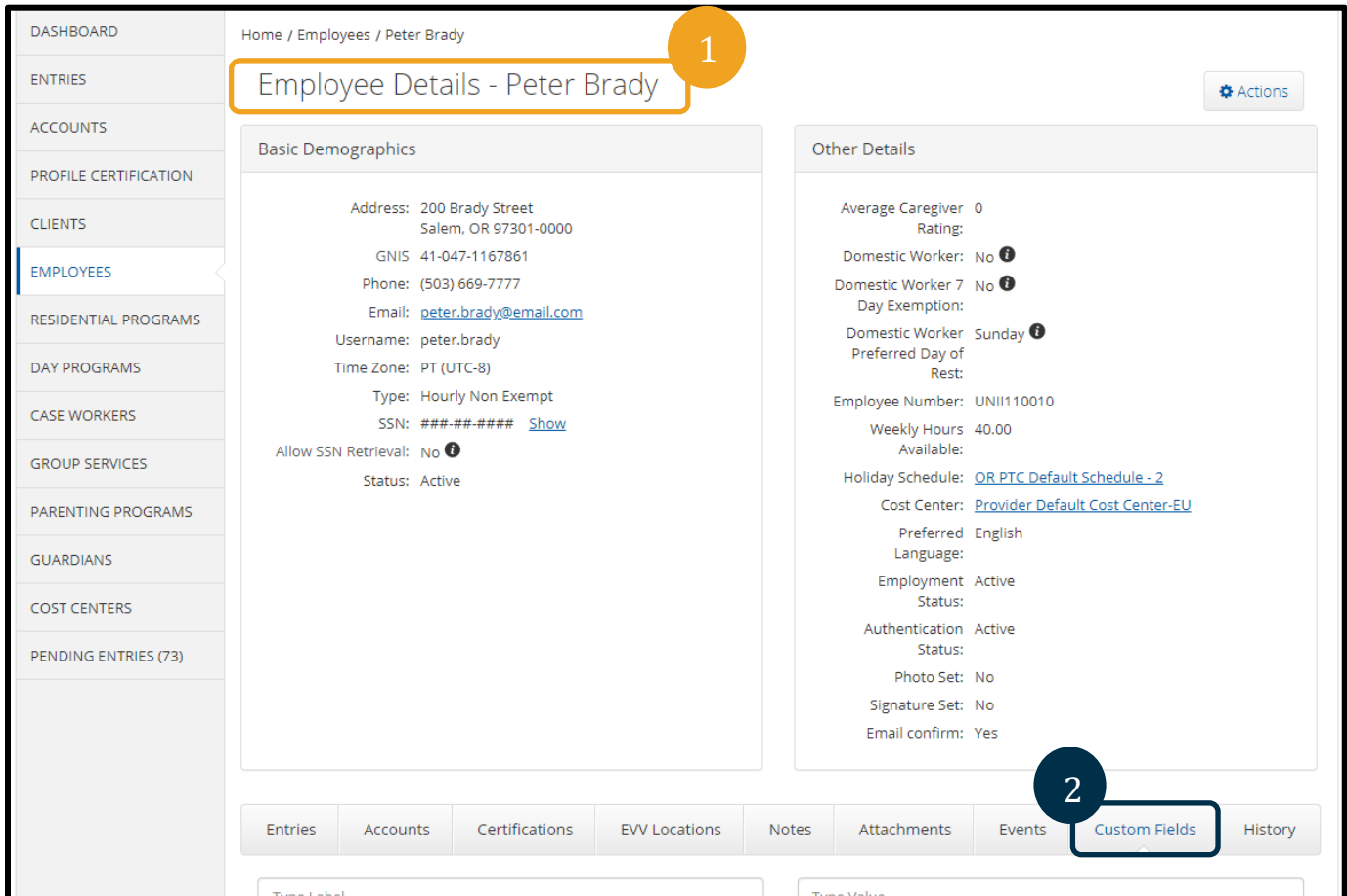
Cancel Save

Profile Management Guide

Finding the Provider Number on the Employee Details Page

You can find the provider's HCW or PCA number on the provider's profile.

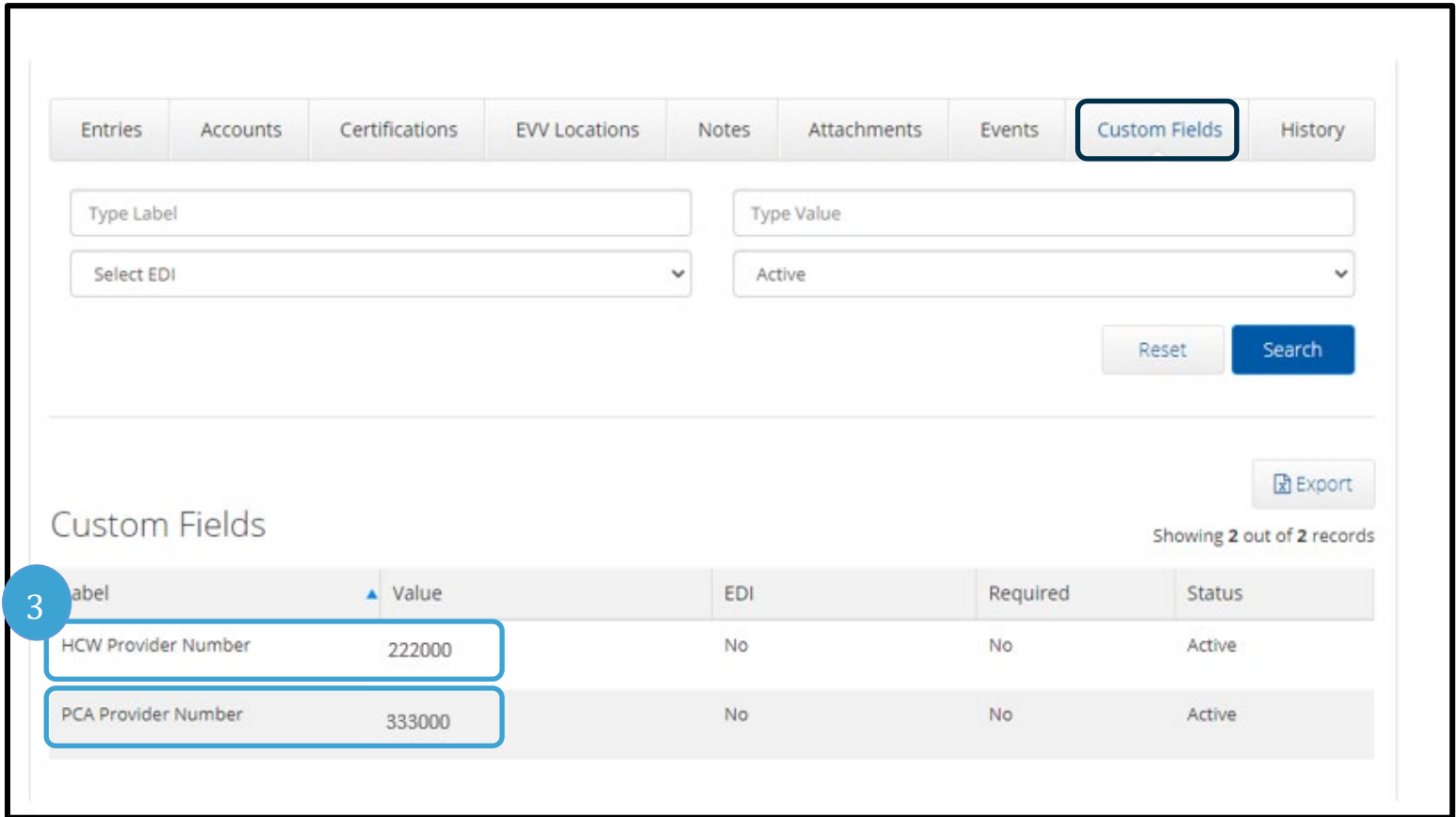
1. Navigate to the provider's Employee Details page.
2. Click on Custom Fields towards the bottom of the screen.



The screenshot shows the 'Employee Details - Peter Brady' page. The left sidebar contains a navigation menu with 'EMPLOYEES' selected. The main content area is split into two columns: 'Basic Demographics' and 'Other Details'. The 'Basic Demographics' section includes fields for Address, GNIS, Phone, Email, Username, Time Zone, Type, SSN, and Status. The 'Other Details' section includes fields for Average Caregiver, Rating, Domestic Worker, Day Exemption, Preferred Day of Rest, Employee Number, Weekly Hours, Available, Holiday Schedule, Cost Center, Preferred Language, Employment Status, Authentication Status, Photo Set, Signature Set, and Email confirm. At the bottom, there is a tabbed interface with 'Custom Fields' selected. A red circle with the number '1' highlights the page title, and another red circle with the number '2' highlights the 'Custom Fields' tab.

Profile Management Guide

3. The provider's HCW and/or PCA number displays.



Custom Fields

Showing 2 out of 2 records

Label	Value	EDI	Required	Status
HCW Provider Number	222000	No	No	Active
PCA Provider Number	333000	No	No	Active

Change Provider Status

There are many situations that can result in a provider's status changing. Statuses used in OR PTC DCI are Active, Inactive, and Terminated. Examples of situations where a status change is needed are:

- A provider is terminated because their provider number expired. This results in a change from Active to terminated.
- A provider decides they no longer want to be a provider for anyone. This results in a change from active to inactive.
- A provider returns to work after an extended time off. This results in a change from inactive to active.
- A provider is reinstated after previously being terminated. This results in a change from terminated to Active.

When a provider status changes:

1. Email the PTC Support Team requesting the status change. Include what the status needs to be changed to. If the status change involves an unlink or relink, include the additional

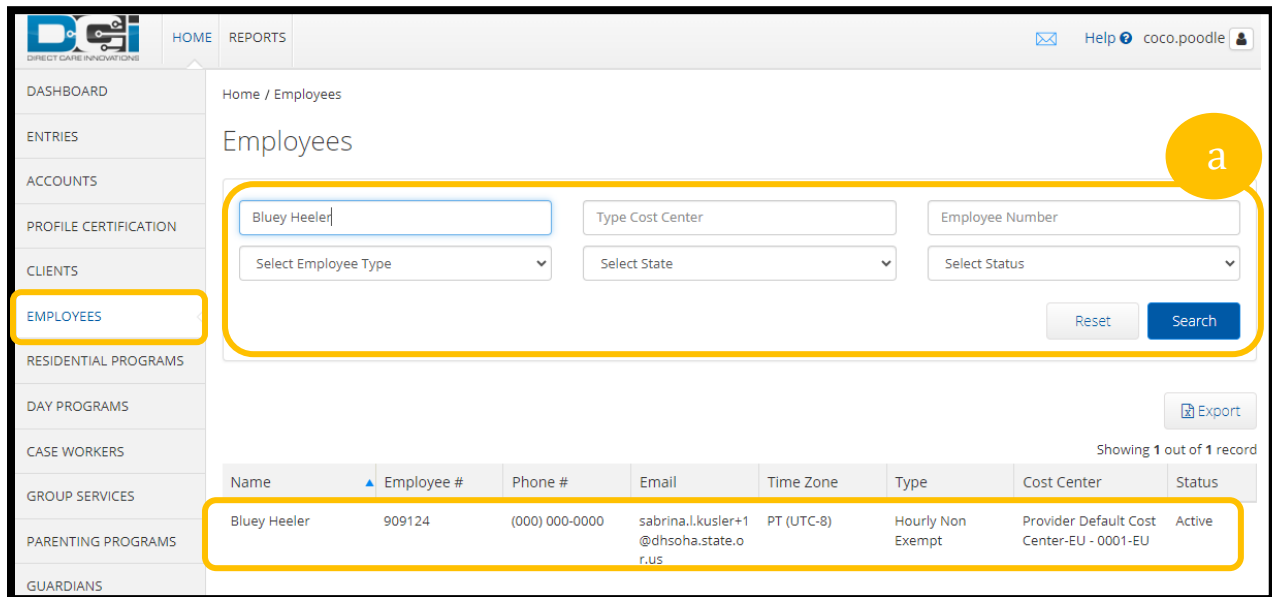
Profile Management Guide

information for those processes as well (see [Linking, Unlinking, and Relinking Providers and Consumers](#) for more information).

2. The PTC Support Team will make the necessary changes to the provider's profile. Local office staff do not change statuses in OR PTC DCI.
3. The PTC Support Team will respond to the requestor that the status change was made.
4. The staff member who requested the change should narrate the steps taken in Oregon Access.

For the specific situation where a provider number was terminated and is now being reinstated, there are a few additional steps:

1. Staff member changes the provider's status in Oregon Access to Approved to Work.
2. Staff member checks in OR PTC DCI to determine the provider's profile status.
 - a. Navigate to the provider's profile.



- b. There are three separate places where the provider status is shown. All three must show Active for a provider to be active.
 - i. Under Basic Demographics is Status. This can show as either Active or Inactive.
 - ii. Under Other Details is Employment Status. This can show as Active, Suspended, Terminated, Extended Leave, or Inactive. Currently the state is only using Active, Terminated, and Inactive.
 - iii. Under Other Details is Authentication Status. This can show as Active, Locked, or Disabled.

Profile Management Guide

Home / Employees / Bluey Heeler

Employee Details - Bluey Heeler

Basic Demographics	Other Details
<p>Address: 1235 Waloby Ln Salem, OR 97301-0000</p> <p>GNIS: 41-047-1167861</p> <p>Phone: (000) 000-0000</p> <p>Mobile Number: (541) 670-3784</p> <p>Email: sabrina.l.kusler+1@dhsosha.state.or.us</p> <p>Username: bluey.heeler</p> <p>Time Zone: PT (UTC-8)</p> <p>Type: Hourly Non Exempt</p> <p>SSN: ###-##-#### Show</p> <p>Allow SSN Retrieval: No ⓘ</p> <p>Mobile Device Id: 3ED4F2E3-F909-428D-B05B-DA9D7F7E583F</p> <p>Status: Active</p>	<p>Average Caregiver Rating: 0</p> <p>Domestic Worker: No ⓘ</p> <p>Domestic Worker 7 Day: No ⓘ</p> <p>Exemption:</p> <p>Domestic Worker Preferred Day of Rest: Sunday ⓘ</p> <p>Employee Number: 909124</p> <p>Weekly Hours Available: 40.00</p> <p>Holiday Schedule: OR PTC Default Schedule - 2</p> <p>Cost Center: Provider Default Cost Center-EU</p> <p>Preferred Language: English</p> <p>Employment Status: Active</p> <p>Authentication Status: Active</p> <p>Photo Set: No</p> <p>Signature Set: No</p> <p>Email confirm: Yes</p> <p>Mobile Number Verified: Yes</p>

<p>Allow SSN Retrieval: No ⓘ</p> <p>Mobile Device Id: 3ED4F2E3-F909-428D-B05B-DA9D7F7E583F</p> <p>Status: Inactive</p>	<p>Holiday Schedule: OR PTC Default Schedule - 2</p> <p>Cost Center: Provider Default Cost Center-EU</p> <p>Preferred Language: English</p> <p>Termination Date: Jan 06, 2024</p> <p>Employment Status: Terminated</p> <p>Authentication: Disabled</p>
--	--

Based on the work done in step two, select the option below (three, four, or five) that fits your scenario.

3. If the provider's profile is terminated or inactive in either Status or Employment Status, a status change is needed.
 - a. An unlink or relink may also be needed, see [Linking, Unlinking, and Relinking Providers and Consumers](#) for more information.
 - b. After determining if an unlink or relink is needed, email the PTC Support Team that the provider has started working again and a status change is needed. Include the date of reinstatement and any information needed for an unlink or relink, if applicable.
4. If the provider's profile is active in all three places, the status change is not needed.
 - a. An unlink or relink may still be needed, refer to [Linking, Unlinking, and Relinking Providers and Consumers](#) for more information.
 - b. After determining if an unlink or relink is needed, email the PTC Support Team according to the process for unlinking or relinking, if applicable.

Profile Management Guide

5. If Status and Employment Status say Active, but Authentication Status shows Locked, you can unlock the profile for the provider. A status change is not needed.
 - a. An unlink or relink may still be necessary, see [Linking, Unlinking, and Relinking Providers and Consumers](#) for more information.
 - b. After determining if an unlink or relink is necessary, email the PTC Support Team according to the process for unlinking or relinking, if applicable.

Linking, Unlinking, and Relinking Providers and Consumers

Providers and consumers are linked by the PTC Support Team. The PTC Support Team will receive a daily report of new consumer and provider combinations (this includes both providers and consumers that have profiles and those that do not). These reports are generated from all vouchers created for pairings that were not previously connected. This means to start this process the local office must create vouchers for the pairing. For efficiency of this process, prior to creating the vouchers and ONGO in Mainframe. A local office staff member must first check in the OR PTC DCI system to see if this pairing has ever been linked. For further information and guidance on Linking, Unlinking and Relinking see the [Unlinking and Relinking Guide](#).

State User Profile Overview

How to Create and Update a Staff Profile

Staff profiles are created and maintained by the PTC Support Team.

To request new staff access, the [Staff Profile Maintenance Form](#) must be completed and submitted to PTC.Support@odhsoha.oregon.gov. The new user will receive an email from ORPTCSupport@dcisoftware.com to complete account setup once their account has been created.

If the request is to modify or close an account, a manager should complete the Staff Profile Maintenance request form and submit it to PTC.Support@odhsoha.oregon.gov. Once the request has been processed, the PTC Support Team will email the requestor to let them know the actions have been taken.

The Staff Profile Maintenance Form can be found on ptc.oregon.gov under AAA/APD Staff by clicking New User Forms.

Profile Management Guide

Note: It is the Manager's responsibility to:

- Request access to OR PTC DCI from the PTC Support Team for all new staff members who need it.
- Notify the PTC Support Team as soon as a staff member no longer needs access, so the PTC Support Team can deactivate their account. This may be due to a change in duties or a change in position. To do this, email the PTC Support Team with the Staff name, P/ OR number, and last day worked.

Unlocking Profiles

A user's profile will be locked if they enter their password incorrectly five times within a 24-hour period or if they have not logged into OR PTC DCI in over 90 days. If an account is locked, the user will receive an email notification stating their account was locked.

NOTE: Staff who need their account unlocked **MUST** contact the PTC Support Team at PTC.Support@odhsoha.oregon.gov. They must email from their own email address and include their name and OR/P Number. The PTC Support Team does not accept third party requests to unlock staff profiles.

Providers, consumers, and CERs can have their account unlocked in the following ways:

- If a profile of a provider, consumer or CER is locked, they can contact the DCI Help Desk, the local office or the PTC Support Team to unlock their profile.
- The user can contact the local office and a staff member with the Supervisor Role over the individual's Cost Center can unlock the account.
- If their account status is disabled/terminated, email the PTC Support Team at PTC.Support@odhsoha.oregon.gov asking to unlock the profile with the following information. For providers, include the provider number and provider's name. For consumers, include the prime number and consumer name. For CER's include the CER's name and the prime number of the consumer they are connected to.
 - If the PTC Support Team determines it is appropriate, they will unlock the account and the account holder will receive a notification.

Profile Management Guide

- If the PTC Support Team determines it is not appropriate, they will respond via email to the requestor letting them know the actions could not be taken.

Prior to unlocking a profile, you must verify the user's identity, as other users may have the same name.

To unlock a profile:

1. Navigate to the Employee (provider), Client (consumer), or Guardian (consumer employer representative) profile page.
2. Click Unlock.

If the individual does not know their PIN and/or Password these can also be reset in the Authentication Information, see [Reset Authentication Details](#) section.

The screenshot displays the 'Employee Details - Test Provider' page. The left sidebar contains a navigation menu with 'EMPLOYEES' highlighted. The main content area is split into two columns: 'Basic Demographics' and 'Other Details'. In the 'Other Details' column, the 'Authentication Status' is 'Locked', and an 'Unlock' button is present, which is the focus of step 2 in the guide.



Profile Management Guide

Authentication Details & Status

Profile Authentication Status

A user's authentication status determines if a user can access OR PTC DCI. For each profile type, the following Authentication Statuses exist:

- **Active:** The user can log in and access OR PTC DCI. New profiles default to a status of active.
- **Disabled:** The user cannot log into OR PTC DCI. This status can only be changed by the PTC Support Team.
- **Locked:** The user cannot log into OR PTC DCI. This status is set by the system when.
 - a user is locked out due to entering their password incorrectly five times in a row within a 24-hour period.
 - A user has not logged into OR PTC DCI in the last 90 days.
 - A state user with the appropriate role can unlock a provider's, consumer's, or CER's profile.

The PTC Support Team can update the Authentication Status. If the status is updated, it needs to be updated in Oregon Access for consumers or a note added in OR PTC DCI for providers and consumer employer representatives.

Note: A consumer's profile being locked does **not** affect the provider's ability to claim time.

Resources

Resources can be found on the [PTC.Oregon.gov](https://www.ptc.oregon.gov)

The resources available consist of:

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