OREGON
PROVIDER
Time Capture

Profile Management Guide

OR PTC DCI

VERSION 2.1

Contents

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 and provider profiles will be created by the PTC Support Team.

The authorization process is initiated by the voucher specialist using the 546 to enter the authorization in DHR to create the voucher. Authorization information will be sent in real time from DHR to OR PTC DCI once the voucher is created in DHR. 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, funding accounts, and service accounts related to that specific authorization. Once all those pieces 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 specialist created the voucher in DHR 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 1.3.1 Add a New Consumer for more details.

> **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

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. 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 has information in ONE updated per local office procedures.
6. State user narrates what tasks were completed in Oregon Access.

See business process 1.3.2 Update Consumer Information for more details.

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
- Email address
- Address

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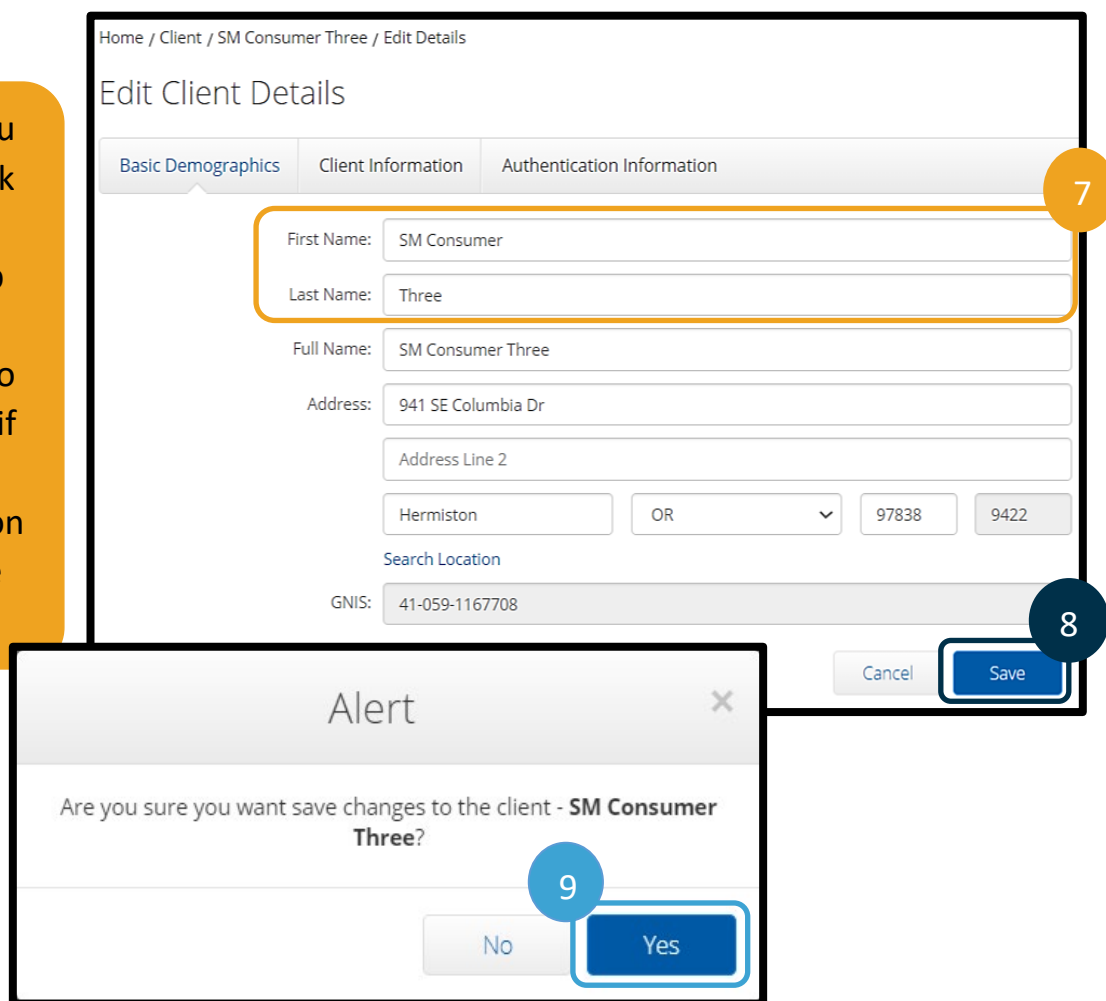
5. Click Actions.
6. Select Edit Client from the drop-down.

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 |

7

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

8

Cancel | Save

Alert ✕

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

9

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. **Address:** Consumer's home address
4. 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.
5. **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.

6. **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.

Client Information Tab

The second tab is Client Information. You will likely not update anything on this tab.

7. **Client Id:** The consumer's prime number.

Consumer Authentication Information Tab

The third tab is Authentication Information.

8. **Authentication Status**
   a. This defaults to Active if "Enable Client Login" is checked and defaults to disabled if "Enable Client Login" is not checked.
   b. If a consumer is no longer receiving services, this will be 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.

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](#).

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

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.

See business process [1.4.3 Create New 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. 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. Case manager has information in ONE updated per local office procedures.
6. Case manager narrates what tasks were completed in Oregon Access.

See business process 1.4.2 Update Consumer Employer Representative Information for more details.

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.

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

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.
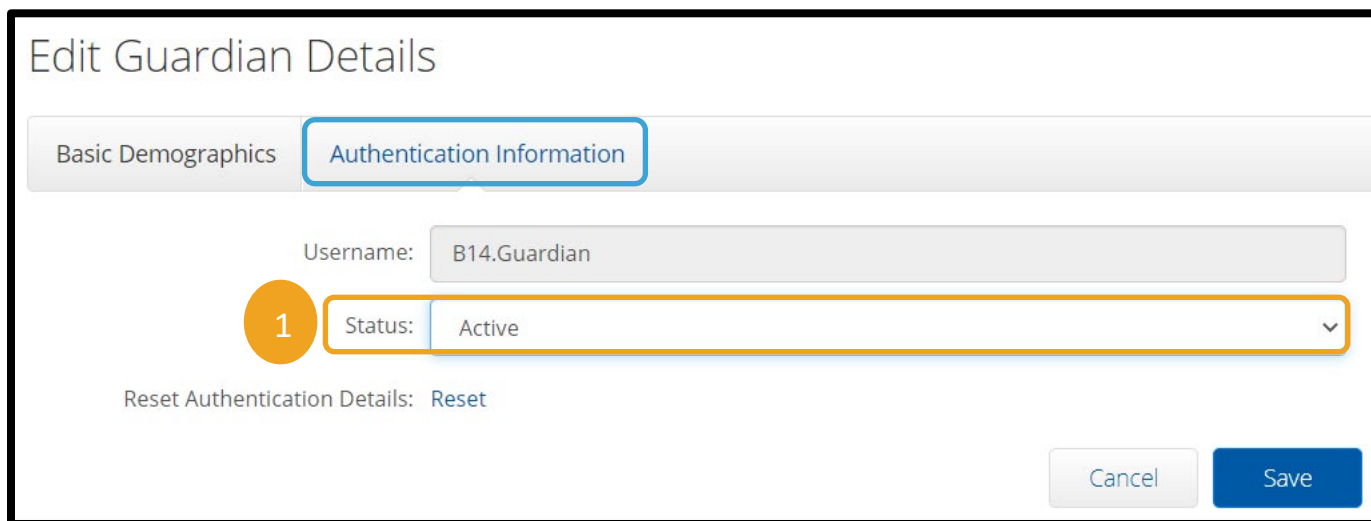6. **Status:** Status should be active if the Guardian is acting as a CER. If the Guardian has no consumers, this should be inactive.

Guardian Authentication Information

The Authentication Information tab shows if the CER's profile is active or inactive.

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

> **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

Edit Guardian Details

Basic Demographics | Authentication Information

Username: B14.Guardian

1 Status: Active

Reset Authentication Details: Reset

Cancel   Save

Linking Client and Guardian Profiles

Consumer employer representatives (Guardians) are given access to consumers (clients) by linking the CER's profile to the consumer's profile. A Guardian can be linked to more than one consumer, but a consumer cannot be linked to more than one Guardian.

Add or Remove Guardian

When a consumer has a Consumer Employer Representative (CER), the CER will be added in the OR PTC DCI System using a Guardian Profile. This will give them the ability to view the authorization as well as sign off on time if they would like to. There will also be times when a consumer removes or changes their CER. In this scenario, the Guardian will need to be unlinked and potentially inactivated in OR PTC DCI if they are not a CER for any other consumers.

See business process 1.4.1 Add/Remove Consumer Employer Representative for more information.

Linking a Guardian Profile to a Client Profile

To link a CER to their consumer:

1. Click on Clients.
2. Enter consumer information in search fields.
3. Click Search.
4. Click on the correct consumer in the search results.

5. Click Actions.
6. Click Edit Client in the drop-down.

7. Click the Client Information tab.
8. Start typing the CER's name in the Guardian field and select the appropriate CER from the drop-down options that appear.
9. Click Save.
10. Click Yes on the Confirmation Alert.

The consumer and the CER profiles are now linked.
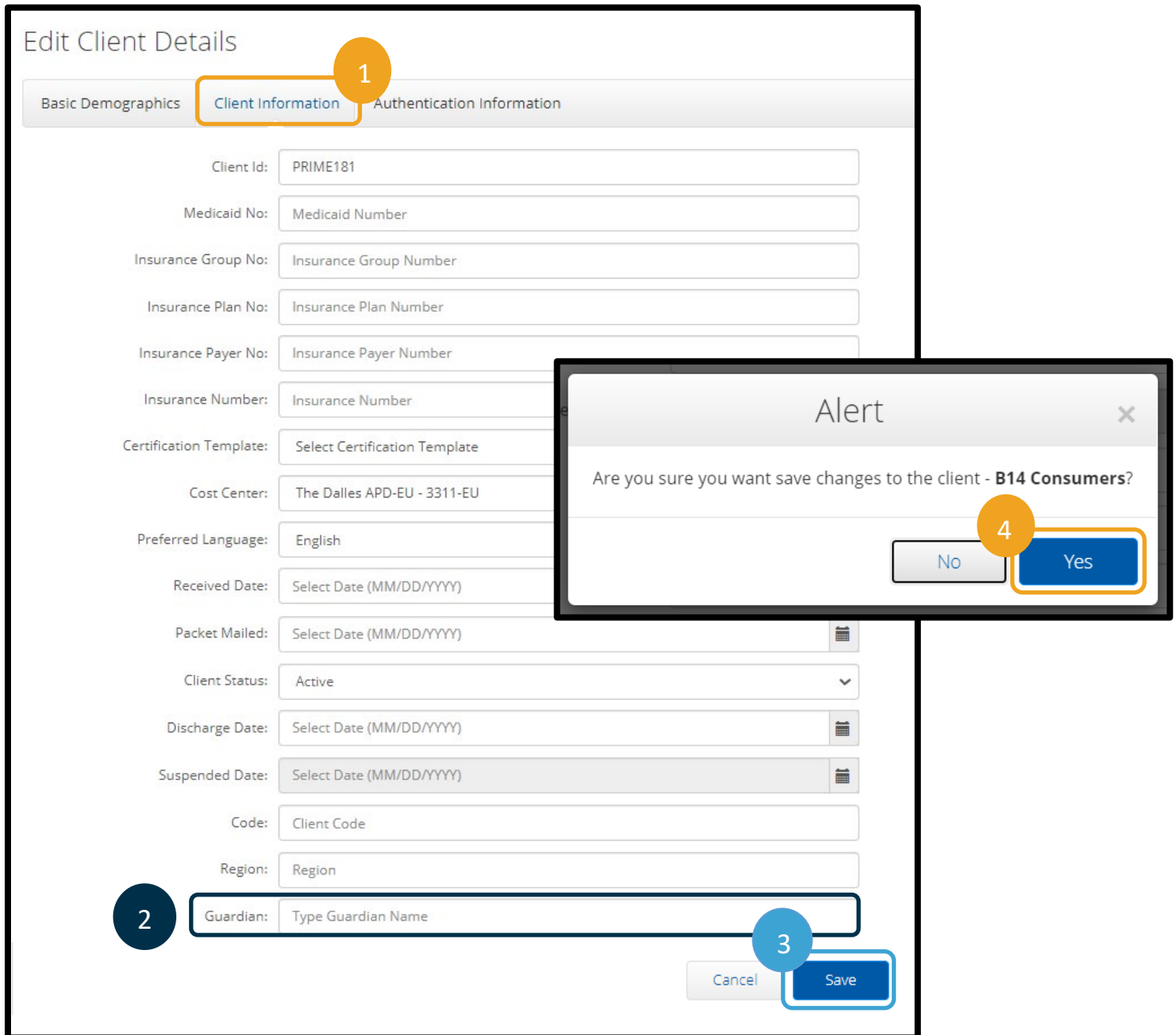
Unlinking a Guardian Profile and a Client Profile

1. Click the Client Information tab.
2. Remove the CER's name from the Guardian field.
3. Click Save.
4. Click Yes on the Confirmation Alert.

The consumer and CER are now unlinked.

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, funding accounts, and service accounts.

The authorization process is initiated by the voucher specialist using the 546 to enter the authorization in DHR to create the voucher. Authorization information will be sent in real-time from DHR to OR PTC DCI once the voucher is created in DHR. 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, funding accounts, and service accounts. Once all pieces 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 DHR 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 a request 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 1.2.1 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
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 1.2.3 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.

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

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.
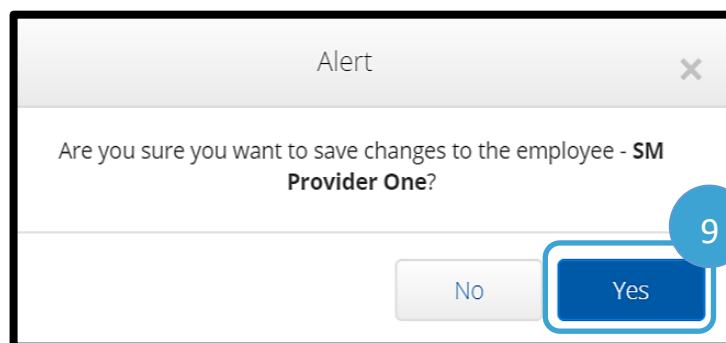
Provider Basic Demographics Tab

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. **Address:** Provider's Physical Address
4. **Phone, Alternate Phone, and Mobile Number:** Provider's Primary, Alternate, and Mobile Phone Numbers
5. **Email:** Provider's Email Address

Edit Employee Details

Basic Demographics	Employee Information	Authentication Information

1 First Name: B14

2 Last Name: Providers

Full Name: B14 Providers

3 Address: 221 Training Road

Address Line 2

Beaverton | OR | 97006 | 0000

Search Location

GNIS: 41-067-0004551809112288688

USA

Time Zone: PT (UTC-8)

4 Phone: (999) 999-6353

Alternate Phone: xxx-xxx-xxxx

Mobile Number: (555) 555-5555

5 Email: PTCProject.info@dhsoha.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

Employee Information Tab

1. **Employee Number:** The provider's Uni ID.
2. **Weekly Hours Available:** The provider's weekly cap. This is listed as 40 hours if they are not on the 50 Hour Cap List. This field is only changed by the PTC Support Team.
3. **Cost Center:** Providers are **always** listed in the Provider Default Cost Center EU – 0001 (do not change this).

Note: The Provider Uni ID can be found on the PRV8 screen in Mainframe.

Edit Employee Details

| Basic Demographics | Employee Information | Authentication Information |

Domestic Worker: ○ Yes ● No ⓘ

Domestic Worker 7 Day Exemption: ○ Yes ● No ⓘ

Domestic Worker Preferred Day of Rest: Sunday

1 Employee Number: 225489561

Weekly Hours Available: 40.00 **2**

Professional Id1: Leave Blank

Professional Id2: Leave Blank

Payroll Id: Leave Blank

Certification Template: Leave Blank

Holiday Schedule: OR PTC Default Schedule - 2

3 Cost Center: Provider Default Cost Center-EU - 0001-EU

Hire Date: Leave Blank

Preferred Language: English
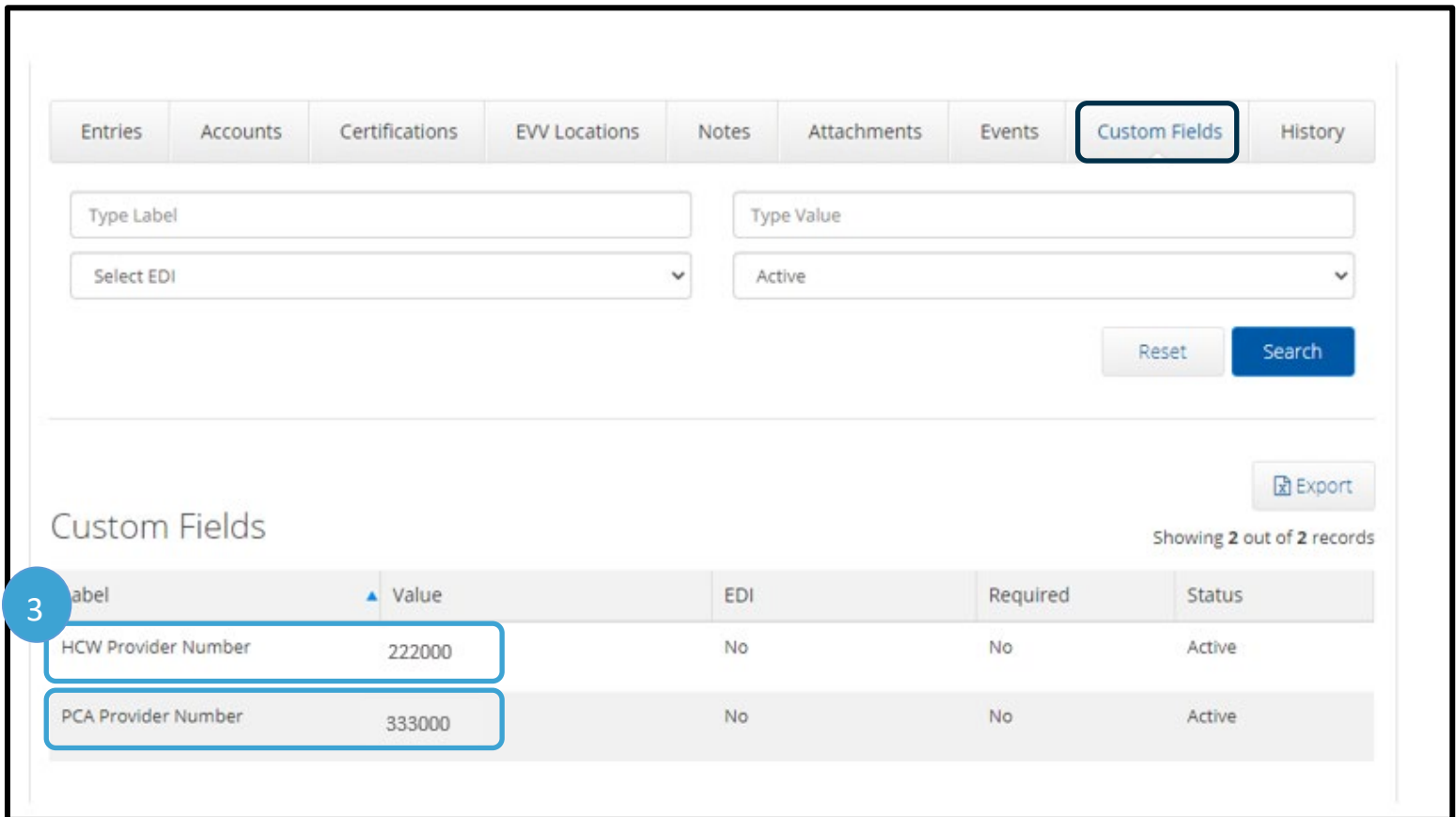
Cancel Save

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.

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

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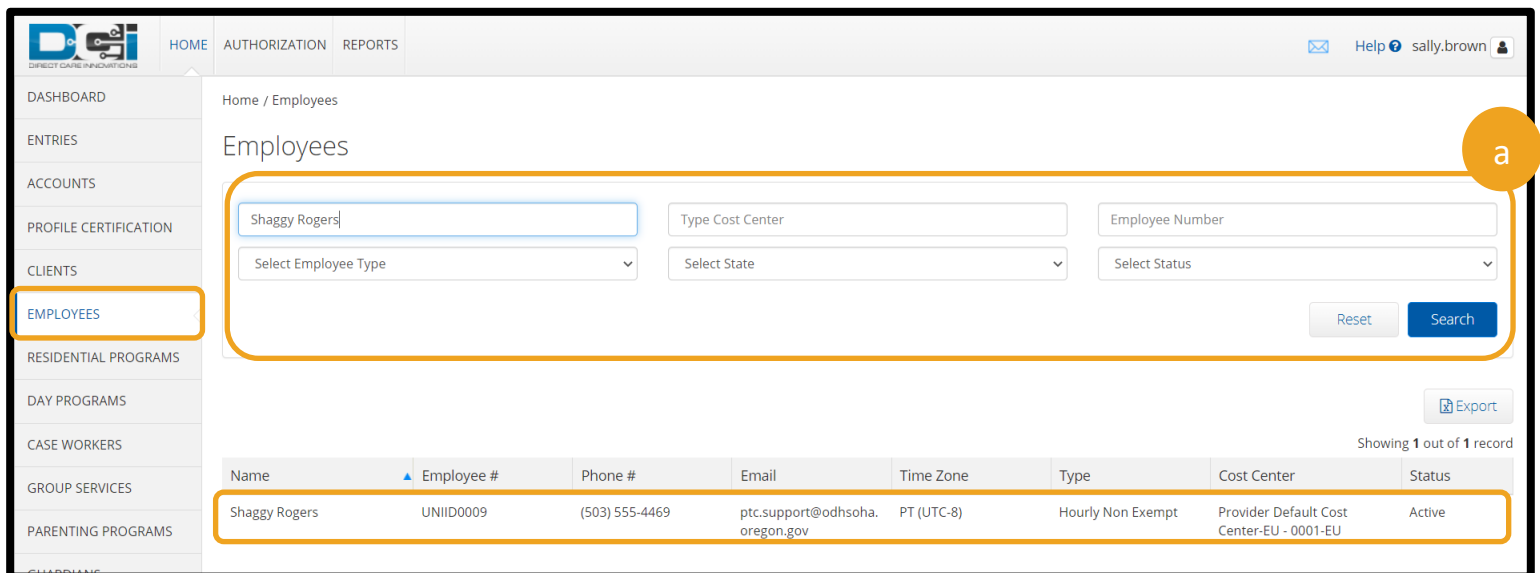
for those processes as well (see Linking, Unlinking, and Relinking Providers and Consumers for more information).

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.

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.
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 <u>Linking, Unlinking, and Relinking Providers and Consumers</u> 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.

This process is shown in the business process <u>1.2.2 Change Provider Status</u>.

Linking, Unlinking, and Relinking Providers and Consumers

Linking 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. From these reports, the PTC Support Team creates funding and service accounts and sends all vouchers to OR PTC DCI, thus creating authorizations.

New pairings should be linked with authorizations in OR PTC DCI within two full business days of the voucher creation in Mainframe. If more than two full business days have passed since the voucher was created in Mainframe, the local office can request this by submitting the <u>Consumer/Provider Profile Maintenance Form</u> to <u>PTC.Support@odhsoha.oregon.gov.</u> The request form can be found on the PTC website at <u>ptc.oregon.gov</u> 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.

Unlinking Providers and Consumers

> **Note**: Prior to sending a request to have a pairing linked, ensure they are not already linked in OR PTC DCI.

When a provider and consumer are no longer working together for any reason, the PTC Support Team **must** be notified. The PTC Support Team needs to unlink the pair and, depending on the situation, potentially inactivate a profile.

Reasons a provider and consumer need to be unlinked:

- Either the consumer or provider passed away.
- The provider's credentials expired.
- The consumer moved to a facility.
- The provider was terminated.
- The consumer has left the country (United States) for more than 30 days, meaning services have been closed.
- The provider is no longer providing care to the consumer for any reason.

The only way the PTC Support Team knows a pairing needs to be unlinked and thus appropriate action is taken in OR PTC DCI, is if they are notified via email by the local office. It is critical the local office relays this information to ensure appropriate action is taken. The PTC Support Team is not automatically notified when providers and consumers need to be unlinked, nor is this information automatically sent to OR PTC DCI from any legacy system.

Process for Unlinking

1. Case manager completes the 546 and 4105.
2. Case manager narrates the provider's last day worked in OA.
3. Case manager provides 546 to voucher specialist.
4. Voucher specialist voids outstanding vouchers and ends the ONGO in Mainframe.
5. Voucher specialist rejects any outstanding authorizations in OR PTC DCI. The authorizations rejected should correlate with the vouchers voided in Mainframe.
   a. To reject an authorization:
      i. From the Authorizations Tab, click on Authorizations.
      ii. Use the search filters to find the authorization you wish to reject.
      iii. Click on the authorization. In the Authorization ID Reference column, you will see the voucher number. You can use this to identify the authorizations you want to edit.

     iv. Click Actions.

     v. Select Reject Authorization.

   b. For more information on rejecting authorizations, see the Authorization Management Guide.

6. Voucher specialist then emails the PTC Support Team to notify them the provider is no longer working for the consumer.

   a. Information to include in the email:

     i. Provider's name

     ii. Provider number

     iii. Consumer's name

     iv. Prime number

     v. Last day the provider worked

     vi. If the provider passed away, including date of death

     vii. If the consumer passed away, including date of death

     viii. If the provider is no longer working as a provider, meaning their profile should be inactivated

     ix. If the consumer is no longer receiving services, meaning their profile should be inactivated

     x. If known, has the provider entered all their time and miles

   b. If any information is missing from the email, the PTC Support Team will reach back out requesting the information.

   c. Upon receiving the email, the PTC Support Team will unlink the pairing and inactivate profiles as needed.

7. Voucher specialist narrates what actions were taken in Oregon Access.

8. Voucher specialist verifies all information is correct in Mainframe and OR PTC DCI, meaning that all vouchers and authorizations are voided/rejected as needed and the ONGO was ended.
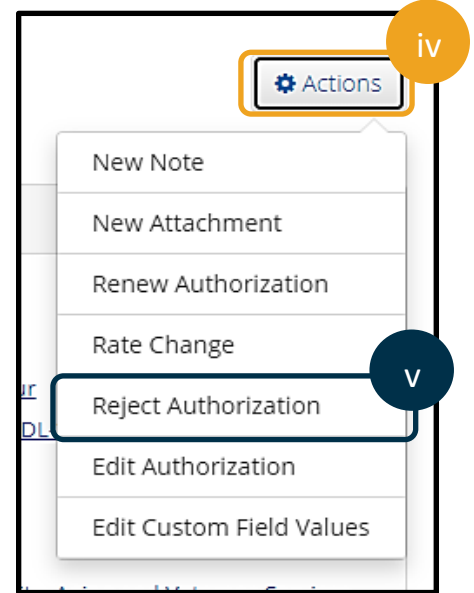
See business process 2.6.2 End Authorization, Expiration, Terminations of Provider for more information.

Process for Unlinking if the Consumer Passed Away

1. Staff member completes 4.3.0 Time Entry for all the entries the consumer's provider(s) have entered. This means pulling a batch containing all the provider's entries and entering these entries into Mainframe with the voucher in 35 status, so it is ready to be paid.

2. Case manager notifies Eligibility of consumer's passing per local office procedure. This should be done immediately, meaning do not wait for provider's entries to be processed or paid.

Refer to the Case Management Death Checklist Closing Procedures for Deceased Consumer resource on APD Staff tools.

3. Case manager completes 546 with prorated hours and requests voiding outstanding vouchers and ending ONGO.
4. Voucher specialist voids outstanding vouchers and ends ONGO in Mainframe.
5. Voucher specialist rejects outstanding authorizations in OR PTC DCI (these will match the vouchers which were voided in Mainframe).
   a. To reject an authorization:
      i. From the Authorizations Tab, click on Authorizations.
      ii. Use the search filters to find the authorization you wish to reject.
      iii. Click on the authorization. In the Authorization ID Reference column, you will see the voucher number. You can use this to identify the authorizations you want to edit.

iv. Click Actions.

v. Select Reject Authorization.

6. Case manager contacts the provider and narrates all the tasks completed in Oregon Access.

7. Case manager closes all auxiliary services and informs vendors as per policy. Refer to the Case Management Death Checklist Closing Procedures for Deceased Consumer resource on APD Staff tools.

8. Case manager closes the Service Plan in Oregon Access after the date of death is added in ONE by eligibility.

9. Case manager narrates and transfers the case to EAU 8606 in Oregon Access, if applicable.

10. Local office staff email the PTC Support Team.

   a. Information to include in the email:

      i. Provider's name

      ii. Provider number

      iii. Consumer's name

      iv. Prime number

      v. Last day the provider worked, if different from the consumer's date of death

      vi. If the consumer passed away, including date of death

      vii. If the provider passed away, including date of death

      viii. If the provider is no longer working as a provider, request their profile be inactivated

      ix. If known, has the provider entered all their time and miles

   b. If any information is missing from the email, the PTC Support Team will reach back out requesting the information.

   c. Upon receiving the email, the PTC Support Team will unlink the pairing and inactivate the consumer's profile.
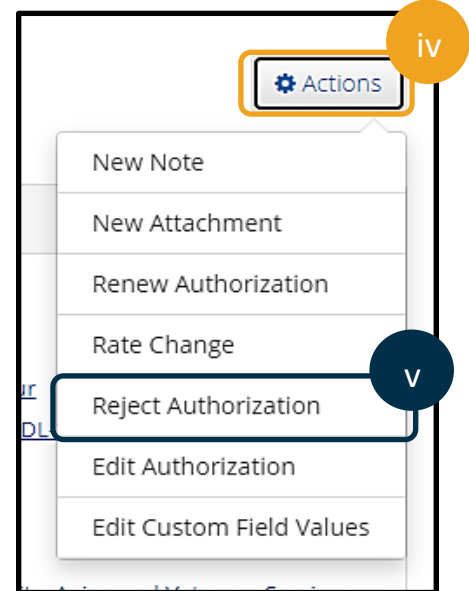
See business process 3.3.0 Consumer Passes Away for more information.

Determining if a Provider and Consumer have been Unlinked

There are two ways the PTC Support Team unlinks a provider and consumer pairing.

1. Add an end date to the service accounts but leave the funding accounts and service accounts active. This method is used when the provider has not yet claimed all their hours or miles and therefore, has 365 days to claim this time. To allow the provider to claim their hours or miles, we do not inactivate. Adding an end date prevents the provider from claiming time after that

date, thus preventing them from claiming time after they stopped working. Once the 365 days pass, the PTC Support Team will complete the unlinking process by inactivating the service accounts and funding accounts.

2. Inactivate the service accounts and funding accounts. This prevents the provider from claiming any time or miles. This process is completed when the PTC Support Team is notified of the need for an unlink and is told the provider has claimed all their hours and miles.

Therefore, to determine if a provider and consumer pairing was unlinked, you must review both active and inactive funding and service accounts on the profile.

To Check if an End Date Exists on the Service Account
1. Navigate to the consumer's profile in OR PTC DCI.

2. Click Accounts.

3. Scroll down to see the accounts with Account Type: Employee Service. Find the two (one for mileage and one for hourly) service accounts for the provider in question under the Employee/Client/Program Name/Vendor Name column. Click on the hourly service account with the correct provider's name. This will open the service account.

4. Look to see if there is an end date in the Account Details section. It would be listed after Max Units Per Punch. If you see End Date listed, then there is an end date on the service account. If you do not see End Date listed, there is not an end date on the service account.

> **Note**: If you do not see an end date on the hourly service account, it is best practice to also verify there is not an end date on the mileage service account. Repeat the above steps but select the mileage service account instead of hourly.
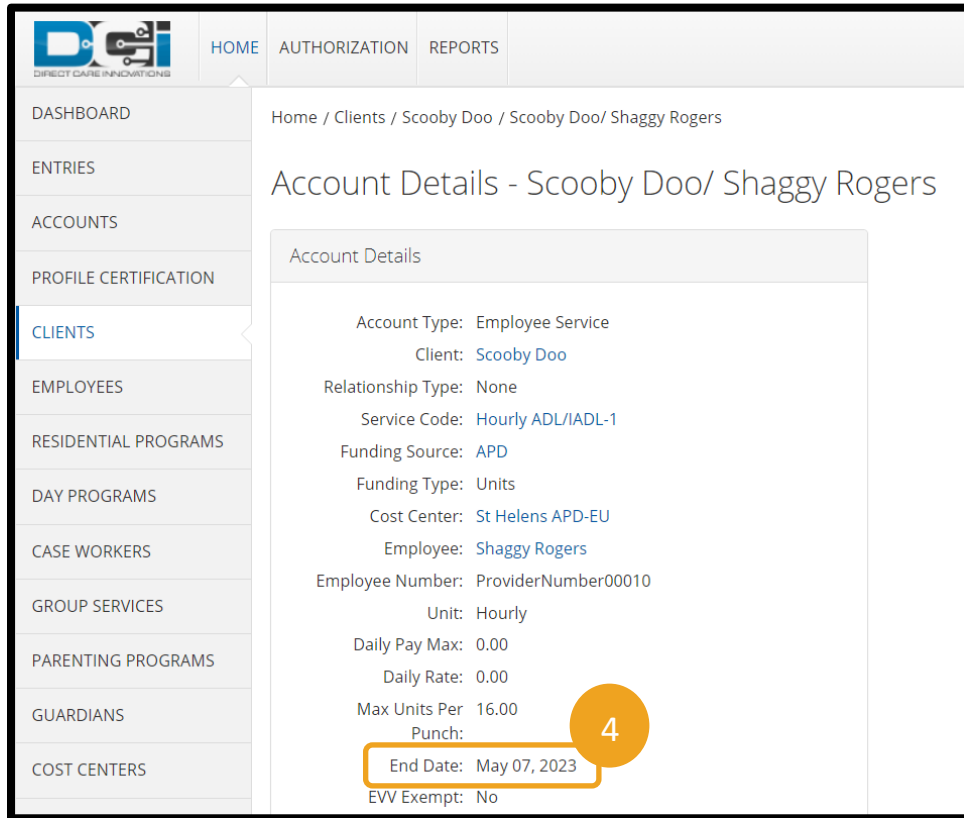
To Check if the Service Account and Funding Account are Inactive

1. Navigate to the consumer's profile in OR PTC DCI.

2. Click Accounts.

3. Scroll down to see the accounts with Account Type: Employee Service. Find the two (one for mileage and one for hourly) service accounts for the provider in question under the Employee/Client/Program Name/Vendor Name column. If the service account is inactive, it will not appear on this list.

4. To verify if the service account and funding accounts are inactive, use the filter criteria. In the drop-down labeled Select Status (this is likely automatically set to Active), choose Inactive.
5. Click Search.

6. Scroll down to see the accounts with Account Type: Employee Service. Find the two (one for mileage and one for hourly) service accounts for the provider in question under the Employee/Client/Program Name/Vendor Name column. If the service account is on this filtered list, the pairing has been fully unlinked.

Relinking Providers and Consumers

When a provider and consumer who were previously unlinked begin working together again, the PTC Support Team must be notified. The PTC Support Team needs to relink the pair and, depending on the situation, potentially reactivate a profile.

The only way the PTC Support Team knows a pairing needs to be relinked and thus appropriate action is taken in OR PTC DCI, is if they are notified via email by the local office. It is critical the local office relays this information to ensure appropriate action is taken. The PTC Support Team is not automatically notified when providers and consumers need to be relinked, nor is this information automatically sent to OR PTC DCI from any legacy system.

If the PTC Support Team is not notified that the provider and consumer are working together again, the provider will not be able to claim time in OR PTC DCI.

Process for Relinking

1. Local office creates vouchers and sets up the ONGO in Mainframe.
2. Check OR PTC DCI to see if the pairing was previously unlinked.
    a. Does the provider and consumer pairing have active funding and service accounts (both hourly and mileage)? If no, they were unlinked.
    b. Is there an end date added on the service accounts (either hourly or mileage)? If yes, they were unlinked.
    c. See Determining if a Provider and Consumer have been Unlinked for how to answer these questions in OR PTC DCI.
3. If the pairing was previously unlinked, email the PTC Support Team stating the provider has started working for the consumer again.
    a. Information to include in the email:
        i. Provider's name
        ii. Provider number
        iii. Consumer's name
        iv. Prime number
        v. Date the provider began working again
    b. If any information is missing from the email, the PTC Support Team will reach back out requesting the information.
    c. Upon receiving the email, the PTC Support Team will relink the pairing. Once this is done, the PTC Support Team will respond to the email to notify the requestor the process is complete.
4. If the pairing was not previously unlinked (based on research in step 2), the pairing is already connected properly.

See business process 1.1.5 Relinking a Provider and Consumer for more information.

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.

See business process 1.5.1 Managing State Profiles for more information.

> **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. If an account is locked, the user will receive an email notification stating their account was locked.

Staff who need their account unlocked can 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:

- A locked profile will automatically unlock after 24 hours. If they need to use the system right away, the local office may be able to assist.
- The user can contact the local office and a state 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.

- o If the PTC Support Team determines it is appropriate, they will unlock the account and the account holder will receive a notification.
- o 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.

See business process 1.5.3 Unlock a Profile for more information.

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.

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 state user with the appropriate role can unlock a provider's, consumer's, or CER's profile.

A state user with the Supervisor Role or 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.

Reset Authentication Details

You may need to reset a profile if someone no longer remembers their login information. Only use this method if they do not know their password and if the Forgot Password option is not working for them. Resetting Authentication Information will reset the security question and remove the PIN. The provider will be prompted to set a new security question upon logging in. They will not be prompted to create a new PIN. However, the provider will need to set a new PIN if they use the landline option or if they use the PIN to log into the OR PTC DCI Mobile App. If the provider does not set a new PIN, they will not be able to use the landline and will have to use their full password to log into the mobile app.

1. Navigate to the Employee (provider), Client (consumer), or Guardian (consumer employer representative) profile page by clicking the tab corresponding with the profile type and searching for the individual in question.
2. Verify the user has a valid email on their profile, meaning it is not the PTC Support email (PTC.Support@odhsoha.oregon.gov).
   a. If they do not have a valid email on file, you cannot reset their authentication details. You will need to contact the user, get a valid email address for them, and update their profile. At that point, you can reset their authentication details.
3. Click Actions.
4. Click Edit Employee for providers, Edit Client for consumers, or Edit Guardian for CERs.

Note: Make sure the user has an active email address in OR PTC DCI before resetting the authentication details. If they do not have an email on file, they will not receive the email to log into their account and therefore, this will not work.

5. Click Authentication Information.
6. Click Reset.

Guidance Resources

Resources can be found on the DCI Help Center.

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.