



# Profile Management Guide

OR PTC DCI  
VERSION 2.1



## Contents

Disclaimer .....	3
Consumer (Client) Profile Overview .....	3
How are Consumer Profiles Created? .....	3
Update Consumer Information .....	4
Consumer Information to Update .....	4
View/Edit Consumer Details .....	5
Consumer Basic Demographics Tab .....	6
Client Information Tab .....	8
Consumer Authentication Information Tab .....	8
Consumer Employer Representative (Guardian) Profile Overview .....	9
Request the PTC Support Team Create a New CER Profile .....	9
Consumer Employer Representatives get Guardian Profiles in OR PTC DCI .....	10
Update Consumer Employer Representative Information .....	10
View/Edit Guardian Details .....	11
Guardian Basic Demographics Tab .....	13
Guardian Authentication Information .....	14
Linking Client and Guardian Profiles .....	14
Add or Remove Guardian .....	14
Linking a Guardian Profile to a Client Profile .....	15
Unlinking a Guardian Profile and a Client Profile .....	17
Provider (Employee) Profile Overview .....	18
How to Create a Provider Profile .....	18
Update Provider Information .....	18
View/Edit Provider Details .....	19
Provider Basic Demographics Tab .....	20
Employee Information Tab .....	22
Provider Authentication Information Tab .....	23
Finding the Provider Number on the Employee Details Page .....	24



Change Provider Status.....	25
Linking, Unlinking, and Relinking Providers and Consumers .....	28
Linking Providers and Consumers .....	28
Unlinking Providers and Consumers .....	28
Process for Unlinking.....	29
Process for Unlinking if the Consumer Passed Away.....	30
Determining if a Provider and Consumer have been Unlinked.....	32
To Check if an End Date Exists on the Service Account .....	33
To Check if the Service Account and Funding Account are Inactive .....	37
Relinking Providers and Consumers.....	39
Process for Relinking.....	40
State User Profile Overview .....	40
How to Create and Update a Staff Profile .....	40
Unlocking Profiles .....	41
Authentication Details & Status .....	43
Profile Authentication Status .....	43
Reset Authentication Details .....	44
Guidance Resources.....	46



## 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](mailto: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](http://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.

The screenshot shows the 'Clients' search interface. Callout 1 points to the 'CLIENTS' link in the left sidebar. Callout 2 points to the search filters (Type Client Name, Type Client Id, Type Cost Center, Select State, Select Status, Select Funding Source). Callout 3 points to the 'Search' button. Callout 4 points to the first row of the results table.

Name	Client Id	State	Region	Cost Center	Status
SM Consumer Three	ConsumerPrime0002	OR		Hermiston APD-EU - 3013-EU	Active
SM Consumer One	ConsumerPrime0000	OR		Hermiston APD-EU - 3013-EU	Active

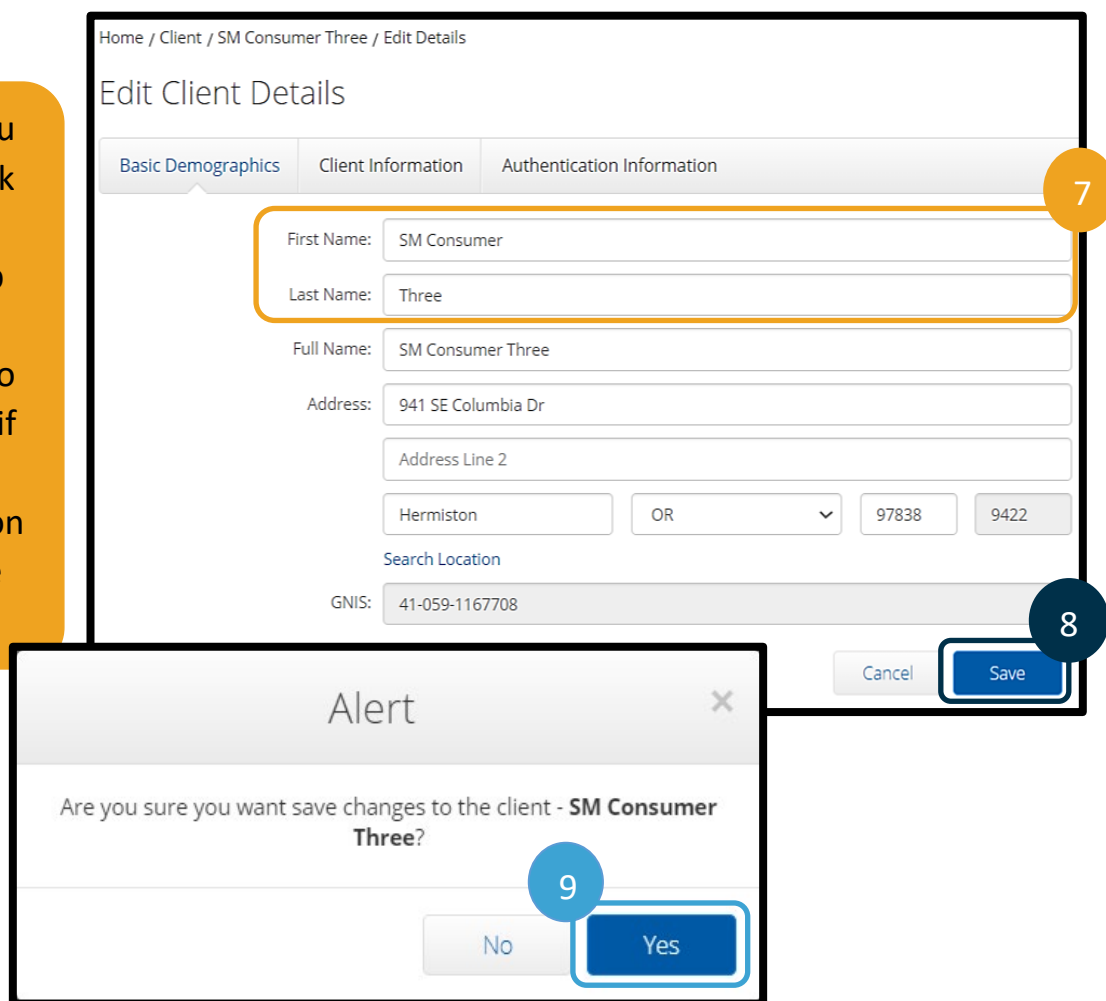
5. Click Actions.
6. Select Edit Client from the drop-down.

The screenshot shows the 'Client Details - SM Consumer Three' page. Callout 5 points to the 'Actions' button. Callout 6 points to the 'Edit Client' option in the dropdown menu.

Basic Demographics	Other Details
Client Id: ConsumerPrime0002 Address: 940 SE Columbia Dr Hermiston, OR 97838-9422 GNIS: 41-059-1167708 Phone: (555) 555-6014	Cost Center: Hermiston Preferred Language: English Username: smconsumer Client Status: Active

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. **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](mailto:PTC.Support@odhsoha.oregon.gov) must be used as a default email.

The screenshot shows the 'Edit Client Details' form with three tabs: 'Basic Demographics', 'Client Information', and 'Authentication Information'. The 'Basic Demographics' tab is active. The form contains the following fields and callouts:

- 1:** First Name: John
- 2:** Last Name: Doe
- 3:** Address: 123 anystreet
- 4a:** Search Location (button)
- 4b:** Time Zone: PT (UTC-8)
- 5:** Phone: (541) 555-5555
- 6:** Email: PTC.Support@odhsoha.oregon.gov


Other fields include: Full Name: John Doe; Address Line 2; City: Redmond; State: OR; ZIP: 97756 0000; GNIS: 41-017-1125912; Country: USA; Alternate Phone: xxx-xxx-xxxx; Mobile Number: xxx-xxx-xxxx; DOB: April 11 1950; Profile Reference: Profile Reference; Training System Reference: Training System Reference; SSN: ... ..; Verify SSN: ... ..; Allow SSN Retrieval:  Yes  No; Photo: Add Photo; Status: Active



## 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.



**Edit Client Details**

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

7 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

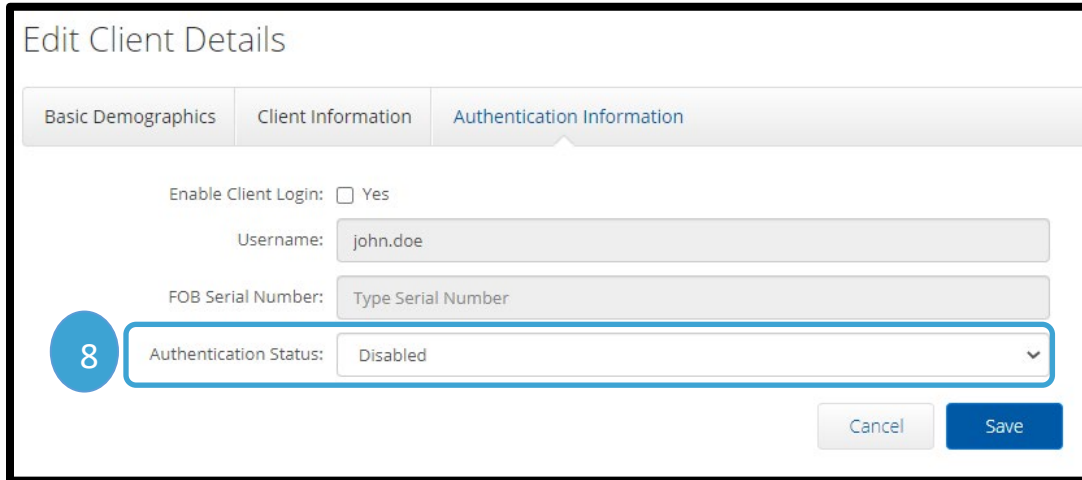
## Consumer Authentication Information Tab

The third tab is Authentication Information.

### 8. **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 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](mailto: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.

Name	Phone	Email	Cost Center	Status
B14 Guardian	(999) 999-1235	PTCProject.info+B14@dhsoha.state.or.us	The Dalles APD-EU - 3311-EU	Active

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

Basic Demographics

Name: B14 Guardian  
Address: 221 Training Road  
Beaverton, OR 97006  
Phone: (999) 999-1235  
Mobile Number: (555) 555-5555  
Email: PTCProject.info+B14@dhsoha.state.or.us

Actions

- New Note
- New Attachment
- Edit Guardian**
- Edit Custom Field Values
- Block Mobile App Usage
- Block Portal Usage

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

Edit Guardian Details

Basic Demographics Authentication Information

First Name: B14

Last Name: Guardian

Address: 221 Training Road

Address Line 2

Beaverton OR 97006

USA

Time Zone: PT (UTC-8)

Phone: (999) 999-1235

Alternate Phone: xxx-xxx-xxxx

Mobile Number: (555) 555-5555

Email: PTCProject.info+B14@dhsosha.state.or.us

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

Profile Reference: PRIME1811

Status: Active

Cancel Save

Alert

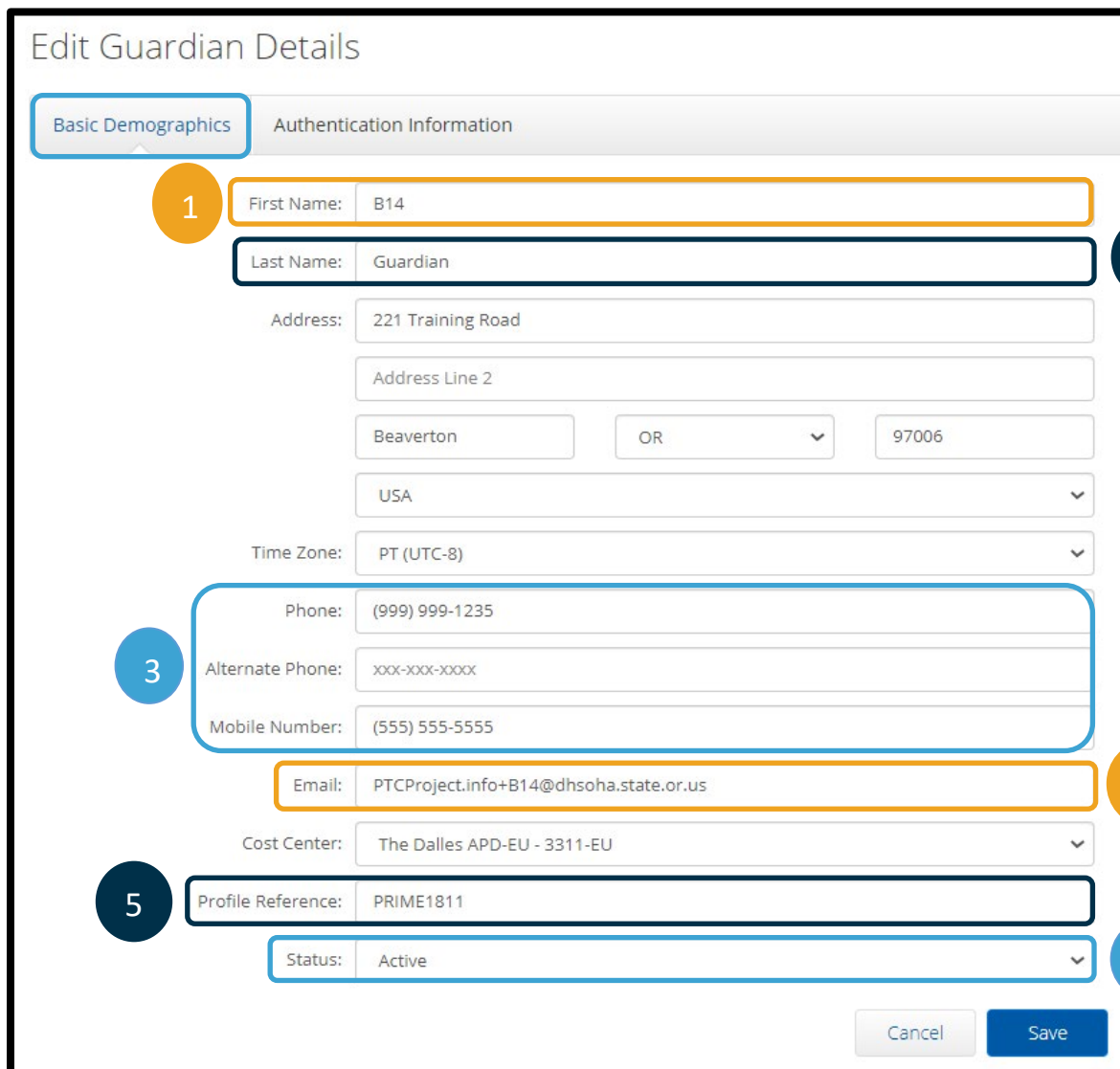
Are you sure you want save changes to the guardian - **B14 Guardian**?

No Yes

## 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.



**Edit Guardian Details**

Basic Demographics | Authentication Information

1 First Name: B14

Last Name: Guardian 2

Address: 221 Training Road

Address Line 2

Beaverton OR 97006

USA

Time Zone: PT (UTC-8)

3 Phone: (999) 999-1235

Alternate Phone: xxx-xxx-xxxx

Mobile Number: (555) 555-5555

4 Email: PTCProject.info+B14@dhsosha.state.or.us

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

5 Profile Reference: PRIME1811

Status: Active 6

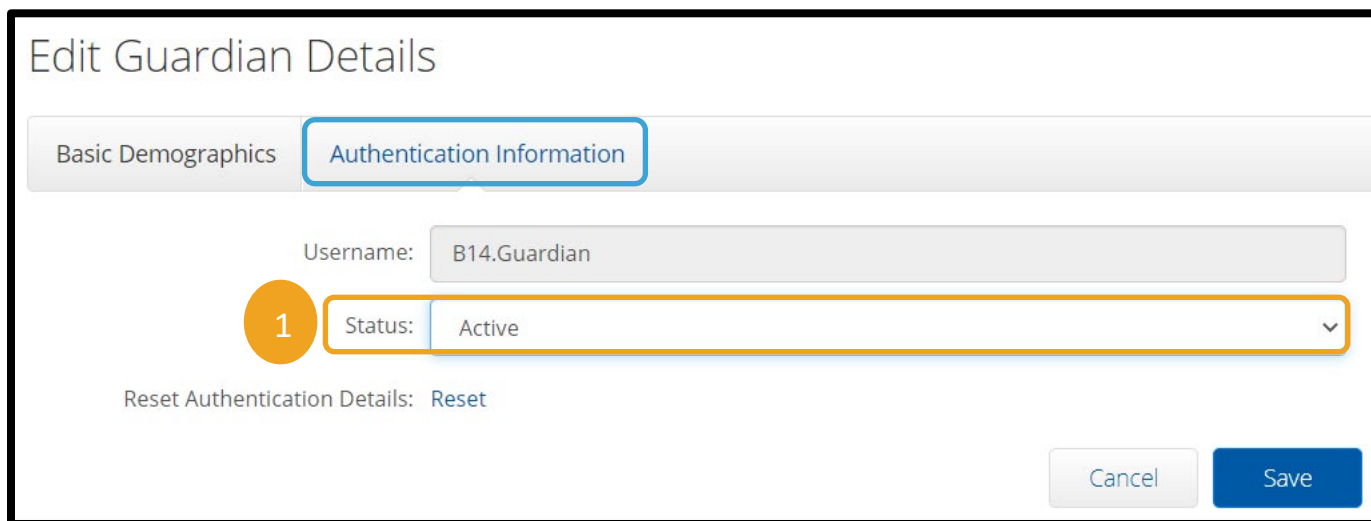
Cancel Save

## 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.

Home / Clients

### Clients

b14 consumers | Type Client Id | Type Cost Center

Select State | Select Status | Select Funding Source

Reset | Search

Export

Showing 1 out of 1 record

Name	Client Id	State	Region	Cost Center	Status
B14 Consumers	PRIME181	OR		The Dalles APD-EU - 3311-EU	Active

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

### Client Details - B14 Consumers

Basic Demographics

Client Id: PRIME181  
Address: 221 Training Road  
Beaverton, OR 97006-0000  
GNIS: 41-067-0004551809112288688  
Phone: (999) 999-9999  
Mobile Number: (555) 555-5555  
Email: PTCProject.info@dhsosha.state.or.us  
Date of Birth: Dec 31, 1953

Other Details

Cost Center: The Dalles APD-EU - 3311-EU  
Preferred Language: English  
Username: B14.Consumer  
Client Status: Active  
Authentication Status: Active  
Email confirm: Yes

Actions

- New Note
- New Attachment
- New Service Account
- New Entry
- Edit Client
- Edit Custom Field Values
- Add Certification





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.

**Edit Client Details**

Basic Demographics **Client Information** Authentication Information

Client Id: PRIME181

Medicaid No: Medicaid Number

Insurance Group No: Insurance Group Number

Insurance Plan No: Insurance Plan Number

Insurance Payer No: Insurance Payer Number

Insurance Number: Insurance Number

Certification Template: Select Certification Template

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

Preferred Language: English

Received Date: Select Date (MM/DD/YYYY)

Packet Mailed: Select Date (MM/DD/YYYY)

Client Status: Active

Discharge Date: Select Date (MM/DD/YYYY)

Suspended Date: Select Date (MM/DD/YYYY)

Code: Client Code

Region: Region

Guardian: Type Guardian Name

Alert

Are you sure you want save changes to the client - **B14 Consumers**?

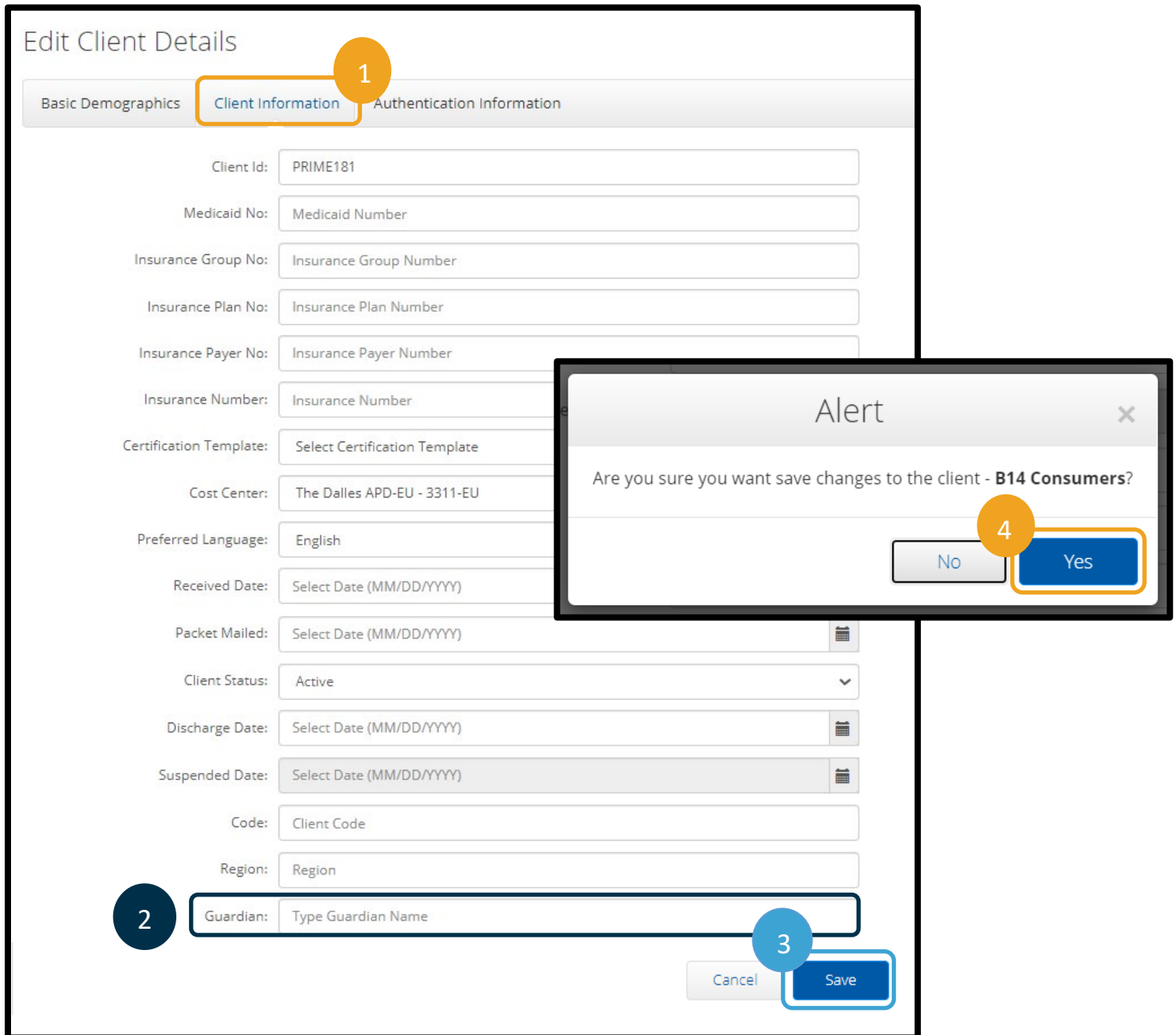
No Yes

Cancel Save

## 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.



The screenshot displays the 'Edit Client Details' form with the 'Client Information' tab selected. The form contains various fields for client identification and insurance details. A confirmation alert dialog is overlaid on the form, asking for confirmation to save changes to the client.

**Edit Client Details**

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

Client Id: PRIME181

Medicaid No: Medicaid Number

Insurance Group No: Insurance Group Number

Insurance Plan No: Insurance Plan Number

Insurance Payer No: Insurance Payer Number

Insurance Number: Insurance Number

Certification Template: Select Certification Template

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

Preferred Language: English

Received Date: Select Date (MM/DD/YYYY)

Packet Mailed: Select Date (MM/DD/YYYY)

Client Status: Active

Discharge Date: Select Date (MM/DD/YYYY)

Suspended Date: Select Date (MM/DD/YYYY)

Code: Client Code

Region: Region

Guardian: Type Guardian Name

Alert

Are you sure you want save changes to the client - **B14 Consumers**?

No Yes

Cancel Save



## 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](mailto:PTC.Support@odhsoha.oregon.gov). The request form can be found on the PTC website at [ptc.oregon.gov](http://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.

Home / Employees

Employees

sm pro    Type Cost Center    Employee Number

Select Employee Type    Select State    Select Status

Reset    Search

Export

Showing 3 out of 3 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.

Home / Employees / SM Provider One

Employee Details - SM Provider One

Actions

Basic Demographics

Address: 940 SE Columbia Dr  
Hermiston, OR 97838-9422

GNIS 41-059-1167708

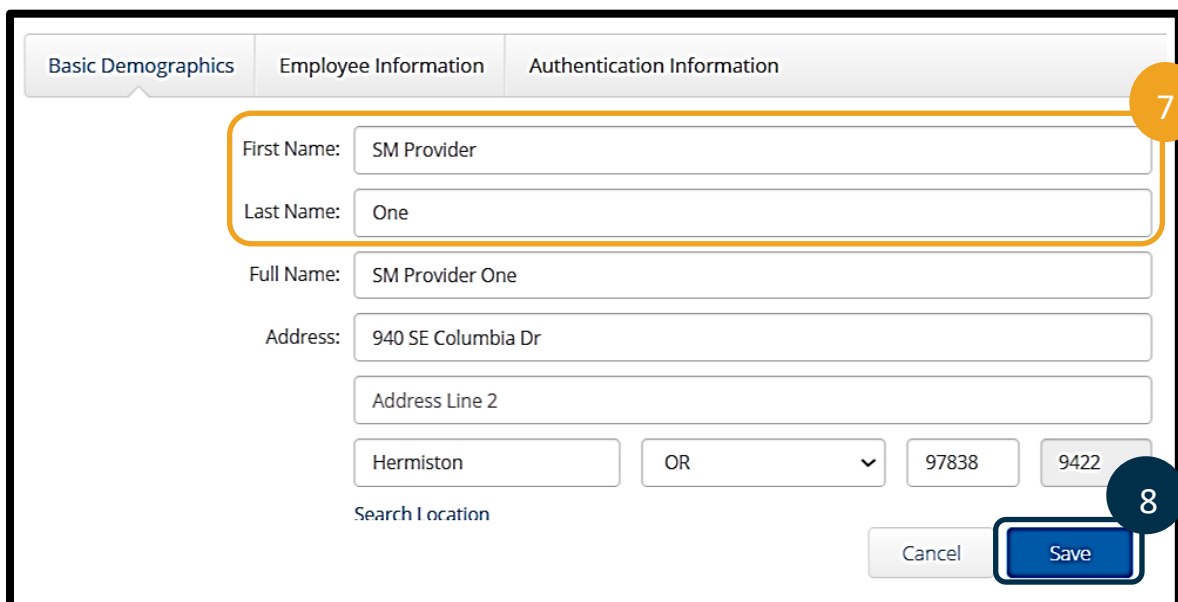
Phone: (555) 555-6006

Other Details

Average Caregiver 0  
Rating:  
Type: Hourly Non Exempt  
Domestic Worker: No

New Note  
New Attachment  
View Roles  
Edit Employee  
Edit Custom Field Values

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.



Basic Demographics Employee Information Authentication Information

First Name: SM Provider

Last Name: One

Full Name: SM Provider One

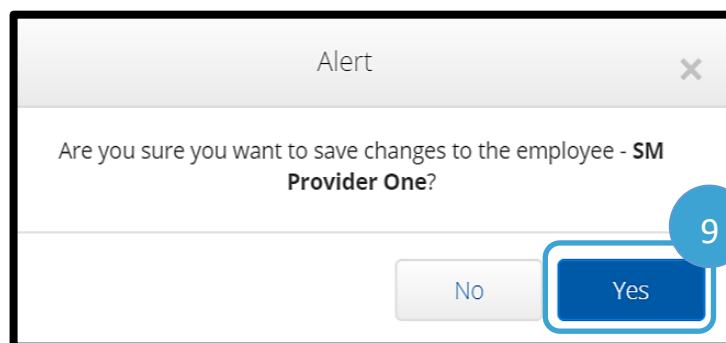
Address: 940 SE Columbia Dr

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. **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

# Profile Management Guide



## Edit Employee Details

Basic Demographics | Employee Information | Authentication Information

1 First Name: B14

Last Name: Providers 2

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

Email: PTCProject.info@dhsosha.state.or.us 5

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

2 Weekly Hours Available: 40.00

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



## Provider Authentication Information Tab

1. **Authentication Status:** This is Active when the provider is working or can work. It will say Locked if the provider is locked out. A local office staff member may change this from Locked to Active if needed.
  - a. This may display locked if the provider has never logged into the system or has not done so for a long time. This may be because they are using the landline only. The provider will not be able to claim time via the OR PTC DCI fob or OR PTC DCI Mobile App while their account is locked. For how to unlock a profile, go to [Unlocking Profiles](#).

Edit Employee Details

Basic Demographics Employee Information **Authentication Information**

Username: B14.Providers

Employment Status: Active

**1** Authentication Status: Active

Global Permissions Least Privilege Permissions Miscellaneous Permissions

Authorization Admin  Import Admin  
 Case Worker Admin  Client Admin  
 Parenting Program Admin  Cost Center Admin  
 Residential Program Admin  Day Program Admin  
 Employee Admin  Permissions Admin  
 Funding Source Admin  Role Admin  
 Group Service Admin

Reset Authentication Details: [Reset](#)

[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.

Home / Employees / Peter Brady

### Employee Details - Peter Brady

Actions

#### Basic Demographics

Address: 200 Brady Street  
Salem, OR 97301-0000

GNIS: 41-047-1167861

Phone: (503) 669-7777

Email: [peter.brady@email.com](mailto:peter.brady@email.com)

Username: peter.brady

Time Zone: PT (UTC-8)

Type: Hourly Non Exempt

SSN: ###-##-#### [Show](#)

Allow SSN Retrieval: No ⓘ

Status: Active

#### Other Details

Average Caregiver: 0

Rating:

Domestic Worker: No ⓘ

Domestic Worker 7: No ⓘ

Day Exemption:

Domestic Worker Preferred Day of Rest: Sunday ⓘ

Employee Number: UNII110010

Weekly Hours: 40.00

Available:

Holiday Schedule: [OR PTC Default Schedule - 2](#)

Cost Center: [Provider Default Cost Center-EU](#)

Preferred Language: English

Employment Status: Active

Authentication Status: Active

Photo Set: No

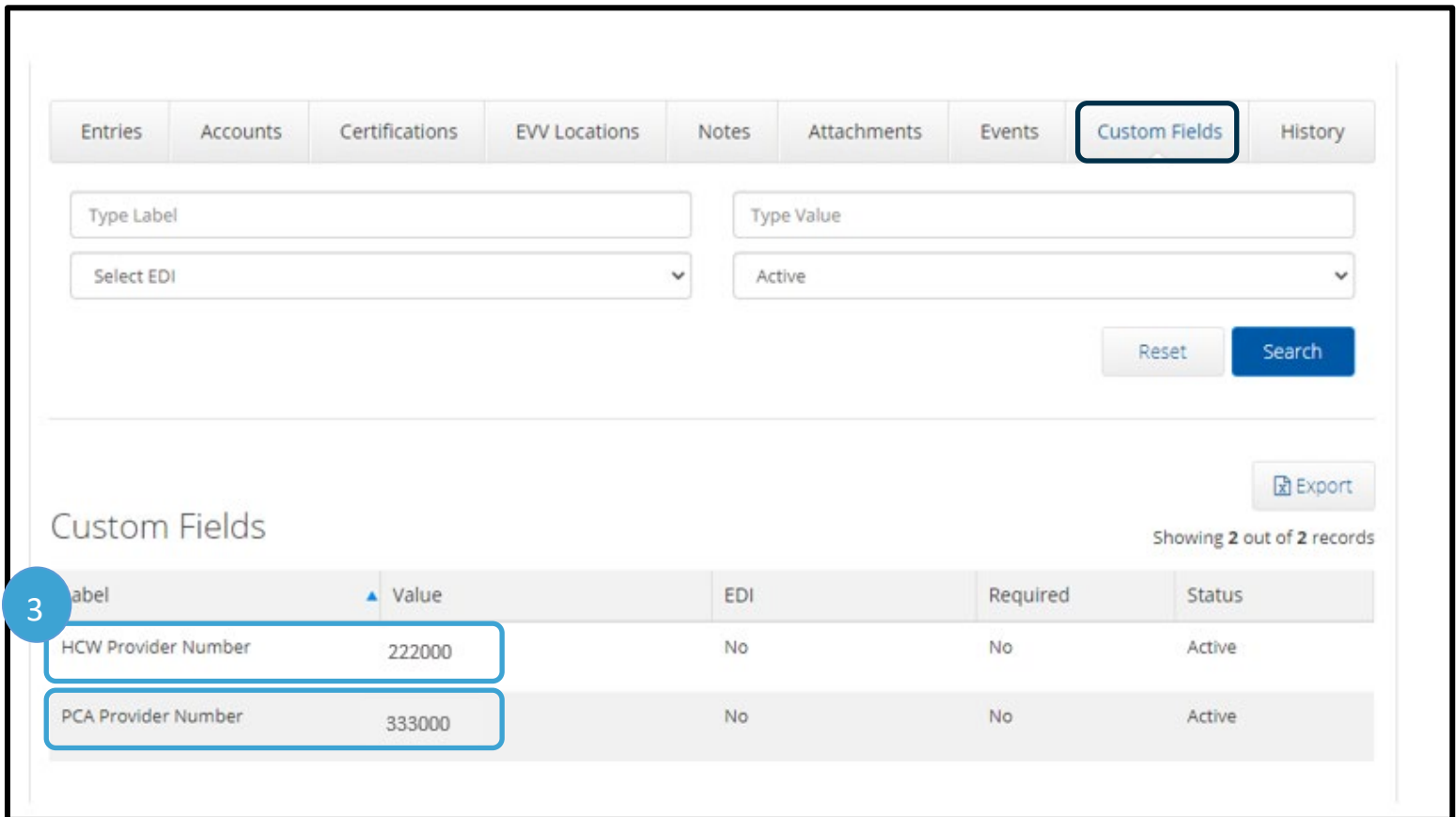
Signature Set: No

Email confirm: Yes

Entries Accounts Certifications EVV Locations Notes Attachments Events **Custom Fields** History

Type Label: Type Value:

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



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:

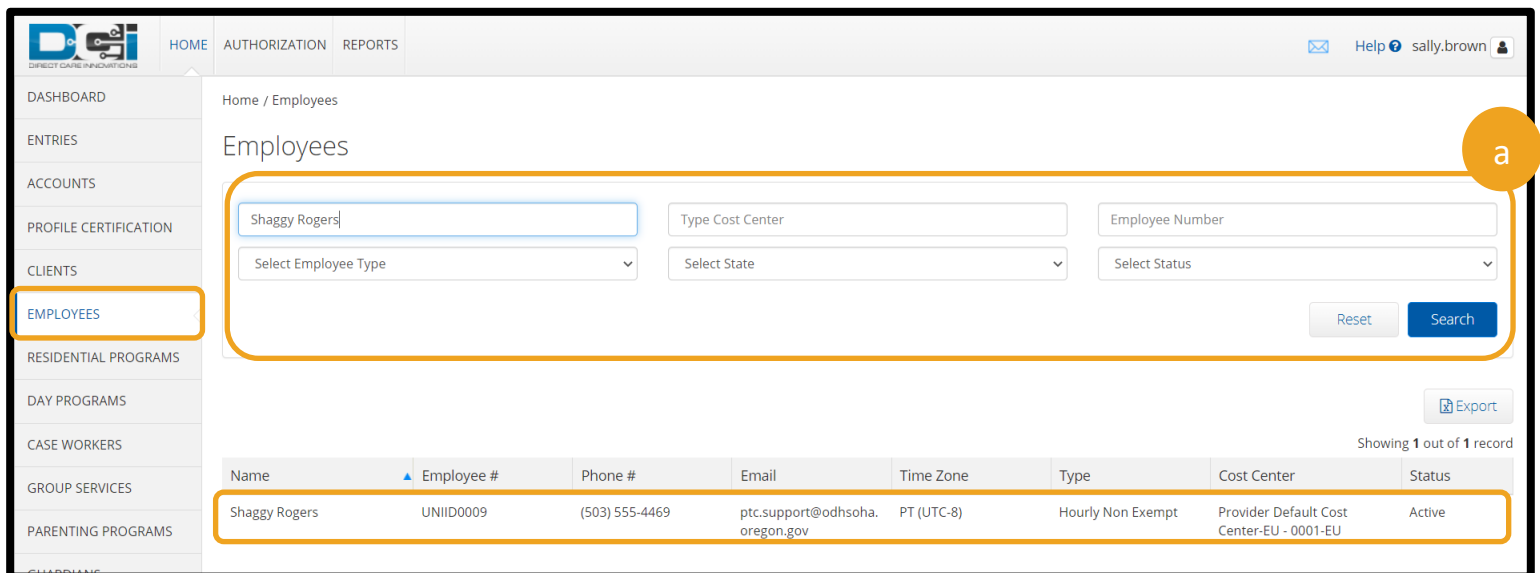
1. Email the PTC Support Team requesting the status change. Include what the status needs to be changed to. If the status change involves an unlink or relink, include the additional information

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.



The screenshot shows the 'Employees' page in the OR PTC DCI system. The left sidebar has 'EMPLOYEES' highlighted. The main content area has a search form with the following fields: Name (Shaggy Rogers), Type Cost Center, Employee Number, Select Employee Type, Select State, and Select Status. There are 'Reset' and 'Search' buttons. Below the search form is a table with one record for 'Shaggy Rogers'. The table has columns: Name, Employee #, Phone #, Email, Time Zone, Type, Cost Center, and Status. The status is 'Active'.

Name	Employee #	Phone #	Email	Time Zone	Type	Cost Center	Status
Shaggy Rogers	UNIID0009	(503) 555-4469	ptc.support@odhsoha.oregon.gov	PT (UTC-8)	Hourly Non Exempt	Provider Default Cost Center-EU - 0001-EU	Active

- 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.

AUTHORIZATION REPORTS

Home / Employees / Shaggy Rogers

## Employee Details - Shaggy Rogers

Basic Demographics	Other Details
Address: 100 Address Street Salem, OR 97305-0000 GNIS: 41-047-1167861 Phone: (503) 555-4469 Mobile Number: (971) 304-5746 Email: <a href="mailto:ptc.support@odhsoha.oregon.gov">ptc.support@odhsoha.oregon.gov</a> Username: shaggy.rogers Time Zone: PT (UTC-8) Type: Hourly Non Exempt SSN: ###-##-#### <a href="#">Show</a> Allow SSN Retrieval: No ⓘ Mobile Device Id: E93FCBD5-A33A-4D7F-BA81-1696CA1A0BDB Status: Active	Average Caregiver Rating: 0 Domestic Worker: No ⓘ Domestic Worker 7 Day Exemption: No ⓘ Domestic Worker Preferred Day of Rest: Sunday ⓘ Employee Number: UNIID0009 Weekly Hours Available: 40.00 Holiday Schedule: <a href="#">OR PTC Default Schedule - 2</a> Cost Center: <a href="#">Provider Default Cost Center-EU</a> Preferred Language: English Employment Status: Active Authentication Status: Active Photo Set: No
Allow SSN Retrieval: No ⓘ Mobile Device Id: E93FCBD5-A33A-4D7F-BA81-1696CA1A0BDB Status: Inactive	Preferred Language: English Termination Date: May 16, 2023 Employment Status: Terminated Authentication Status: 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 [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.

This process is shown in the business process [1.2.2 Change Provider Status](#).

## 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 [Consumer/Provider Profile Maintenance Form](#) to [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov). The request form can be found on the PTC website at [ptc.oregon.gov](http://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.

### 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.

Authorizations

From (MM/DD/YYYY) To (MM/DD/YYYY) Type Entry Id

Scooby Doo Type Service Code Initial Balance

Type Cost Center Select Status Type Authorization ID Reference

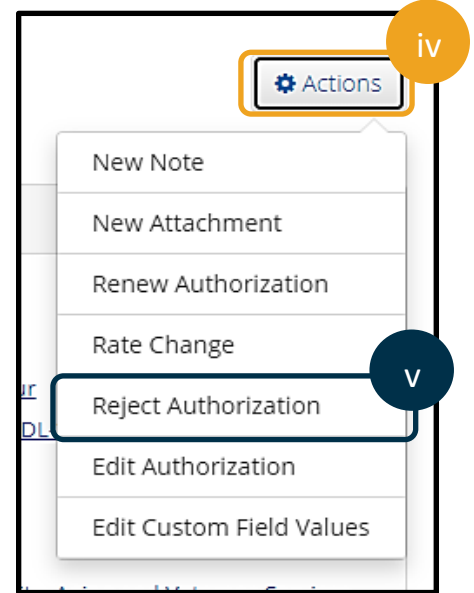
Reset Search

Export

Showing 9 out of 9 records

Id	Start Date	End Date	Client	Service Code	Funding Type	Bill Rate	Cost Center	Remaining Balance	Holds	Authorization ID Reference
2123	Aug 14, 2022	Aug 28, 2022	Scooby Doo	Hourly ADL/IADL-1	Units	0.00	0511-EU	30.00	8.00	2022845845
1989	Jun 26, 2022	Jul 09, 2022	Scooby Doo	Mileage-1	Units	0.00	0511-EU	9.00	0.00	8529648653
1983	Jun 26, 2022	Jul 09, 2022	Scooby Doo	Hourly ADL/IADL-1	Units	0.00	0511-EU	24.75	6.57	8529648653
1968	Jun 12, 2022	Jun 25, 2022	Scooby Doo	Hourly ADL/IADL-1	Units	0.00	0511-EU	9.00	7.00	voucher568951

- 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.

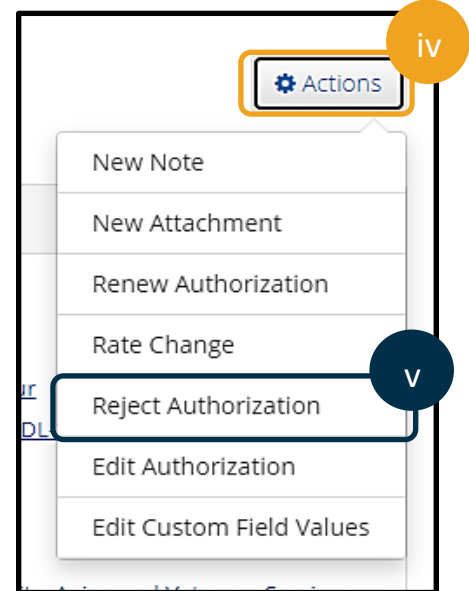
3. Case manager completes 546 with prorated hours and requests voiding outstanding vouchers and ending ONGO.
4. Voucher specialist voids outstanding vouchers and ends ONGO in Mainframe.
5. Voucher specialist rejects outstanding authorizations in OR PTC DCI (these will match the vouchers which were voided 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.

The screenshot displays the 'Authorizations' page in the OR PTC DCI system. The left sidebar contains navigation options: AUTHORIZATIONS (highlighted with callout 'i'), PENDING AUTHORIZATIONS (0), FUNDING ACCOUNTS, PENDING FEES AND ADJUSTMENTS, and CLIENT FEES AND ADJUSTMENTS. The main content area is titled 'Authorizations' and features a search filter section (highlighted with callout 'ii') with fields for 'From (MM/DD/YYYY)', 'To (MM/DD/YYYY)', 'Type Entry Id', 'Scooby Doo', 'Type Service Code', 'Initial Balance', 'Type Cost Center', 'Select Status', and 'Type Authorization ID Reference'. Below the search filters is an 'Export' button and a table of authorizations (highlighted with callout 'iii'). The table shows 9 records, with the first three rows visible:

Id	Start Date	End Date	Client	Service Code	Funding Type	Bill Rate	Cost Center	Remaining Balance	Holds	Authorization ID Reference
2123	Aug 14, 2022	Aug 28, 2022	Scooby Doo	Hourly ADL/IADL-1	Units	0.00	0511-EU	30.00	8.00	2022845845
1989	Jun 26, 2022	Jul 09, 2022	Scooby Doo	Mileage-1	Units	0.00	0511-EU	9.00	0.00	8529648653
1983	Jun 26, 2022	Jul 09, 2022	Scooby Doo	Hourly ADL/IADL-1	Units	0.00	0511-EU	24.75	6.57	8529648653



- 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.

Home / Clients

### Clients

Scooby Doo | Type Client Id | Type Cost Center

Select State | Select Status | Select Funding Source

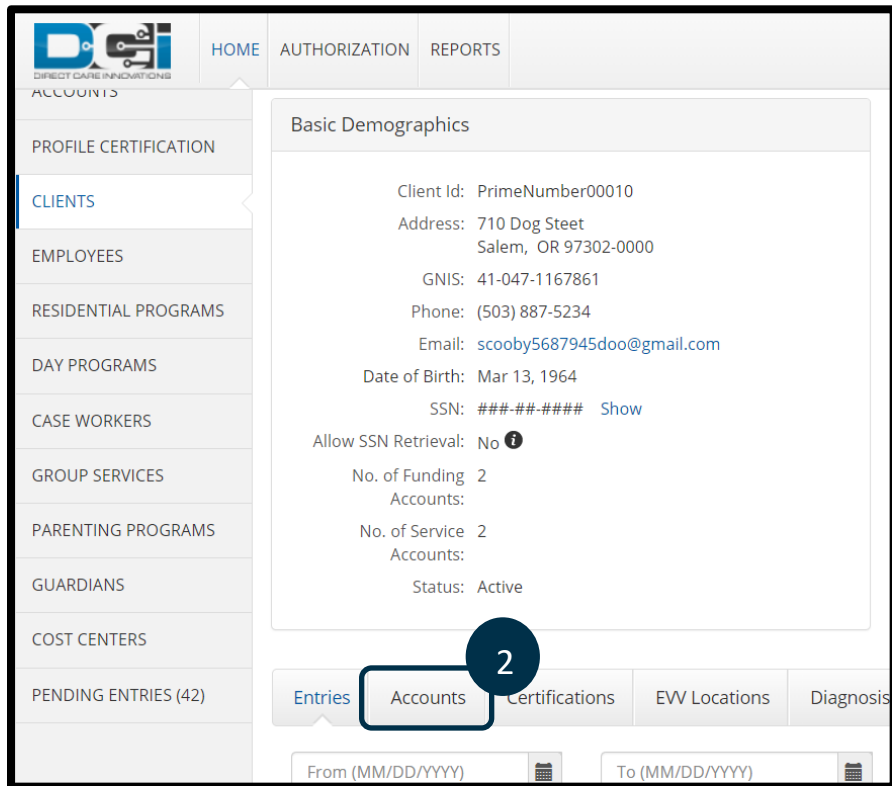
Reset Search

Export

Showing 1 out of 1 record

Name	Client Id	State	Region	Cost Center	Status
Scooby Doo	PrimeNumber00010	OR		St Helens APD-EU - 0511-EU	Active

## 2. Click Accounts.



The screenshot displays the 'Basic Demographics' section of a profile management interface. The left sidebar contains a list of menu items: ACCOUNTS, PROFILE CERTIFICATION, CLIENTS, EMPLOYEES, RESIDENTIAL PROGRAMS, DAY PROGRAMS, CASE WORKERS, GROUP SERVICES, PARENTING PROGRAMS, GUARDIANS, COST CENTERS, and PENDING ENTRIES (42). The 'CLIENTS' menu item is currently selected. The main content area shows the following information:

**Basic Demographics**

- Client Id: PrimeNumber00010
- Address: 710 Dog Steet  
Salem, OR 97302-0000
- GNIS: 41-047-1167861
- Phone: (503) 887-5234
- Email: scooby5687945doo@gmail.com
- Date of Birth: Mar 13, 1964
- SSN: ###-##-#### Show
- Allow SSN Retrieval: No ⓘ
- No. of Funding Accounts: 2
- No. of Service Accounts: 2
- Status: Active

At the bottom of the main content area, there are four tabs: Entries, Accounts, Certifications, and EVV Locations. The 'Accounts' tab is highlighted with a red circle containing the number '2'. Below the tabs are two date input fields: 'From (MM/DD/YYYY)' and 'To (MM/DD/YYYY)', each with a calendar icon.



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.

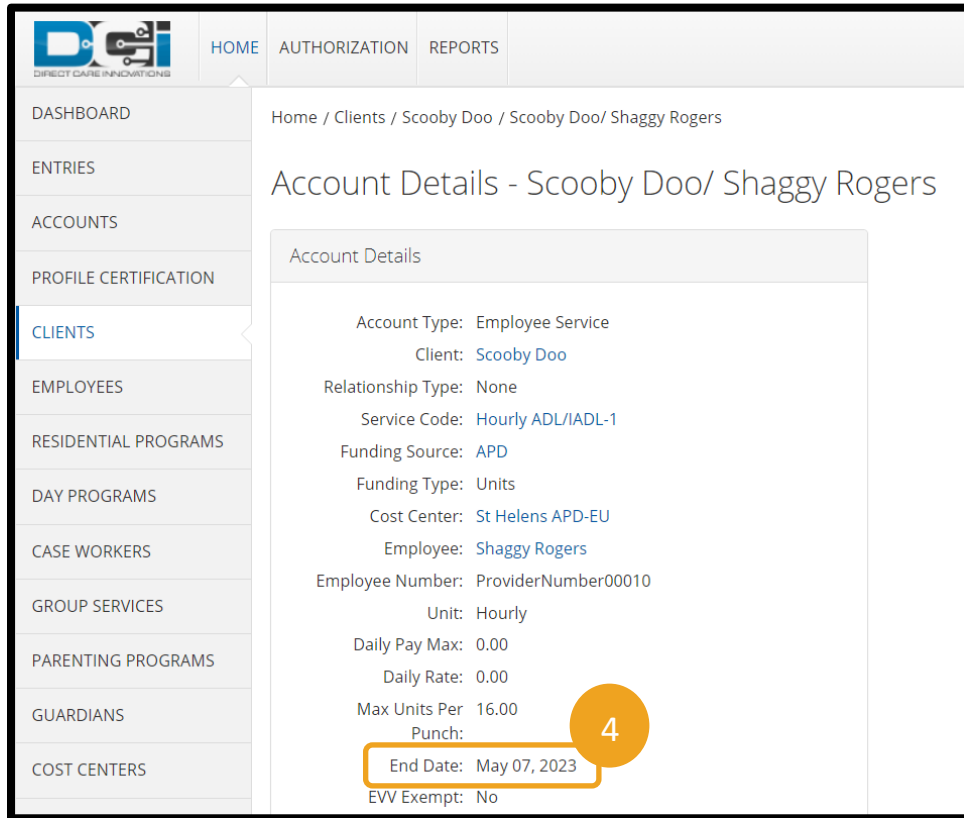
The screenshot shows the 'Accounts' section of a software interface. At the top, there are navigation tabs: 'ME', 'AUTHORIZATION', and 'REPORTS'. On the right, there is a user profile for 'sally.brown'. Below the navigation is a search filter area with several dropdown menus and text input fields: 'Select Account Type', 'Select Profile Type', 'Type Cost Center', 'Type Funding Source', 'Type Service Code', 'Select Unit', and 'Active'. A 'Reset' button and a blue 'Search' button are also present. Below the search area, there is an 'Export' button and the text 'Showing 4 out of 4 records'. The main content is a table with the following columns: 'Account Type', 'Profile Type', 'Cost Center', 'Funding Source', 'Service Code', 'Employee/ Client/ Program Name/ Vendor Name', 'Unit', and 'Status'. The table contains four rows of data. The first two rows are for 'Client Funding' and 'Client' profile type. The last two rows are for 'Employee Service' and 'Employee' profile type. The third row in the 'Employee Service' section is highlighted with a blue circle containing the number '3', and a blue line points from this circle to the 'Hourly ADL/IADL-1' account for 'Shaggy Rogers'.

Account Type	Profile Type	Cost Center	Funding Source	Service Code	Employee/ Client/ Program Name/ Vendor Name	Unit	Status
Client Funding	Client	St Helens APD-EU - 0511-EU	APD - Mileage	Mileage-1	Scooby Doo	Miles	Active
Client Funding	Client	St Helens APD-EU - 0511-EU	APD	Hourly ADL/IADL-1	Scooby Doo	Hourly	Active
Employee Service	Employee	St Helens APD-EU - 0511-EU	APD - Mileage	Mileage-1	Shaggy Rogers	Miles	Active
Employee Service	Employee	St Helens APD-EU - 0511-EU	APD	Hourly ADL/IADL-1	Shaggy Rogers	Hourly	Active



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.

Home / Clients

### Clients

Scooby Doo | Type Client Id | Type Cost Center

Select State | Select Status | Select Funding Source

Reset Search

Export

Showing 1 out of 1 record

Name	Client Id	State	Region	Cost Center	Status
Scooby Doo	PrimeNumber00010	OR		St Helens APD-EU - 0511-EU	Active

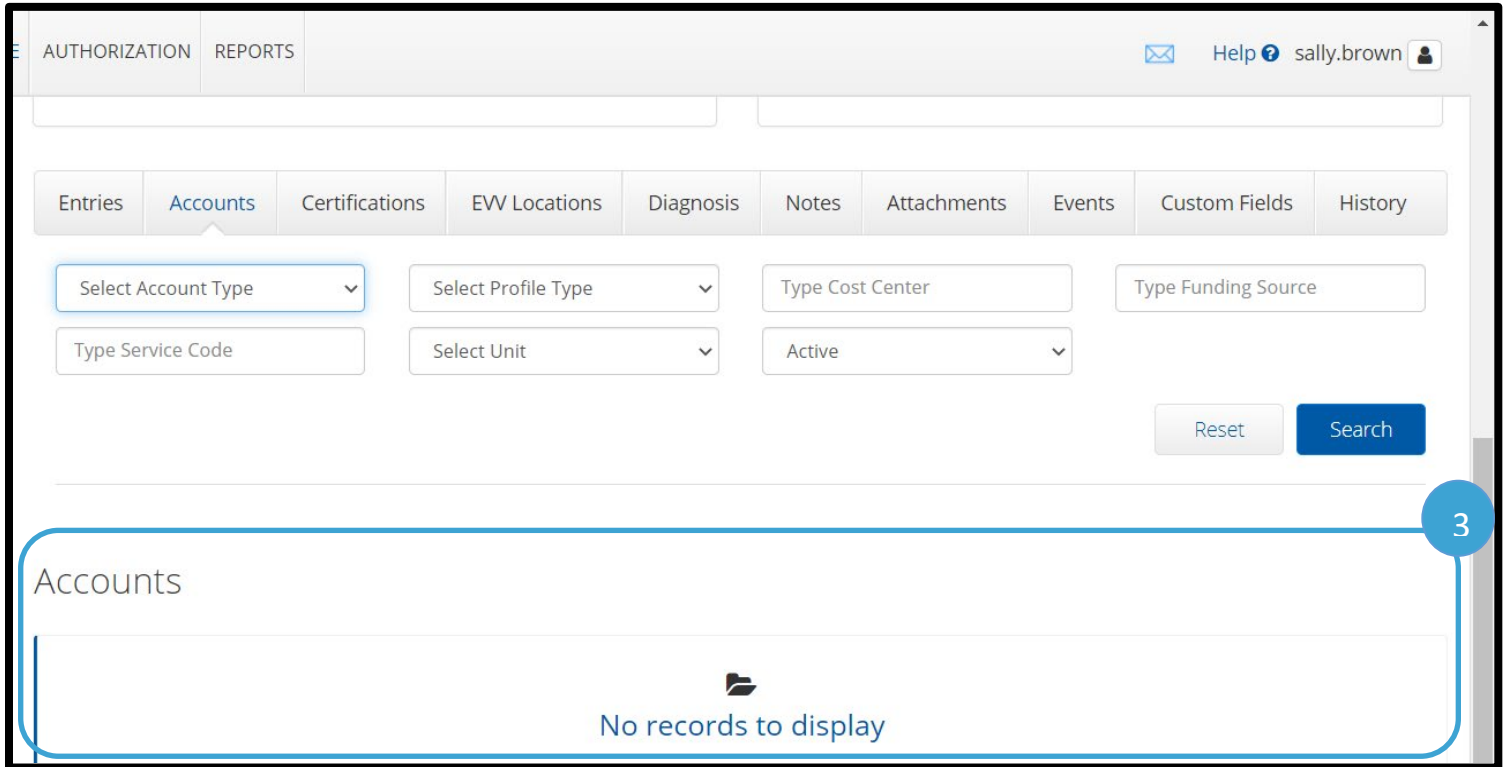
## 2. Click Accounts.

Basic Demographics

Client Id: PrimeNumber00010  
Address: 710 Dog Steet  
Salem, OR 97302-0000  
GNIS: 41-047-1167861  
Phone: (503) 887-5234  
Email: scooby5687945doo@gmail.com  
Date of Birth: Mar 13, 1964  
SSN: ###-##-#### Show  
Allow SSN Retrieval: No ⓘ  
No. of Funding Accounts: 2  
No. of Service Accounts: 2  
Status: Active

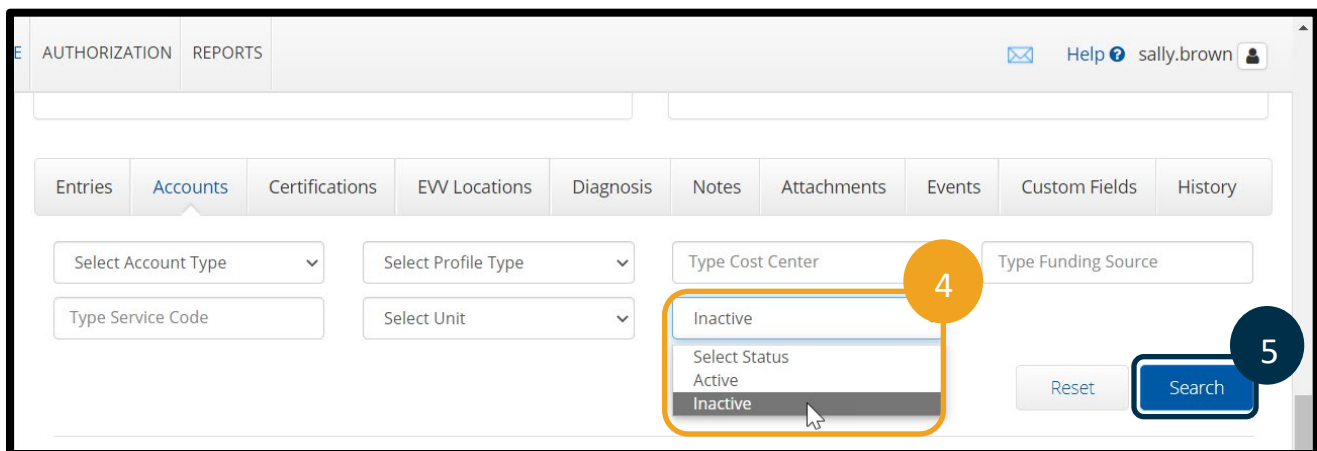
Entries Accounts Certifications EVW Locations Diagnosis

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.



The screenshot shows the 'Accounts' filter interface. At the top, there are tabs for 'AUTHORIZATION' and 'REPORTS'. On the right, there is a user profile for 'sally.brown'. Below the tabs, there are several filter fields: 'Select Account Type', 'Select Profile Type', 'Type Cost Center', 'Type Funding Source', 'Type Service Code', and 'Select Unit'. There is also an 'Active' status dropdown menu. A 'Reset' button and a 'Search' button are located at the bottom right. The main content area is titled 'Accounts' and displays 'No records to display' with a blue circular callout containing the number '3' pointing to the empty area.

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.



The screenshot shows the 'Accounts' filter interface with the 'Select Status' dropdown menu open. The dropdown menu has three options: 'Inactive', 'Select Status', 'Active', and 'Inactive'. The 'Inactive' option at the bottom is highlighted with a mouse cursor. A blue circular callout with the number '4' points to the dropdown menu. Another blue circular callout with the number '5' points to the 'Search' button. The 'Reset' button is also visible.

- 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.

The screenshot shows the 'Accounts' section of a software interface. At the top, there are navigation tabs for 'AUTHORIZATION' and 'REPORTS', and a user profile for 'sally.brown'. Below these are several filter fields: 'Select Account Type', 'Select Profile Type', 'Type Cost Center', 'Type Funding Source', 'Type Service Code', and 'Select Unit'. There are also 'Reset' and 'Search' buttons. An 'Export' button is located on the right. The main area displays a table of accounts with the following columns: Account Type, Profile Type, Cost Center, Funding Source, Service Code, Employee/ Client/ Program Name/ Vendor Name, Unit, and Status. The table contains four rows. The third and fourth rows are highlighted with a blue box, and a blue circle with the number '6' is positioned to the right of the second highlighted row.

Account Type	Profile Type	Cost Center	Funding Source	Service Code	Employee/ Client/ Program Name/ Vendor Name	Unit	Status
Client Funding	Client	St Helens APD-EU - 0511-EU	APD - Mileage	Mileage-1	Scooby Doo	Miles	Inactive
Client Funding	Client	St Helens APD-EU - 0511-EU	APD	Hourly ADL/IADL-1	Scooby Doo	Hourly	Inactive
Employee Service	Employee	St Helens APD-EU - 0511-EU	APD - Mileage	Mileage-1	Shaggy Rogers	Miles	Inactive
Employee Service	Employee	St Helens APD-EU - 0511-EU	APD	Hourly ADL/IADL-1	Shaggy Rogers	Hourly	Inactive

## 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](mailto:PTC.Support@odhsoha.oregon.gov). The new user will receive an email from [ORPTCSupport@dcisoftware.com](mailto: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](mailto: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](http://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](mailto: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](mailto: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.
- 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.

Home > Employees > Test Provider

## Employee Details - Test Provider

Actions

### Basic Demographics

Address: Test  
Test, OR 97321-0000  
GNIS: 41-043-1116796  
Phone: (555) 555-5555  
Alternate Phone:  
Mobile Number:  
Email: [ashleys+350@dcisoftware.com](mailto:ashleys+350@dcisoftware.com)  
Username: test.provider1  
Time Zone: PT (UTC-8)  
SSN: ###-##-#### [Show](#)  
Allow SSN Retrieval: No ⓘ  
Profile Reference:  
Training System Reference:  
Status: Active  
Photo:

### Other Details

Average Caregiver: 0  
Rating:  
Type: Hourly Non Exempt  
Domestic Worker: No ⓘ  
Domestic Worker 7: No ⓘ  
Day Exemption:  
Domestic Worker: Sunday ⓘ  
Preferred Day of Rest:  
Employee Number: 2126146541  
Weekly Hours: 0.00  
Available:  
Professional Id1:  
Professional Id2:  
Payroll Id:  
Holiday Schedule: [OR PTC Default Schedule - 2](#)  
Cost Center: [Burns/Harney Senior & Community Services - EU](#)  
Preferred Language: English  
Termination Date:  
Hire Date:  
Employment Status: Active  
FOB Serial Number:  
Authentication Status: Locked [Unlock](#)  
Certification Template:  
Photo Set: No  
Signature Set: No  
Email confirm: Yes

## 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.

# Profile Management Guide



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](mailto: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.

The screenshot displays the 'Employee Details - Test Provider' page. The left sidebar contains a navigation menu with 'EMPLOYEES' selected (1). The main content area shows the employee's profile information. The 'Basic Demographics' section includes fields for Address, GNIS, Phone, Alternate Phone, Mobile Number, Email (2), Username, Time Zone, SSN, Allow SSN Retrieval, Profile Reference, Training System Reference, Status, and Photo. The 'Other Details' section includes Average Caregiver Rating, Type, Domestic Worker status, Day Exemption, Preferred Day of Rest, Employee Number, Weekly Hours Available, Professional Id1/2, Payroll Id, Holiday Schedule, Cost Center, Preferred Language, Termination Date, Hire Date, and Employment status. An 'Actions' button (3) is located in the top right corner, and a dropdown menu is open showing 'Edit Employee' (4).

**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.

Home > Employees > Test Provider > Edit Details

## Edit Employee Details

Basic Demographics | Employee Information | **Authentication Information**

Username: test.provider1

Employment Status: Active

Authentication Status: Active

Global Permissions | Least Privilege Permissions | Miscellaneous Permissions

- Authorization Admin
- Case Worker Admin
- Parenting Program Admin
- Residential Program Admin
- Employee Admin
- Funding Source Admin
- Group Service Admin

Reset Authentication Details: Reset

Cancel Save

**Note:** Resetting their authentication will trigger an email to the user allowing them to reset their password, PIN, and security question.

## 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.