

# Staff – Provider Login Issues QRG



**Purpose:** This guide shows staff how to troubleshoot an OR PTC DCI provider login problem such as new profile creation, forgotten password, or locked profile.

**Outcome:** Staff will know how to help providers log in, change passwords, unlock profiles, and where to reach out for resources and assistance.

## New Provider Login

New provider profiles are created in OR PTC DCI by the PTC Support Team one to two business days after vouchers are created in Mainframe for the new service plan. After the provider profile is created, the provider is given their username, temporary password, and Welcome Support Guide from the PTC Support Team via email.

Providers cannot log into OR PTC DCI until they have a profile. For this reason, they should not be given information about how to log in or how to contact the DCI Help Desk or the PTC Support Team for assistance until after they have a profile.

- The provider will be unable to log in if they are given login information too early, or if the wrong login information is given.
- Giving someone “generic” login information without confirming the person’s username in OR PTC DCI is a security risk. You may be giving a provider the username of another user.
- Staff must not give out the temporary password unless they have confirmed the provider has a profile, can see their username, and have confirmed the provider’s identity matches the profile.
- Once the profile has been created, local office staff can look up their username and share this information with the provider, along with the [OR PTC DCI Support Guide](#),

**Note:** If no email address is listed in the provider’s employee record, the PTC Support Team will add a default email address to the profile that will need to be updated by local office staff.

Case managers will be notified by the PTC Support Team that the provider does not have an email on file. The case manager will need to contact the provider to give them their login information.

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which explains how to log in for the first time. Staff should also make sure the provider's email address in OR PTC DCI is correct and update it if needed.

- To see the provider-facing process of setting up a new provider, please refer to [How to get set up in OR PTC DCI](#).

How to find the provider's profile in OR PTC DCI:

1. Log into OR PTC DCI.
2. From the dashboard/home page, select the Employees tab on the left.
3. Type the provider's name in the Type Employee Name field, or the UNI ID in the Employee Number field.
4. Select Search.

The screenshot shows the 'Employees' search interface. On the left sidebar, the 'EMPLOYEES' tab is highlighted with an orange circle and the number 2. The main search area has a blue border and contains several input fields: 'Type Employee Name' (with a blue circle and number 3), 'Type Cost Center', 'Employee Number', 'Select Employee Type', 'Select State', and 'Select Status'. At the bottom right of the search area, there are 'Reset' and 'Search' buttons, with the 'Search' button highlighted in blue and a blue circle and number 4 next to it.

5. Select the correct provider from the search results. If there are multiple results, you can confirm using the UNI ID, phone number, or email address displayed.

The screenshot shows the search results for 'shaggy rogers'. The search fields are filled with 'shaggy rogers', 'Type Cost Center', 'Employee Number', 'Select Employee Type', 'Select State', and 'Select Status'. The 'Search' button is highlighted in blue. Below the search fields, there is an 'Export' button and the text 'Showing 1 out of 1 record'. A table displays the search results, with the first row highlighted in orange and a blue circle and number 5 next to it.

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

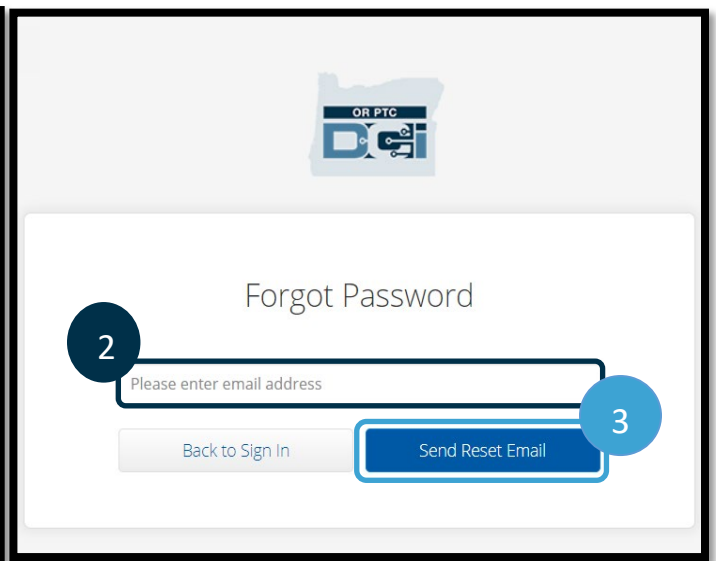
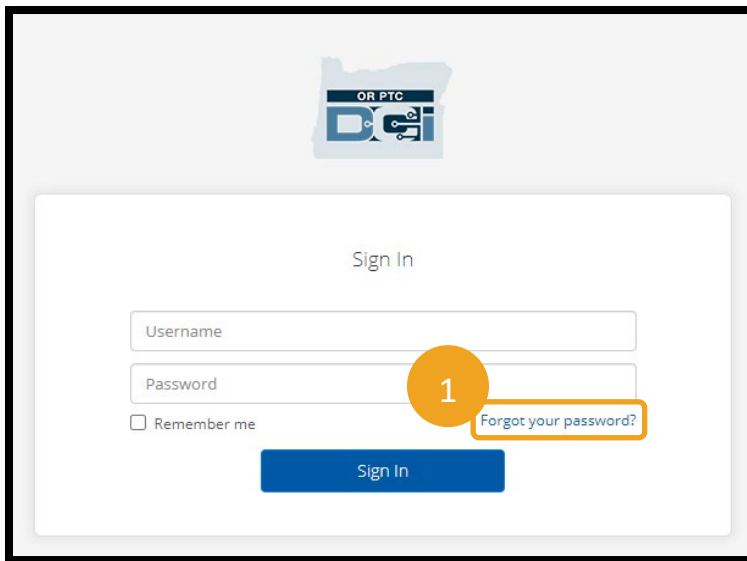
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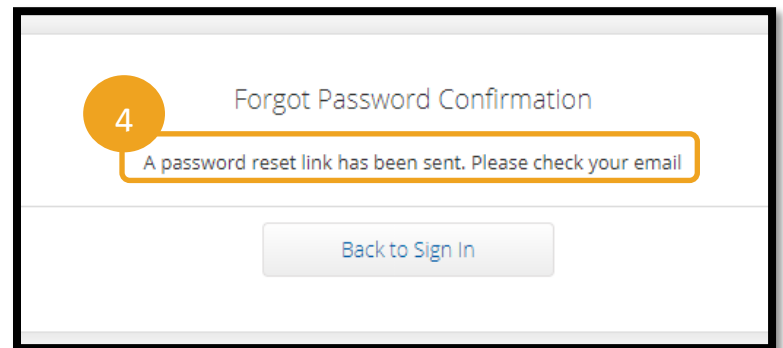
## Forgotten Password

If a provider forgets their password, they can reset their own password following the below steps:

1. Select the 'Forgot your password?' hyperlink of the login screen.
2. The provider enters their email address into the email field.
3. Select Send Reset Email.



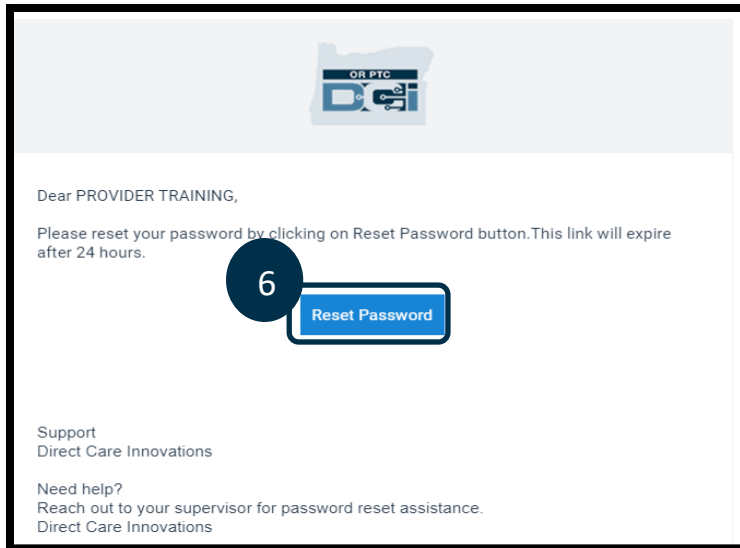
4. The provider will then see a confirmation alert and an email will be sent to the email address listed on their profile in OR PTC DCI.



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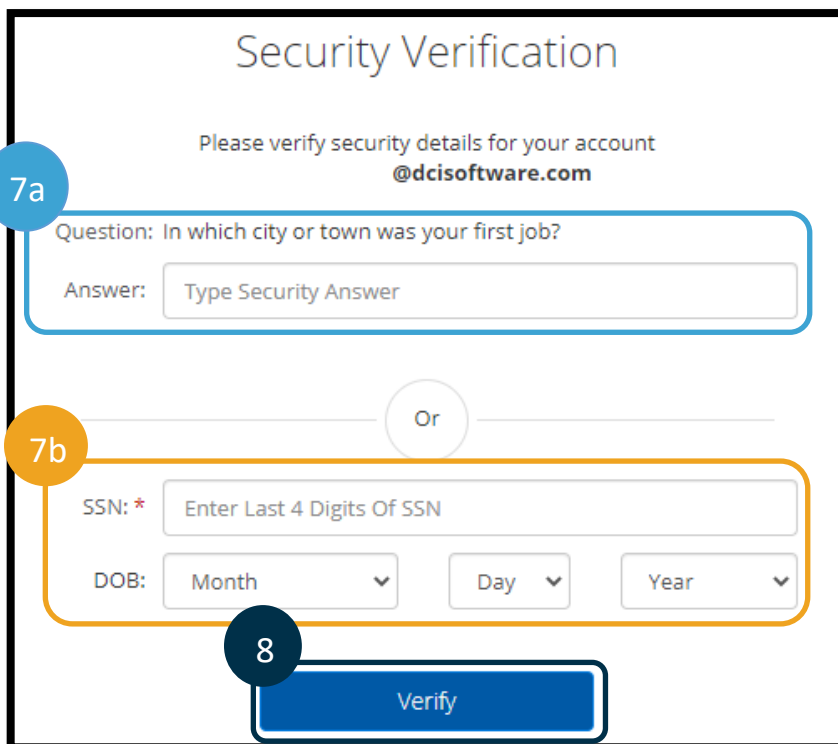
5. The provider will open the reset email from [orptcsupport@dcisoftware.com](mailto:orptcsupport@dcisoftware.com).
6. Select Reset Password.



**Note:** If the OR PTC DCI user does not receive the email:

- First, ask the user to check their spam folder.
- Then, check their OR PTC DCI profile to make sure the correct email address is on file.

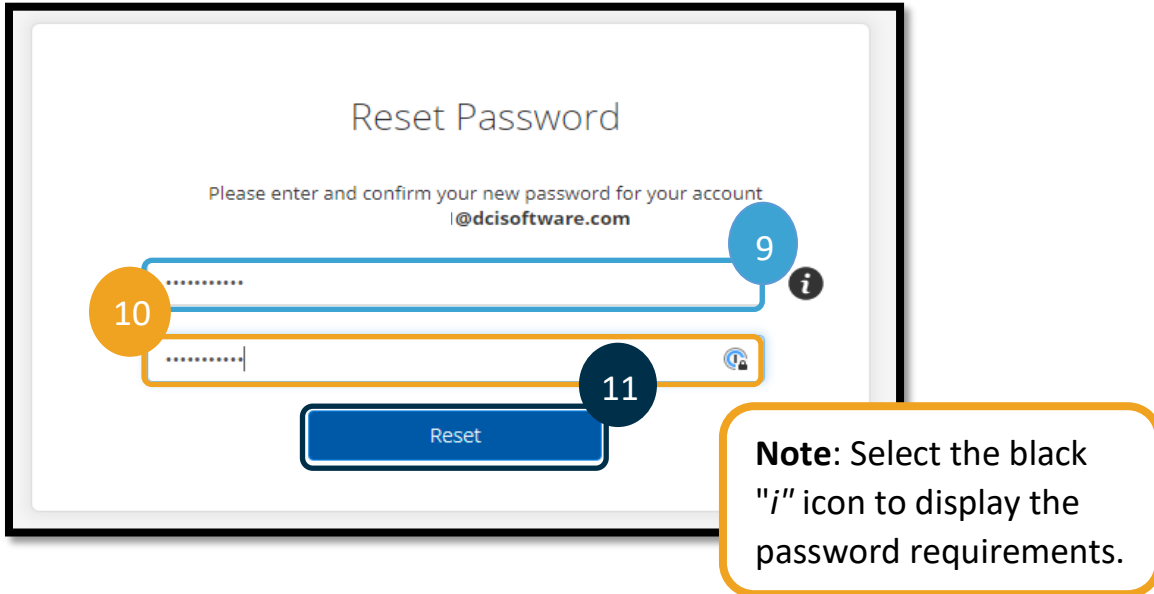
7. To reset the password, the provider must enter either:
  - a. The answer to their security question, **or**
  - b. The last 4 digits of their social security number and their date of birth.
8. Enter a response to one of the two options, then select Verify.



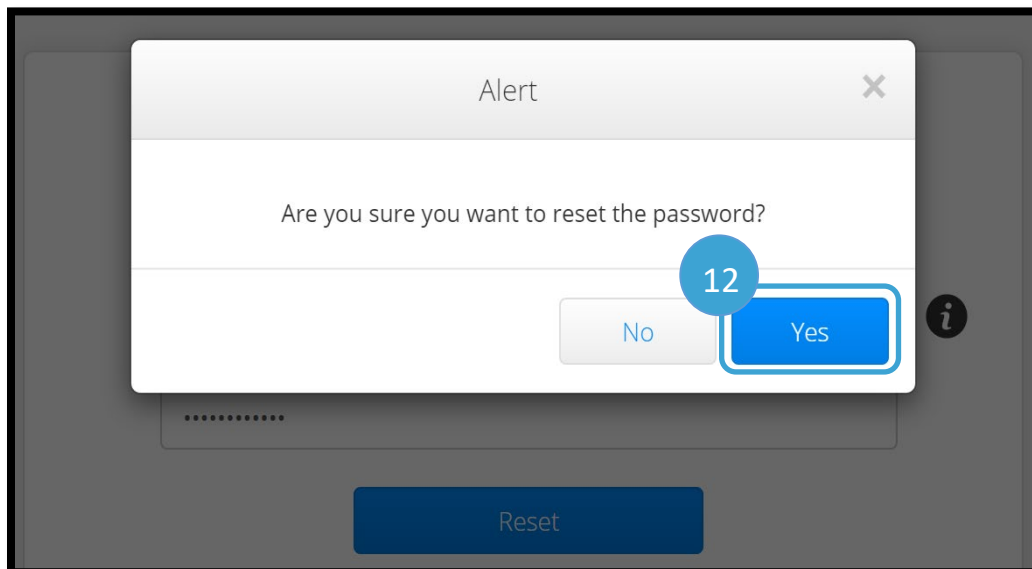
**Note:** Staff members should utilize 'option a' when changing their own password. Social Security and date of birth information is not stored in OR PTC DCI for staff members.

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9. The provider will enter the new password they want to use.
10. Re-enter the new password.
11. Select Reset to complete the password reset.



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



If an OR PTC DCI user is unable to verify themselves using the Forgot Password hyperlink, email the PTC Support Team at [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov). The user must have an active email listed in OR PTC DCI to have their password reset.

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**Note:** Resetting a profile is completed as a last resort, as this results in clearing any PIN and security questions. Please see the below guides for instructions on how to verify a PIN, change a PIN, and update security questions if needed:

[Quick Reference Guide - Adding and Changing a PIN](#)

[OR PTC DCI User Settings Guide](#)

## Password Rules:

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

**Note:** An example password looks like: ILovePTC2021!

## Locked profiles

If a user attempts to log in but their profile is locked, a banner will show reading: “For security purposes you have been locked out. Please contact your supervisor.” This language will display for all user types, and the PTC Support Team cannot change the wording.

A screenshot of the OR PTC DCI login interface. At the top center is the OR PTC DCI logo. Below it is a pink banner with the text: "For security purposes you have been locked out. Please contact your supervisor." Underneath the banner is the "Sign In" heading. There are two input fields: "Username" and "Password". Below the "Username" field is a checkbox labeled "Remember me". To the right of the "Password" field is a link that says "Forgot your password?". At the bottom center is a blue "Sign In" button.

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If a provider needs their profile unlocked, this can be done by:

- Any local office staff member with a supervisor role in OR PTC DCI,
- The PTC Support Team ([PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov)), or
- The DCI Help Desk – **Only if the provider has a valid email address in OR PTC DCI** (855-565-0155 or [ORPTCSupport@dcisoftware.com](mailto:ORPTCSupport@dcisoftware.com)).

**Note:** Staff profiles can only be unlocked by the PTC Support Team and cannot be unlocked by other local office staff or the DCI Help Desk.

Instructions for staff unlocking a locked profile:

1. Sign into your OR PTC DCI profile with a supervisor role.
2. Use the Employees to navigate to the provider’s profile, see ‘How to find the provider’s profile in OR PTC DCI’ on page 2 for further instructions.
3. In the Other Details section, the Authentication Status will say “Locked” in red.
4. Select the blue “Unlock” button next to where it says Locked.

**Note:** The Authentication Status will say “Active” if the profile is not locked.

