

Staff Learning Materials Catalog

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Guides

Title	Description
OR PTC DCI Web Portal	OR PTC DCI Web Portal Overview
Payroll Batch and Time Entry Guide	Walk through of creating a payroll batch using the Punch Entries Report
Reports	How to guide on finding and downloading reports.
Time Entry Management	Guide on pending time entries management.
User Settings Guide	How to update the password, PIN, security questions, email, phone number and username in OR PTC DCI.
Profile Management	How-to Guide on updating User Profiles in OR PTC DCI.
Authorization Management	Informational Guide about Funding Accounts, Service Accounts, and Authorization Management.

Staff Training

Title	Description
OR PTC DCI Staff Training Video	Step-by-step training video for Staff on how to use OR PTC DCI.

Provider and Consumer Materials

Title	Description
Provider Learning Materials Catalog	Catalog containing all of the Provider learning materials and resources.
OR PTC DCI English Provider Orientation OR PTC DCI Russian Provider Orientation OR PTC DCI Spanish Provider Orientation OR PTC DCI Vietnamese Provider Orientation	This is a video recording of the Provider Orientation Session where each method of time entry is explained in depth with step-by-step instructions on how to use each Method.
Consumer/Consumer Employer Representative Learning Materials Catalog	Catalog containing all of the Consumer/Consumer Employer Representative learning materials and resources.
Provider and Consumer Resource Guide	A list of resources available to support Providers and Consumers.

Quick Reference Guides (QRGs)

Title	Description
Submitting a Request to PTC Support	Step-by-step process to submit a request to the PTC Support team.
Red Eye Pending Entries	Guide on what each red eye pending entry means, and the actions needed to remedy the pending entry.
Time Conversion Chart	Chart showing the conversion of minutes to decimal hours.

Updating an Authorization	Step-by-step instructions on how to update an authorization in OR PTC DCI.
Correcting a Punch Entry in Approved Status	Walkthrough for State Staff to correct a punch entry that is in "Approved" status.
Correcting a Punch Entry in Processed Status	Walkthrough for State Staff to correct a punch entry that is in "Processed" status.
Consumer Passes Away	This guide provides instructions for staff on what actions to take in OR PTC DCI after a consumer passes away to ensure their account is properly closed.
Entry Status	This Quick Reference Guide covers the different time entry statuses that a time entry can have in OR PTC DCI, and what actions a staff member or provider can take for each status.
Resetting Passwords	This guide shows resetting a consumer, provider, or CER's profile in OR PTC DCI.
Explanation of PTC Errors in Mainframe	List of PTC Error in Mainframe and what they mean.
Business Rule List	List of Business Rules enabled in OR PTC DCI.
Adding a Note to a Provider's Profile	Step-by-step guide on how to add notes to a Provider's Profile in OR PTC DCI.
Time Entry Troubleshooting	Guide providing tips and reminders for what staff need to look for to maintain and correct time entries in OR PTC DCI.
Trouble Shooting Guide – Data Integrity	Guide outlining situations and associated business processes needed to keep information consistent between OR PTC DCI and legacy systems.
Importing Excel Sheets into Google	Step-by-step guide on how to import Excel Sheets into Google Drive
How to Find a UniID Number	Step-by-step guide showing where to find a Provider's UniID in DHR.
Pulling Authorization Entries Report	This QRG covers how to pull the Authorization Entries Report and why a staff member may want to do so.
How to Download and Format Batch Reports	Step-by-step instructions on how to download and format batch reports using Excel.
Formatting OR PTC DCI Reports for Download	Step-by-step instructions on how to download the Payroll Batch Details Report into Excel.
OR PTC DCI Mobile App Offline	How to use the offline feature in the mobile app.
OR PTC DCI Landline Tip Sheet	How to create a real-time punch as well as the available OR PTC DCI Landline numbers to call.
How to Uninstall and Reinstall the OR PTC DCI Mobile App on Apple Devices	Step-by-step reference guide on how to uninstall and reinstall the OR PTC DCI mobile app from an Apple smart device.
Unable to Access DCI Mobile App on Android Device	Step-by-step instructions on clearing the DCI App Data (cache) on any Android device.
Linking a Fob to a Consumer	Outline the steps required to successfully link a Consumer to a fob in the Local Office. These steps assume the local office has a fob stored locally.
Unlinking a Fob to a Consumer	Outline the steps required to successfully unlink a Consumer to a fob in the Local Office.
Generating the Punch Entry Authorization Violation Report	Generate this report to view all pending entries that are over authorized hours.
Staff Resource Guide	A list including all available support resources for Staff.

Online Learning

CBT Title	Description
Recovering a Forgotten Password	Hands on step-by-step how to change a password when it has been forgotten.
Logging in to OR PTC DCI and Changing Your User Settings	Hands on walkthrough of changing a user's personal settings.

Business Processes

Business Process	Description
1.1.2 Provider Switches During Pay Period - Permanently	This process is for if the number of hours between two Providers must change permanently. For example: If a consumer is authorized 40 hours and HCW A has 25 hours but they quit, so you need to lower their hours to zero and increase HCW B's hours to 40.
1.1.3 Provider Switches During Pay Period - Temporary	This process is for if a number of hours between two Providers much change temporarily. For example: If HCW A is on vacation and HCW B must cover those hours.
1.1.4 Change Authorization	Process for if a change in the authorization is needed, including a change in mileage or hours, ending the authorization early, etc.
1.1.5 Relinking a Provider and Consumer	Process used when a Provider begins working for a Consumer they previously had stopped working for.
1.2.1 Add a New Provider	Process used to add a new Provider.
1.2.2 Change Provider Status	Process used when a Provider's status must be updated.
1.2.3 Update Provider Information	Process used when you have to update information on a Provider's account.
1.2.4 Provider Number Reinstated	Process used when a previously terminated Provider's Provider Number has been reinstated.
1.3.1 Add Consumer Information	Process used to add Consumer information.
1.3.2 Update Consumer Information	Process used to update Consumer information.
1.3.3 Consumer Transfers to a New Branch	Process used to transfer a Consumer to a new branch.
1.3.4. Return or Request a Fob in the Local Office	Process used when a Consumer requests a fob or returns a fob.
1.4.1 Add or Remove Consumer Employer Representative	Process used to add/remove Consumer Employer Representative.
1.4.2 Update Consumer Employer Representative Information	Process used to update Consumer Employer information.
1.4.3 Create Consumer Employer Representative Account	Create a Consumer Employer Representative Account.
1.5.3 Unlock an Account	Process to unlock an account.
1.6.0 Manually Adding or Updating Branch Info	Process to add or update branch information.
1.7.0 Setting Up EVV Options with Consumers and Providers	This process includes confirming the option they have chosen, confirming the landline, set up with the fob, set up telephony historical time entry (Consumer needs PIN), set up phone EVV, etc.
2.1.0 Increase in Weekly Cap	Business process needed for retroactive increased weekly cap hours.
2.12.0 Provider Goes Over Authorized Hours	Pended Entries Management where an entry pends due to the going over the authorized hours.
2.2.3 Correct Punch Entry Mistake	Process for if a Provider, State Staff Member, or Consumer notices a mistake in a punch entry after the Consumer has approved the entry (meaning the Provider cannot edit the entry in OR PTC DCI).

2.3.0 Entries Claimed After 365 Days	Process that details what a staff user should do to assist a Provider in submitting time entries that are older than 365 days.
2.6.2 End Authorization, Expiration, Terminations	Process to follow when a Provider is terminated, an authorization ends, or their credentials expire. This process should be basically the same as it is in the current system with the addition of updating OR PTC DCI.
3.3.0 Consumer Passes Away	Process to follow when a Consumer passes away.
4.1.1 Pending Entries Management	The process for working the pend queue on a daily basis. The purpose is to either approve or reject time entries that have failed a business rule and resolving the issues that caused them to pend.
4.3.0 Time Entry	This is the process for entering time from OR PTC DCI into Mainframe.
4.4.0 Over and Underpayments	How to process under and over payments.
6.1.0 Case with Multiple Providers & Varying Hours	The process for handling cases that have multiple Providers who have varying hours every pay period.

New User Forms

Form	Description
Staff Profile Maintenance Form	Form to request the addition of a new State User, modify the access of a current State User, or deactivate a State User.
Consumer/Provider Profile Maintenance Form	Form to request the addition of a new Consumer/Provider combination or to deactivate a Consumer/Provider.
Consumer Employer Representative Profile Maintenance Form	Form to request the addition or deactivation of a Consumer Employer Representative.

Related articles

- [Business Process - Change in Authorizations](#)
- [Staff Learning Materials Catalog](#)
- [QRG - Explanation of PTC Errors in Mainframe](#)
- [Staff QRG - Notes Functionality](#)
- [Guide - Web Portal](#)