

QRG - Resetting Passwords in OR PTC DCI



Staff - Resetting Passwords...CERs, or Providers v2.0.pdf



Purpose: This guide shows resetting a consumer, provider, or CER's profile in OR PTC DCI.

Outcome: Staff understand how to reset authentication information (password and PIN).

If a consumer, provider, or CER is unable to login because they forgot their password and the forgot password function isn't working for them, you can reset their authentication information. This sends an email with a reset link to the email address on their OR PTC DCI profile. Upon clicking reset in the email, the user will be prompted to set a new password and security question. They must set a new PIN once logged in (instructions for adding a PIN can be found in the [Adding and Changing a PIN](#) QRG). If the user does not have a valid email on file, do not reset their authentication information.

Reset clears out the password, security questions, and PIN.

The following steps show resetting a consumer's authentication information, but they also apply to providers and CERs. If any steps differ between these groups, they are indicated.

1. Click Clients.
 - a. For providers, click Employees.
 - b. For CERs, click Guardian.



Note

Ensure you have the correct profile by verifying key information such as date of birth or last four digits of the SSN.

2. Search for the consumer using either their name or Prime Number.
 - a. For providers, search using name or Uni ID.
 - b. For CERs, search using their name.
3. Click Search.

4. Select the consumer/provider/CER from the results list.

Clients

Search: scooby

Filters: Type Client Id, Type Cost Center, Select State, Select Status, Select Funding Source

Buttons: 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 |

5. From the Client/Employee/Guardian Details page, ensure there is a valid email on file in the Basic Demographics column. If the email is Support@odhsoba.oregon.gov, this is a placeholder. You cannot reset the account until the email is updated to one belonging to the user. If there is a valid email listed in OR PTC DCI belonging to the consumer/provider/CER, you can continue to step 6 to reset their authentication information.
6. Click Actions.
7. Click Edit Client.
- a. For providers, click Edit Employee.
- b. For CERs, click Edit Guardian.

Client Details - Scooby Doo

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: 1

No. of Service Accounts: 1

Status: Active

Other Details

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

Preferred Language: English

Username: scooby.doo

Client Status: Active

Authentication Status: Disabled

Photo Set: No

Signature Set: No

Enable Caregiver: No

Rating Emails: No

Actions

- New Note
- New Attachment
- New Service Account
- New Entry
- Edit Client
- Edit Custom Field Values
- Add Certification
- Add New FOB
- Add Diagnosis
- Block Mobile App Usage
- New EVV Location
- Block Portal Usage
- Register with Training System

8. Click the Authentication Information tab.
9. Ensure the Authentication Status says Active. If it does not, change to Active.
10. Click Reset.
11. Click Save.

Home / Client / Scooby Doo / Edit Details

Edit Client Details

Basic Demographics Client Information **Authentication Information**

Enable Client Login: ☒ Yes

Username: scooby.doo

FOB Serial Number: Type Serial Number

Authentication Status: Active

Reset Authentication Details: [Reset](#)

Cancel Save

You will see a brief pop-up if it was reset successfully.

Authentication Status: Active

Reset Authentication Details: [Reset](#)

Email has been successfully sent.

Cancel Save



Note

If the user does not see the email, tell them to check their spam/junk folder.

Related articles

- [Guide - OR PTC User Settings Guide](#)
- [Staff Learning Materials Catalog](#)
- [Guide - Time Entry Management](#)
- [Online Learning - Recovering a Forgotten Password](#)
- [Business Process - Managing Staff Profiles](#)