

# QRG - Linking a Fob to a Consumer



Staff - Link a Fob 2.0.pdf



**Purpose:** This outlines 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.

**Outcome:** The consumer is now linked to a fob.

**Relevant Business Process:** [1.3.4 Return or Request a Fob in the Local Office](#)

If a consumer asks for a fob and the local office has a fob on hand, this fob can be linked to the consumer. The consumer can then take this fob to use. Follow the below steps to link the fob.

If a provider requests a fob on behalf of their consumer, the fob must be given directly to the consumer. If the consumer does not want to come to the office to pick up the fob or if you do not have a fob on hand, request one from the [PTC Support Team](#) by emailing a request with the consumer's name, prime number, and mailing address.

## Steps to Link a Fob

1. Locate the consumer's profile in OR PTC DCI by searching for the consumer by name and/or prime number in the Clients tab. Click on the row containing the consumers information. This will take you to the Client Details page.

1 Client Details - Judy Jetson Actions

| Basic Demographics   | Other Details   |
|--|---|
| <p>Client Id: PrimeNumber1123</p> <p>Address: 1234 Training St<br/>Salem, OR 97301-0000</p> <p>GNIS: 41-047-1167861</p> <p>Phone: (000) 000-0000</p> <p>Email: <a href="mailto:PTCProject.info@dhsosha.state.or.us">PTCProject.info@dhsosha.state.or.us</a></p> <p>Date of Birth: Jan 01, 1955</p> <p>SSN: ****-**-**** <a href="#">Show</a></p> <p>Allow SSN Retrieval: No </p> <p>No. of Funding: 2</p> <p>Accounts:</p> | <p>Cost Center: <a href="#">Hillsboro APD-EU</a></p> <p>Guardian: <a href="#">George Jetson</a></p> <p>Preferred: English</p> <p>Language:</p> <p>Username: Judy Jetson</p> <p>Client Status: Active</p> <p>Authentication: Disabled</p> <p>Status:</p> <p>Photo Set: No</p> <p>Signature Set: No</p> <p>Enable Caregiver: No</p> |

2. Verify the consumer does not already have a FOB Serial Number assigned in the Other Details section. The example to the right shows there is a fob already associated with this profile. If there is already a fob associated with the account but they do not have the fob, please follow the steps in [Unlink a Fob](#), then follow the steps in this QRG to link a new fob.

Other Details

Cost Center: Hillsboro APD-EU

Guardian: George Jetson

Preferred Language: English

Username: judy.jetson

Client Status: Active

FOB Serial Number: 2608008002622

Authentication Status: Disabled

Photo Set: No

Signature Set: No

Enable Caregiver: No

Rating Emails:

3. Click Actions on the Client Details page.
4. Click Add New FOB.

3 Actions

New Note

New Attachment

Edit Client

Edit Custom Field Values

New Service Account

New Entry

Add Certification

Block Mobile App Usage

Block Portal Usage

New EW Location

Add New FOB

4

5. In the Add New FOB screen, type the serial number located on the back of the fob into the field labeled FOB Serial Number.
6. Press the red button on the fob to display a six-digit code. Enter the six-digit code into the field labeled "Code".

7. Click Save.

Add New FOB

Name : Judy Jetson

FOB Serial Number : Type Serial Number

Code : Type Code

Cancel Save

8. Click Yes on the Alert.

Alert

Are you sure you want to add a new 2608008002622 Token Serial Number for Judy Jetson?

No Yes

9. The fob is linked to the consumer. You can see the FOB Serial Number is now listed under Other Details on the consumer's profile.

Other Details

Cost Center: Hillsboro APD-EU

Guardian: George Jetson

Preferred Language: English

Username: judy.jetson

Client Status: Active

FOB Serial Number: 2608008002622

Authentication Status: Disabled

Photo Set: No

10. Email the PTC Support Team an update with the consumer's name, Prime Number and the associated FOB Serial Number. Use this template.
- To: [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov)
  - Subject Line: Fob linked to client profile
  - Body of Email:
    - Consumer's name
    - Prime Number
    - FOB Serial Number
    - Date of fob linking
11. Narrate in Oregon Access that the fob was provided to the consumer, including the Serial Number. Before handing the fob over to the consumer, ensure you have sanitized the fob.

## Related articles

- [Business Process - Over and Underpayments](#)
- [Staff Learning Materials Catalog](#)
- [QRG - Resetting Passwords in OR PTC DCI](#)
- [Guide - Profile Management](#)
- [QRG - Profile Requests for OR PTC DCI](#)