

Staff Learning Materials Catalog

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Guides

Title	Description
Auditor Guide	Guide specifically for staff with an Auditor role in OR PTC DCI.
Authorization Management Guide	Guide for staff about Funding Accounts, Service Accounts, and Authorization Management.
Fob Guide	Guide for staff about using fobs, including instructions for linking and unlinking fobs.
OR PTC DCI Web Portal Guide	Guide for staff on how to use the OR PTC DCI Web Portal.
Payroll Batch and Time Entry Guide	Guide for staff about how payroll batches are pulled and time entry after a payroll batch is emailed to the local office.
Profile Management Guide	Guide for staff on updating User Profiles in OR PTC DCI.
Report Guide	Guide for staff on finding and downloading reports.
Time Entry Management Guide	Guide for staff on determining available balance for a provider, correcting an entry mistake, entry edits, under and over payments, and historical entries.
Troubleshooting Guide	Guide for staff containing troubleshooting steps for a wide variety of issues staff may come across related to looking at entries in OR PTC DCI or issues the provider reported.
Unlinking and Relinking Guide	Guide for staff with all the resources and guidance staff need related to unlinking and relinking procedures.
User Settings Guide	Guide for all OR PTC DCI users to update their password, PIN, security questions, email, phone number and username in OR PTC DCI.

Staff Training

Title	Description
OR PTC DCI 1.1.4 Change in Authorizations	Step-by-step computer based training for when a change in authorization is needed and prorating.
OR PTC DCI 4.3.0 Time Entry	Step-by-step computer based training on payroll roles and batches, and common questions.
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
Consumer/Consumer Employer Representative Learning Materials Guide	Catalog containing all of the Consumer/Consumer Employer Representative 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.
Provider and Consumer Resource Guide	List of resources available to support Providers and Consumers.
Provider Learning Materials Catalog	Catalog containing all the Provider learning materials and resources.

Quick Reference Guides (QRGs)

Title	Description
Adding a Note to a Provider's Profile	Demonstrates how to add notes to a Provider's Profile in OR PTC DCI.
Authorizations Widget	Demonstrates how to use the authorizations widget to view authorizations and hours assigned in OR PTC DCI for a consumer and their providers.
Business Rule List	List of Business Rules in OR PTC DCI with descriptions.
Case with Multiple Providers and Varying Hours	Guides staff in the management of cases with multiple providers and varying hours as they relate to Mainframe and OR PTC DCI.
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.
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 Process Status	Walkthrough for State Staff to correct a punch entry that is in "Processed" status.
Entries Claimed After 365 Days	Demonstrates the steps required when a provider requests payment more than 365 days after providing services.
Entry Status	List of 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.
Explanation of PTC Errors in Mainframe	List of PTC Errors in Mainframe with descriptions.
How to Download and Format Batch Reports	Step-by-step instructions on how to download and format batch reports using Excel.
How to Find a UniID Number	Demonstrates where to find a Provider's UniID in DHR.
Importing Excel Sheets into Google	Demonstrates on how to import Excel Sheets into Google Drive.
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.
OR PTC DCI Landline Tip Sheet	Demonstrates how to create a real-time entry via the OR PTC DCI Landline option, including the number to call.
OR PTC DCI Mobile App Offline	Demonstrates how to use the offline feature in the mobile app.
Over and Underpayments	Demonstrates what actions to take when an over or underpayment request is needed.
Profile Requests for OR PTC DCI	Demonstrates how to use the Staff Profile Maintenance form to make changes to the OR PTC DCI profiles of staff members.
Provider Login Issues	Demonstrates how to troubleshoot an OR PTC DCI provider login problem such as new profile creation, forgotten password, or locked profile.
Punch Entry Details Report	Demonstrates how to create and download the Punch Entry Details report to find information on entries, hours worked, and miles claimed by a provider.

Staff Resource Guide	List of available support resources for Staff.
Submitting a Request to PTC Support	Demonstrates how to submit a request to the PTC Support team.
Time Conversion Chart - Minutes to Decimal Hours	Chart showing the conversion of minutes to decimal hours.
Unlinking a Fob to a Consumer	Outline the steps required to successfully unlink a Consumer to a fob in the Local Office.
Updating an Authorization	Step-by-step instructions on how to update an authorization in OR PTC DCI.

Online Learning

CBT Title	Description
Logging in to OR PTC DCI and Changing Your User Settings	Demonstrates how to change a user's personal settings.
Recovering a Forgotten Password	Demonstrates how to change a password when it has been forgotten.

Business Processes

Business Process	Description
1.1.2 Provider Switches During Pay Period - Permanently	There is a need for a permanent switch in provider(s) during a pay period.
1.1.3 Provider Switches During Pay Period - Temporarily	There is a need for a one-time switch in provider(s) during a pay period.
1.1.4 Change in Authorizations	A change/update in an authorization is needed.
1.1.5 Relinking a Provider and Consumer	Provider begins working for a Consumer they previously had stopped working for.
1.2.1 Add a New Provider	A new provider needs a profile
1.2.2 Change Provider Status	A provider status needs to be changed.
1.2.3 Update Provider Information	Provider information must be updated.
1.3.1 Add a New Consumer	A new consumer needs a profile in OR PTC DCI.
1.3.2 Update Consumer Information	Consumer information must be updated in OR PTC DCI.
1.3.3 Consumer Transfers to a New Branch or Program	A long-term care consumer moves to a new branch or program.
1.3.4. Return or Request a Fob in the Local Office	A fob is returned to the local office.
1.4.1 Add or Remove Consumer Employer Representative	CER needs to be added.
1.4.2 Update Consumer Employer Representative Information	CER information must be updated.
1.4.3 Create New Consumer Employer Representative	CER profile needs to be created.
1.5.1 Managing Staff Profiles	Staff member needs an OR PTC DCI profile to be created, modified, or closed.
1.5.3 Unlock a Profile	OR PTC DCI profile must be unlocked.

1.6.0 Manually Adding or Updating Branch Info	OR PTC DCI support receives notification of branch change from BOTS legacy BAs.
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	Case manager identified an exception need to increase a provider's weekly cap.
2.2.3 Correct Entry Mistake	A mistake has occurred or a consumer/CER disputes an entry.
2.3.0 Entries Claimed After 365 Days	Provider has time to turn in past 365 days.
2.6.2 End Authorization, Expiration, Terminations	A provider is terminated, an authorization ends, or their credentials expire.
3.3.0 Consumer Passes Away	A consumer passed away.
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 - Over and Underpayments](#)
- [Staff Learning Materials Catalog](#)
- [QRG - Resetting Passwords in OR PTC DCI](#)
- [Guide - Profile Management](#)
- [QRG - Profile Requests for OR PTC DCI](#)