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, adjustments, over/underpayments, and historical entries.
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.
Auditor Guide	Informational Guide specifically for users with an Auditor role in OR PTC DCI.
Troubleshooting Guide	Contains troubleshooting steps for a wide variety of issues staff may come across related to entering time in Mainframe or looking at entries in OR PTC DCI, as well as issues the provider reported.

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
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 Guide	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.
Time Conversion Chart - Minutes to Decimal Hours	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.
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.
How to Download and Format Batch Reports	Step-by-step instructions on how to download and format batch reports using 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.
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.
Staff Resource Guide	A list including all available support resources for Staff.
Profile Requests for OR PTC DCI	Explains how to use the Staff Profile Maintenance form to make changes to the OR PTC DCI profiles of staff members.

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	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

- 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