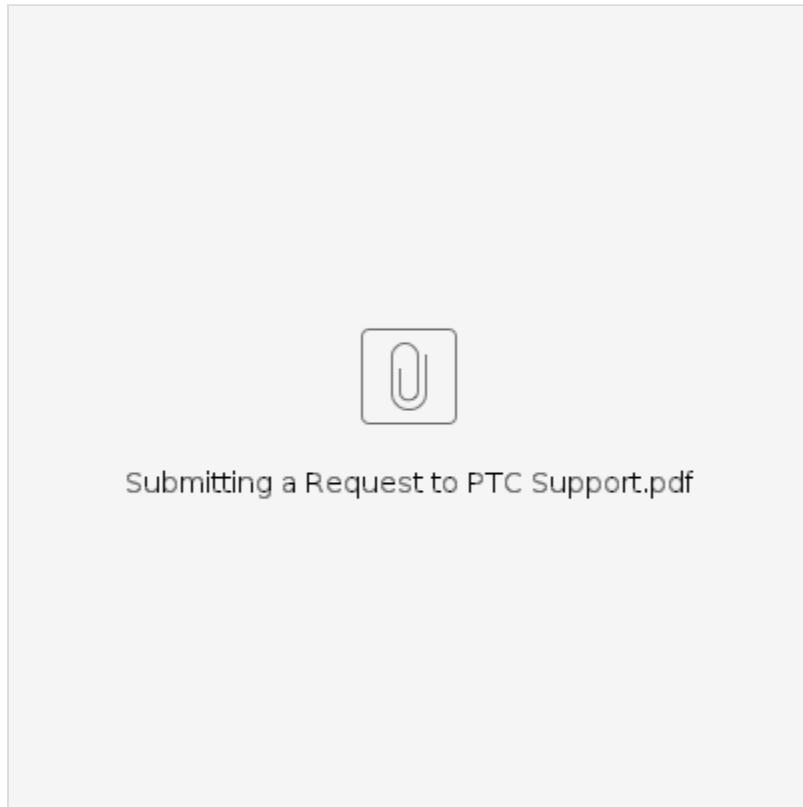


# QRG - Submitting a Request to PTC Support

Submitting a Request to PTC Support



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## 1. Introduction

This document includes all information necessary to be included in requests sent to the PTC Support team at [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov). The title of each section defines the request you wish to submit. Under each section is a list of items that must be included in your email request. If any of the information listed under "must include" is not included, the PTC Support team will respond to your request asking you to provide the necessary information, thus delaying completion of your request. Please send your email securely by starting the subject with #secure#.

## 2. Troubleshooting

If you are having issues with OR PTC DCI or attempting to troubleshoot with a provider or consumer and need assistance, please email [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov) with the following information (as it applies):

If a staff member needs to troubleshoot an issue with their own account, please include:

- The staff member's name and OR# or P#

- As much information about the issue as possible, including screenshots if you can get them

If you are troubleshooting with a provider/consumer, or if you are attempting to take action in a provider/consumer account or time entry and need assistance, please include all that apply:

- The consumer's name and Prime #,
- The provider's name and provider number
- As many details about the issue as possible, including screenshots if you can get them, and
- Any related entry ID, voucher number, batch number, or other identifying information

### 3. Request transfer of a consumer to a new branch

See business process [1.3.3 Consumer Transfers to a New Branch](#).

Must Include:

- Consumer's name
- Consumer's prime number
- Whether the consumer is keeping their provider(s) or not, and the provider's UniID (for identification)
- Cost Center the consumer is transferring to

### 4. Unlock an account

See business process [1.5.3 Managing User Accounts - Unlock a Profile](#).

Must Include:

- Name of the user who has been locked out
- Unique number of the individual who has been locked out (prime number, OR/P number, UniID)

### 5. Request a fob for a consumer

See business process [1.7.0 Setting Up EVV Options with Consumer and Providers](#). If a consumer needs a fob device and there is not one available at the local office, send a fob request to [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov). If there is a fob available in the local office and staff are able to give one to the consumer, see [APD-IM-22-030 Fob Process Updates](#) for instructions on linking a fob to a consumer.

Email requests for a new fob must Include:

- Consumer's name
- Consumer's mailing address
- Prime number

### 6. Request a fob replacement

This is when a consumer needs a replacement fob, either because their fob was lost, broken, or the battery died. Please see [APD-IM-22-030 Fob Process Updates](#) for instructions on how to link and unlink fobs within the local office. The transmittal also explains how to test a fob if a provider/consumer claims it is broken. If the fob needs to be replaced but no fobs are available in the local office, send a request to [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov).

Email requests for replacement fobs must Include:

- Consumer's name
- Consumer's mailing address
- Prime number
- Reason why the fob needs to be replaced

### 7. Request a new staff account

For staff needing new access to OR PTC DCI, complete the [Staff Profile Maintenance](#) form.

Be sure to include all staff identifying information, including name, OR/P number, email address, phone, and address. Include all roles and permissions the staff will need. The second page has space to add additional cost centers.

Please note: A staff member cannot have more than one role. This means a staff member with the supervisor role (with the ability to see profiles, entries, pending entries screen, etc.) cannot also have a payroll team role (with the ability to run payroll batches). Most branches have a dedicated shared email address they use for their Payroll Team account.

New staff requests must have manager approval from the requesting office.

## 8. Change staff roles or permissions

For staff needing changes to their role or permissions, complete the applicable portions of the [Staff Profile Maintenance](#) form.

Include the name, email address, and OR/P number, as well as the needed changes to the staff's role or permissions.

The most common changes include adding authorization admit permissions, adding additional cost centers with the supervisor role, or removing all roles /permissions (due to staff resignation or transfer).

Staff role/permission change requests must have manager approval from the requesting office.

## 9. New Consumer Employer Representative (CER) account needed

CER accounts are not created automatically in OR PTC DCI and the PTC Support team must create each one manually. To request a new CER account, please complete the [Consumer Employer Representative Profile Maintenance](#) form. Be sure to include complete and accurate information.

Please note: A consumer's CER cannot also be the consumer's provider as this is a conflict of interest.

## 10. New provider/consumer accounts needed

New provider and consumer accounts are created after the local office creates a voucher. If a voucher is created with a provider and/or consumer who are not already present and linked in the system, a PTC error is triggered, thus notifying the PTC Support team to create the needed accounts.

However, there are rare circumstances where a new provider/consumer pair may not trigger an error.

If you create a voucher but notice that the accounts are not created in OR PTC DCI after 2 business days, please complete the [Consumer/Provider Profile Maintenance](#) form and email it to the PTC Support team. In your email, please include the applicable voucher number(s) and date those vouchers were created in Mainframe/DHR.

Note: If you can't find a consumer by searching for their prime number or name, they may not be in your cost center in OR PTC DCI. If you have Authorization admin permissions, go to the Authorization tab and search for the consumer's name there. See Request transfer of a consumer to a new branch if the consumer is in the incorrect cost center and needs to be transferred.

## 11. Request a custom report

For additional information on this process see the staff support guide under 13.1.0 Request a Custom Report.

Must Include:

- If it is an existing custom report (either the Changed Email/Phone Report or Notifications Report), name of the report requested
  - If it is the Notifications Report, date range of notifications being requested (start date and end date), either UnilD or Provider number who received the notifications, and name of the Message Template(s) included in the request (you may state "All")
- If it is not an existing custom report, what information is being requested
- Reason for this request
- Requestor name and identifying number (OR/P number)

Note: Only designated individuals can request a custom report. Those individuals are Andrea Kempel, OHCC Customer relations mailbox, Jenny Cokeley, Traci Lerner, and Amy Gordin.

## 12. Request a change in the recipient list of the changed email/phone report

This is for when the staff members who receive the Changed Email/Phone Report change must be changed. More information on this process can be found in the staff support guide under 13.3.0 Change Recipient of Changed Email/Phone Report.

Must Include:

- Name of individual being added/removed from the recipient list
- OR/P number of individual being added/removed from the recipient list
- EU Branch number(s) for which the recipient should receive the report for or be removed from

## 13. Request for information

To request information from the PTC Support team, include the following information in the request.

Must Include:

- Name and OR/P number

- Specific information needed
- Purpose for request

## 14. Unlinking a consumer and provider

This is for instances when a consumer and provider are no longer working together for any reason. This may include when a provider is terminated, if a consumer passes away or is no longer eligible for services, etc. The profile should be inactivated if the consumer or provider will no longer need to access their account, claim time, or receive services. More information is in [APD-IM-22-021 Unlinking Consumers and Providers in OR PTC DCI](#).

Must include:

- Consumer name and prime number
- Provider name and 6-digit provider number
- Last day worked
- Reason for unlinking
- Whether the profile(s) need to be inactivated

## 15. Relinking a consumer and provider in OR PTC DCI

This is for instances when a consumer and provider had previously been unlinked in OR PTC DCI and start working together again. More information is in [1.5 Relinking a Provider and Consumer](#) and [APD-IM-22-049 Relinking Consumers and Providers in OR PTC DCI](#).

If relinking is needed, the email to the PTC Support team must include:

- Consumer name and prime number
- Provider name and 6-digit provider number
- Date provider began working with consumer again
- Service account active or inactive

## 16. Changing a consumer from one program to another

This is for when a consumer changes from one program to another (APD to OPI or HSD, or vice versa) and is working with the same provider.

The provider will see two service codes when attempting to clock in or report time until the old service account has been inactivated. To prevent confusion or errors related to having more than one service code available, ask the provider to enter all their time for the old service code. Then send an inactivation request to the PTC Support team with the following text:

*The following consumer and provider changed programs from (indicate prior program) to (indicate new program) as of (date).*

- Consumer name and prime
- Provider name and provider number
- The provider has entered all their time under (prior program).
- Please deactivate the (prior program)'s service account.

## 17. Request materials in braille

This is related to anytime there is a request for materials in Braille. The PTC Support team is unable to fulfill other types of requests for individual or bulk printing of materials.

Must Include:

- Requester's branch number
- Recipient's name
- Mailing address to send materials
- Title of document being requested in Braille

## 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](#)