QRG - Staff - Profile Requests for OR PTC DCI

Purpose: To explain how to use the Staff Profile Maintenance form to make changes to the OR PTC DCI profiles of local/program office staff members.

Outcome: Management teams will understand how to use the Staff Profile Maintenance form to add, deactivate, modify, and reactivate staff profiles.

Relevant Business Process: 1.5.1 State Managing PTC User Accounts

As a manager, you may need to ask PTC Support to add, deactivate, modify, or reactivate your employee's OR PTC DCI profile. To take any of these actions, you (or a staff member on behalf of your management team) will need to fill out the Staff Profile Maintenance form and email it to PTC.Support@odhsoha.oregon.gov. (Note: If a staff member is completing the form, the manager must be CC'd on the email for awareness.) The form can be located on the PTC website (ptc.oregon.gov) under the AAA/APD Staff tab and "New User Forms" heading.

How to Know What Role or Permissions to Request

There are three main roles a profile can have in OR PTC DCI. A role dictates what actions a user can take in OR PTC DCI. A single profile cannot have more than one role over a cost center (branch).

Supervisor Role: This is the most common role for staff using OR PTC DCI. Users with this role can:

- Edit, reject, or create entries in OR PTC DCI;
- Make updates to profiles for consumers housed in their cost center;
- Make updates to provider profiles;
- View authorization information (using dashboard widgets);* (*In combination with Authorization Admin permissions, this role can also edit or reject authorizations.)
- Run reports.

Payroll Team Role: The only function of the payroll team role is to create and download the payroll batch report for a cost center (branch). The payroll batch report contains all entries submitted by providers in a cost center during a set period of time. Profiles with this role cannot view or edit entries or authorizations.

Offices may create a shared payroll team profile. Staff will be able to have their own, separate profile with the supervisor role and can log in to the shared payroll team profile when the payroll batch report needs to be created.

Auditor Role: The auditor role allows users to view entries and pull reports from the system. Users with this role cannot take any action on entries in the system. This role is great for fraud units, OHCC staff, policy staff or others who need to review actions that have been taken, but not create or edit entries or authorizations. The Authorization Admin permissions can be added to this role to allow users to view authorizations.

Permissions: At this time, there is one permission set that can be requested. The **Authorization Admin** permission set allows users to view and edit authorizations. It can be added to the supervisor or auditor role.

Adding a Staff Profile

When a new staff member starts on your team and needs access to OR PTC DCI, you will need to submit a Staff Profile Maintenance form for their profile to be created.

1. On the Staff Profile Maintenance form, check the box for “Add a New Staff User.”
2. Fill in all boxes under “User Information Part 1” and “User Information Part 2.”
    a. The branch name and branch number here refer to the home branch of the staff member.
3. Select the role you would like to add to this staff member’s profile. Fill in the branch(es) the role will be over.
    a. For more information on roles, see “*How to Know What Role or Permissions to Request*” above.
    b. If you are requesting access to multiple branches, you can add them here or list them in the spaces or Notes field on page 2.
4. Check Yes or No indicating if you would like the user to receive the Change Email/Phone Report. (See “*Change Email/Phone Report*” section below for more information.)
5. Manager fills out “Manager Information” section.
6. Email the completed form to PTC Support.

Deactivating a Staff Profile

When a staff member leaves your team and they previously had access to OR PTC DCI, you will need to submit a Staff Profile Maintenance form to PTC Support to deactivate their profile. This is crucial to ensure that only authorized personnel have access to OR PTC DCI.

1. On the Staff Profile Maintenance form, check the box for “Deactivate a User.”
2. Fill out “User information Part 1.”
3. Manager fills out “Manager Information” section.
4. Email completed form to PTC Support.

Modifying a Staff Member’s Access

If a staff member moves from one team or branch to another, their role or cost center may need to be modified in OR PTC DCI.

1. On the Staff Profile Maintenance form, check the box for “Modify Access.”
2. Fill out “User Information Part 1.”
3. Under “Staff User Roles,” fill out the roles that need to be added or removed.
4. Under “Staff User Permissions,” check if the Authorization Admin Permission should be added or removed, if applicable.
    a. Tip: for requests that are more complex, use the Notes section on the 2nd page to provide details of your request.
5. Manager fills out “Manager Information” section.
6. Email completed form to PTC Support.

Reactivating a Staff Profile

If a staff member returns to a role that requires access to OR PTC DCI, their profile will need to be reactivated.

1. On the Staff Profile Maintenance form, check the box to “Reactivate Access.”
    a. If the staff member transferred branches, check the “Due to Branch Switch” box.

Then, fill in the “Staff User Roles” section indicating which roles/cost centers they need access to.

1. If the staff member is returning to the same role after a break, they likely will not need roles added or removed. PTC Support should be able to reactivate the profile with the roles the user previously had.
2. If additional explanation is needed, use the Notes section on page 2 to provide the details of your request.

1. Fill out “User Information Part 1.”
2. Manager fills out the “Manager Information” section.
3. Email completed form to PTC Support.

Change Email/Phone Report

The Change Email/Phone Report is generated each month by DCI. Users who have been identified by their management team to be a recipient of the report will receive it via the messaging module in OR PTC DCI on or around the first of the month.

The report lists all email addresses and phone numbers that have been updated by providers, consumers or Consumer Employer Representatives in OR PTC DCI in the last month.

Follow the business processes below to update user information across all State systems:

- 2.3 Manage Provider Accounts – Update Provider Information
- 3.2 Update Consumer Information
- 4.2 Update Consumer Employer Representative Information

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- Descargue la guía rápida de OR PTC DCI Mobile Web
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