

# Staff Learning Materials Catalog

- [Guides](#)
- [Staff Training](#)
- [Provider and Consumer Materials](#)
- [Quick Reference Guides \(QRGs\)](#)
- [Online Learning](#)
- [Business Processes](#)
- [New User Forms](#)
- [Related articles](#)

## Guides

Title	Description
<a href="#">OR PTC DCI Web Portal</a>	OR PTC DCI Web Portal Overview
<a href="#">Payroll Batch and Time Entry Guide</a>	Walk through of creating a payroll batch using the Punch Entries Report
<a href="#">Reports</a>	How to guide on finding and downloading reports.
<a href="#">Time Entry Management</a>	Guide on pending time entries management, adjustments, over/underpayments, and historical entries.
<a href="#">User Settings Guide</a>	How to update the password, PIN, security questions, email, phone number and username in OR PTC DCI.
<a href="#">Profile Management</a>	How-to Guide on updating User Profiles in OR PTC DCI.
<a href="#">Authorization Management</a>	Informational Guide about Funding Accounts, Service Accounts, and Authorization Management.
<a href="#">Auditor Guide</a>	Informational Guide specifically for users with an Auditor role in OR PTC DCI.
<a href="#">Troubleshooting Guide</a>	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
<a href="#">OR PTC DCI 1.1.4 Change in Authorizations</a>	Step-by-step computer based training for when a change in authorization is needed and prorating.
<a href="#">OR PTC DCI 4.3.0 Time Entry</a>	Step-by-step computer based training on payroll roles and batches, and common questions.
<a href="#">OR PTC DCI Staff Training Video</a>	Step-by-step training video for Staff on how to use OR PTC DCI.

## Provider and Consumer Materials

Title	Description
<a href="#">Provider Learning Materials Catalog</a>	Catalog containing all of the Provider learning materials and resources.
<a href="#">OR PTC DCI English Provider Orientation</a> <a href="#">OR PTC DCI Russian Provider Orientation</a> <a href="#">OR PTC DCI Spanish Provider Orientation</a> <a href="#">OR PTC DCI Vietnamese Provider Orientation</a>	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.
<a href="#">Consumer/Consumer Employer Representative Learning Materials Guide</a>	Catalog containing all of the Consumer/Consumer Employer Representative learning materials and resources.
<a href="#">Provider and Consumer Resource Guide</a>	A list of resources available to support Providers and Consumers.

## Quick Reference Guides (QRGs)

Title	Description
<a href="#">Submitting a Request to PTC Support</a>	Step-by-step process to submit a request to the PTC Support team.
<a href="#">Time Conversion Chart - Minutes to Decimal Hours</a>	Chart showing the conversion of minutes to decimal hours.
<a href="#">Updating an Authorization</a>	Step-by-step instructions on how to update an authorization in OR PTC DCI.
<a href="#">Correcting a Punch Entry in Approved Status</a>	Walkthrough for State Staff to correct a punch entry that is in "Approved" status.
<a href="#">Correcting a Punch Entry in Process Status</a>	Walkthrough for State Staff to correct a punch entry that is in "Processed" status.
<a href="#">Consumer Passes Away</a>	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.
<a href="#">Entry Status</a>	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.
<a href="#">Resetting Passwords</a>	This guide shows resetting a consumer, provider, or CER's profile in OR PTC DCI.
<a href="#">Explanation of PTC Errors in Mainframe</a>	List of PTC Error in Mainframe and what they mean.
<a href="#">Business Rule List</a>	List of Business Rules enabled in OR PTC DCI.
<a href="#">Adding a Note to a Provider's Profile</a>	Step-by-step guide on how to add notes to a Provider's Profile in OR PTC DCI.
<a href="#">Importing Excel Sheets into Google</a>	Step-by-step guide on how to import Excel Sheets into Google Drive
<a href="#">How to Find a UniID Number</a>	Step-by-step guide showing where to find a Provider's UniID in DHR.
<a href="#">How to Download and Format Batch Reports</a>	Step-by-step instructions on how to download and format batch reports using Excel.
<a href="#">OR PTC DCI Mobile App Offline</a>	How to use the offline feature in the mobile app.
<a href="#">OR PTC DCI Landline Tip Sheet</a>	How to create a real-time punch as well as the available OR PTC DCI Landline numbers to call.
<a href="#">Linking a Fob to a Consumer</a>	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.
<a href="#">Unlinking a Fob to a Consumer</a>	Outline the steps required to successfully unlink a Consumer to a fob in the Local Office.
<a href="#">Staff Resource Guide</a>	A list including all available support resources for Staff.
<a href="#">Profile Requests for OR PTC DCI</a>	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
<a href="#">Recovering a Forgotten Password</a>	Hands on step-by-step how to change a password when it has been forgotten.
<a href="#">Logging in to OR PTC DCI and Changing Your User Settings</a>	Hands on walkthrough of changing a user's personal settings.

## Business Processes

Business Process	Description
------------------	-------------

<b>1.1.2 Provider Switches During Pay Period - Permanently</b>	There is a need for a permanent switch in provider(s) during a pay period.
<b>1.1.3 Provider Switches During Pay Period - Temporarily</b>	There is a need for a one-time switch in provider(s) during a pay period.
<b>1.1.4 Change in Authorizations</b>	A change/update in an authorization is needed.
<b>1.1.5 Relinking a Provider and Consumer</b>	Provider begins working for a Consumer they previously had stopped working for.
<b>1.2.1 Add a New Provider</b>	A new provider needs a profile
<b>1.2.2 Change Provider Status</b>	A provider status needs to be changed.
<b>1.2.3 Update Provider Information</b>	Provider information must be updated.
<b>1.3.1 Add a New Consumer</b>	A new consumer needs a profile in OR PTC DCI.
<b>1.3.2 Update Consumer Information</b>	Consumer information must be updated in OR PTC DCI.
<b>1.3.3 Consumer Transfers to a New Branch or Program</b>	A long-term care consumer moves to a new branch or program.
<b>1.3.4. Return or Request a Fob in the Local Office</b>	A fob is returned to the local office.
<b>1.4.1 Add or Remove Consumer Employer Representative</b>	CER needs to be added.
<b>1.4.2 Update Consumer Employer Representative Information</b>	CER information must be updated.
<b>1.4.3 Create New Consumer Employer Representative</b>	CER profile needs to be created.
<b>1.5.1 Managing Staff Profiles</b>	Staff member needs an OR PTC DCI profile to be created, modified, or closed.
<b>1.5.3 Unlock a Profile</b>	OR PTC DCI profile must be unlocked.
<b>1.6.0 Manually Adding or Updating Branch Info</b>	OR PTC DCI support receives notification of branch change from BOTS legacy BAs.
<b>1.7.0 Setting Up EVV Options with Consumers and Providers</b>	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.
<b>2.1.0 Increase in Weekly Cap</b>	Case manager identified an exception need to increase a provider's weekly cap.
<b>2.2.3 Correct Entry Mistake</b>	A mistake has occurred or a consumer/CER disputes an entry.
<b>2.3.0 Entries Claimed After 365 Days</b>	Provider has time to turn in past 365 days.
<b>2.6.2 End Authorization, Expiration, Terminations</b>	A provider is terminated, an authorization ends, or their credentials expire.
<b>3.3.0 Consumer Passes Away</b>	A consumer passed away.
<b>4.3.0 Time Entry</b>	This is the process for entering time from OR PTC DCI into Mainframe.
<b>4.4.0 Over and Underpayments</b>	How to process under and over payments.
<b>6.1.0 Case with Multiple Providers &amp; Varying Hours</b>	The process for handling cases that have multiple Providers who have varying hours every pay period.

## New User Forms

Form	Description
<a href="#">Staff Profile Maintenance Form</a>	Form to request the addition of a new State User, modify the access of a current State User, or deactivate a State User.
<a href="#">Consumer/Provider Profile Maintenance Form</a>	Form to request the addition of a new Consumer/Provider combination or to deactivate a Consumer/Provider.
<a href="#">Consumer Employer Representative Profile Maintenance Form</a>	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](#)