



# Provider Time Capture

## Fall 2023 Webinar Series

New Profiles and Links  
Troubleshooting

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# Group agreements

- Be respectful to all participants and presenters
- Specific case questions cannot be addressed in this webinar. Please send those to [PTC.Support@odhsoha.Oregon.gov](mailto:PTC.Support@odhsoha.Oregon.gov)
- This webinar will be recorded and posted to PTC Staff Tools



# Webinar and Learning Lab Series!

- This webinar series focuses mostly on general information and questions/answers.
- Each webinar session has a corresponding Learning Lab scheduled one or two weeks after the webinar.
- Recordings and written materials for the webinars and Learning Labs will be posted to Workday.
- **You must register for the Learning Lab series in Workday! Once you register, you are signed up for all the Learning Labs.**





# Provider Time Capture

## Fall 2023 Webinar Series

New Profiles and Links  
Troubleshooting



# Agenda

- How are a consumer and provider paired in OR PTC DCI? (“New links”)
- How to check for a consumer/provider pairing?
- Logging in
- Editing profile information
- EVV options and troubleshooting
- Q&A



# How are new consumer/ provider pairs created in OR PTC DCI?



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**1.** After receiving a 546/531, the voucher specialist or designated staff creates a voucher in Mainframe.

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**2.** If the provider has not worked for the consumer since September 2021, this new voucher will trigger a PTC error. PTC errors come to a queue daily that the PTC Support Team can see.

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**3.** Within 2 business days, the PTC Support Team creates any new profiles needed by pulling info from Mainframe and OA.

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**4.** The PTC Support Team creates new funding and service accounts for all new consumer/provider pairs.

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**5.** After new profiles are created in OR PTC DCI, PTC Support sends a welcome email to new users who have a valid email address in Oregon ACCESS.

# Who should new providers reach out to?

- Providers should NOT contact PTC Support or DCI Help Desk until **after** their profile is created.
- New provider profiles will not be in OR PTC DCI until one to two business days **after the vouchers are created in Mainframe.**
- Providers with valid email addresses on file will receive a welcome email from the PTC Support Team after the profile is created.
- Please ensure all providers have a valid email address in Oregon ACCESS.
- Please direct new providers to learning materials when they have questions about PTC and ask them to wait for their profile to be set up.

# Who can help with what?

## DCI Help Desk

855-565-0155

[orptcsupport@dcisoftware.com](mailto:orptcsupport@dcisoftware.com)

- Basic login help for providers/consumers/CERs **after the profile has been created**
- Limited troubleshooting help with certain issues (providers/consumers only)
- The caller must supply the following:  
last 4 of SSN and DOB

## PTC Support

[PTC.Support@odhsoha.Oregon.gov](mailto:PTC.Support@odhsoha.Oregon.gov)

- Login help for all users **after the profile has been created**
- Troubleshooting help for all users
- Escalation of complex issues
- All staff questions, feedback, and requests



# How do you know if a consumer and provider are linked in OR PTC DCI?

- Go to the consumer's profile page
- Scroll down and select the Accounts tab
- Look for an Employee Service Account with the provider's name
- Select the account (not the name hyperlink!) to make sure there is not an End Date



If you don't see the provider's name, take this step:

- Change the Status dropdown to "Inactive" and select Search. This will show any inactive accounts

# Example of an end date

Only the PTC Support Team should add or remove an end date!

Entries	Accounts	Certifications	EVV Locations	Diagnosis	Notes	Attachments	Events	Custom Fields	History
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD			Hourly ADL/IADL-10	Joe Schmoe	Hourly	Active

Employee: [Joe Schmoe](#)

Employee Number: 222000

Unit: Hourly

Daily Pay Max: 0.00

Daily Rate: 0.00

Max Units Per Punch: 16.00

End Date: Sep 12, 2023

EVV Exempt: No

End Date: Sep 12, 2023

Allows Overlapping: No

Pay Rates:

Display Auth Widget: Yes

Created Date: Aug 26, 2021

Status: Active

- Go to consumer's profile page
- Go to accounts
- Find an account with the provider's name
- Select anywhere on the account except the provider's name hyperlink
- This example shows a service account with an end date of September 12, 2023.
- The provider stopped working for the consumer on this date.
- **Email a relink request to the PTC Support Team.**

# Example of inactive service account

- Go to the consumer's profile page
- Go to accounts
- Change the status to inactive
- Look for an inactive account with the provider's name
- If you find an inactive account, email a relink request to the PTC Support Team

Entries Accounts Certifications EVV Locations Diagnosis Notes Attachments Events Custom Fields History

Select Account Type  Select Profile Type  Type Cost Center  Type Funding Source

Type Service Code  Select Unit

Select Status  
Active  
Inactive

Only the PTC Support Team should deactivate or activate an account!

Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD - Mileage	Mileage-2	Jane Doe	Miles	Inactive
Employee Service	Employee	The Dalles APD-EU - 3311-EU	APD	Hourly ADL/IADL-2	Jane Doe	Hourly	Inactive

# Relinks



If there is an **end date on the service account,**

OR

an **inactive service account,**

this is a relink and **not** a new linking!

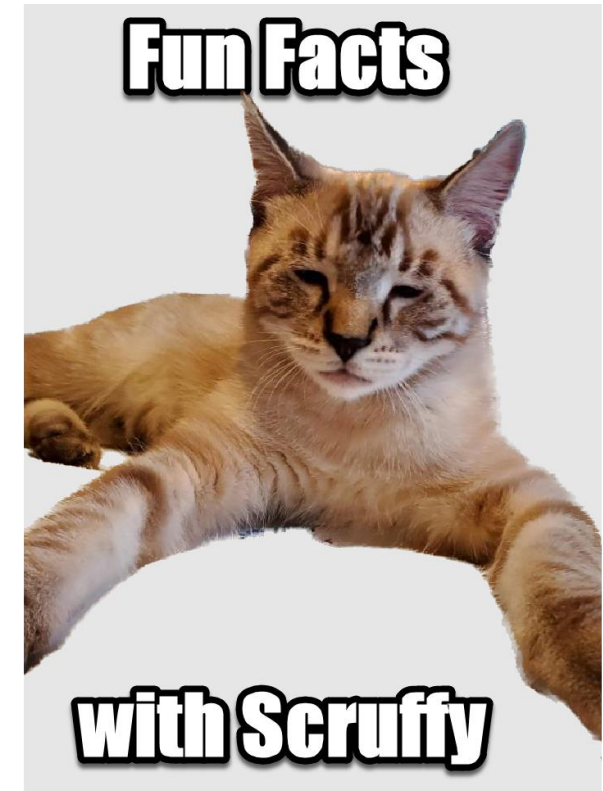
Email the PTC Support Team to relink them before creating vouchers!

See [APD-AR-23-029 Relinking in OR PTC DCI](#)

# New Linking “Fun Facts”

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- The PTC Support Team uses a screen called “SPTC” in Mainframe to gather all the new consumer/provider pairings for the day.
- If a provider has an invalid email address listed in Oregon ACCESS, they will not get their welcome email that the PTC Support Team sends when their profile is created.
- There are an average of around **600 new profiles created every month. The total number of new consumer/provider pairings is around 3-4 times this number.**



# Who can edit what in OR PTC DCI?

## All users

- Can edit phone and email address.
- Can edit their own authentication information.

## Local Office Staff

- Can update consumer or provider phone number, email address, or home address.
- Can update provider or consumer's name.

## PTC Support

- Only group that can update a staff member's name.
- Can edit anything except authentication information.

### Authentication information:

- Username
- Password
- PIN



Authentication information can **only be edited by the user.**



# Logging In



New providers cannot log into OR PTC DCI until after PTC Support creates a new profile.



If there is another user in the system with the same name, the newer user will have a number after their name in the username. For example, John.Smith2 (check first before giving out a username).



Only providers can change their username in the system, but only staff can change the name. You must update the first name, last name, AND full name.

# Login troubleshooting

## Does the provider report trouble logging in?

- Check the Events tab on their profile page in OR PTC DCI.
- If the Events tab shows they have unsuccessful login attempts, then they are typing their **password** incorrectly.
- If the Events tab shows no login attempts, then they are typing their **username** incorrectly.

## Did the provider forget their password?

- Make sure their email address is correct in OR PTC DCI.
- Then, ask them to click the “Forgot Password” hyperlink on the login page.
- They will get an email to reset their password.



# Setting up the EVW Options



Include the following information for fob requests:

- Consumer name
- Prime
- Mailing address
- Primary language

## OR PTC DCI Mobile App

- If a new provider wants to use the mobile app, then staff don't need to do anything! The provider will download the OR PTC DCI Mobile App and can use it after their profile is created.

## OR PTC DCI Landline

- If a new provider wants to use the landline, check the consumer's OR PTC DCI profile to make sure their landline number is listed as the primary phone number. They can use the landline once their profile is created.

## OR PTC DCI Fob

- If the provider cannot use the mobile app or landline, the fob is the other option. Request a fob from the PTC Support Team **after the OR PTC DCI profile is created**, and it will be mailed to the consumer. The provider must use the web portal to enter their fob codes and dates/times worked.

# Troubleshooting

- The following are some tips to help you troubleshoot some common issues with the mobile app, landline, and fob. We can't cover every scenario here!
- If a provider is having continued issues using any OR PTC DCI option, please **do not** refer them to the DCI Help Desk. Instead, please contact the PTC Support Team at [PTC.Support@odhsoha.Oregon.gov](mailto:PTC.Support@odhsoha.Oregon.gov) with as much detail as possible about the issue.
- You can also ask the provider to email PTC Support directly with detailed information about the issue, their full name, and their provider number.

[OR PTC DCI Troubleshooting Guide](#)



# Mobile App Troubleshooting

## Steps for troubleshooting app issues:

- Check OR PTC DCI to make sure the provider has an active profile, is linked to the consumer, and they have authorizations.
- Update device and mobile app.
- Uninstall and reinstall the mobile app.
- If they have an Android device, clearing the data cache may help the mobile app's performance.
- Internet connection issues can cause mobile app slowness – we will talk about Offline Mode next.

The minimum software requirements recently went up for Apple devices only:

\*Previously:

Apple Operating System: iOS version 13 or later

**\*Now:**

**Apple Operating System: iOS version 14 or later**

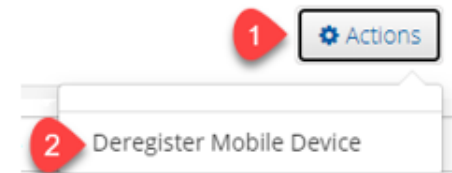


# Mobile App Troubleshooting Continued

## Offline Mode

Offline Mode allows providers to use the mobile app without an internet connection.

- If Offline Mode doesn't "kick in" when there is no internet connection, the provider will experience mobile app issues.
- Staff can deregister the device from the provider's profile to troubleshoot app issues such as spinning and freezing.
- Navigate to the profile in OR PTC DCI, click Actions, and click Deregister Mobile Device. The provider's device will be automatically registered the next time they log in.
- If internet service is limited, the provider can try turning off cellular data completely before logging in to allow Offline Mode to "kick in" when using the mobile app.
- Download this guide to see instructions and additional steps you can take: [OR PTC DCI Mobile App Spinning and Offline Mode](#)



# Landline Troubleshooting

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## Steps for troubleshooting landline issues:

- Check OR PTC DCI to make sure:
  - The provider has an active profile
  - The provider is linked to the consumer
  - They have authorizations
  - The consumer's primary phone is their landline phone number. Make sure it really is a landline number!
- Ensure the provider is entering last 4 of their SSN when prompted.
- Ensure the provider is “selecting” the attestation statement at the end of the call by pressing 1 for “Yes” when asked if they agree with the attestation statement.

# Landline Troubleshooting, cont'd



- The provider must enter their PIN\* (NOT the consumer's PIN) when prompted after the attestation statement.
- PIN not accepted?
  - The provider may hear "We were unable to locate your provider record with the information provided." This means the PIN is incorrect or was reset with a password reset.
  - If the password was reset, the PIN was reset as well.
  - The default PIN is the last 4 of the phone number. However, changing the phone number does NOT change the PIN.
  - The provider must log into the OR PTC DCI Web Portal to change or create a new PIN.
  - Instructions are in the [User Settings Guide](#).
- If the consumer's phone number is a "blocked" number, it must be unblocked to be used for landline time entry.

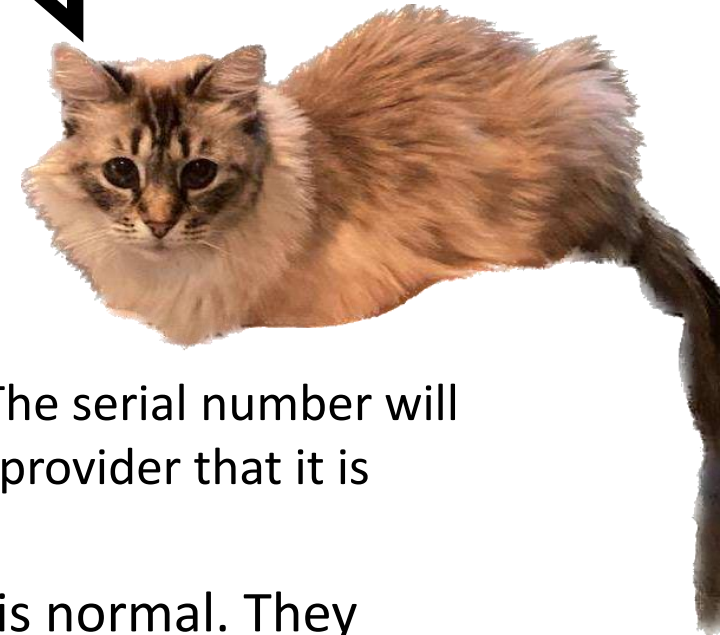
# Fob Troubleshooting



## Steps for troubleshooting fob issues:

Check OR PTC DCI to make sure:

- The provider has an active profile.
- The provider is linked to the consumer.
- They have authorizations.
- The consumer's profile shows the correct fob is linked to their profile. The serial number will be displayed on the profile, and you can confirm with the consumer or provider that it is correct.
- If the numbers on the fob's display are disappearing too quickly, this is normal. They should push the button again and record the new code. See [How to Use a Fob](#) for more helpful tips on using the fob.
- Fobs in your office? See [APD-IM-22-030 Fob Process Updates](#) for information on what to do with a returned fob, how to link and unlink fobs, and more.





Enroll in the Learning Lab!  
Only one registration is required for the series



Register for the Learning Lab series. Next Learning Lab:

November 29<sup>th</sup>

2:05-2:55 PM



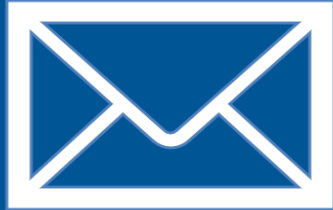
[Link to Workday Course](#)





Questions?

# Resources



## PTC Support Email

- [PTC.Support@odhsoha.oregon.gov](mailto:PTC.Support@odhsoha.oregon.gov)
- The PTC Support Team monitors this inbox daily



## PTC Project Website

- [PTC.Oregon.gov](http://PTC.Oregon.gov)
- Includes learning materials and project updates.

