

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@dhsosha.state.or.us. 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. Some requests list optional information that you may choose to include to help the PTC Support Team better understand your request. These items are optional, but it is suggested that you provide this information.

2. Request PTC Support Team Help Transfer a Consumer to a New Branch

This is related to 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

3. Unlock an Account

This is related to business process [1.5.3 Managing User Accounts - Unlock an Account](#).

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)

4. Request a Fob for a Consumer

This is related to business process [1.7.0 Setting Up EVV Options with Consumer and Providers](#). This is also covered in the staff support guide under 11.1.0 Distributing and Linking Fobs, this is for anytime a Consumer needs a fob device that does not already have one.

Must Include:

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

5. Request Materials

This is related to anytime there is a request for materials, materials including items such as training documents, braille materials, support guides, etc. More information on this is in the staff support guide under 14.8.0 Request Materials.

Must Include:

- Requester's branch number
- Recipient's name
- How would the recipient like the materials (email or mail)
- If they would like email, include email address
- If they would like mail, include mailing address
- Materials being requested (titles, if possible, or description)
- Alternate Format/Languages needed

6. Request a Fob Replacement

This is related to anytime a Consumer needs a replacement fob, either because their fob was lost, broken, or the battery died. This is covered in the staff support guide under 11.2.0 Replacing a Fob.

Must Include:

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

7. Request a Custom Report

This is related to the process for requesting a custom report. More information on this process is in 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 UniID 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, OHC Customer relations mailbox, Jenny Cokeley, Traci Lerner, Noel Suarez, and Amy Gordin.

8. Request a Change in the Recipient list of the Changed Email/Phone Report

This is related to staff needing to change which staff members receive the Changed Email/Phone Report. More information on this is in 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

9. Request for Information

This is related to anytime there is a request for information.

Must Include:

- Name and OR/P number
- Specific information needed
- Purpose for request

Optional to Include:

- Examples of information needed from existing reports