OR PTC DCI Staff Catalog

Guides

Title	Description
OR PTC DCI Web Portal	OR PTC DCI Web Portal Overview
Punch Entries Report (Payroll)	Walkthrough of creating a payroll batch using the Punch Entries Report
Reports	How to guide on finding and downloading reports.
Time Entry Management	Guide on pending time entries management.
User Settings Guide	How to update the password, PIN, security questions, email, phone number and username in OR PTC DCI.
State Staff: Profile Management	How-to Guide on updating User Profiles in OR PTC DCI.
State Staff: Authorization Management	Informational Guide about Funding Accounts, Service Accounts, and Authorization Management.

Staff Training

Catalog	Description
OR PTC DCI Staff Training Video	Step-by-step training video for Staff on how to use OR PTC DCI.

Provider and Consumer Materials

Catalog	Description
Provider Learning Materials Catalog	Catalog containing all of the Provider learning materials and resources.
OR PTC DCI English Provider Orientation OR PTC DCI Russian Provider Orientation OR PTC DCI Spanish Provider Orientation OR PTC DCI Vietnamese Provider Orientation	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.
Consumer/Consumer Employer Representative Learning Materials Catalog	Catalog containing all of the Consumer/Consumer Employer Representative learning materials and resources.

QRGs (Quick Reference Guides)

Title	Description
State Staff: Red Eye Pending Entries QRG	Guide on what each red eye pending entry means, and the actions needed to remedy the pending entry.
Time Conversion Chart	Chart showing the conversion of minutes to decimal hours.
Updating an Authorization	Step-by-step instructions on how to update an authorization in OR PTC DCI.

Correcting a Punch Entry in Approved Status	Walkthrough for State Staff to correct a punch entry that is in “Approved” status.
Correcting a Punch Entry in Processed Status	Walkthrough for State Staff to correct a punch entry that is in “Processed” status.
Create Punch Entry Authorization Violation Report QRG	Step-by-step process on generating a report showing all of the pending entries that are over authorized hours.
Explanation of PTC Errors in DHR	List of PTC Error in DHR and what they mean.
Batch Status QRG	How to verify a batch is successfully created in OR PTC DCI.
Business Rule List	List of Business Rules enabled in OR PTC DCI.
How to Add a Note to a Provider’s Profile	Step-by-step guide on how to add notes to a Provider’s Profile in OR PTC DCI.
Trouble Shooting Guide – Time Entries	Guide providing tips and reminders for what staff need to look for to maintain and correct time entries in OR PTC DCI.
Trouble Shooting Guide – Data Integrity	Guide outlining situations and associated business processes needed to keep information consistent between OR PTC DCI and legacy systems.
Importing Excel Sheets into Google QRG	Step-by-step guide on how to import Excel Sheets into Google Drive
How to Find a UnilD Number QRG	Step-by-step guide showing where to find a Provider’s UniID in DHR.
How to Download and Format Batch Reports QRG	Step-by-step instructions on how to download and format batch reports using Excel.
Report for Download Tip QRG	Step-by-step instructions on how to download the Payroll Batch Details Report into Excel.
Mobile App Offline QRG	How to use the offline feature in the mobile app.
OR PTC DCI Landline Tip Sheet	How to create a real-time punch as well as the available OR PTC DCI Landline numbers to call.
How to Uninstall and Reinstall the OR PTC DCI Mobile App on an Apple Device	Step-by-step reference guide on how to uninstall and reinstall the OR PTC DCI mobile app from an Apple smart device.
Unable to Access DCI Mobile App on Android Device	Step-by-step instructions on clearing the DCI App Data (cache) on any Android device.

CBTs (Computer Based Trainings)

CBT Title	Description
Recovering a Forgotten Password	Hands on step-by-step how to change a password when it has been forgotten.
Logging In/User Settings	Hands on walkthrough of changing a user’s personal settings.

Business Processes for Staff

Business Process	Description
1.1.2 Provider Switches During Pay Period - Permanently	This process is for if the number of hours between two Providers must change permanently. For example: If a consumer is authorized 40 hours and HCW A has 25 hours but they quit, so you need to lower their hours to zero and increase HCW B's hours to 40.
1.1.3 Provider Switches During Pay Period - Temporary	This process is for if a number of hours between two Providers much change temporarily. For example: If HCW A is on vacation and HCW B must cover those hours.
1.1.4 Change Authorization	Process for if a change in the authorization is needed, including a change in mileage or hours, ending the authorization early, etc.
1.2.1 Add a New Provider	Process used to add a new Provider.
1.2.2 Change Provider Status	Process used to update Provider information.
1.3.1 Add Consumer Information	Process used to add Consumer information.
1.3.2 Update Consumer Information	Process used to update Consumer information.
1.3.3 Consumer Transfers to a New Branch	Process used to transfer a Consumer to a new branch.
1.4.1 Add or Remove Consumer Employer Representative	Process used to add/remove Consumer Employer Representative.
1.4.2 Update Consumer Employer Representative Information	Process used to update Consumer Employer information.
1.4.3 Create Consumer Employer Representative Account	Create a Consumer Employer Representative Account.
1.5.3 Managing User Accounts - Unlock an Account	Process to unlock an account.
1.6.0 Manually Adding or Updating Branch Info	Process to add or update branch information.
1.7.0 Setting Up EVV Options with Consumers and Providers	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.
2.1.0 Increase in Weekly Cap	Business process needed for retroactive increased weekly cap hours.
2.12.0 Provider Goes Over Authorized Hours	Pended Entries Management where an entry pends due to the going over the authorized hours.
2.2.3 Correct Punch Entry Mistake	Process for if a Provider, State Staff Member, or Consumer notices a mistake in a punch entry after the Consumer has approved the entry (meaning the Provider cannot edit the entry in OR PTC DCI).
2.6.2 End Authorization, Expiration, Terminations	Process to follow when a Provider is terminated, an authorization ends, or their credentials expire. This process should be basically the same as it is in the current system with the addition of updating OR PTC DCI.
3.3.0 Consumer Passes Away	Process to follow when a Consumer passes away.

4.1.1 Pending Entries Management	The process for working the pend queue on a daily basis. The purpose is to either approve or reject time entries that have failed a business rule and resolving the issues that caused them to pend.
4.3.0 Time Entry	This is the process for entering time from OR PTC DCI into Mainframe.
4.4.0 Over and Underpayments	How to process under and over payments.
6.1.0 Case with Multiple Providers & Varying Hours	The process for handling cases that have multiple Providers who have varying hours every pay period.

New User Forms

Form	Description
Staff Profile Maintenance Form	Form to request the addition of a new State User, modify the access of a current State User, or deactivate a State User.
Consumer/Provider Profile Maintenance Form	Form to request the addition of a new Consumer/Provider combination or to deactivate a Consumer/Provider.
Consumer Employer Representative Profile Maintenance Form	Form to request the addition or deactivation of a Consumer Employer Representative.