

Guardian Trac (GT) Independence Portal Quick Guide and Report Key

New: Aug. 4, 2026

Use the portal to:

- View individuals linked to your caseload
- Review reports
- Track enrollment status
- View time/shift information
- Set pre-selected alerts
- Access the Direct Support Worker (DSW) registry

Do not use the portal to:

- Send messages to GT
- Request follow-up
- Submit case-specific concerns
- Replace email or phone communication

Use email or phone for:

- Forms
- Enrollment documents
- Representative questions
- DSW concerns
- Complaints
- Case-specific follow-up

Report highlights

To determine whether approved service hours are being worked as planned

Use either the **Calendar Usage Report** or the **Utilization Review Weekly Report**.

- The Calendar Usage Report shows when services were used, hours logged by day and week, service codes, and possible gaps.
- The Utilization Review Weekly Report compares authorized hours with hours used and shows the variance.

Check for missed shifts or missed hours

Use either the **Calendar Usage Report** or the **Utilization Review Weekly Report**. Both reports can help identify missed shifts, missed hours, or gaps in service.

See where a DSW clocked in for a shift

Use the **Shift Details Report**. This report shows whether the DSW clocked in at the home, whether the shift was EVV compliant, and the clock-in and clock-out information.

Find who the DSW is and how many DSWs are working with an individual

Use the **Paid Timesheets tab**. After selecting the individual, the tab shows the DSWs who have paid time sheets for that Individual. This can help identify DSWs who have recently provided paid services, but it may not be a complete list of all currently active DSWs.

Report key

Report name	What it shows	Case manager
Approved Outside Participants	The number of times a shift was approved away from the individual's address.	Useful when reviewing shifts approved away from the individual's address to identify patterns that may need follow-up about where supports are being provided.
Budget Report	Month-to-date and year-to-date authorization and service-use information.	Helps review overall service use compared with the available authorization.
Calendar Usage Report	Shows DSW support provided over a five-week period, including shifts and hours worked.	Useful when reviewing how services were provided over several weeks, including the pattern of shifts and hours worked and possible gaps in care.
Clocked in at Caregivers	This report shows the number of times a DSW clocked in at the caregiver's address	Useful when a CM needs to confirm whether DSW support is actively occurring and whether it may be a good time to connect with the individual and DSW.

Report name	What it shows	Case manager
Clocked in Outside Participants	This report shows the number of times a DSW clocked in away from the individual's address.	Useful when reviewing patterns of DSW clock-ins away from the individual's expected service location that may need additional review.
Clocked Out Early	This report shows the number of times a DSW clocked out early.	Useful when reviewing patterns of DSWs ending shifts earlier than scheduled or expected.
Employee Eligibility Items	This report shows training, eligibility items, completion dates, and expiration dates.	Useful when checking whether DSW eligibility items are current, completed, or nearing expiration.
Manual Shifts	This report shows the number of times a DSW manually created a shift.	Useful when reviewing how often shifts are manually entered instead of captured through Electronic Visit Verification (EVV).
Participants Last Pay Date	This report shows the pay date for each DSW. Review the last day of service for each individual.	Useful when reviewing recent paid-service activity and identifying when services were last recorded for an individual.

Report name	What it shows	Case manager
Shift Details	View details for each shift such as service code, service date, times, and total hours. View EVV compliance status.	Useful when a CM needs detailed information about a specific shift, including when it occurred, how many hours were recorded, and its EVV status.
Shift Status	Review the payment status for each shift.	Useful when checking whether shifts are approved, pending, or connected to payment status.
Utilization Review Weekly	Shows approved hours compared to hours worked, with a variance column showing the difference between the two. View hours worked each day of the week.	Helps compare approved hours with hours worked and identify underused or missed hours.

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact the Aging and People with Disabilities at apd.ltss@odhs.oregon.gov or 503-945-5600. We accept all relay calls.



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