

Information Memorandum Transmittal Aging and People with Disabilities



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Authorized signature

Number: APD-IM-22-032

Issue date: 4/18/2022

Topic: Other

Due date:

Subject: Provider Time Capture (PTC) - Updating OR PTC DCI Profiles

Applies to (check all that apply):

- | | |
|---|---|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging: Types A and B | <input checked="" type="checkbox"/> Health Services |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs | <input type="checkbox"/> ODDS Children's Intensive In Home Services |
| <input type="checkbox"/> County DD program managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> Support Service Brokerage Directors | <input checked="" type="checkbox"/> Other (<i>please specify</i>): Comagine |
| <input type="checkbox"/> ODDS Children's Residential Services | |
| <input type="checkbox"/> Child Welfare Programs | |

Message:

This transmittal reviews information about shared email addresses between Providers and Consumers. It also reviews common questions the PTC Team has received since go-live regarding updating Consumer and Provider information on OR PTC DCI profiles.

Tips on shared email addresses in OR PTC DCI:

Each Consumer and Provider profile in OR PTC DCI requires a unique email address in order to allow individuals to properly utilize the Forgot Password functionality. If two profiles share the same email address, the Forgot Password functionality may not work correctly for each user. This can prevent Providers and Consumers from logging in and reporting time if either individual forgets their password and attempts to reset it.

What if a local office staff member notices that a Consumer and Provider pair share the same email address?

- See if either the Consumer or Provider has an alternative email address in Oregon ACCESS.

- Contact the Consumer or Provider to determine if the email belongs to one person and explain that each account needs to have a unique email for security purposes and system functionalities.
- Providers are required to have an active email address to complete their Carewell training. See if they have another valid email address they can use for OR PTC DCI.
- Consumers are not required to have an email address on file to sign off on their time in OR PTC DCI.
- The default email address, PTC.Support@dhsoha.state.or.us, is used for Consumer and Provider profiles if there is no email address on file. You can change the user's email address to the default if they don't have a valid unique email address.
- **Note:** Consumers and Providers can update their own email addresses in OR PTC DCI. See the [User Settings Guide](#) for detailed instructions. Staff members are also able to make email address updates on the Consumer's/Provider's behalf. You can update the email address by using the Edit Client or Edit Employee function on the Consumer or Provider's profile.

Forgot password/reset password functionality:

Encourage Providers and Consumers to use the “Forgot your password?” link on the login screen whenever they are having problems logging in. The user must have a valid email address in their OR PTC DCI profile for this functionality to work. Clicking “Forgot your password?” will send an email to the user with a link directing them to create a new password.

If the user does not have a valid email address, they will not be able to use the “Forgot your password” functionality. Please reach out to the PTC Support team for assistance.

Sign In

Remember me

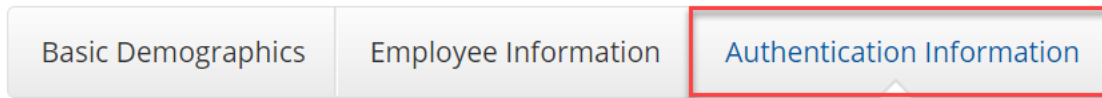
Forgot your password?

Sign In

If the user is unable to reset their password independently using the “Forgot your password?” link, you may reset their Authentication Details. However, be aware that taking this action will reset all the user's login credentials, including the PIN and security questions. The user must also have a valid email address to reset their Authentication Details.

To use this last resort method of resetting the password, follow these steps:

1. Navigate to the user's profile in OR PTC DCI
2. Click "Actions" in the upper right corner
3. Click "Edit Employee" or "Edit Client"
4. Click on the Authentication Information tab



5. Scroll down to find the Reset button



6. If the user is ready to reset all their login information (except the username), click the Reset button

7. The user will get an email asking them to reset their login information.

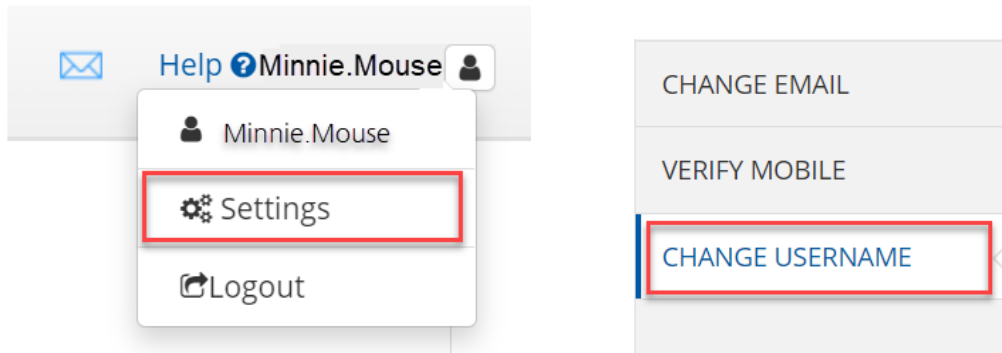
If the user does not have an email address, please reach out to PTC.Support@dhsosha.state.or.us for assistance.

What if a name correction is needed in OR PTC DCI?

Consumers and Providers are the only ones who can change their own usernames BUT staff members are the only ones who can update/change a Consumer or Provider's displayed first and last name.

How a Consumer or Provider can update their username:

1. Log into the OR PTC DCI Web Portal
2. Click on your name in the upper right corner
3. Click "Settings"
4. Click the Change Username tab on the left of the screen
5. Enter your new Username
6. Click "Change Username"



Change Username

Current Username: * Minnie.Mouse

New Username: * Please enter new Username

Cancel Change Username

How a staff member can update a Consumer or Provider's name:

- 1.Go to the Consumer or Provider's profile
- 2.Click "Actions"
- 3.Select "Edit Client" or "Edit Employee"
- 4.Make any updates to the first and last name
- 5.Important: *** Update the Full Name to match the first and last name updates ***
- 6.Click "Save"

 A screenshot of the 'Edit Employee Details' form. On the left, an 'Actions' menu is open with 'Edit Employee' highlighted. The main form has three tabs: 'Basic Demographics', 'Employee Information', and 'Authentication Information'. The 'Employee Information' tab is active, showing fields for 'First Name' (Minnie), 'Last Name' (Mouse), and 'Full Name' (Minnie Mouse). The 'First Name', 'Last Name', and 'Full Name' fields are highlighted with red boxes, and a red arrow points to the 'Full Name' field.

Phone number reminders:

- The Consumer's primary phone number should only be a landline or VOIP phone number as this number is connected to the Phone EVV option. If they do not

have a landline or VOIP number, the primary number should be (000) 000-0000.

- Providers can have a cell phone, landline, or VOIP as their primary phone number in OR PTC DCI.

PIN reminders:

- The default PIN is the last four digits of the primary phone number that was used when the account was first created.
- If the phone number is changed, this does NOT automatically change the PIN. The PIN is similar to a password in that it must be updated by the user.
- If the phone number has been changed, you can see what phone number was originally used by clicking the History tab on the Consumer or Provider's profile.
- Remember, resetting the authentication status wipes the PIN so the user must log in and enter a new one if their authentication details have been reset.

See the [User Settings Guide](#) for step-by-step instructions on how to:

- Change your password
- Reset your own password
- Change your PIN
- Change your security question
- Change your email
- Verify your mobile phone number
- Change your username

For more information on the PTC Project, please visit PTC.Oregon.gov.

If you have any questions about this information, contact:

Contact(s): Provider Time Capture	
Phone:	Fax:
Email: PTC.Support@dhsosha.state.or.us	