

# Action Request Transmittal Aging and People with Disabilities



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**Number: APD-AR-21-028**

**Issue date: 6/10/2021**

**Topic:** Contact Information

**Due date:** 6/30/2021

**Subject:** Provider Time Capture (PTC) Project Training and Implementation Tasks

**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 type="checkbox"/> Other ( <i>please specify</i> ):                     |
| <input type="checkbox"/> ODDS Children's Residential Services             |   |
| <input type="checkbox"/> Child Welfare Programs                           |   |

**Action required:**

In order to prepare for the Provider Time Capture (PTC) Implementation, managers are requested to fill out the [spreadsheet](#) with staff information on those who will be using OR PTC DCI.

**APD, AAA, & HSD Accounts**

The Project needs staff roles and authorized permissions to ensure OR PTC DCI is set up with the necessary information. This will ensure proper testing and alignment of roles across the state. We recognize this list may change prior to pilot or statewide implementation but will be refreshed closer to go-live.

Please update the first tab of the spreadsheet. Attached is the "OR PTC DCI Roles" presentation with more detailed information, to assist in selection of roles and/or permissions (if needed) for each staff member. There can only be one role assigned to a staff member. However, that person can have the same role for multiple Local Offices within the District (HSD would only have one office of 9028). If a staff member is authorized to the same role for more than one office, they need to be listed on the spreadsheet for each office. The second tab has an example if the staff member only needs access to one office and the third tab has an example if the staff member needs access to more than one office.

We have also created a [video](#) explaining the roles and permissions at a high level.

**Email/Phone Number Changed Report**

Consumers, Providers and Consumer Employer Reps have the ability to change their email and phone number associated with their OR PTC DCI profiles. In order to keep Oregon ACCESS, Mainframe and OR PTC DCI systems in sync, the vendor created the “Email/Phone Number Changed Report”. This report will contain information to indicate whose information has changed as well as who made the change. Please indicate who would need access to this report by adding an “X” in the last column of the spreadsheet. This report will be used to update and maintain Oregon ACCESS and Mainframe records and ensure the systems match.

Please see below for an example of the “Emailed/Phone Number Changed Report” which has been split into three parts to give a better visual of the report data:

<b>Month:</b>	Feb-21				
<b>Branch:</b>	3412 - EU				

User Name	Profile Type	Prime/UniID	Provider Number	Old Email Address	New Email Address
Test Provider	Employee	123456	456789		
Provider Ten	Employee	UI0000000	123456	ashleys+20@dcisoftware.com	jamesp+5@dcisoftware.com
Provider Six	Employee	UI6666666	555555,666666	ashleys+16@dcisoftware.com	drudywork@comcast.net
Provider Four	Employee	UI4444444	444444,OR1212122	ashleys+14@dcisoftware.com	jamesp@dcisoftware.com
Consumer Three	Client	AZ222222			
Test Guardian	Guardian				

Old Aternate Phone	New Alternate Phone	Old Mobile Phone	New Mobile Phone

Changed Date	Changed Time	Changed By Name	Changed By Employee Number
March 18, 2021	3:09:29 PM	Case Manager	123456
March 2, 2021	11:12:25 PM	DCI Implementation	UI0000000
February 9, 2021	2:55:09 PM	David Rudolph	UI6666666
February 11, 2021	2:23:26 PM	Super User	UI4444444
February 4, 2021	3:24:28 PM	DCI Implementation	1234
February 26, 2021	11:31:09 AM	DCI Implementation	1234

**Due Date and Support Information**

Please fill the spreadsheet out for each office within your district or organization and email to [PTCProject.Info@dhsoha.state.or.us](mailto:PTCProject.Info@dhsoha.state.or.us) **no later than close of business on Wednesday, June 30<sup>th</sup>**. If you are having trouble deciding which roles and/or permissions to assign, please send an email to [PTCProject.Info@dhsoha.state.or.us](mailto:PTCProject.Info@dhsoha.state.or.us)

for assistance.

**Reason for action:** Preparation for PTC Training and Implementation tasks.

**Field/stakeholder review:**  Yes  No

**If yes, reviewed by:** APD Operations Team

*If you have any questions about this action request, contact:*

Contact(s): PTC Project	
Phone: N/A	Fax: N/A
Email: PTCProject.Info@dhsosha.state.or.us	



# OR PTC DCI Roles

## Commonly Used Terms within OR PTC DCI

**Client Profile:** A profile type that enables Consumers to view their schedule and Provider's punch entries, and to request services. Consumers can also sign off on entries (EVV) via the web portal using their client profile.

**Consumer Employer Rep:** For situations in which the Consumer requires assistance in signing off their Provider's time worked.

**Cost Center:** For purposes of OR PTC DCI, this is the branch office number.

**Cost Center EU:** For purposes of OR PTC DCI, this is the branch office number-EU for external users such as Consumers, Consumer Employer Reps and Providers.

**Employee Service Account:** Creates the relationship between a Consumer and Provider so the Provider can create punch entries for that Consumer.

**Guardian Profile:** This is the profile type used for Consumer Employer Representatives.

**Payroll Batch (Punch Entries Report):** A batch of punch entries based on criteria established by the Payroll Specialist – Punch Entries Report User for each batch. Processing a payroll batch will produce the punch entry (time in/time out) data needed to enter into the Legacy System via STIM.

**Punch Entry (Time Entry):** An entry representing a time or mileage entry by a Provider for services being performed for a Consumer.

**Service Authorization:** Authorization with service dates, hours authorized, and services being provided for a Consumer/Provider combination.

**Service Code:** The service code that indicates the services a Consumer is receiving.

**Sign Off:** The term used to describe the action taken by the Consumer or Consumer Employer Rep to sign off on provider's time entries in the web portal. Also known as Client Portal Sign-Off.

## Roles and Tasks within OR PTC DCI

### Supervisor Role

- Create, edit, view, and approve punch entries
- Create and view notes and attachments
- View authorizations and remaining balances
- Edit and view provider & state staff profiles; consumer & consumer rep profiles
- Run reports and save default report preferences
- Reset passwords, change email, and unlock profiles of other users

\*Note: This role is not just for supervisor, this is a system role. Majority of the roles for Local Offices will be Supervisor.

### Payroll Team Role

- View pending & approved punch entries
- Generating punch entries report for STIM data entry.
- View and edit pending payroll entries
- View authorizations and remaining balances

### Auditor Role

- View pending & approved punch entries
- View authorizations and remaining balances
- Run reports and save default report preferences

### What can't I do?

- A user cannot have more than one role in OR PTC DCI
- A user should not have the Payroll Team Role and be able to create and approve punch entries.

## OR PTC DCI Permissions

### Client Admin

Allows the user to add client profiles across the system. Allows the user to view and edit client profiles as constrained by the user's cost centers.

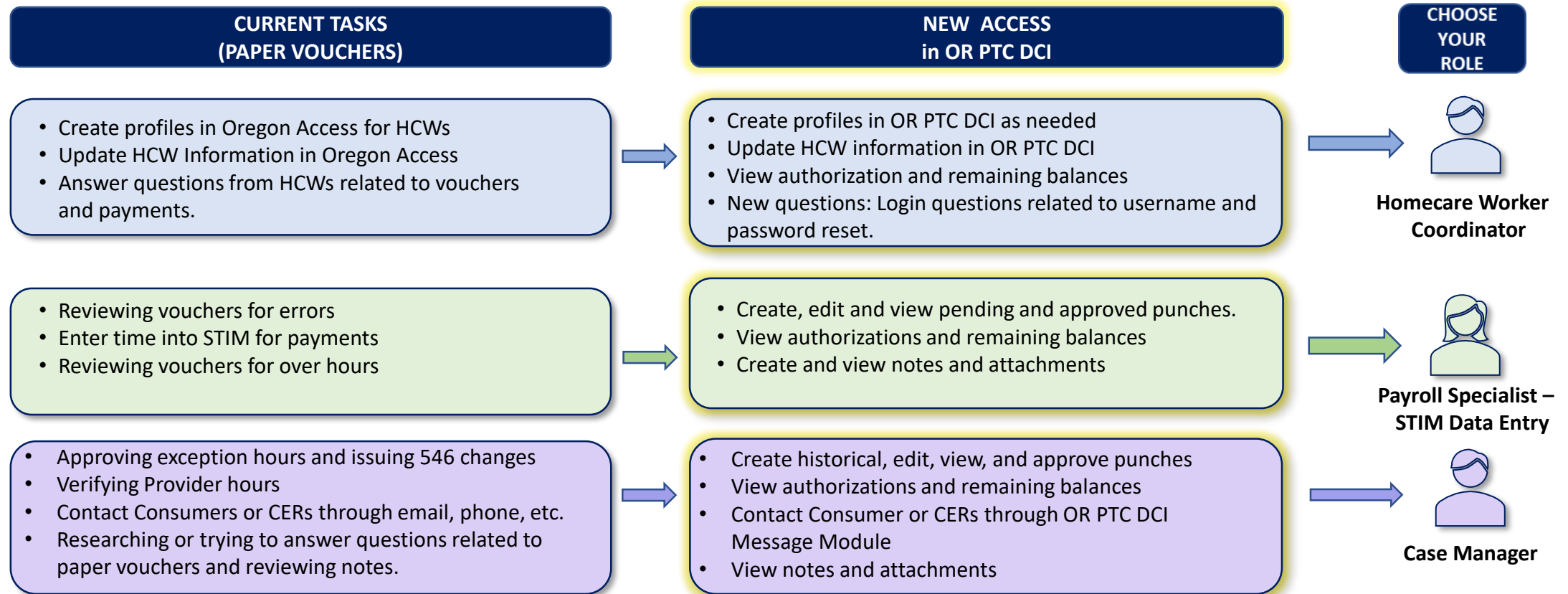
### Employee Admin

Allows the user to view, add, and edit employee profiles across the system. Allows the user to view and edit employee profiles as constrained by the user's cost centers.

### Authorization Admin

Allows the user to view, add, edit, reject and renew authorizations across the instance. Allows the user to view, add, and edit funding accounts constrained by the user's cost centers.

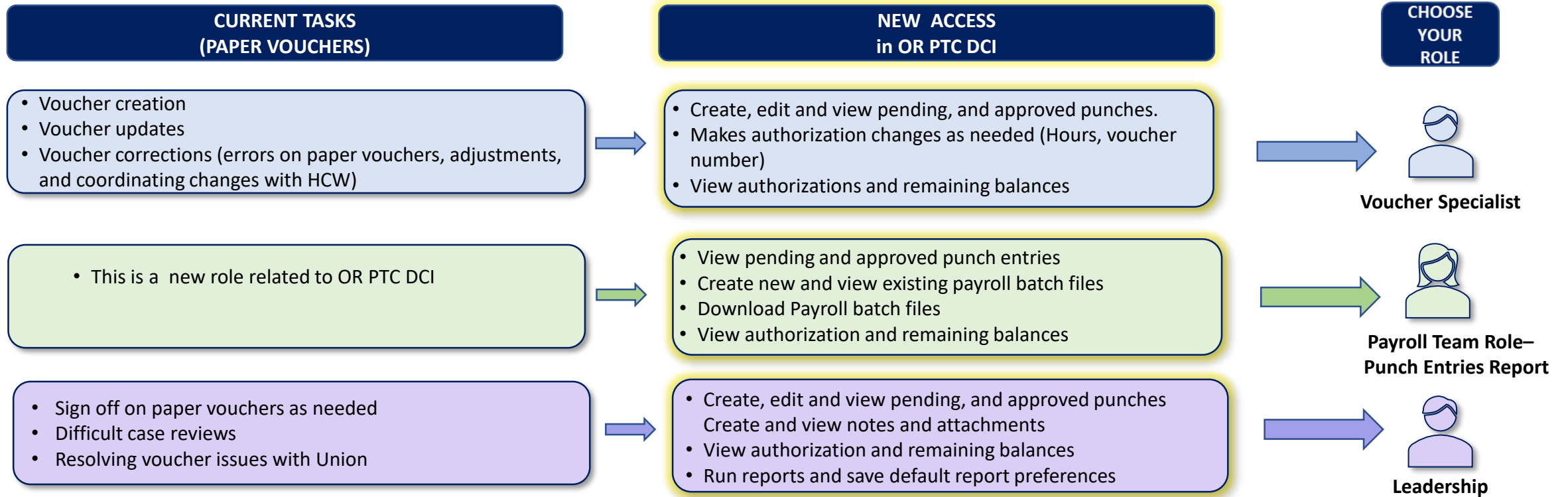
**What does OR PTC DCI look like for me?** *Role-based interactions with system and business processes. These tasks are not necessarily what the role **WILL** be expected to do, but they are tasks the role **CAN** do if needed.*



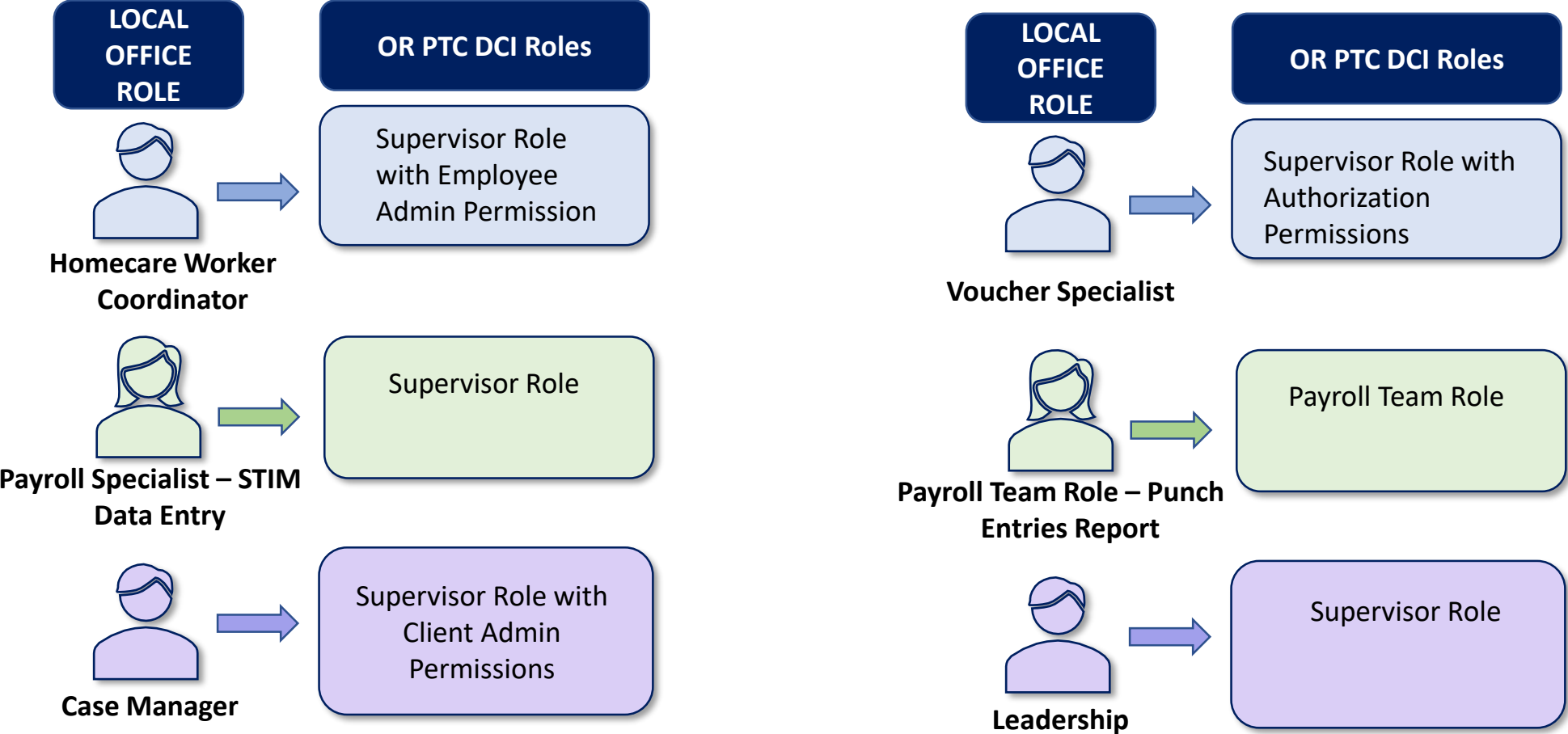
**NOTE:** *This is not an all-inclusive list. We will continue to share updated tasks related to each role in ongoing communications. Design sessions are wrapping up, and more information will be provided as available.*



**What does OR PTC DCI look like for me?** *Role-based interactions with system and business processes. These tasks are not necessarily what the role WILL be expected to do, but they are tasks the role CAN do if needed.*



**What do we recommend?** Below are the recommended OR PTC DCI roles and permissions for existing job duties. You CAN make choices on roles/permissions that are not listed together below.





## What can't I do?

Punch Entries Report &  
Punch Entries in one user

Multiple Roles