

Information Memorandum Transmittal Aging and People with Disabilities



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Number: APD-IM-22-019

Issue date: 3/2/2022

Topic: Other

Due date:

Subject: Provider Time Capture (PTC) - General Updates March 2022

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:

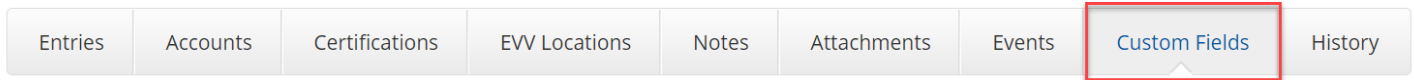
The PTC Team has noticed trends in questions and concerns that we are receiving from local office staff. In this transmittal, we will review the importance of not using Internet Explorer with OR PTC DCI, review how to find the Provider number, review the Notes functionality, explain how to print out a Provider's entries, give some tips for branch transfers, and discuss what to do if a Consumer switches programs but keeps the same Provider. Our goal is to provide guidance and reduce confusion around these topic areas.

Reminder: OR PTC DCI is not compatible with Internet Explorer!

- Make sure any lobby computers you have do not use Internet Explorer as a default browser. If Providers try using a computer in your lobby that has IE as the default, it will lead to problems when trying to access the OR PTC DCI web portal.

How to find the Provider Number on a Provider's OR PTC DCI profile:

1. Navigate to the provider's Employee Details page by clicking the Employees tab on the left, searching for the provider, and clicking on the correct Provider's name.
2. On the Employee Details page, scroll down to the bar that contains several tabs. Here you will find the Custom Fields tab.
3. Click on the Custom Fields tab to view the provider number.



Updates to Business processes

We continue to update our business processes. The [Business Process 3.3.0 Consumer Passes Away](#) and [Business Process 1.3.3 Consumer Transfers to a New Branch](#) had several recent updates.

All Business Processes:

[Follow this link and scroll down to "For Staff"- click "Business Processes for Staff"](#)

Notes functionality in OR PTC DCI

Staff can use the Notes tool within the **Provider's profile** to leave notes the provider **cannot** see.

Staff can use the Notes tool within a **time entry** to leave notes that the provider **can** see.

Steps to use profile Notes:

1. Navigate to the provider's Employee Details Page
2. Click the Actions button in the upper right corner
3. Click on New Note
4. Enter a note type, subject, and fill out the body of the note. Click Save.

Staff can view notes by scrolling down and clicking on the Notes tab.

When to use profile Notes: Follow the guidelines outlined in this Quick Reference Guide:

[Guidelines for Narrating and Documenting in OR PTC DCI](#)

Time/Mileage Entry Notes functionality:

Staff can use the entry notes when rejecting or editing a time or mileage entry to leave a note the Provider can see.

While rejecting or editing an entry, you can add notes in the Notes field. The system also asks you to add a note when using the Reason Code "Staff- Other." Providers can see any entry notes you make.

What if a provider wants a print-out of all their entries?

The following explains how a provider can either print their own entries, or how a staff member can print a provider's entries for them.

A Provider can either print their entries screen, or they can make a print-out of each entry, by using the screen print function.

Note: If your lobby computer(s) is not connected to a printer, we do not recommend this method unless the Provider can email the file to themselves.

Provider steps to print entries:

1. Locate the Print Screen key on your keyboard. It's usually in the upper-right-hand corner, above the "SysReq" button and often abbreviated to "PrtSc."
2. Press the main Win key (with the Windows logo) and PrtSc at the same time to take a screenshot.
3. Win key + PrtSc will create a screenshot of the entire current screen. It will save to the computer's pictures, likely in the Screenshots folder.
4. If your office's lobby computer is connected to a printer, this file can then be printed if the Provider is in the office.

Staff can print detailed information about a Provider's entries using a Punch Entry Details Report.

Staff steps to print provider entries:

1. Go to the Reports tab of OR PTC DCI (top of the screen)
2. Hover over the COA Reports tab (on the left) and click Punch Entry Details Report. *Do not click Search until you narrow it down to the specific provider
3. Type in the provider's name in the Type Employee Name field
4. Put in the date range
5. Click Search
6. Click Download
7. Select the items you would like to include in the report (An example Punch Details Report might include: Punch ID, Date of Service, Employee/Vendor

Name, Client /Residential/ Day Program Name, Hours, Amount, and Created Date)

8. Click Next
9. Select Format: Excel
10. Click Download and confirm by clicking Yes
11. The file should pop up on your screen, and will also be viewable in your files under Downloads
12. You can then do any sorting or other desired formatting to the excel file prior to printing it for the Provider.

Tips for branch transfers:

- CC the other branch when you send a transfer email to the PTC Support team.
- When the cost center is updated in OR PTC DCI, staff in the updated cost center will be able to see entries going forward, but not the past entries.
- There will still need to be coordination with the previous cost center for time entries included in previous payroll batches, and for historical entries made going forward.

Tips for when a Consumer switches programs:

Attention Case Managers-

- If a Consumer switches programs but keeps the same Provider (for example, if they switch from OPI services to APD, or vice versa.), it is extremely important to email the PTC Support team as soon as possible.
- Why- The change in program means there will be a new service account created for the Provider and Consumer. This also means the Provider will have two service codes for the same Consumer until we have unlinked the old service account. The two service codes could cause confusion and possible errors in time entry.
- If a Consumer switches programs *and* changes Providers, the process is the same as any other unlinking of a Consumer and Provider. We will be sharing a refresher and more details about the unlinking process soon.

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	