State Staff:
OR PTC DCI Web Portal
v.1.3

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Menu Overview

Menu Overview

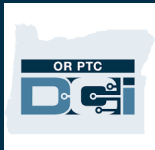After logging into the web portal, State Users will see the following:

1. **Dashboard:** View high priority message alert, Overtime Gauge, hours worked, Authorizations widget
2. **Entries:** This will be blank for State Users
3. **Clients:** Click to view all Consumers
4. **Employees:** Click to view all Providers
5. **Guardians:** Click to view all Consumer Employer Representatives
6. **Cost Centers:** Click to view all cost centers
7. **Pending Entries:** Click to view all pending entries

Dashboard Overview

Authorizations Widget

The authorizations widget is available to the following user types:

- Employee Profile with Supervisor Role (most State Users)

- Employee Profile with Super User Role

- Client Profile

- Guardian Profile

The authorizations widget is visible on the user's main dashboard under the Home Tab:
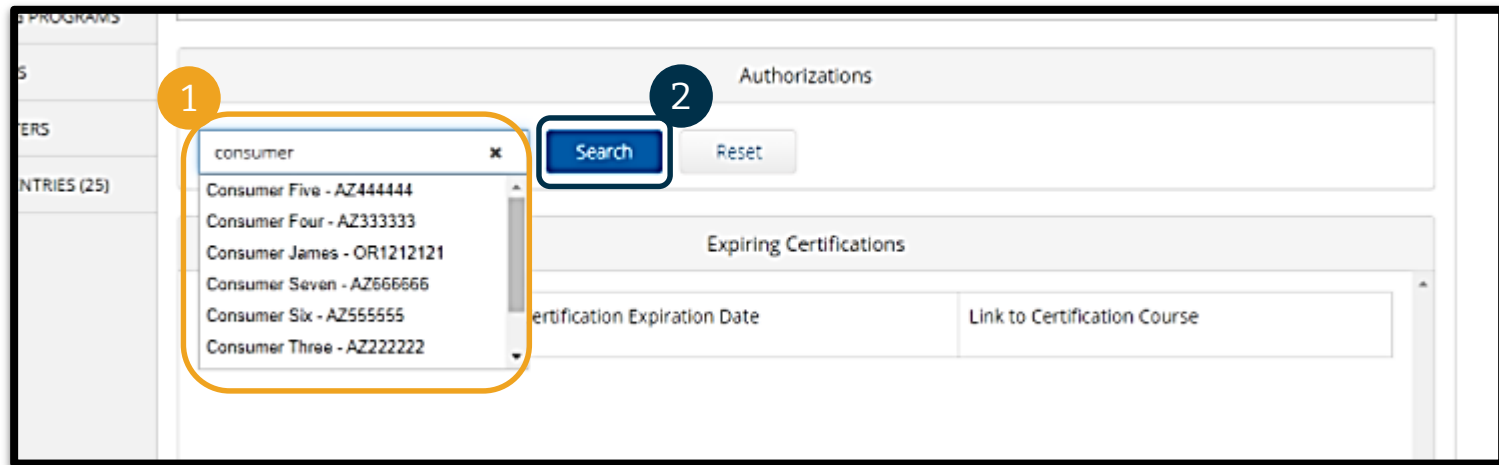
Authorizations Widget

To find current authorizations for Consumers in the cost center that you have a role over:

1. Start typing a Consumer's name and select from the list that appears.

2. Click: Search, and the authorizations will appear

Note: *The value to the right of the Consumer's name is the Consumer's Prime Number, which maps to the Client ID field on the Consumer's profile.*

Authorizations Widget

The dashboard values are as follows:

- **Service Code**: Type of Services

- **Start Date:** The **Authorization** Start Date (also the Voucher Start Date)

- **End Date:** The Authorization End Date (also the Voucher End Date)

- **Initial Balance:** The total number of hours or miles authorized.

- **Remaining Balance:** The total number of hours or miles in an approved, processed, or paid status.

- **Pre-Authorization Holds:** The total number of hours entries in a pending, unverified, or unvalidated status

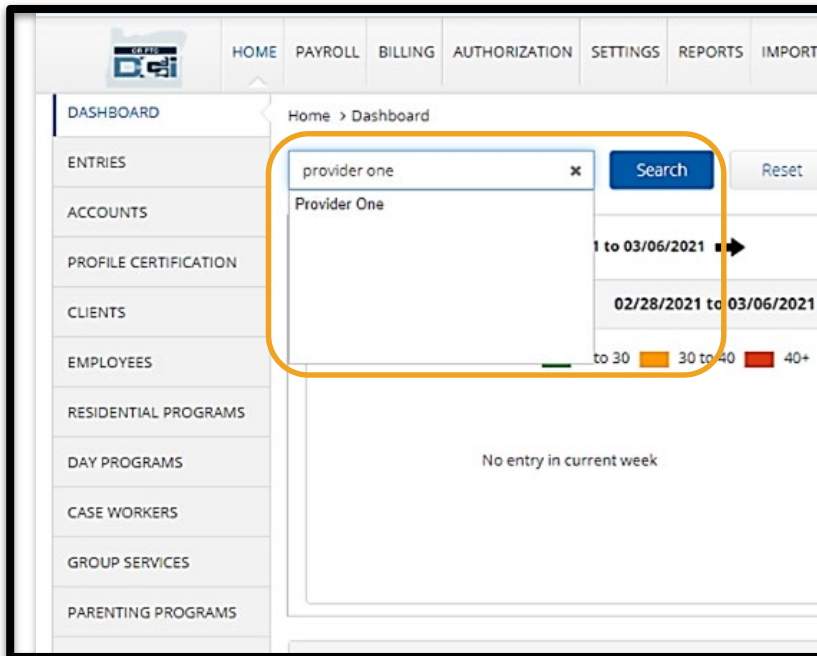- **Current Available Balance**: Current number of hours or miles remaining on the authorization.

	Authorizations					
Consumer One - AZ123456 ✖	Search	Reset				

Authorization for Client: Consumer One

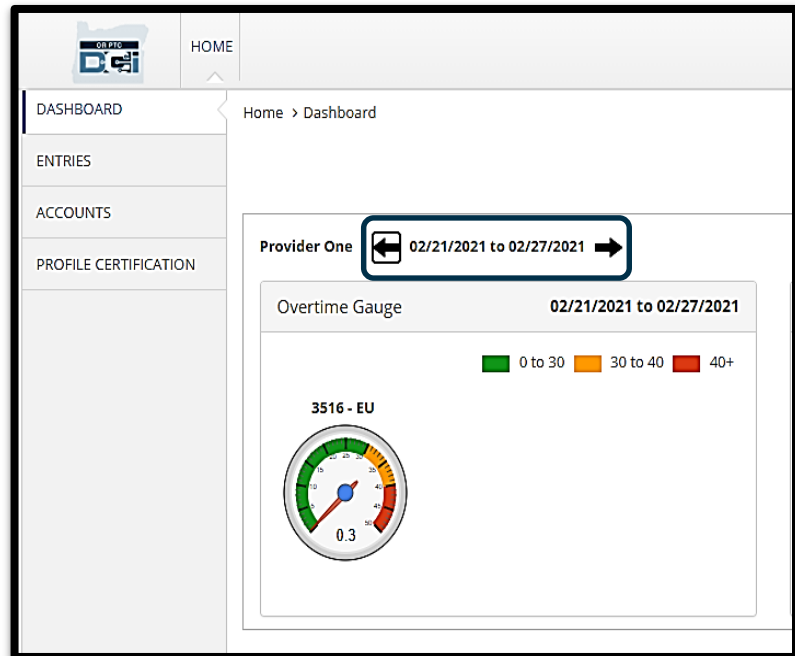| Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	Current Available Balance
Hourly ADL/IADL-OPI-1	02/28/2021	03/13/2021	100.00	100.00	0.00	100.00
Mileage-OPI-1	02/28/2021	03/13/2021	100.00	100.00	0.00	100.00

Overtime Gauge

The overtime gauge is present on the dashboard for all users with an Employee Profile

- State Users can use the Search function to view the Overtime Gauge for Providers associated with the Cost Center they have a Role over.

- The arrows on each side of the date can be used to toggle between different weeks for the Provider Overtime Gauge being viewed.
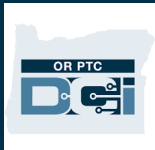
Messaging Module Overview

Messaging Module

To access the Messaging Module:
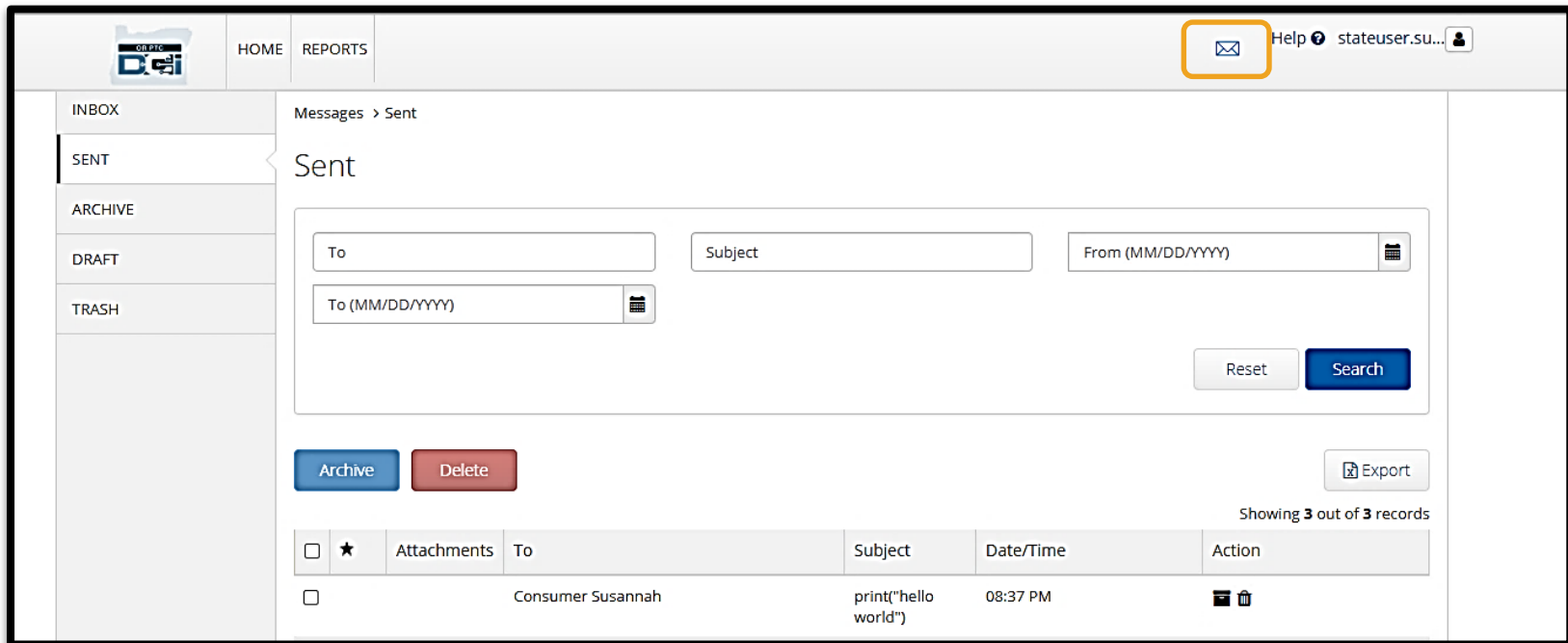
1. Click the envelope in the upper right corner of the screen
2. Click See All Messages
3. Messages Inbox displays
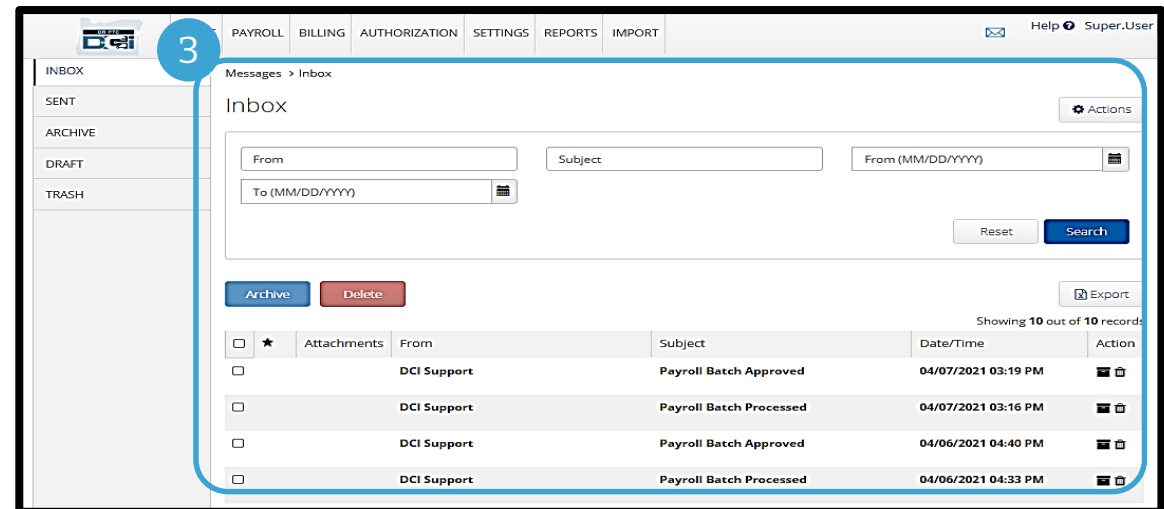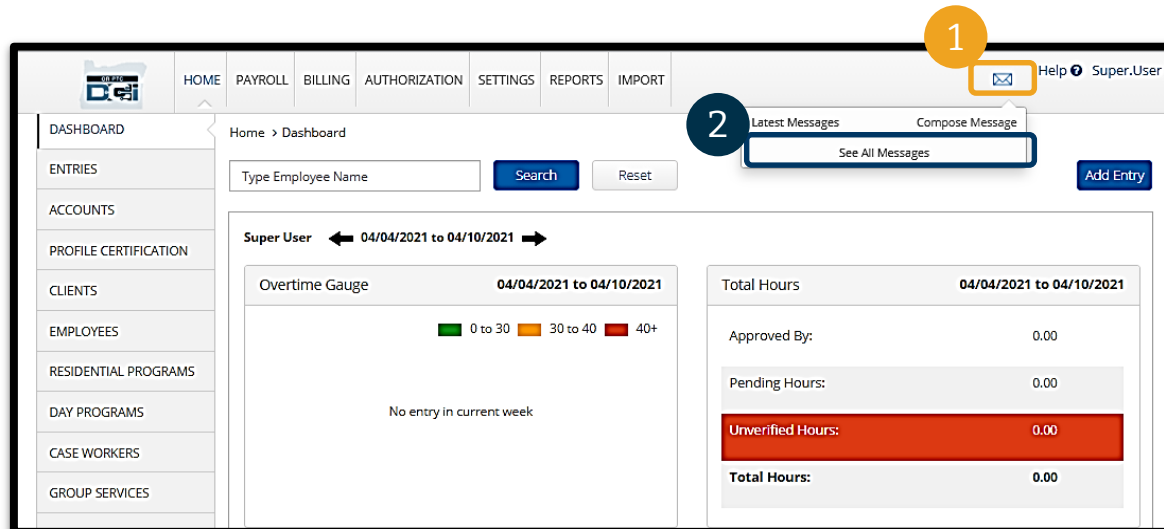
NOTE: *While a red bar will appear across the top of the Dashboard screen if there are unread high priority messages, there is no indicator on the envelope itself to alert the user when there is a new regular priority message.*

Messaging Module

- The Messaging Module allows users to send and receive messages to other OR PTC DCI users.

- The Messaging Module also allows users to receive automated messages.

- Certain restrictions apply. These restrictions will be listed in the slides that follow.

Messaging Module

Users can direct messages specific individuals based on the roles and permissions they are assigned in OR PTC DCI.

Supervisor Role

The following individuals associated with their

Cost Center
- Providers
- Consumers
- Consumer Employer Representatives
- Other State Uses with assigned Roles/Permissions

Auditor Role

The following individuals associated with their

Cost Center
- Supervisor Role
- Payroll Team Role

Payroll Team Role
- All Providers

Client Admin Permission – Least
- Consumers in State User's Cost Center

Employee Admin Permission - Least
- All Providers in State User's Cost Center

Messaging Module - Notifications

OR PTC DCI sends automated messages when certain events happen.

Below are events that trigger automated messages different types of users:

All Users

- **Reset Password -** A profile's password was reset by an administrative user.
- **User Locked Out -** A profile is locked out due to entering an incorrect password five times in a row.
- **Changed Password -** The user changed their own password.
- **User Unlocked -** A profile is unlocked after being locked.
- **PIN Changed -** A profile PIN is changed.

Payroll Batch Specialist

- **Processed -** Payroll batch has finished processing.
- **Approved -** Payroll or Billing batch has finished approval process.
- **Exception Batch Created -** An exception batch is created (Payroll)

Messaging Module   - Notifications Cont.

Providers

- **Signoff Rejected -** Client or Guardian rejects sign off on a punch.
- **Approved Authorization Related Business Rule Violation -** An entry that violated an authorization related business rule was approved by a supervisor.
- **Business Rule Validation Failed -** At least one enabled business rule failed for a particular entry.
- **Unverified Punch Created -** A user added a punch on behalf of a Provider or edited an existing punch, resulting in an unverified punch.
- **Authorization Expiration Date Business Rule Violation -** A punch is created after the authorization's 3-day grace period.
- **Compensate Punch Created -** An approved punch is canceled or rejected. A compensate punch is an offsetting punch that was created to cancel out the original approved punch.

Thank you!