

**State Staff:  
OR PTC DCI Web Portal  
v.1.3**

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Overview



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# Menu Overview



# Menu Overview

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

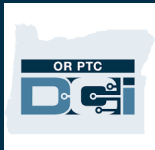
1. **Dashboard:** View high priority message alert, Overtime Gauge, hours worked, Authorizations widget
2. **Entries:** This will be blank for State Users
3. **Clients:** Click to view all Consumers
4. **Employees:** Click to view all Providers
5. **Guardians:** Click to view all Consumer Employer Representatives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

The screenshot shows the web portal interface for State Users. The top navigation bar includes 'HOME' and 'REPORTS' tabs, along with a user profile 'Case.Manager'. The left sidebar menu is highlighted with numbered callouts 1 through 7. The main content area displays the 'Home / Dashboard' page. It features a search bar for 'Type Employee Name' and an 'Add Entry' button. Below this, there is a section for 'Case Manager' with a date range of '05/02/2021 To 05/08/2021'. This section includes an 'Overtime Gauge' showing 'No entry in current week' and a 'Total Hours' summary table. The summary table shows 'Approved By: 0.00', 'Pending Hours: 0.00', 'Unverified Hours: 0.00', and 'Total Hours: 0.00'. Below the summary table, there are sections for 'Client Total Hours Per Week' and 'Authorizations', both with search bars for 'Type Client Name'.



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# 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:

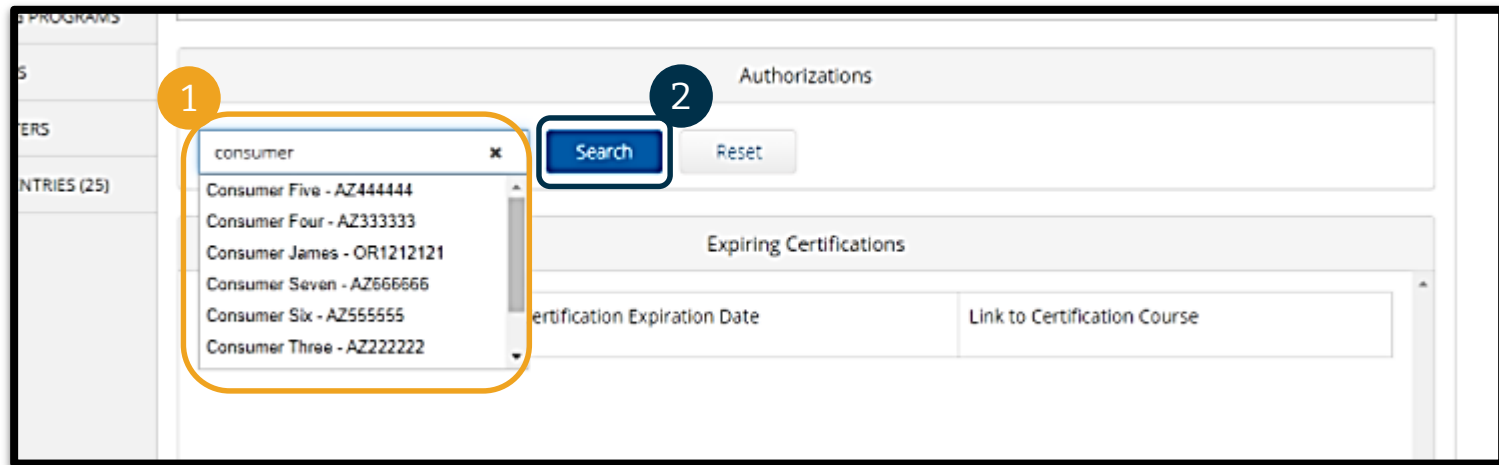
The screenshot displays a web application dashboard. At the top, there are navigation tabs for 'HOME' and 'REPORTS', and a user profile for 'Payroll.Spec...'. A left sidebar contains a menu with items like 'DASHBOARD', 'ENTRIES', 'ACCOUNTS', 'PROFILE CERTIFICATION', 'CLIENTS', 'EMPLOYEES', 'RESIDENTIAL PROGRAMS', 'DAY PROGRAMS', 'CASE WORKERS', 'GROUP SERVICES', 'PARENTING PROGRAMS', 'GUARDIANS', 'COST CENTERS', and 'PENDING ENTRIES (25)'. The main content area shows a search for 'Payroll Specialist' for the period '02/28/2021 to 03/06/2021'. It includes an 'Overtime Gauge' with a legend (0 to 30, 30 to 40, 40+) and a message 'No entry in current week'. To the right, a 'Total Hours' summary table shows 'Approved By: 0.00', 'Pending Hours: 0.00', 'Unverified Hours: 0.00', and 'Total Hours: 0.00'. Below this, the 'Authorizations' widget is highlighted with an orange box, featuring a search bar for 'Type Client Name' and 'Search' and 'Reset' buttons. At the bottom, there is a section for 'Expiring Certifications'.



# 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.

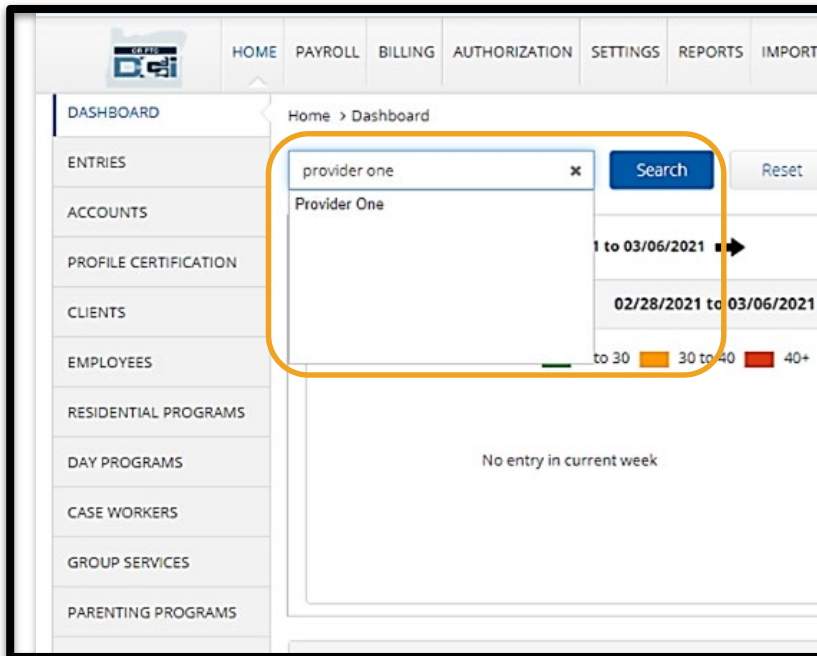
Authorizations						
Consumer One - AZ123456 <input type="button" value="x"/> <input type="button" value="Search"/> <input type="button" value="Reset"/>						
Authorization for Client: <b>Consumer One</b>						
Service Code	Start Date	End Date	Initial Balance	Remaining Balance	Pre Authorizations Holds	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



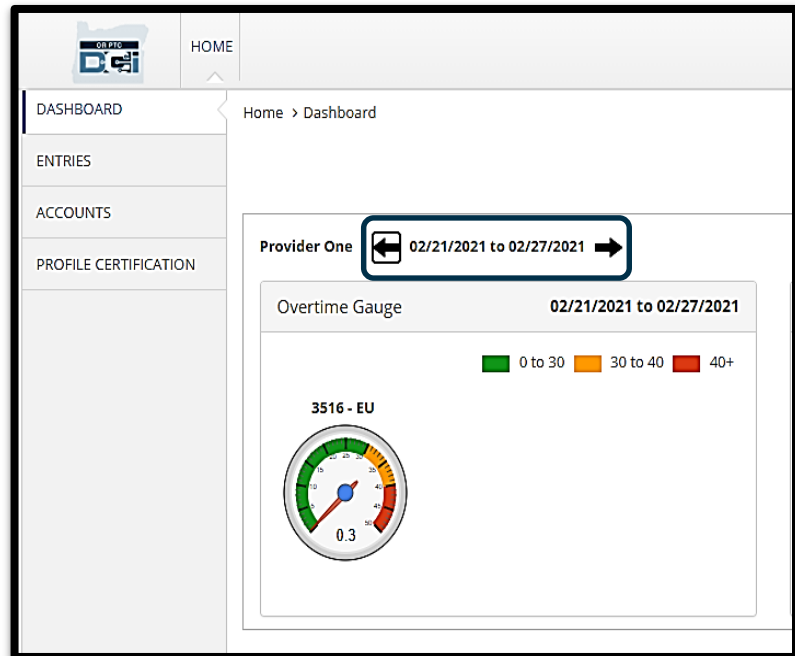
# Overtime Gauge

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.



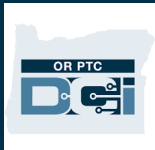
This screenshot shows the dashboard search interface. A search bar contains the text "provider one" and a "Search" button. Below the search bar, a dropdown menu displays "Provider One". To the right of the search bar, there are date range indicators: "1 to 03/06/2021" with a right-pointing arrow, and "02/28/2021 to 03/06/2021". Below these, there are color-coded indicators for overtime hours: "to 30" (green), "30 to 40" (orange), and "40+" (red). The main content area displays "No entry in current week".



This screenshot shows the Overtime Gauge for Provider One. The gauge is titled "Overtime Gauge" and displays the date range "02/21/2021 to 02/27/2021". Below the title, there are color-coded indicators for overtime hours: "0 to 30" (green), "30 to 40" (orange), and "40+" (red). The gauge itself is a circular dial with a needle pointing to the value "0.3". The text "3516 - EU" is displayed above the gauge.

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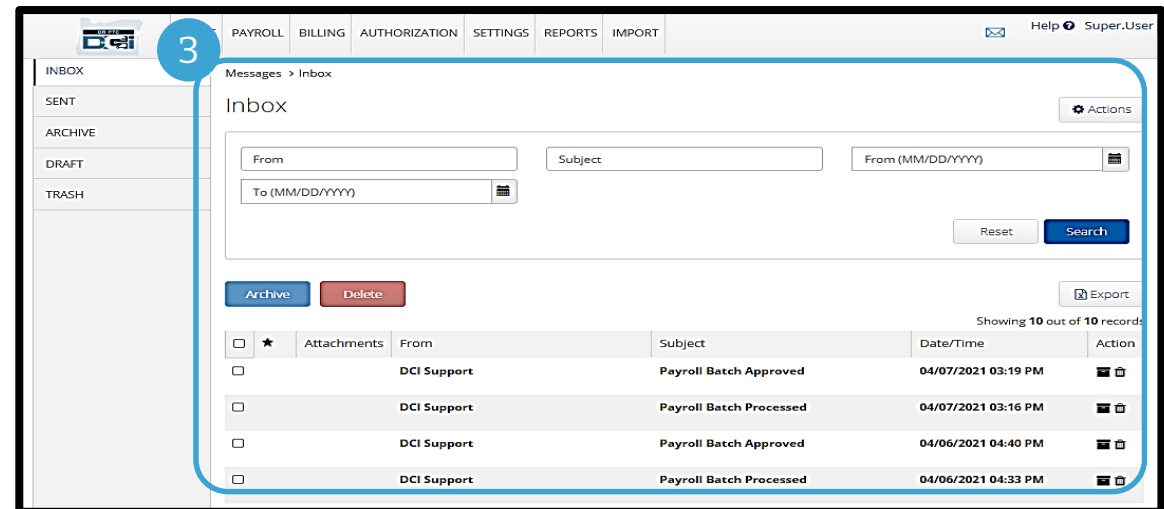
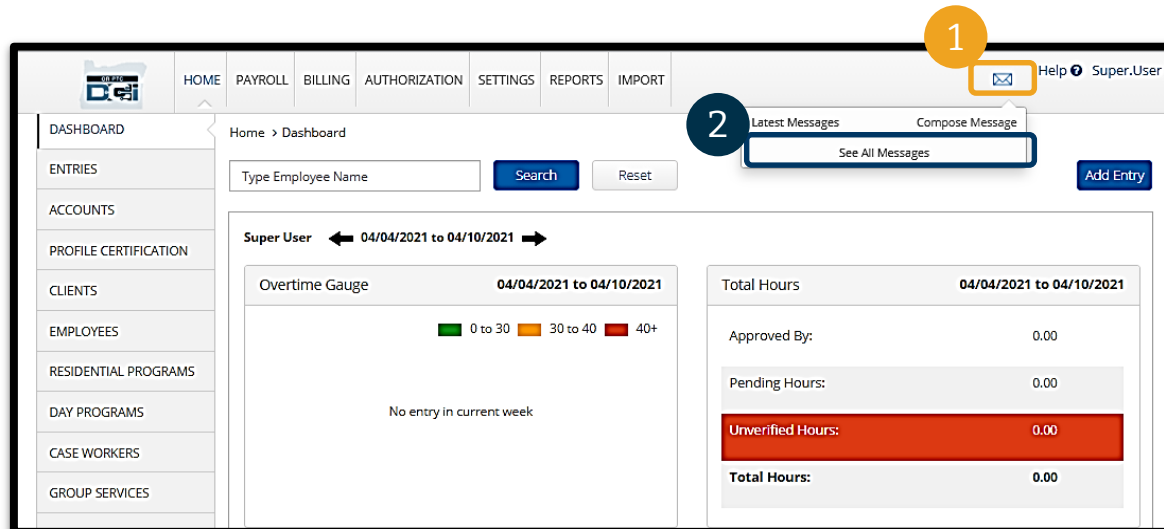
# Messaging Module Overview



# Messaging Module

## To access the Messaging Module:

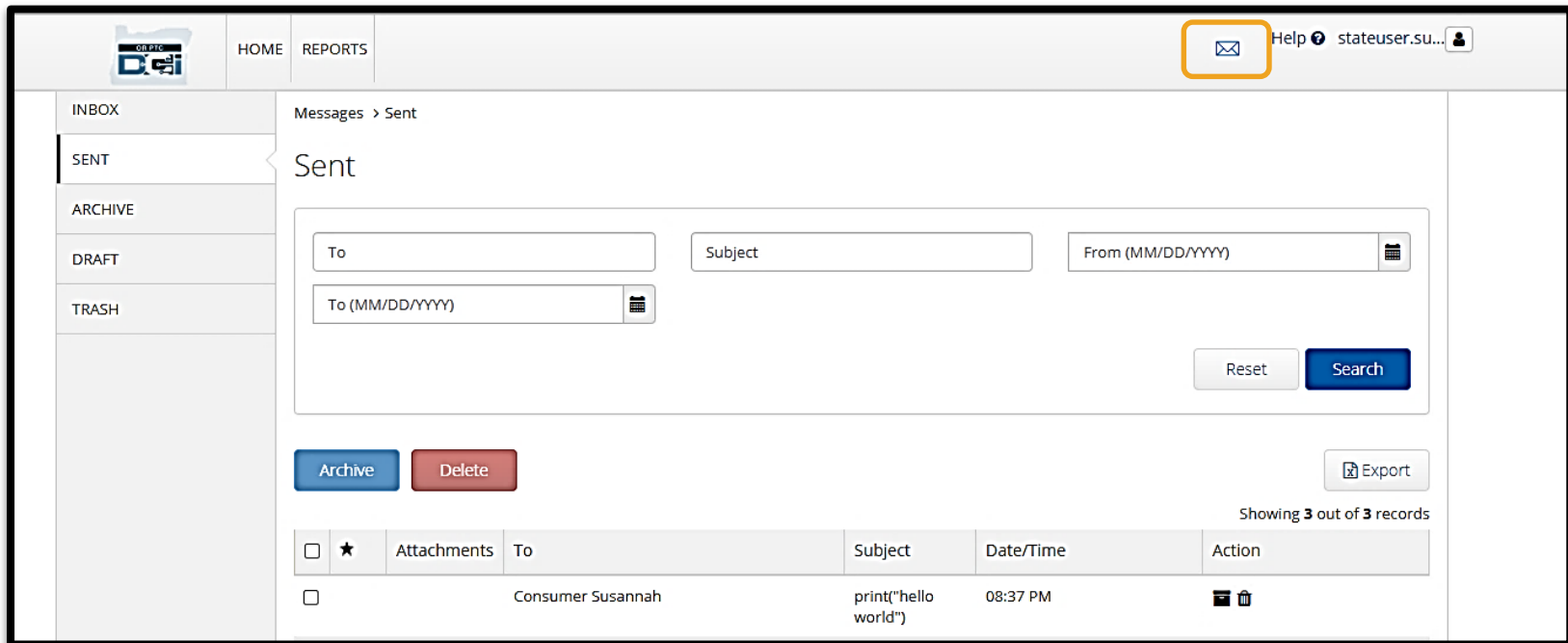
1. Click the envelope in the upper right corner of the screen
2. Click See All Messages
3. Messages Inbox displays





**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.



The screenshot displays the Messaging Module interface. At the top, there is a navigation bar with 'HOME' and 'REPORTS' tabs, and a user profile section for 'stateuser.su...' with a 'Help' icon. A blue envelope icon is highlighted with a yellow box. On the left, a sidebar shows folders: INBOX, SENT, ARCHIVE, DRAFT, and TRASH. The main content area is titled 'Messages > Sent' and 'Sent'. It features a search form with fields for 'To', 'Subject', and 'From (MM/DD/YYYY)', and a 'Search' button. Below the search form are 'Archive' and 'Delete' buttons, and an 'Export' button. A table at the bottom shows a list of messages with columns for 'Attachments', 'To', 'Subject', 'Date/Time', and 'Action'. The table contains one message from 'Consumer Susannah' with the subject 'print("hello world")' and the time '08:37 PM'.

<input type="checkbox"/>	★	Attachments	To	Subject	Date/Time	Action
<input type="checkbox"/>			Consumer Susannah	print("hello world")	08:37 PM	 

# 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.



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# Thank you!

