



Purpose: This guide describes the note and messaging functionality available to staff in OR PTC DCI. Step-by-step instructions with screenshots are included on pages 2-5.
Outcome: Staff understand how notes and messages work and how to use them.

Type of note	Can be viewed by staff	Can be viewed by provider	Steps to add the Note
1. Staff member adds note on a punch entry	Yes	No	Steps: <ul style="list-style-type: none"> • Navigate to the entry • Select Actions • Select New Note
2. Staff member adds note on provider's profile	Yes	No	Steps: <ul style="list-style-type: none"> • Navigate to the provider's profile • Select Actions • Select New Note
3. Staff adds note directly to entry using the Reason Code	Yes	Yes* *If the provider selects the entry to view the entry details. They will not be notified a note has been added.	Steps: <ul style="list-style-type: none"> • While editing or rejecting an entry, use the State-Other reason code. This reason code requires a note. • Type a note in the Add Note field under the Add Reason Code field.
4. Staff adds note directly to entry using Notes field	Yes	No	Steps: <ul style="list-style-type: none"> • While editing or rejecting an entry, you will see a Notes field at the bottom of the entry window. • Type your note in the Notes field.
5. Provider adds note to entry using Reason Code or Notes field	Yes	Yes	Steps: <ul style="list-style-type: none"> • Provider adds entry, clocks in, or opens an entry to edit. • Provider adds note to reason code (historical entries and editing only) or to the Notes section.
6. Message sent through Messaging Module	Yes	Yes	Steps: <ul style="list-style-type: none"> • Select the envelope icon in the upper right corner of your dashboard. • Select Compose Message to create a message to a provider.



1. Staff member adds note on a punch entry

Steps:

- Navigate to the entry
- Select Actions
- Select New Note
- Create a note and click Save.

Staff can see notes entered using the “New Note” action, **but providers cannot.**

Staff: Navigate to the provider’s Employee Details page and select the Notes tab.

Home / Employee / B28 Providers / B28 Consumers / Hourly ADL/IADL-1 / 2167

Punch Detail - B28 Providers/ B28 Consumers

Punch Details

Entry Id: 2167
 Machine Details: 174.192.130.162
 Service Date: Sep 16, 2022
 Check In: 07:06 AM
 Check Out: 07:08 AM
 Hour(s): 0:00:02
 Amount: 0.03 Hour
 Employee Time Zone: PT (UTC-8)
 Client/ Program Time Zone: PT (UTC-8)
 Authorization Entry Id: 2165
 Pay Rate Name: Standard
 Pay Rate: 0.00
 Status: Pending
 Created By: B28 Providers
 Created: Sep 16, 2022
 Input Method Type: Mobile App
 Needs Review: ?

Account Details/ Service Account

Account Id: 1275
 Account Type: Hourly
 Client/ Program Time Zone: PT (UTC-8)
 Employee: B28 Providers
 Employee Time Zone: PT (UTC-8)
 Service Code: Hourly ADL/IADL-1
 Portal Signoff: TRUE
 Funding Type: Units
 Funding Source: APD
 Cost Center: The Dalles APD-EU
 Unit Type: Hourly
 Status: Active

Actions

- New Note
- New Attachment
- Edit Custom Field Values
- Sign off
- Approve
- Reject
- Edit Entry

New Note

Note Type: * Note

Subject: * New Note

Body: *

Note added to entry using New Note functionality.

Attachment: Choose File

Cancel
Save

Subject	Body
New Note	Note added to entry using New Note functionality.

EVV Locations
Notes
Attachments

2. Staff member adds note on provider’s profile

Steps:

- Navigate to the provider’s profile
- Select Actions
- Select New Note

How it works:

Staff can see these notes, **but providers cannot.**

Staff: Navigate to the provider’s Employee Details page and select the Notes tab.

Home / Employees / B28 Providers

Employee Details - B28 Providers

Basic Demographics

Address: 221 Training Road
 Beaverton, OR 97006-0000
 GNIS: 41-067-0004551809112288688
 Phone: (999) 999-9999
 Mobile Number: (555) 555-5555
 Email: PTCProject.info@dhsosha.state.or.us
 Username: B28 Provider

Other Details

Average Caregiver Rating: 0
 Domestic Worker: No
 Domestic Worker 7 Day Exemption: No
 Domestic Worker Preferred Day of Rest: Sunday
 Employee Number: Uniid195

Actions

- New Note
- New Attachment
- View Roles
- New Service Account
- New Entry
- Edit Employee

EVV Locations
Notes
Attachments



3. Staff adds note directly to entry using the Reason Code

Steps:

- While editing or rejecting an entry, use the State-Other reason code. This reason code requires a note.
- Type a note in the Add Note field under the Add Reason Code field.
- Don't forget to select the blue plus sign to the right to add the reason code to the entry.

How it works:

Providers will see the reason code note, if they select the entry to view the entry details. They will not receive a notification and must check the entry manually.

Staff will also see the reason code note in the entry details.

Please note: If the provider needs information in a language other than English, the staff member will need to translate the message first. OR PTC DCI system will not auto translate the note.

Reason: ⊖

Add Reason Codes: * ⊕

Add Note: *

Added Reason Codes:			
Name	Code	Note	Actions
Reason Codes			
Reason Code Name: State-Other			
Reason Code: StateO			
Free Text Note: <input type="text" value="Time edited by staff member"/>			

4. Staff adds note directly to entry using Notes field

Steps:

- While editing or rejecting an entry, you will see a Notes field at the bottom of the entry window.
- Type your note in the Notes field.

How it works:

Staff can see these notes, **but providers cannot.**

Staff: Navigate to the entry and scroll down to the Notes tab.

Add Reason Codes: * ⊕

Add Note: *

Added Reason Codes:			
Name	Code	Note	Actions
Notes: <input type="text" value="Edited by C.S."/>			
<div style="display: flex; justify-content: space-around;"> Ref Entries Notes Attachments Events </div>			
Subject	Body		
Punch Created	Edited by C.S. 1. Time is correct. Falsifying may be Medicaid fraud		



5. Provider adds note to entry using Reason Code or Notes field

Steps:

- Provider adds entry, clocks in, or opens an entry to edit.
- Provider adds note to reason code (historical entries and editing only) or to the Notes section.

How it works:

The provider and staff can see the notes in the entry details.

Reason: ⊖

Add Reason Codes: * ⊕

 Add Note: *

Added Reason Codes:	Name	Code	Note	Actions
Diagnostic Code: <input type="text" value="Diagnostic Code"/>				

 Notes:

Attachment:

Statements: * Time is correct. Falsifying may be Medicaid fraud

Reason Codes

Reason Code Name: Provider-Other
Reason Code: ProvO

 Free Text Note:

Ref Entries **Notes** Attachments Verifications Map Business Rules Auto Approval Custom Fields History

Notes Showing 2 out of 2 records

Date	Type	Subject	Body	Added By
Oct 14, 2022	Note	Punch Created	<input type="text" value="Note added to Notes section"/> . Time is correct. Falsifying may be Medicaid fraud	B28 Providers
Oct 14, 2022	Note	Punch Created	Provider-Other	B28 Providers

6. Message sent through Messaging Module

Another communication method is the OR PTC DCI Messaging Module. The messaging module can be accessed via the envelope icon at the top of your dashboard.

Steps:

- Select the envelope icon in the upper right corner of your dashboard.
- Select Compose Message to create a message to a provider.

Note: To send a message via the Messaging Module, you will need to select the name from all employees in the system and all consumers in your cost center(s). If there are multiple users with the same name, you will not be able to distinguish which one is the correct recipient. You should use a different method of communication in this scenario.

