Staff – Notes Functionality

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: • Navigate to the entry • Select Actions • Select New Note
2. **Staff member adds note on provider's profile**	Yes	No	Steps: • 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: • 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: • 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: • 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: • 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.

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.

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: *	State-Other - StateO ▾			⊕
Add Note: *	Time edited by staff member			
Added Reason Codes:	Name	Code	Note	Actions

Reason Codes

Reason Code Name:	State-Other
Reason Code:	StateO
Free Text Note:	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: *	State-Other - StateO ▾			⊕
Add Note: *	Time edited by staff member			
Added Reason Codes:	Name	Code	Note	Actions
Notes:	Edited by C.S.			

| Ref Entries | Notes | Attachments | Events |

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: * | Provider-Other - ProvO ▾ | ⊕

Add Note: * | Note added to reason code |

Added Reason Codes:

Name	Code	Note	Actions

Diagnostic Code: | Diagnostic Code |

Notes: | Note added to Notes section |

Attachment: [Choose File]

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

Reason Codes

Reason Code Name: Provider-Other
Reason Code: ProvO
Free Text Note: Note added to reason code

| 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	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.