

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.	 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.



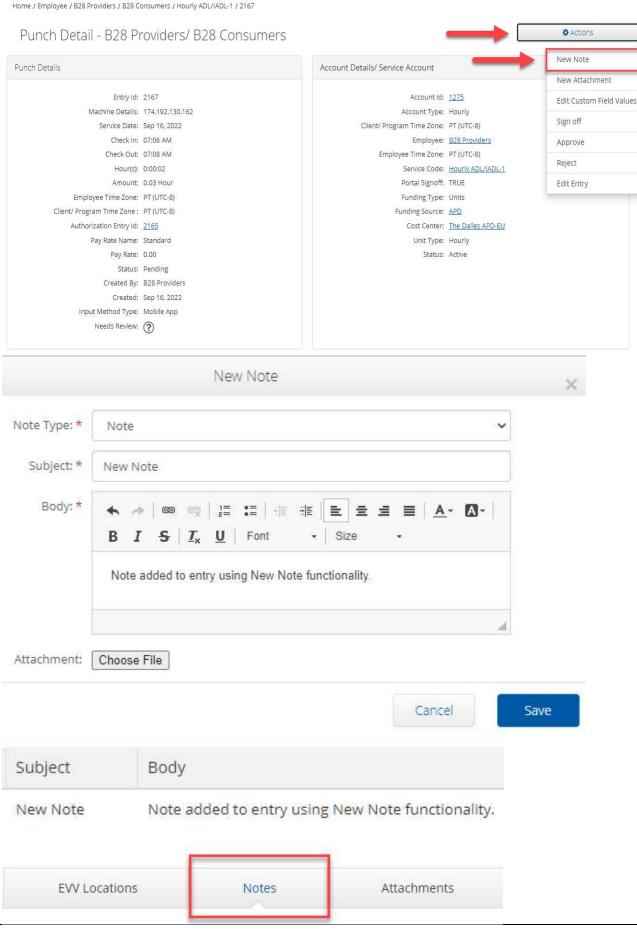


Steps:

- 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

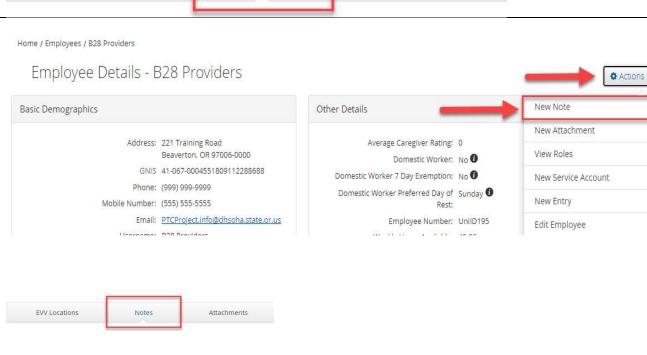
Steps:

- 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:

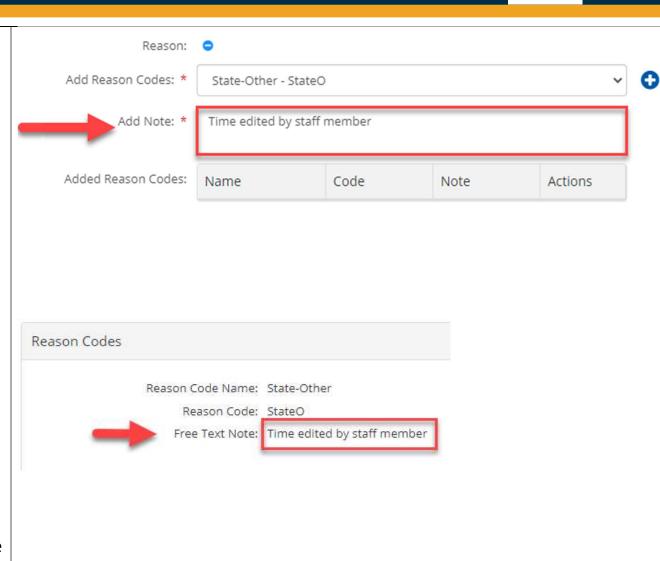
- While editing or rejecting an entry, use the State-Other reason code. This reason code requires a note.
- Type a note in the Add Note field under the Add Reason Code field.
- Don't forget to select the blue plus sign to the right to add the reason code to the entry.

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.



4. Staff adds note directly to entry using Notes field

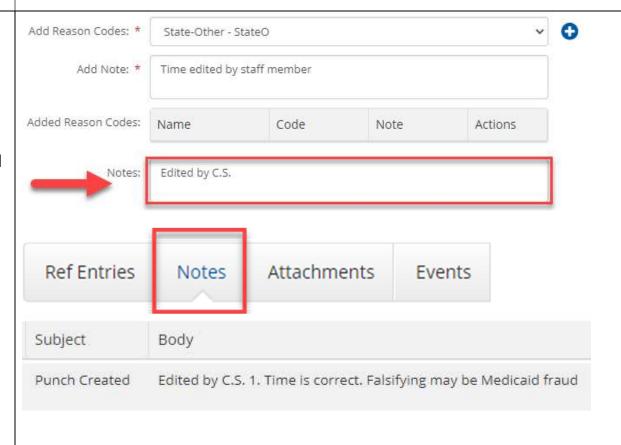
Steps:

- 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.





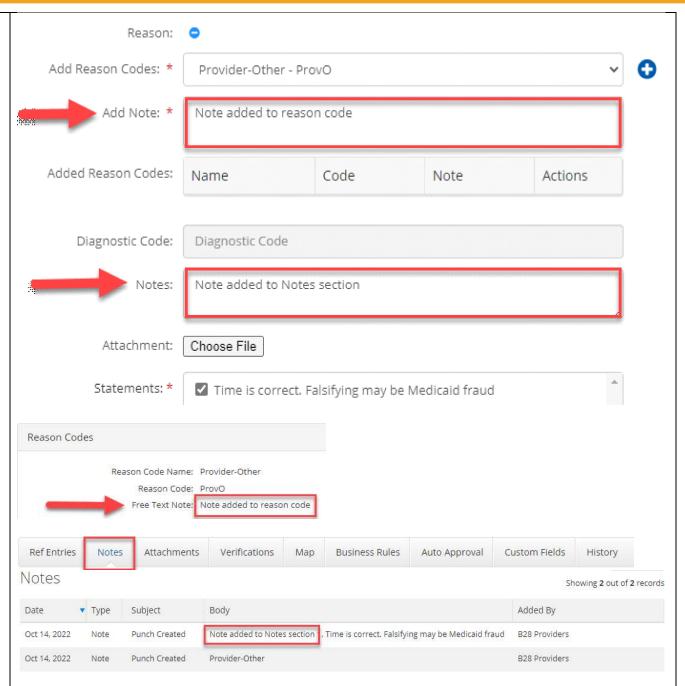
5. Provider adds note to entry using Reason Code or Notes field

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.





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.

