



Purpose: This gives instructions for adding a note to a provider's profile in OR PTC DCI.
Outcome: Staff can add notes to a provider's profile and view notes added by other staff members.

Notes on a provider's profile are not visible to the provider, but they are visible to all staff who can view the provider's profile. The only type of note a provider can see is the free text note added as part of the Staff-other Reason Code. All other types of notes are not visible to the provider. For more information on when to use these notes, please see [APD-IM-22-009: Documenting HCW Information in OR PTC DCI](#).

To add a note to a provider's profile:

1. In OR PTC DCI, click the Employees tab on the left.
2. Search for the provider you wish to add a note for by typing the provider's name or Uni ID.
3. Click Search.
4. In the search results, click on the provider to which you want to add a note.

The screenshot shows the OR PTC DCI interface. On the left is a sidebar with navigation tabs: DASHBOARD, ENTRIES, ACCOUNTS, PROFILE CERTIFICATION, CLIENTS, EMPLOYEES (highlighted with a blue box and a '1' callout), RESIDENTIAL PROGRAMS, DAY PROGRAMS, CASE WORKERS, GROUP SERVICES, PARENTING PROGRAMS, GUARDIANS, COST CENTERS, and PENDING ENTRIES (35). The main content area is titled 'Home / Employees' and 'Employees'. It features a search bar with 'April Ludgate' entered, and fields for 'Type Cost Center', 'Employee Number', 'Select Employee Type', 'Select State', and 'Select Status'. A 'Search' button is highlighted with a blue box and a '3' callout. Below the search bar is a table with one record for April Ludgate. The table columns are Name, Employee #, Phone #, Email, Time Zone, Type, Cost Center, and Status. The record for April Ludgate is highlighted with an orange box and a '4' callout. Below the table is a callout box titled 'Employee Details - April Ludgate'. It shows 'Basic Demographics' (Address: 123 Park St, Pawnee, OR 97439-0000; GNIS: 41-039-1142259; Phone: (541) 665-9875; Email: whocares@email.com) and 'Other Details' (Average Caregiver Rating: 0; Domestic Worker 7 Day Exemption: No). A 'New Note' button is highlighted with a blue box and a '6' callout. A '5' callout points to the 'Actions' button in the top right corner of the callout box.

5. On the provider's profile, click Actions.
6. Click New Note.

Staff - How to Add a Note to a Provider's Profile



7. Select the Note Type, add a Subject, and type the body of the note in the note wizard.
8. Click Save.
9. Click Yes.
10. To view the note, scroll to the tabs at the bottom of the provider's profile and click Notes.

New Note

Note Type: * Note

Subject: * Contacted Provider About Over Hours

Body: * On 6-14-2021 at 4:30 I contacted April because she is over hours.

Alert

Are you sure you want to add a new **Note** - **Contacted Provider About Over Hours**?

No Yes Cancel Save

Signature Set: No
Email confirm: No [Resend Email](#)

Entries Accounts Certifications EWV Locations **Notes** Attachments Events Custom Fields History

From (MM/DD/YYYY) To (MM/DD/YYYY) Select Type Select Sub Type

Subject Type Added By

Reset Search

Export

Showing 4 out of 4 records

Date	Type	Sub Type	Subject	Body	Added By
Jun 15, 2022	Note		Contacted Provider About Over Hours	On 6-14-2021 at 4:30 I contacted April because she is over hours.	Sally Brown