

# QRG - Adding a Note to a Provider's Profile



**Purpose:** This guide 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



Staff - How to Add a Note to Providers Profile v2.1.pdf

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

## Related articles

- [Business Process - Over and Underpayments](#)
- [Staff Learning Materials Catalog](#)
- [QRG - Resetting Passwords in OR PTC DCI](#)
- [Guide - Profile Management](#)
- [QRG - Profile Requests for OR PTC DCI](#)