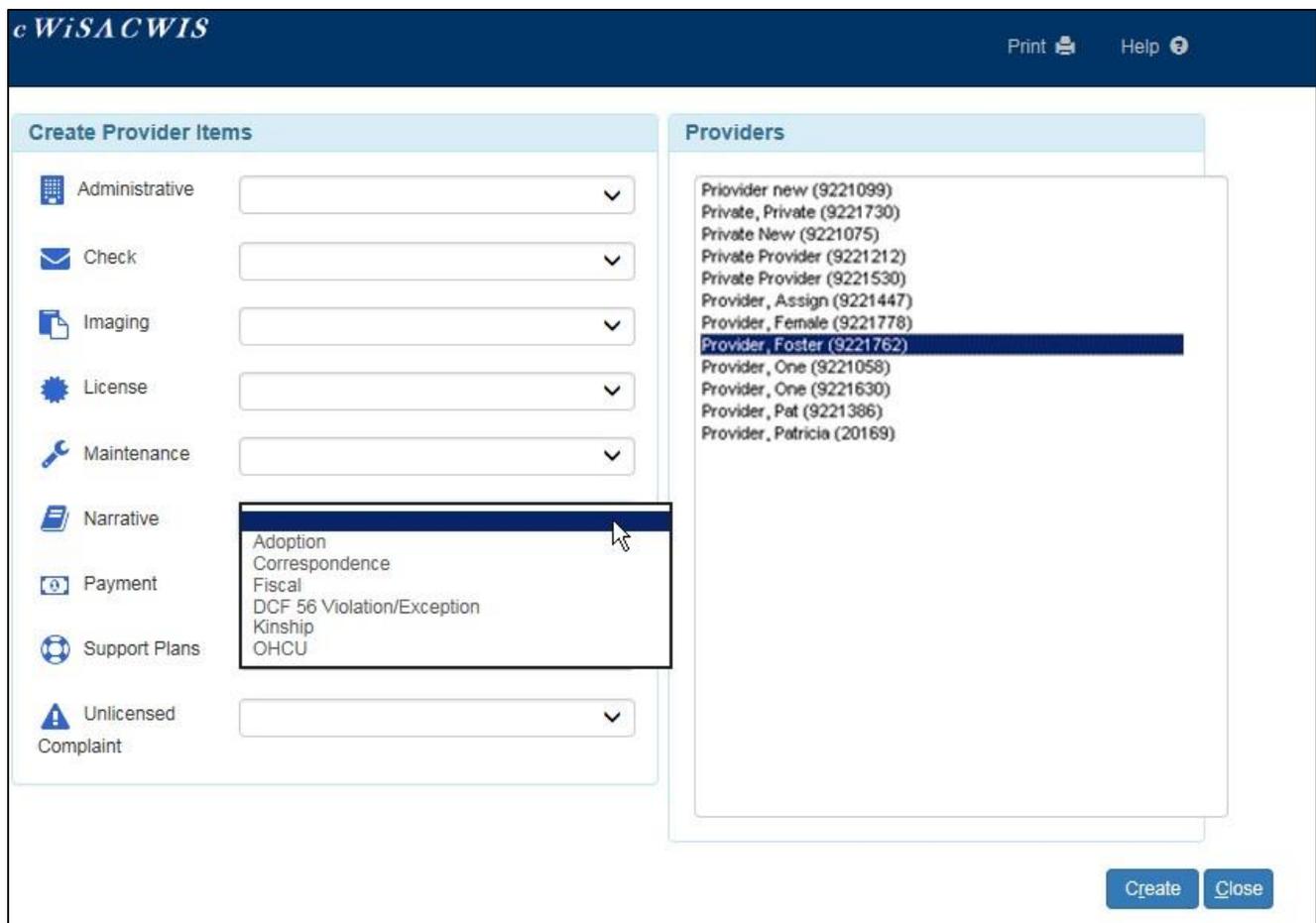
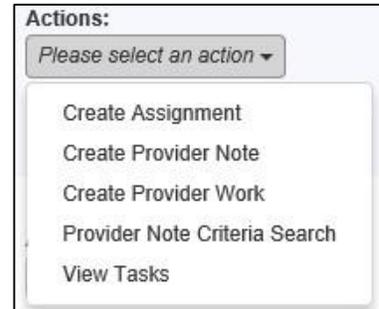


# Creating and Viewing Provider Notes

**Note:** In order to create a provider note, an assignment to the provider is not needed. Additionally, a provider note can be created on a closed provider record.

## Creating Provider Notes on Assigned Cases

1. From your desktop, go to the Provider tab and click the Create Provider Work hyperlink [Create provider work](#) or select Create Provider Work from the Actions drop-down next to the specific provider to open the Create Provider Work page.
2. Select the Category from the Narrative drop-down and select the Provider. Click Create. This will open the Provider Note page.



3. At the top of the Provider Note page there is an option to search out the Worker Making Contact. Enter the Date, Begin Time, select the Category and Type and enter Narrative. The Provider Note can be saved and updated for up to 30 days after it is created. When the Note Finalized checkbox is checked or 30 days have passed, the note will be frozen and no longer editable. Click Save to save your changes. The Create button creates a new Provider Note. The Clear Fields button will blank out all of the fields on this note. For the Insert Correction Note button, see the associated Creating Provider Correction Notes User Guide.



## Creating Provider Notes from Search

1. From your desktop, click Search on the menu bar. This will open the Search page. On the Search page, select the Provider Organization tab to search the provider. You do not need to be assigned to the provider, and the provider can be open or closed. Click the Actions hyperlink next to the provider name in the search results to open the Actions page (as shown below) or select the 'Create Provider Note' icon which will open the Provider Note page.
2. On the Actions page, select Create Provider Note radio button and click Continue.

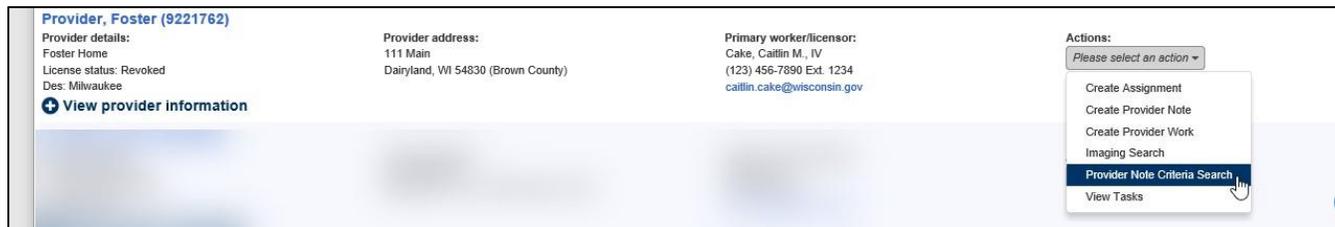
The screenshot displays the eWiSACWIS search interface. At the top, the 'Provider Organization' tab is selected. The search criteria section includes fields for Provider Name (set to 'Provider'), First Name (set to 'Foster'), and Provider ID. Other fields include Parent Agency ID, Provider Type, Site #, County, and ZIP Code. There are checkboxes for 'Date Restricted' and 'View Not Approved/Cancelled', and a 'Search Precision' slider set to 'High'. A 'Search' button is located on the right. Below the search criteria, the results show 'Record 1 to 2 of 2'. The first result is 'Provider, Foster (9221762)' with an 'Actions' link highlighted in a red box. The second result is 'Provider, Foster (9221772)' with an 'Actions' link. A modal window titled 'Select Action' is open, showing three radio button options: 'Create Provider Note' (selected), 'Provider Note Criteria Search', and 'View Ticklers'. 'Continue' and 'Close' buttons are at the bottom of the modal. A 'Close' button is also present at the bottom right of the main search results area.

3. This opens the Provider Note page. Complete the required fields and click Save.

**Note:** Up until the day a provider note is finalized, a provider note can be updated via Search by either the Worker Creating Note or the Worker Making Contact.

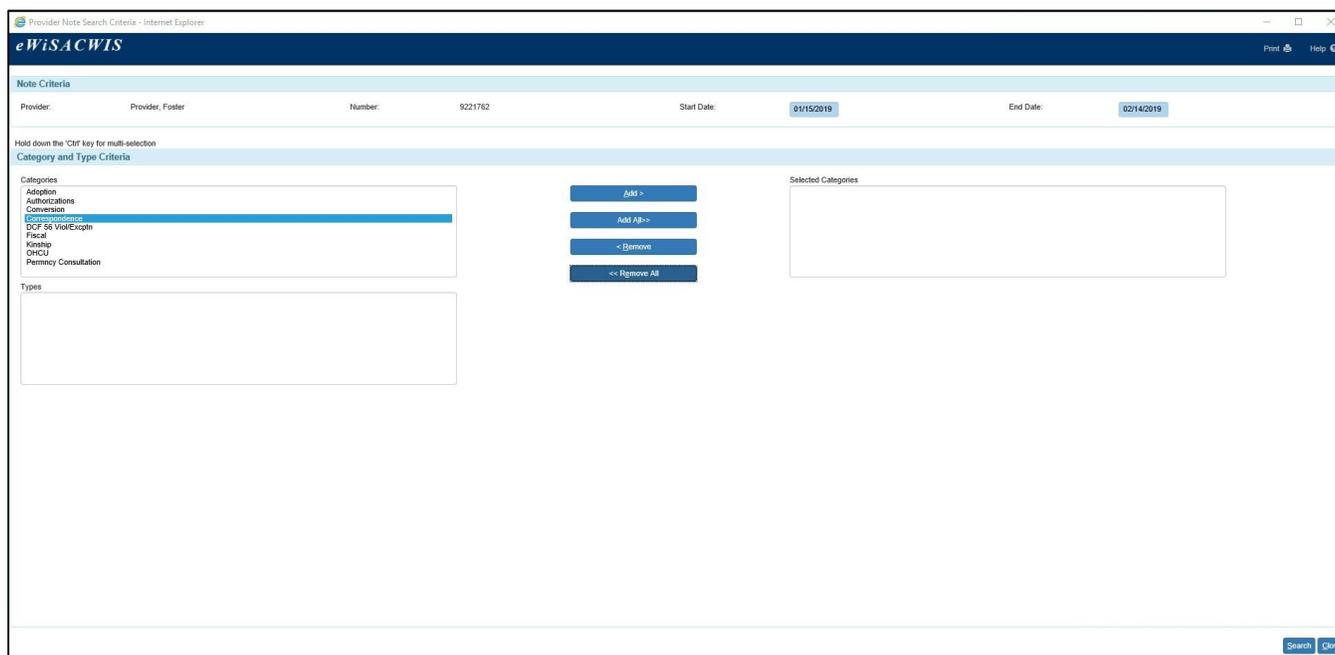
## Viewing Provider Notes

1. To view or print multiple notes for a provider from your desktop or from search, click the Actions hyperlink next to the provider name and select Provider Note Criteria Search.

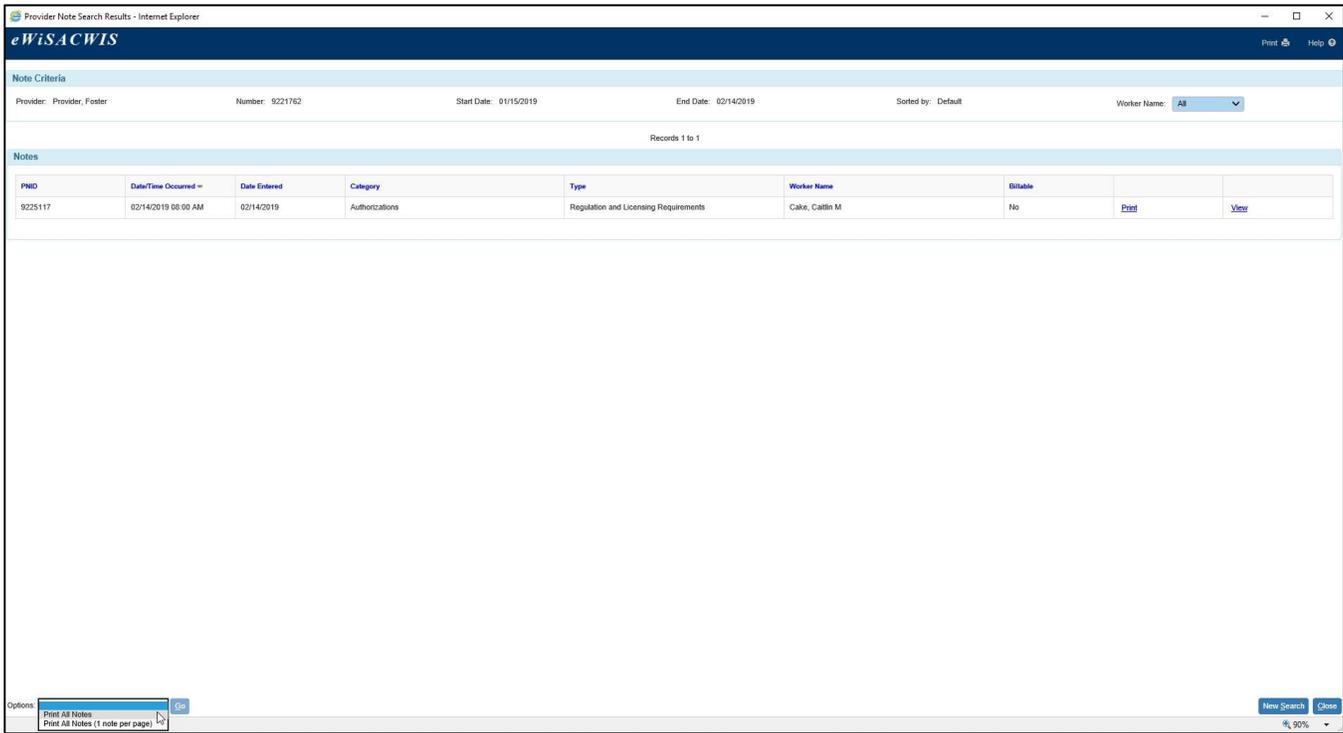


2. Enter the criteria for the notes to be viewed. Start Date, End Date, and at least one Category are required. Once all desired criteria is entered, click the Search button. Hold ctrl key to select multiple criteria at once before selecting Add>.

**Note:** The Start Date and End Date pre-fill to retrieve the past 30 days' worth of notes. These dates can be changed to retrieve a greater or lesser timeframe.



3. The notes returned can be sorted different ways by clicking the blue column labels like Date Entered, Category, Type, etc. To show notes only for a particular worker, select that worker from the Worker Name drop-down. To Print or View one provider note, select the appropriate hyperlink on the right. To view or print all retrieved notes at once, select Print All Notes from the Options drop-down and click 'Go.' This will open the notes in a PDF document. The New Search button will return you to the Provider Note Search Criteria page.



## Quick View of Provider Notes from the Desktop or Search

1. From the desktop or from search, click to view the provider's information then click to open Narratives.
2. Put your mouse cursor over the word (Details) to see the first 120 characters of that note. To view the entire note, select the hyperlink.

**Provider, Foster (9221762)**

**Provider details:**  
Foster Home Level 2  
License status: Pending  
Des: Milwaukee

**Provider address:**  
111 Main  
Dairyland, WI 54830 (Brown County)

**Primary worker/licensor:**  
Cake, Caitlin C.  
(123) 456-7890  
ccake@wisconsin.gov

**View provider information**

- Assignments
- Licenses
- Placements
- Background Checks
- Members
- Provider Services
- Basic
- Narratives

Hover over (Details) to see the user entered text.

Link	(Details)	Date	Worker Name	Category	Status
<a href="#">Correspondence</a>	(Details)	10/03/2023	Cake, Caitlin C.	Letter	Pending
<a href="#">Authorizations</a>	(Details)	02/14/2019	Cake, Caitlin C.	Regulation and Licensing Requirements	Finalized
<a href="#">OHCU</a>	(Details)	10/01/2012	Cake, Caitlin C.	Licensing	Finalized