

# Dashboard

A dashboard is a visual representation of key information, data, or metrics displayed in a consolidated and easily digestible format. It is typically designed to provide users with a quick and clear overview of relevant information to help them make informed decisions or monitor specific aspects of a system.

- [Dashboard Overview](#)
- [Set up](#)

# Dashboard Overview

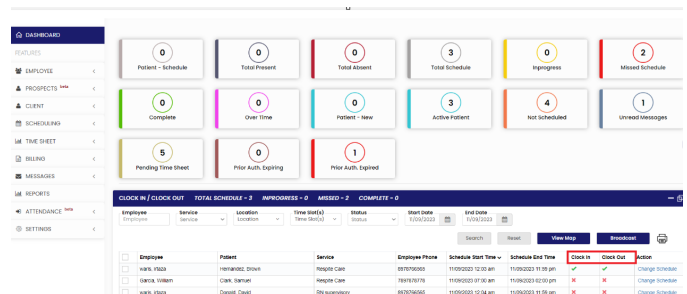
The dashboard screen serves as a comprehensive overview of the organization's activities, providing users with real-time reporting information for efficient tracking and management of day-to-day operations. Here is a breakdown of the key elements displayed on the dashboard.

**The Dashboard screen provides a quick glance view of the schedules for the day.**

## Features in Dashboard

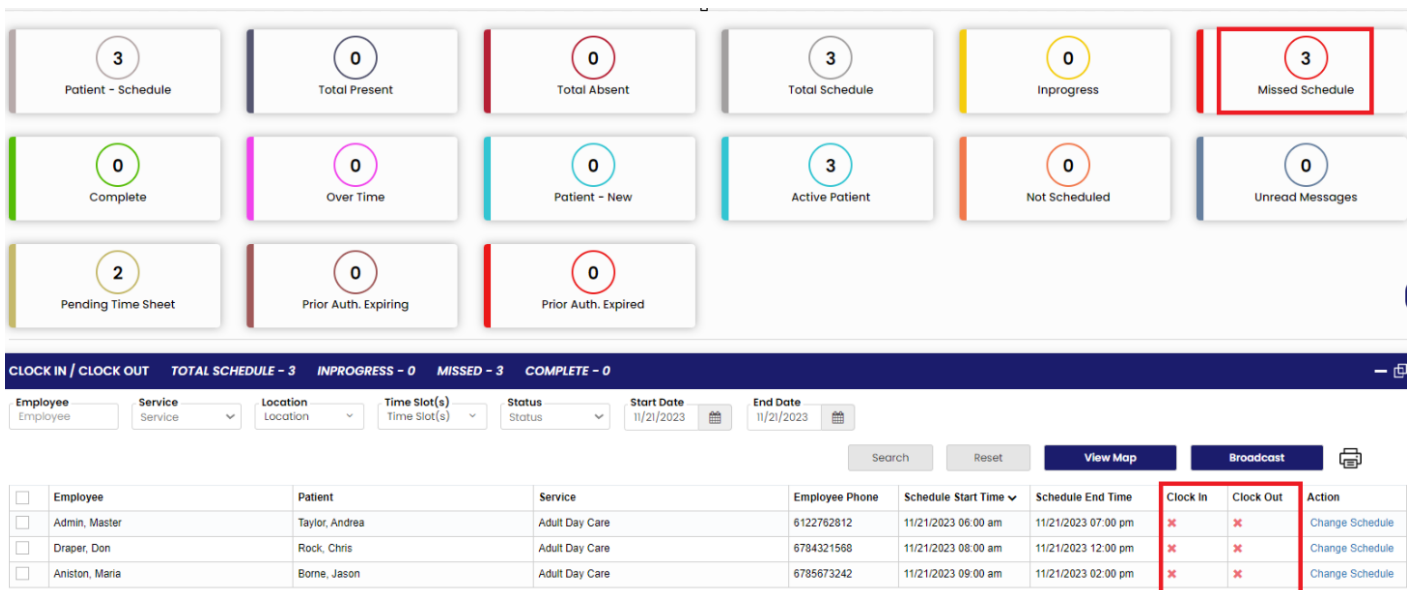
### Employees - Clock-in / Clock out:

This section provides information about employee attendance, including their clock-in and clock-out times. It helps monitor and manage employee working hours, ensuring proper attendance and time management.



## Missed Schedules

The user can track the missed schedules for the day by clicking the option Missed in the Dashboard. The schedules in which the clock-in and clock-out is not done comes under missed schedules.



## Complete Schedules

The user can track the completed schedules for the day by clicking the option Complete in the Dashboard. The schedules in which the clock-in and clock-out is done comes under Complete Schedules.

**Dashboard Summary:**

- Patient - Schedule: 3
- Total Present: 0
- Total Absent: 0
- Total Schedule: 3
- Inprogress: 0
- Missed Schedule: 2
- Complete: 1**
- Over Time: 0
- Patient - New: 0
- Active Patient: 3
- Not Scheduled: 0
- Unread Messages: 0
- Pending Time Sheet: 2
- Prior Auth. Expiring: 0
- Prior Auth. Expired: 0

**Filters:** Employee, Service, Location, Time Slot(s), **Status: Complete**, Start Date: 11/21/2023, End Date: 11/21/2023

Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/> Draper, Don	Rock, Chris	Adult Day Care	6784321568	11/21/2023 08:00 am	11/21/2023 12:00 pm	✓	✓	<a href="#">Change Schedule</a>

## In-progress Schedules

The user can track the In-progress schedules for the day by clicking the option In-progress in the Dashboard. The schedules in which the clock-in is done and clock-out is not yet done comes under In-progress Schedules.

**Dashboard Summary:**

- Patient - Schedule: 3
- Total Present: 0
- Total Absent: 0
- Total Schedule: 3
- Inprogress: 1**
- Missed Schedule: 1
- Complete: 1
- Over Time: 0
- Patient - New: 0
- Active Patient: 3
- Not Scheduled: 0
- Unread Messages: 0
- Pending Time Sheet: 2
- Prior Auth. Expiring: 0
- Prior Auth. Expired: 0

**Filters:** Employee, Service, Location, Time Slot(s), **Status: Inprogress**, Start Date: 11/21/2023, End Date: 11/21/2023

Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/> Aniston, Maria	Borne, Jason	Adult Day Care	6785673242	11/21/2023 09:00 am	11/21/2023 02:00 pm	✓	✗	<a href="#">Change Schedule</a>

## Change Schedule

The option change schedule is used to change the schedule with required Employee name and the available timings. Click change schedule option under Actions.

CLOCK IN / CLOCK OUT

TOTAL SCHEDULE - 3

INPROGRESS - 0

MISSED - 2

COMPLETE - 1

Employee

Service

Location

Time Slot(s)

Status

Start Date

End Date

Search

Reset

View Map

Broadcast

<input type="checkbox"/>	Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/>	Admin, Master	Taylor, Andrea	Adult Day Care	6122762812	11/21/2023 06:00 am	11/21/2023 07:00 pm	✗	✗	Change Schedule

Now, select the Employee name and enter the available timings and then click Save. The schedule will be changed to the respective Employee with Start time and End time.

Clock-In-Out

00:00:00

Visitor Attendance

DAY CARE

MASTER

3

Patient - Schedule

0

Total Present

1

Complete

0

Over Time

2

Pending Time Sheet

0

Prior Auth. Expiring

0

Prior Auth. Expired

3

Total Schedule

0

Inprogress

2

Missed Schedule

3

Active Patient

0

Not Scheduled

0

Unread Messages

Change Schedule

Select Employee

Master Admin

Schedule Start Time

06:00 am

Schedule End Time

07:00 pm

Cancel

Save

CLOCK IN / CLOCK OUT

TOTAL SCHEDULE - 3

INPROGRESS - 0

MISSED - 2

COMPLETE - 1

Employee

Service

Location

Time Slot(s)

Status

Start Date

End Date

Search

Reset

View Map

Broadcast

<input type="checkbox"/>	Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/>	Admin, Master	Taylor, Andrea	Adult Day Care	6122762812	11/21/2023 06:00 am	11/21/2023 07:00 pm	✗	✗	Change Schedule
<input type="checkbox"/>	Draper, Don	Rock, Chris	Adult Day Care	6784321568	11/21/2023 08:00 am	11/21/2023 12:00 pm	✓	✓	Change Schedule
<input type="checkbox"/>	Aniston, Maria	Borne, Jason	Adult Day Care	6785673242	11/21/2023 09:00 am	11/21/2023 02:00 pm	✗	✗	Change Schedule

Employees Overtime:

The employees' overtime section displays the number of employees who have accumulated overtime hours in the last seven days. It helps organizations track and manage overtime effectively, ensuring compliance with labor regulations and managing workload distribution.

Upcoming Birthday:

This section presents information about upcoming birthdays of both patients and employees. It serves as a reminder to celebrate and acknowledge birthdays, fostering a positive work environment and patient care experience.

EMPLOYEES - OVERTIME IN LAST 7 DAYS

Start Date

10/21/2023

End Date

10/27/2023

Search

Employee	Allocated Hrs	Used Hrs	OverTime Hrs
Garcia, William	21	21	12

UPCOMING BIRTHDAY		
Patient Employee		
Patient	Phone	Birthday
Samuel Clark	4561235484	09, November

**Patient - New:**

The new patient section provides information about recently admitted or registered patients. It allows staff to stay informed about new arrivals and helps initiate the necessary procedures and documentation for these patients.

**Patient - Fully not scheduled:**

This section highlights patients who are not yet fully scheduled for the next seven days. It alerts staff to ensure proper scheduling and avoid any gaps in patient care or appointments.

**Patient - Pending:**

The pending patient section displays information about patients whose status is pending. It helps staff stay updated on patients whose cases are awaiting further actions or approvals, ensuring timely follow-up and resolution.

**Patient - Discharged:**

This section provides information about patients who have been discharged from the organization's care. It helps track the number of discharged patients and their relevant details for record-keeping and reporting purposes.

**Patient - Transfer:**

The patient transfer section provides information about patients who have been transferred to another location or facility. It enables seamless coordination between different departments or facilities involved in the patient's care.

**Patient - On Hold:**

This section displays information about patients who are currently on hold, indicating that their cases are temporarily paused or pending certain conditions or decisions. It helps staff track and manage patients whose care plans are on hold.

PATIENT - NEW

Start Date

10/13/2023

End Date

10/13/2023

Search

Patient ^

Created Date

Created By

No records found.

PATIENT - FULLY NOT SCHEDULED FOR NEXT 7 DAYS

Start Date

10/14/2023

End Date

10/20/2023

Search

Patient	Allocated Hrs	Scheduled Hrs	Remaining Hrs	Unscheduled Hrs
Hernandez, Brown	42	0	42	0
Clark, Samuel	49	14	28	7

PATIENT - PENDING

Start Date

10/14/2023

End Date

10/13/2023

Search

Patient ^

Created Date

Created By

No records found.

PATIENT - DISCHARGED

Start Date

11/07/2023

End Date

11/07/2023

Search

Patient ^

Created Date

Created By

William, John	10/23/2023	Admin, Master
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PATIENT - TRANSFER

Start Date

11/07/2023

End Date

11/07/2023

Search

Patient ^

Created Date

Created By

Joseph, Thomas	03/30/2022	Admin, Master
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PATIENT - ONHOLD

Start Date

11/07/2023

End Date

11/07/2023

Search

Patient ^

Created Date

Created By

Taylor, Charles	03/30/2022	Admin, Master
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**Prior Auth Expiring:**

This section highlights the expiration dates of prior authorizations. It enables staff to proactively manage the authorization process, ensuring that necessary authorizations are renewed or extended in a timely manner to avoid disruption in patient care and billing.

PRIOR AUTH EXPIRING			
Patient	Payor	Expiring Date	Total Visits
dev, Rahul	Atena	11/10/2023	20

**Prior Auth Expired:**

The prior authorization expired section provides information about authorizations that have expired. It helps staff identify cases where authorization needs to be reestablished to continue patient care and billing processes smoothly.

PRIOR AUTH EXPIRED			
Patient	Payor	Expiring Date	Total Visits
Hernandez, Brown	Atena	11/05/2023	33

**Overall, this comprehensive dashboard enables users to monitor and manage various aspects of the organization's activities, ensuring efficient operations, timely patient care, and compliance with necessary protocols and regulations.**

# Set up

Setting up an application is the process of installing, configuring, and customizing software or systems to ensure they work as intended. It involves tailoring the application to specific needs, setting user permissions, and preparing it for use, ensuring a smooth and effective operation.

Note: All Fields marked with \* are mandatory and must be filled out, otherwise the system will generate an error indicating that the required information is missing.

## User Login

The User Login on the top right corner of the software contains the following features:

- My Profiles
- Roles and Permissions
- Organization Settings
- Billing
- Log Out

Clock-In-Out00:00:00?🔔

Visitor AttendanceDAY CAREMASTER

0Patient - Schedule

0Total Present

0Total Absent

3Total Schedule

0Inprogress

Missed Schedule

0Complete

0Over Time

0Patient - New

3Active Patient

3Not Scheduled

1Unread Messages

5Pending Time Sheet

1Prior Auth. Expiring

1Prior Auth. Expired

CLOCK IN / CLOCK OUTTOTAL SCHEDULE - 3INPROGRESS - 0MISSED - 2COMPLETE - 0

EmployeeEmployee

ServiceService

LocationLocation

Time Slot(s)Time Slot(s)

StatusStatus

Start Date11/07/2023

End Date11/07/2023

Search

Reset

View Map

Broadcast

	Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/>	waris, irtaza	Donald, David	Service Facilitation	8978766565	11/07/2023 11:38 pm	11/07/2023 11:59 pm	✗	✗	Change Schedule
<input type="checkbox"/>	waris, irtaza	Clark, Samuel	RN supervisory	8978766565	11/07/2023 12:11 am	11/07/2023 11:59 pm	✓	✓	Change Schedule
<input type="checkbox"/>	waris, irtaza	Hernandez, Brown	RN supervisory	8978766565	11/07/2023 11:40 pm	11/07/2023 11:59 pm	✗	✗	Change Schedule

## My Profiles

The user can update the Profile information under My Profiles option. Update the required fields, upload the Profile image and click Save option.

EDIT PROFILE

Cancel Save

My Profile

Upload Profile Image

Note\*: Preferable image ratio: 1:4 (80 X 320) and maximum allowed file size: 2MB.

First Name\* Master

Middle Name Middle Name

Last Name\* Admin

Email\* support@myezcare.com

Work Phone\* (000) 000-0000

Mobile Phone\* (000) 000-0000

Username\* me-admin

Password Password

Confirm Password Confirm Password

Security Question\* What is your favorite color?

Security Answer\* Red

Save Cancel

## Roles & Permissions

The user can give permissions to the respective Role of the Employee. Select and Role and choose the permission to be given for the Role.

- **Mobile App Permissions**
- **Web Permissions**
- **Report Permissions**

ROLE PERMISSION Search And Set Role Permission Details

SYSTEM - PERMISSIONS

Role Name + Add Role

PCA/CNA

Note\*: You can enable/disable any permission from permission tree. Please make sure to Admin or SuperAdmin. Ex. Role Permission Page's Access

Selected Role: PCA/CNA

Permissions

Select Role

Select Role

Mobile App Permissions

Web Permissions

Report Permissions

Reserved for "Special Admin Rights" which will be applicable only

## Organization Settings

The user can update the Organization information under Organization Settings. It has features like Logo Settings, Invoice Settings, Billing Settings etc.



Organization Settings

Forms Library

Cancel

Save

Organization Information

Organization Name \*

Myezcare2

Support Email \*

support@myezcare.com

Address

Address

City

City

State

State Code

Zip Code

XXXXX

Time Zone \*

(UTC-05:00) Eastern Time (US & Canada)

Site Miscellaneous Settings

Page Size \*

50

Patient Resignature Needed

Yes

Google Drive Integration

Link Google Drive

MIF Settings

Appendix

Appendix

Description

Description

Revision

Revision

Site Logo Settings

Login Screen Logo\*

Upload Image

Note\*: Preferable resolution: 300px x 40px (7.5:1)

myEZcare

simple yet Powerful

Sidebar Logo\*

Upload Image

Note\*: Preferable resolution: 128px x 14px (7:1)

Fav Icon\*

Upload Image

Note\*: Preferable resolution: 32px x 32px (1:1)

Template Logo\*

Upload Image

Note\*: Preferable resolution: 600px x 200px (3:1)

Invoice Settings

Invoice Generation Frequency

Visit Wise

Invoice Tax Rate

0

Invoice Due Days

0

Invoice Notes

Invoice Notes

Bill to Payor

Include Patient Address

Include Patient DOB

Include Addressline 1


Include Addressline 2

Include AddressZip

The Billing option gives us information about the list of Invoices generated in the software.

## Log Out

By clicking the "Log Out " button, the user can prevent unauthorized access to the account, reducing the data breeches and maintaining online privacy.



### Login into account

Use your credentials to access your account.

☐ Remember

[Forgot Password?](#)

LOGIN

GET IT ON  
Google Play

Download on the  
App Store

## Announcement

### What's new in Ver. 2.1.36

Posted On: 6/24/2023

**Bugs:**

- Some UI Issues fixed on referral timeslot issues like days dropdown and +1 day etc.


**Features:**

- On Adult Daycare –Added option for skipping patient task list, and it's based on permission. When we click on the clock-out button then asking Do we want to Skip the Attendance Patient Task if **select yes then skip the task list and redirect to the clock-out page** if select no then it renders to the task list page.
- Change Schedule hyperlink added in the ClockIn Out list on Dashboard. Here user can change the scheduled employee and time.
- Patient schedule days name information added on a patient schedule list, And also here we can get schedule-related complete information and we can assign the schedule to another employee.

Your feedback is very valuable to us to improve the features and enhancement. Please provide your feedback by emailing us at [helpdesk@myezcare.com](mailto:helpdesk@myezcare.com)

## Hide Features

The four line in the Dashboard is used to hide the Feature names in the Dashboard screen.



Clock-In-Out 00:00:00 ? Visitor Attendance DAY CARE MASTER

DASHBOARD

FEATURES

EMPLOYEE

PROSPECTS beta

CLIENT

SCHEDULING

TIME SHEET

BILLING

MESSAGES

REPORTS

ATTENDANCE beta

SETTINGS

0

Patient - Schedule

0

Total Present

0

Total Absent

3

Total Schedule

0

Inprogress

2

Missed Schedule

0

Complete

0

Over Time

0

Patient - New

3

Active Patient

3

Not Scheduled

1

Unread Messages

5

Pending Time Sheet

1

Prior Auth. Expiring

1

Prior Auth. Expired

CLOCK IN / CLOCK OUT

TOTAL SCHEDULE - 3

INPROGRESS - 0

MISSED - 2

COMPLETE - 0

Employee

Service

Location

Time Slot(s)

Status

Start Date 11/07/2023

End Date 11/07/2023

Search

Reset

View Map

Broadcast

Now, the Features name is not visible in the Dashboard screen and we can work in the large screen.

The screenshot shows the top navigation bar of the system. On the right side, there are several icons: a clock icon labeled 'Clock-In-Out' with a timer at '00:00:00', a question mark icon, a bell icon (Notification Bell), and a green button labeled 'Visitor Attendance'. Below these icons is a dropdown menu showing 'DAY CARE' and 'MASTER'. A red arrow points to the bell icon.

Category	Value
Patient - Schedule	0
Total Present	0
Total Absent	0
Total Schedule	3
Inprogress	0
Missed Schedule	2
Complete	0
Over Time	0
Patient - New	0
Active Patient	3
Not Scheduled	3
Unread Messages	1
Pending Time Sheet	5
Prior Auth. Expiring	1
Prior Auth. Expired	1

Summary: CLOCK IN / CLOCK OUT TOTAL SCHEDULE - 3 INPROGRESS - 0 MISSED - 2 COMPLETE - 0

Filters: Employee (Employee), Service (Service), Location (Location), Time Slot(s) (Time Slot(s)), Status (Status), Start Date (11/07/2023), End Date (11/07/2023)

Buttons: Search, Reset, View Map, Broadcast

## Notification

The Notification Bell option represents to Notify messages in the system.

The screenshot shows the same dashboard as before, but with a red box highlighting the bell icon (Notification Bell) in the top right header. The left sidebar menu is visible, showing options like DASHBOARD, FEATURES, EMPLOYEE, PROSPECTS, CLIENT, SCHEDULING, TIME SHEET, BILLING, MESSAGES, REPORTS, ATTENDANCE, and SETTINGS.

Category	Value
Patient - Schedule	0
Total Present	0
Total Absent	0
Total Schedule	3
Inprogress	0
Missed Schedule	2
Complete	0
Over Time	0
Patient - New	0
Active Patient	3
Not Scheduled	3
Unread Messages	1
Pending Time Sheet	5
Prior Auth. Expiring	1
Prior Auth. Expired	1

Summary: CLOCK IN / CLOCK OUT TOTAL SCHEDULE - 3 INPROGRESS - 0 MISSED - 2 COMPLETE - 0

Filters: Employee (Employee), Service (Service), Location (Location), Time Slot(s) (Time Slot(s)), Status (Status), Start Date (11/07/2023), End Date (11/07/2023)

Buttons: Search, Reset, View Map, Broadcast

## Visitor Attendance

The Visitor Attendance check-in and check-out Log can be maintained in the system using the function Visitor Attendance.

Select the Facility and enter the Patient name and click search option.

FULL SCREEN



Select Facility

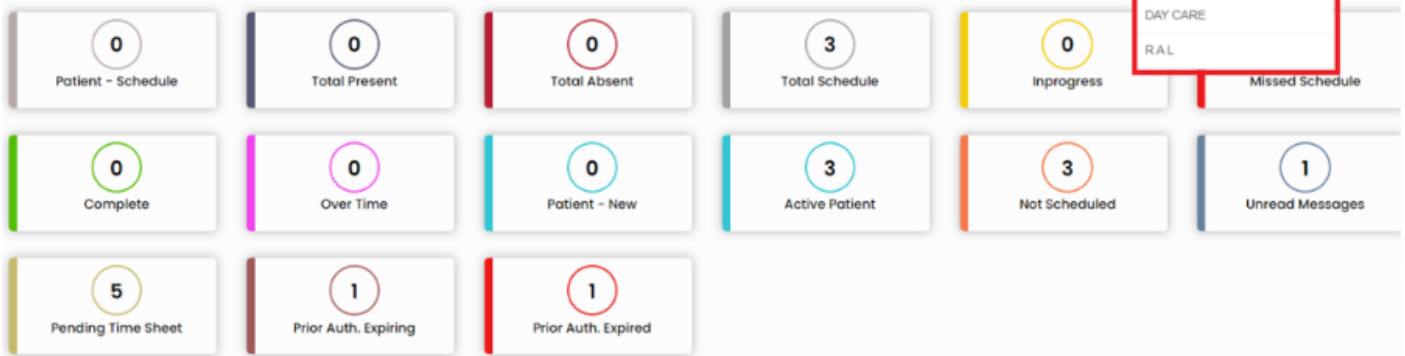
Search Visitor/Patient

Search

## Care Type

The user can choose the type of care by using the dropdown option on the top right corner in the software.

HOME CARE  
CASE MANAGEMENT  
DAY CARE  
R A L



CLOCK IN / CLOCK OUT TOTAL SCHEDULE - 3 INPROGRESS - 0 MISSED - 2 COMPLETE - 0

Employee Employee Service Service Location Location Time Slot(s) Time Slot(s) Status Status Start Date 11/07/2023 End Date 11/07/2023

Search Reset View Map Broadcast

<input type="checkbox"/>	Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/>	waris, intaza	Donald, David	Service Facilitation	8978766565	11/07/2023 11:38 pm	11/07/2023 11:59 pm	✗	✗	<a href="#">Change Schedule</a>
<input type="checkbox"/>	waris, intaza	Clark, Samuel	RN supervisory	8978766565	11/07/2023 12:11 am	11/07/2023 11:59 pm	✓	✓	<a href="#">Change Schedule</a>
<input type="checkbox"/>	waris, intaza	Hernandez, Brown	RN supervisory	8978766565	11/07/2023 11:40 pm	11/07/2023 11:59 pm	✗	✗	<a href="#">Change Schedule</a>