

# 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.

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# Dashboard Overview

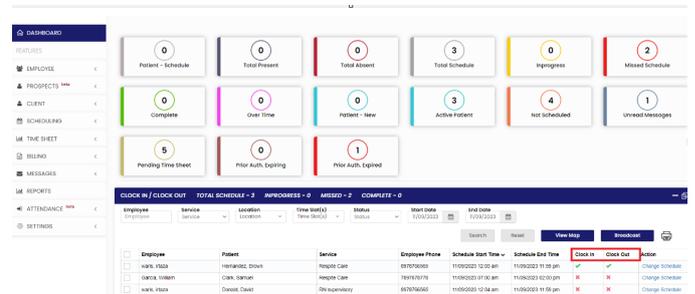
The dashboard screen serves as a comprehensive overview of the organization's activities, providing users with real-time reporting information for efficient tracking and management of day-to-day operations. Here is a breakdown of the key elements displayed on the dashboard.

**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.

This view shows a grid of summary cards. The 'Missed Schedule' card is highlighted with a red border and shows a count of 3. Below the grid is a filter bar with options for Employee, Service, Location, Time Slot(s), Status, Start Date, and End Date. A table below the filter bar lists three employees: Admin, Master; Draper, Don; and Aniston, Maria. The 'Clock In' and 'Clock Out' columns for all three employees have red 'X' marks, indicating missed schedules. The 'Action' column for each row contains a 'Change Schedule' link.

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	X	X	<a href="#">Change Schedule</a>
<input type="checkbox"/> Draper, Don	Rock, Chris	Adult Day Care	6784321568	11/21/2023 08:00 am	11/21/2023 12:00 pm	X	X	<a href="#">Change Schedule</a>
<input type="checkbox"/> Aniston, Maria	Borne, Jason	Adult Day Care	6785673242	11/21/2023 09:00 am	11/21/2023 02:00 pm	X	X	<a href="#">Change Schedule</a>

## 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.

**CLOCK IN / CLOCK OUT    TOTAL SCHEDULE - 1    INPROGRESS - 0    MISSED - 0    COMPLETE - 1**

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

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"/>	Draper, Don	Rock, Chris	Adult Day Care	6784321568	11/21/2023 08:00 am	11/21/2023 12:00 pm	✓	✓	Change Schedule

## 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.

**CLOCK IN / CLOCK OUT    TOTAL SCHEDULE - 1    INPROGRESS - 1    MISSED - 0    COMPLETE - 0**

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

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"/>	Aniston, Maria	Borne, Jason	Adult Day Care	6785673242	11/21/2023 09:00 am	11/21/2023 02:00 pm	✓	✗	Change Schedule

## 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.

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

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.

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

### 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.

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

### 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.

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 10/13/2023	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

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

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

### 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

The screenshot displays the software's dashboard. At the top right, there are navigation elements: 'Clock-In-Out' with a clock icon and '00:00:00', a help icon, a notification bell, and a dropdown menu currently showing 'Visitor Attendance' and 'DAY CARE'. Below this is a grid of 15 status cards with circular icons and numbers: Patient - Schedule (0), Total Present (0), Total Absent (0), Total Schedule (3), Inprogress (0), Missed Schedule (1), 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), and Prior Auth. Expired (1). A red box highlights a dropdown menu with options: HOME CARE, CASE MANAGEMENT, DAY CARE, and R.A.L. Below the cards is a summary bar: 'CLOCK IN / CLOCK OUT TOTAL SCHEDULE - 3 INPROGRESS - 0 MISSED - 2 COMPLETE - 0'. Below the summary bar are search filters for Employee, Service, Location, Time Slot(s), Status, Start Date, and End Date. At the bottom is a table with columns: Employee, Patient, Service, Employee Phone, Schedule Start Time, Schedule End Time, Clock In, Clock Out, and Action.

Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
waris, irtaza	Donald, David	Service Facilitation	8978766565	11/07/2023 11:38 pm	11/07/2023 11:59 pm	✗	✗	Change Schedule
waris, irtaza	Clark, Samuel	RN supervisory	8978766565	11/07/2023 12:11 am	11/07/2023 11:59 pm	✓	✓	Change Schedule
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
Cancel Save

Forms Library

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**Organization Information**

<b>Organization Name *</b> <input type="text" value="Myezcare2"/>	<b>Support Email *</b> <input type="text" value="support@myezcare.com"/>	<b>Address</b> <input type="text" value="Address"/>
<b>City</b> <input type="text" value="City"/>	<b>State</b> <input type="text" value="State Code"/>	<b>Zip Code</b> <input type="text" value="XXXXX"/>
<b>Time Zone *</b> <input type="text" value="(UTC-05:00) Eastern Time (US &amp; Canada)"/>		

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**Site Miscellaneous Settings**

<b>Page Size *</b> <input type="text" value="50"/>	<b>Patient Resignature Needed</b> <input type="text" value="Yes"/>	<b>Google Drive Integration</b> <a href="#">Link Google Drive</a>
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**MIF Settings**

<b>Appendix</b> <input type="text" value="Appendix"/>	<b>Description</b> <input type="text" value="Description"/>	<b>Revision</b> <input type="text" value="Revision"/>
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**Site Logo Settings**

<p><b>Login Screen Logo*</b></p> <p><a href="#">Upload Image</a></p> <p><b>Note*:</b> Preferable resolution: 300px x 40px (7.5:1)</p>		<p><b>Sidebar Logo*</b></p> <p><a href="#">Upload Image</a></p> <p><b>Note*:</b> Preferable resolution: 128px x 14px (7:1)</p>
		
<p><b>Fav Icon*</b></p> <p><a href="#">Upload Image</a></p> <p><b>Note*:</b> Preferable resolution: 32px x 32px (1:1)</p>		
<p><b>Template Logo*</b></p> <p><a href="#">Upload Image</a></p> <p><b>Note*:</b> Preferable resolution: 600px x 200px (3:1)</p>		

**Invoice Settings**

<b>Invoice Generation Frequency</b> <input type="text" value="Visit Wise"/>	<b>Invoice Tax Rate</b> <input type="text" value="0"/>	<b>Invoice Due Days</b> <input type="text" value="0"/>
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**Invoice Notes**

**Bill to Payor**

- Include Patient Address
- Include Patient DOB
- Include Addressline 1
- Include Addressline 2
- Include AddressZip

SMTP Settings
Test Email

**Network Host**

**Network Port**

**From Title**

**From Email**

**Password**

**Enable SSL**

**FAX Settings**

**Fax No**

**IVR Details**

**Country Code**

**IVR Phone No**

**Billing Settings**

**Submitter Details**

**Company Name**

**NPI Number**

**Contact Name**

**Phone**

**Email**

**Billing Provider Details**

**Billing Provider Name**

**NPI Number**

**Billing Provider Address**

**Billing Provider City**

**State**

**Zipcode**

**Tax ID/EIN**

**ClaimMD**

**ClaimMD Account Key**

**ClaimMD User ID**

**Has Aggregator?**

**Schedule Type**

Enforce across all clients  
 With PriorAuth  
 Without PriorAuth

**Environment Type**

Demo  
 Live

Save
Cancel

## Billing

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

INVOICE LIST							
<span style="border: 1px solid #ccc; padding: 2px 5px; border-radius: 3px;">Refresh</span>							
Invoice Number	Invoice Date	Due Date	Invoice Amount	Paid Amount	Invoice Status	Action	
No records found							

# Log Out

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

The screenshot shows the myEZcare login interface on a dark blue background. It includes a 'Login into account' section with fields for 'Username' and 'Password', a 'Remember' checkbox, and a 'Forgot Password?' link. Below the login fields are 'GET IT ON Google Play' and 'Download on the App Store' buttons. To the right, an 'Announcement' banner for version 2.1.36 is displayed, dated 6/24/2023. The announcement lists 'Bugs' (UI issues fixed) and 'Features' (options for skipping task lists, changing schedule hyperlinks, and adding patient schedule days information). A feedback link is provided at the bottom of the announcement.

# Hide Features

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

The screenshot shows the myEZcare dashboard with a sidebar on the left containing a menu with items like DASHBOARD, EMPLOYEE, PROSPECTS, CLIENT, SCHEDULING, TIME SHEET, BILLING, MESSAGES, REPORTS, ATTENDANCE, and SETTINGS. The main dashboard area displays a grid of 12 feature cards, each with a number and a label. The labels are: 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), and Unread Messages (1). Below the grid is a summary bar with 'CLOCK IN / CLOCK OUT', 'TOTAL SCHEDULE - 3', 'INPROGRESS - 0', 'MISSED - 2', and 'COMPLETE - 0'. At the bottom, there are search and filter options for Employee, Service, Location, Time Slot(s), Status, Start Date, and End Date, along with buttons for Search, Reset, View Map, and Broadcast.

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

The dashboard displays the following metrics:

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

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

Filters: Employee, Service, Location, Time Slot(s), 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 dashboard displays the same metrics as above. The notification bell icon in the top right corner is highlighted with a red box.

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

Filters: Employee, Service, Location, Time Slot(s), 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

# myEZcare

simple yet Powerful

## Checkin & Checkout Log

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.

The screenshot shows the myEZcare dashboard with a top navigation bar. The 'DAY CARE' dropdown menu is open, showing options: HOME CARE, CASE MANAGEMENT, DAY CARE, and R.A.L. The dashboard features several status cards:

- Patient - Schedule: 0
- Total Present: 0
- Total Absent: 0
- Total Schedule: 3
- Inprogress: 0
- Missed Schedule: 1
- 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

Below the dashboard is a summary bar: CLOCK IN / CLOCK OUT TOTAL SCHEDULE - 3 INPROGRESS - 0 MISSED - 2 COMPLETE - 0. A search filter bar includes fields for Employee, Service, Location, Time Slot(s), Status, Start Date, and End Date. Below the filter bar are buttons for Search, Reset, View Map, Broadcast, and a printer icon.

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