

Employee Document

The Employee documents may include certifications, employment contracts, and care plans, ensuring compliance with regulations and offering a comprehensive overview of the caregiver's qualifications and responsibilities.

Uploading Employee Document

The required documents of the Employee can be uploaded in the system by using the option Employee Document.

Employee Tab >> List >> Select Employee >> Employee Document



Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.



Adding New Folder in Employee document

Click + Add New Folder option in Employee document. The following screen appears, update the required information. Also in the option Show to All, if the user needs the folder name to be added for all the employee click Yes option. If the user wants the folder to be added only for the particular employee click No option and click Save.

Employee Information

Employee Document

Employee Schedule

Professional D...

Admission

Discharge

drop box

auth

reports

+ Add New Fold...

+ Add New Sub Fo...

Add Section

Documentation Type *

Internal

Section Name *

Name

Color Scheme *

Color Scheme

Is Time Based ? *

Select

Attached Template Form

Show To All

Yes

No

Select Roles to Provide Access

Super Admin, Nurse, HHA, Office Staff, Staffing,

Save

Upload Documents

The folder Documents is added successfully to upload the required documents of the employee.

Employee Information

Employee Document

Employee Schedule

Personal Time Off

Calendar

Notes

Certificate

Checklist

Preferences

Professional D...

Admission

Discharge

drop box

auth

reports

Documents

+ Add New Fold...

+ Add New Sub Fo...

< All Filters

Upload Documents

No records found.

Adding New Sub Folder in Employee Document

Select the folder name and click the option +Add New Sub Folder option. The following screen appears, update the required information. Also in the option Show to All, if the user needs the Sub folder name to be added for all the employee click Yes option. If the user wants the folder to be added only for the particular employee click No option and click Save.

The screenshot shows a web application interface for managing employee documents. On the left, a sidebar lists folders: Professional D..., Admission, Discharge, drop box, auth, reports, and Documents. The 'Discharge' folder is selected. A modal dialog titled 'Add Sub Section' is open in the center. The dialog contains the following fields and options:

- Documentation Type ***: A dropdown menu with 'Internal' selected.
- Sub Section Name ***: A text input field containing 'Name'.
- Is Time Based ? ***: A dropdown menu with 'Select' selected.
- Attached Template Form**: A label above a 'Show To All' section.
- Show To All**: Two radio buttons, 'Yes' (selected) and 'No'.
- Select Roles to Provide Access**: A dropdown menu with 'Super Admin, Nurse, HHA, Office Staff, Staffing, ' selected.
- Save**: A green button at the bottom right of the dialog.

At the bottom of the sidebar, there are two buttons: '+ Add New Fold...' and '+ Add New Sub Fo...'. On the right side of the main content area, there is a button '+ Upload Documents' and a red rectangular area.

The Sub folder 2023 is now added under folder name Discharge to upload the required documents of the Employee.

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Professional D...

Admission

Discharge

drop box

auth

reports

2023

<

All Filters

Upload Documents

No records found.

+ Add New Fold...

+ Add New Sub Fo...

Revision #1
Created 7 November 2023 19:03:56 by Thamarai
Updated 7 November 2023 19:03:56 by Thamarai