

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.

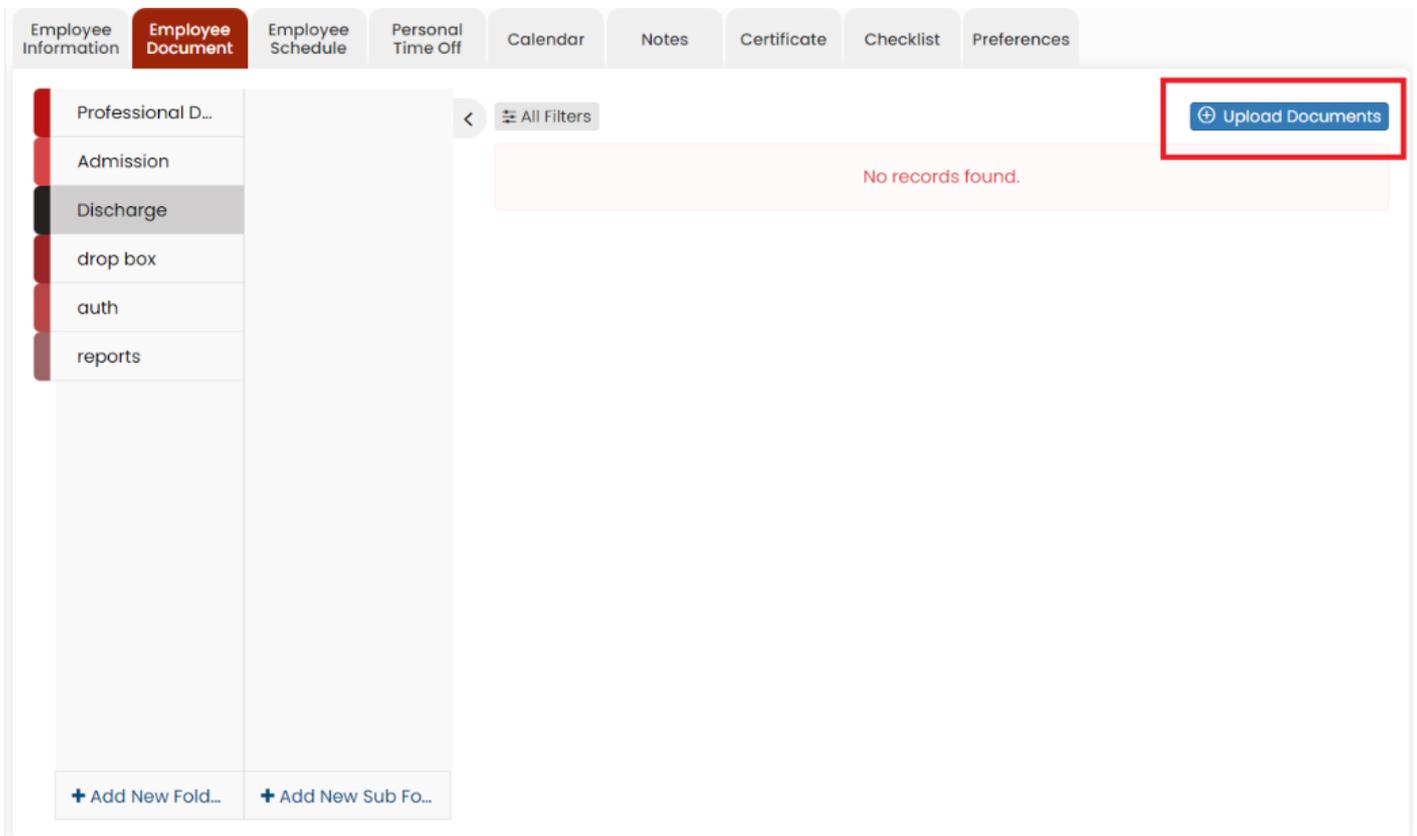
Uploading Employee Document

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

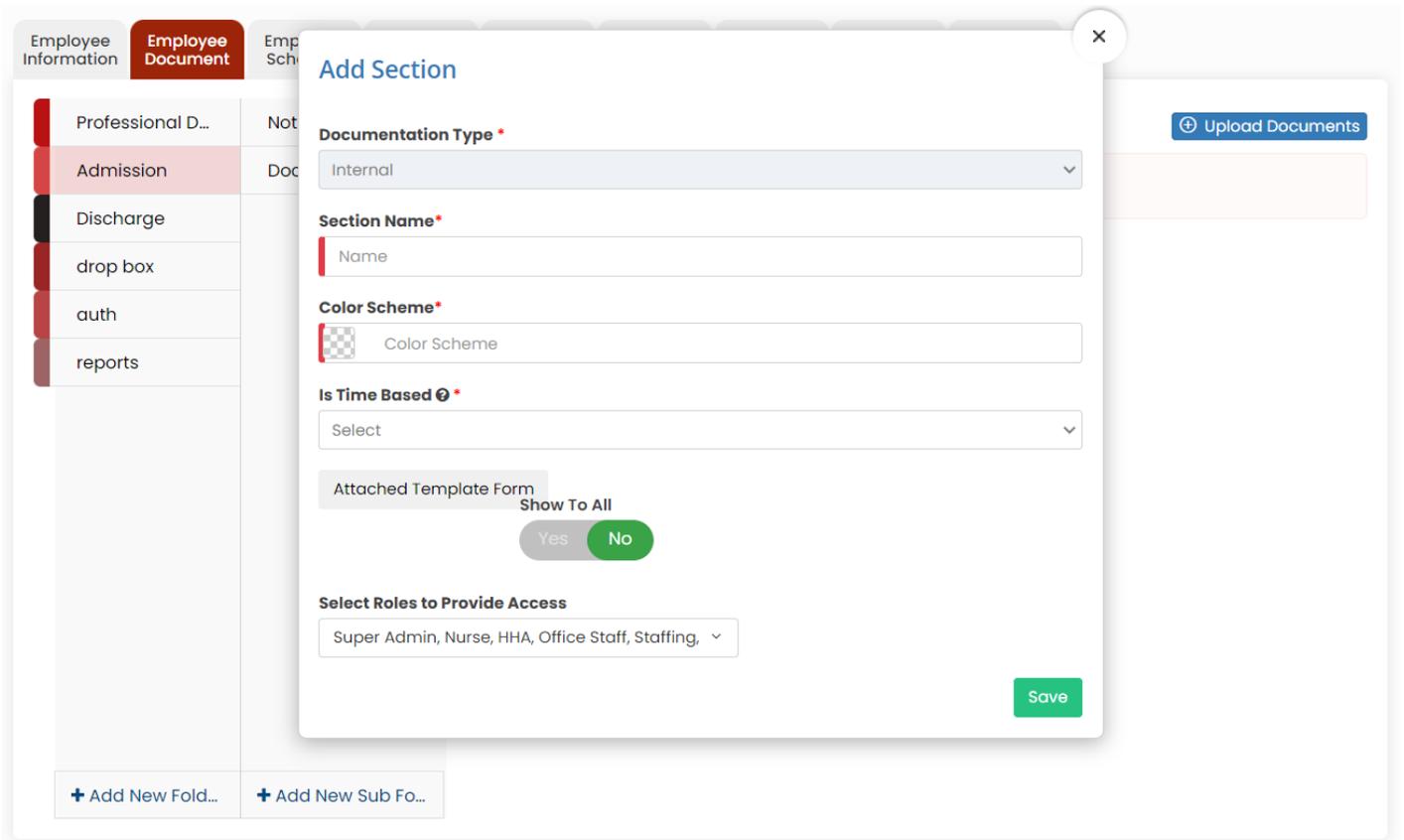
The screenshot displays a web application interface for managing employee documents. On the left, a sidebar menu includes options like DASHBOARD, EMPLOYEE, PROSPECTS, CLIENT, SCHEDULING, TIME SHEET, BILLING, MESSAGES, REPORTS, ATTENDANCE, and SETTINGS. The main area is titled 'LIST OF EMPLOYEES' and contains a table with columns for Employee ID and Name. A modal window is open, showing a list of document types: Professional D..., Admission, Discharge, drop box, auth, and reports. An 'Upload Documents' button is visible in the top right of the modal. At the bottom of the modal, there are options to '+ Add New Fold...' and '+ Add New Sub Fo...'.

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.

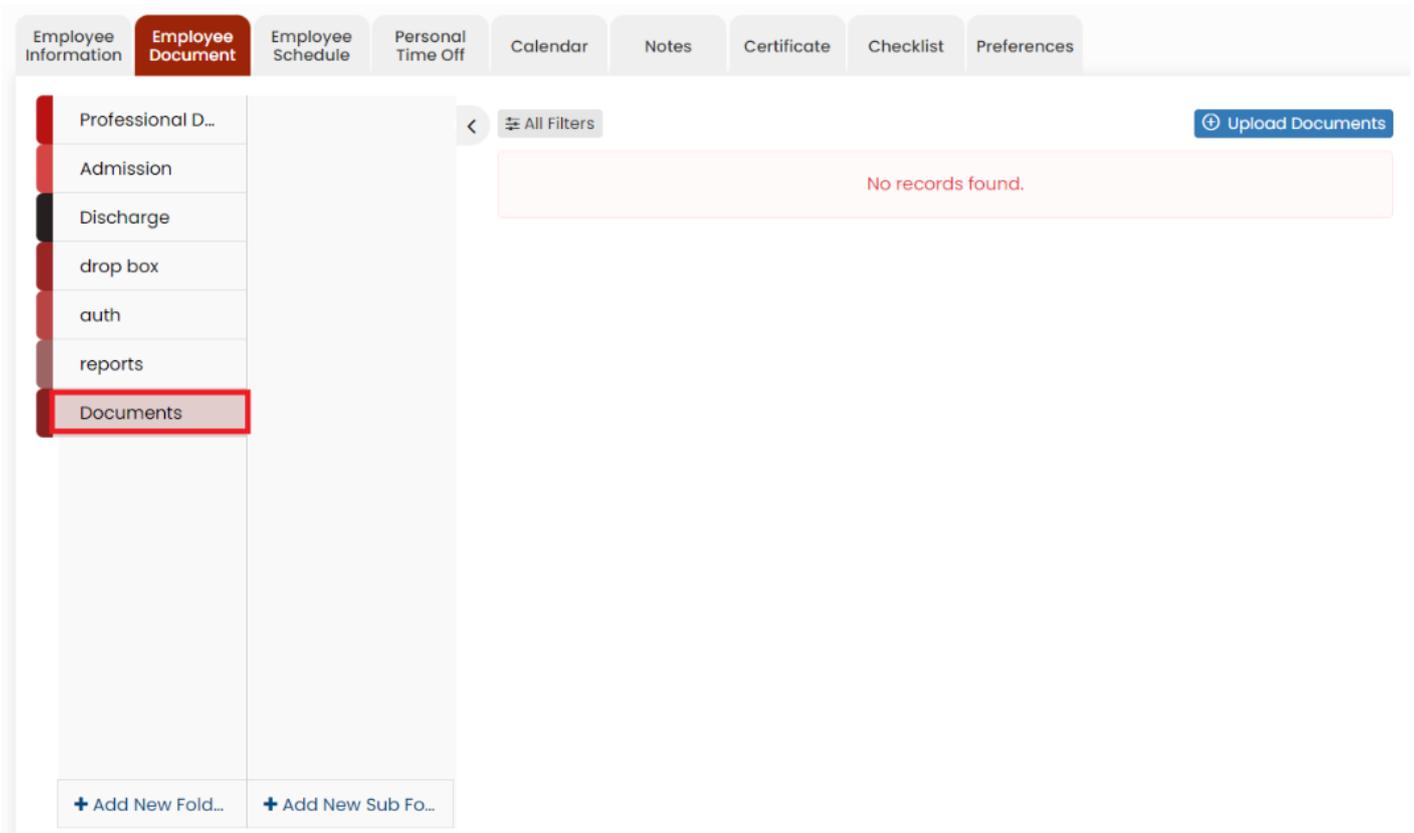


Adding New Folder in Employee document

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.



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



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 the 'Employee Document' interface with a modal dialog titled 'Add Sub Section'. 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 section with a 'Show To All' label and two radio buttons: 'Yes' (unselected) and 'No' (selected).
- 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.

In the background, the 'Employee Document' sidebar is visible with folders: Professional D..., Admission, Discharge, drop box, auth, reports, and Documents. At the bottom of the sidebar, there are buttons for '+ Add New Fold...' and '+ Add New Sub Fo...'. On the right side of the main interface, there is an 'Upload Documents' button and a red error message box.

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

Employee Information **Employee Document** Employee Schedule Personal Time Off Calendar Notes Certificate Checklist Preferences

Professional D... 2023 < All Filters [Upload Documents](#)

Admission

Discharge

drop box

auth

reports

+ Add New Fold... + Add New Sub Fo...

No records found.

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