

# 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 a software interface with a top navigation bar containing 'Clock-In-Out 00:00:00', a help icon, a notification bell, and a dropdown menu for 'Visitor Attendance' and 'DAY CARE'. The main dashboard features a grid of 15 metric 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), 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 dashboard is a summary bar: 'CLOCK IN / CLOCK OUT TOTAL SCHEDULE - 3 INPROGRESS - 0 MISSED - 2 COMPLETE - 0'. A search bar includes filters for Employee, Service, Location, Time Slot(s), Status, Start Date, and End Date. A table below shows employee schedules with columns for 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	
<input type="checkbox"/>	waris, irtaza	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, irtaza	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, irtaza	Hernandez, Brown	RN supervisory	8978766565	11/07/2023 11:40 pm	11/07/2023 11:59 pm	✗	✗	<a href="#">Change Schedule</a>

## 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

### 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)"/>		

### 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> <input type="button" value="Link Google Drive"/>
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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

**Login Screen Logo\***

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



**Sidebar Logo\***

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



**Fav Icon\***

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



**Template Logo\***

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

### 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

<b>Network Host</b> officemailmyezycare.com	<b>Network Port</b> 465	<b>From Title</b> Myezcare Support
<b>From Email</b> noreply@myezycare.com	<b>Password</b> Password	<b>Enable SSL</b> True

**FAX Settings**

**Fax No**  
Fax No

**IVR Details**

<b>Country Code</b> +1	<b>IVR Phone No</b> IVR Phone No
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**Billing Settings**

**Submitter Details**

<b>Company Name</b> Company Name	<b>NPI Number</b> NPI Number	<b>Contact Name</b> Contact Name
<b>Phone</b> Phone	<b>Email</b> Email	

**Billing Provider Details**

<b>Billing Provider Name</b> Billing Provider Name	<b>NPI Number</b> NPI Number	<b>Billing Provider Address</b> Billing Provider Address
<b>Billing Provider City</b> Billing Provider City	<b>State</b> State	<b>Zipcode</b> XXXXXX
<b>Tax ID/EIN</b> Tax ID/EIN		

**ClaimMD**

<b>ClaimMD Account Key</b> ClaimMD Account Key	<b>ClaimMD User ID</b> ClaimMD User ID
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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

Refresh

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. The login form includes fields for Username and Password, a 'Remember' checkbox, and a 'Forgot Password?' link. A prominent orange 'LOGIN' button is at the bottom. Below the login form are links to download the app on Google Play and the App Store. To the right, an 'Announcement' section titled 'What's new in Ver. 2.1.36' is posted on 6/24/2023. It lists 'Bugs' (UI issues fixed) and 'Features' (options for skipping task lists, changing schedule hyperlinks, and adding patient schedule days). A feedback link is provided at the bottom.

# 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 menu on the left. The main dashboard area displays a grid of 12 feature cards, each with a number and a label. The feature names are hidden, leaving only the numbers and some descriptive text visible. The dashboard also includes a summary bar at the bottom with filters for Employee, Service, Location, Time Slot(s), Status, Start Date, and End Date. The summary bar shows: CLOCK IN / CLOCK OUT, TOTAL SCHEDULE - 3, INPROGRESS - 0, MISSED - 2, COMPLETE - 0.

Feature	Count
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

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 software interface with a dashboard of status cards and a dropdown menu for 'DAY CARE'. The status cards are as follows:

- 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

The 'DAY CARE' dropdown menu is open, showing the following options:

- HOME CARE
- CASE MANAGEMENT
- DAY CARE
- R.A.L

Below the dashboard is a summary bar:

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

Search filters include: Employee, Service, Location, Time Slot(s), Status, Start Date, and End Date. Action buttons include Search, Reset, View Map, Broadcast, and Print.

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

Revision #5

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