

# 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

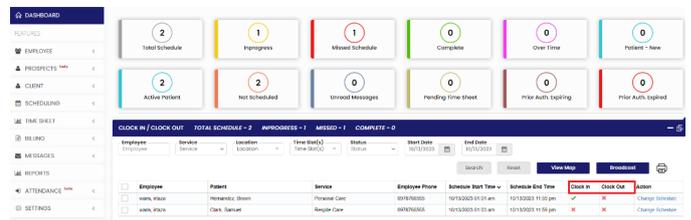
The dashboard screen serves as a comprehensive overview of the organization's activities, providing users with real-time reporting information for efficient tracking and management of day-to-day operations. Here is a breakdown of the key elements displayed on the dashboard.

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

## Features in Dashboard

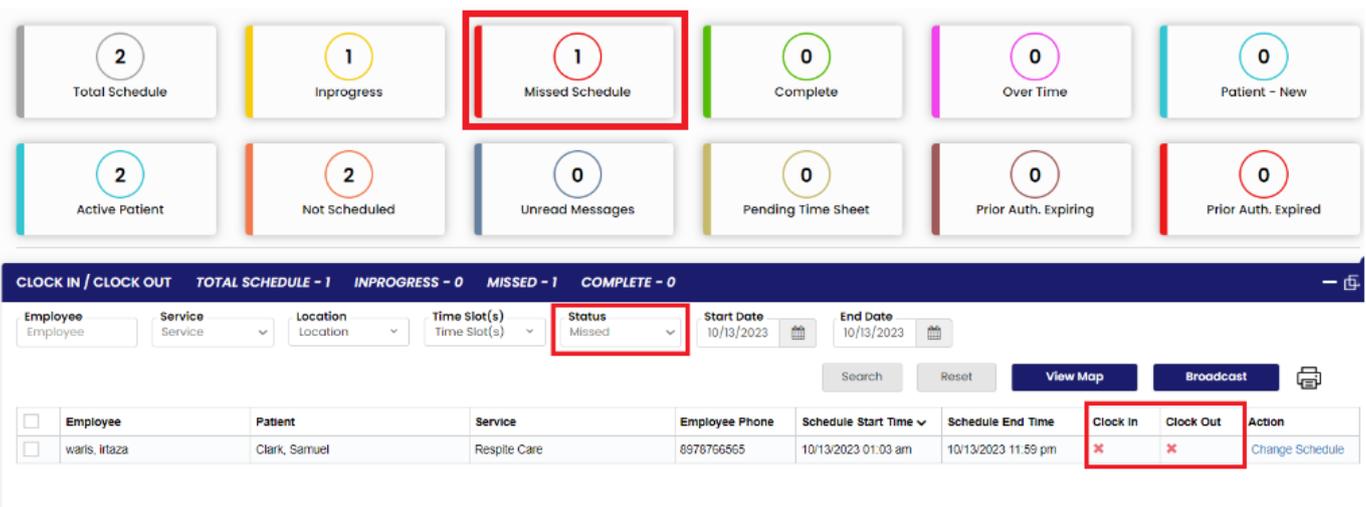
### Employees - Clock-in / Clock out:

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.

The dashboard displays various schedule status cards: Total Schedule (3), Inprogress (1), Missed Schedule (1), Complete (1), Over Time (0), Patient - New (0), Active Patient (2), Not Scheduled (2), Unread Messages (0), Pending Time Sheet (0), Prior Auth. Expiring (0), and Prior Auth. Expired (0). The 'Complete' card is highlighted with a red border.

Below the cards is a filter bar with the following values: CLOCK IN / CLOCK OUT, TOTAL SCHEDULE - 1, INPROGRESS - 0, MISSED - 0, COMPLETE - 1. The 'Status' dropdown is set to 'Complete' and is highlighted with a red border.

The table below shows the following data:

Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/> Garcia, William	Clark, Samuel	Respite Care	789787878	10/13/2023 07:00 am	10/13/2023 02:00 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.

The dashboard displays various schedule status cards: Total Schedule (3), Inprogress (1), Missed Schedule (1), Complete (1), Over Time (0), Patient - New (0), Active Patient (2), Not Scheduled (2), Unread Messages (0), Pending Time Sheet (0), Prior Auth. Expiring (0), and Prior Auth. Expired (0). The 'Inprogress' card is highlighted with a red border.

Below the cards is a filter bar with the following values: CLOCK IN / CLOCK OUT, TOTAL SCHEDULE - 1, INPROGRESS - 1, MISSED - 0, COMPLETE - 0. The 'Status' dropdown is set to 'Inprogress' and is highlighted with a red border.

The table below shows the following data:

Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/> waris, Irtaza	Hernandez, Brown	Personal Care	8978766565	10/13/2023 01:01 am	10/13/2023 11:59 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.

The dashboard displays various schedule status cards: Total Schedule (2), Inprogress (0), Missed (2), Complete (0). The filter bar shows: CLOCK IN / CLOCK OUT, TOTAL SCHEDULE - 2, INPROGRESS - 0, MISSED - 2, COMPLETE - 0. The 'Status' dropdown is set to 'Status'.

The table below shows the following data:

Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/> Garcia, Maria	Clark, Samuel	Respite Care	7897879878	10/10/2023 07:00 am	10/10/2023 02:00 pm	✗	✗	<a href="#">Change Schedule</a>
<input type="checkbox"/> waris, Irtaza	Hernandez, Brown	Personal Care	8978766565	10/10/2023 08:00 am	10/10/2023 11:00 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.

The screenshot shows a 'Change Schedule' modal window. The modal contains a dropdown menu for 'Select Employee' with 'Maria Garcia' selected. Below this are two input fields: 'Schedule Start Time' with the value '07:00 am' and 'Schedule End Time' with the value '02:00 pm'. At the bottom of the modal are 'Cancel' and 'Save' buttons. The background dashboard shows various schedule metrics: Total Schedule (2), Inprogress (0), Complete (0), Over Time (0), Patient - New (0), Active Patient (2), Not Scheduled (1), Pending Time Sheet (0), Prior Auth. Expiring (0), and Prior Auth. Expired (1). Below the dashboard is a table 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"/>	Garcia, Maria	Clark, Samuel	7897879878	10/10/2023 07:00 am	10/10/2023 02:00 pm	×	×	<a href="#">Change Schedule</a>
<input type="checkbox"/>	waris, Irtaza	Hernandez, Brown	8978766565	10/10/2023 08:00 am	10/10/2023 11:00 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.

The screenshot shows the 'EMPLOYEES - OVERTIME IN LAST 7 DAYS' section. It includes a table with the following data:

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.

The screenshot shows the 'UPCOMING BIRTHDAY' section. It includes a table with the following data:

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.

The screenshot shows the 'PATIENT - NEW' section. It includes a table with the following data:

Patient	Created Date	Created By
No records found.		

### 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.

The screenshot shows the 'PATIENT - FULLY NOT SCHEDULED FOR NEXT 7 DAYS' section. It includes a table with the following data:

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

### 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.

### 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 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.

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			
Patient	Payor	Expiring Date	Total Visits
Donald, David	Atena	11/10/2023	20

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 a software dashboard. At the top right, there is a 'Clock-In-Out' section showing '00:00:00' and a user menu with options: HOME CARE, MASTER, MY PROFILE, ROLE & PERMISSION, ORGANIZATION SETTINGS, BILLING, and LOG OUT. The dashboard features a grid of 12 cards with the following data:

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

Below the dashboard is a filter bar with the following text: CLOCK IN / CLOCK OUT TOTAL SCHEDULE - 3 INPROGRESS - 1 MISSED - 1 COMPLETE - 1. The filter bar includes dropdowns for Employee, Service, Location, Time Slot(s), Status, Start Date (10/13/2023), and End Date (10/13/2023). Below the filter bar are buttons for Search, Reset, View Map, and Broadcast. At the bottom is a table with the following data:

<input type="checkbox"/>	Employee	Patient	Service	Employee Phone	Schedule Start Time	Schedule End Time	Clock In	Clock Out	Action
<input type="checkbox"/>	waris, Irtaza	Hernandez, Brown	Personal Care	8978766565	10/13/2023 01:01 am	10/13/2023 11:59 pm	✓	✗	Change Schedule
<input type="checkbox"/>	waris, Irtaza	Clark, Samuel	Respite Care	8978766565	10/13/2023 01:03 am	10/13/2023 11:59 pm	✗	✗	Change Schedule
<input type="checkbox"/>	Garcia, William	Clark, Samuel	Respite Care	7897878778	10/13/2023 07:00 am	10/13/2023 02:00 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

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**My Profile**



[Upload Profile Image](#)

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

**First Name\***

**Middle Name**

**Last Name\***

**Email\***

**Work Phone\***

**Mobile Phone\***

**Username\***

**Password**

**Confirm Password**

**Security Question\***

**Security Answer\***

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

**Note:** \* You can enable/disable any permission from permission tree. Please make sure before enabling/disabling **Administrative Permission**. This permission is reserved for **Special Admin Rights** which will be applicable only 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

## Editing the Role

The Role of the Employee can also be edited by using the option Edit in the Selected Role.

Please find the list of permissions for all the features in the application. Click on the + button to view all the permission for each Tab.

ROLE PERMISSION Search And Set Role Permission Details

SYSTEM - PERMISSIONS

Role Name + Add Role

Permissions

**Note:** \* You can enable/disable any permission from permission tree. Please make sure before enabling/disabling **Administrative Permission**. This permission is reserved for **Special Admin Rights** which will be applicable only to Admin or SuperAdmin. Ex. Role Permission Page's Access

Selected Role: Clinical Team ✎

## Web Permissions

- ⚡ Administrative Permission
- ⚡ Invoice
- ⚡ Referral Tracking
- ⚡ Employee Shift
- ⚡ Record Access
- ⚡ Additional Permissions
- ⚡ Dashboard
- ⚡ Masters
- ⚡ Employee
- ⚡ Group Level Record
- ⚡ ID Number
- ⚡ Add/Update
- ⚡ Delete
- ⚡ List
- ⚡ Calendar
- ⚡ Schedule
- ⚡ PTO
- ⚡ Patient Intake
- ⚡ Scheduling
- ⚡ Billing & Claim Processing
- ⚡ Messages
- ⚡ Reports
- ⚡ Can Approve Bypass Clock In & Clock Out
- ⚡ Transport Services
- ⚡ Employee Attendance
- ⚡ Can Approve Visits

## Dashboard

The Dashboard Permissions can be given to the employee by using the option Dashboard under Roles and Permissions. Mark the Permissions to be given to the employee and Click Save option.

- ⚡ Dashboard
  - ⚡ Employees - Didn't Clock In / Clock Out
  - ⚡ Employees - Over Time in Last 7 Days
  - ⚡ Patient - New
  - ⚡ Patient - Fully Not Scheduled for Next 7 Days
  - ⚡ Received Internal Message
  - ⚡ Sent Internal Message
  - ⚡ Web Notifications
  - ⚡ Dashboard Card
    - ⚡ Employee OverTime
    - ⚡ New Patient
    - ⚡ Patient FullySchedule
    - ⚡ Internal Message
    - ⚡ Approval Pending For Visits
    - ⚡ Total Schedule
    - ⚡ Prior Auth Expiring
    - ⚡ Patient - Schedule
    - ⚡ Patient - Total Present
    - ⚡ Patient - Total Absent
    - ⚡ Payor List
    - ⚡ Total Payor
    - ⚡ Active Patient Count
    - ⚡ Prior Auth Expired
  - ⚡ Employee Birthday
  - ⚡ Patient Birthday
  - ⚡ Patient - Clock In / Clock Out
  - ⚡ Patient - Discharged
  - ⚡ Patient Medicaid
  - ⚡ Patient - OnHold
  - ⚡ Patient - Pending
  - ⚡ Patient - Transfer
  - ⚡ View Map
  - ⚡ Broadcast Notifications

## Employee

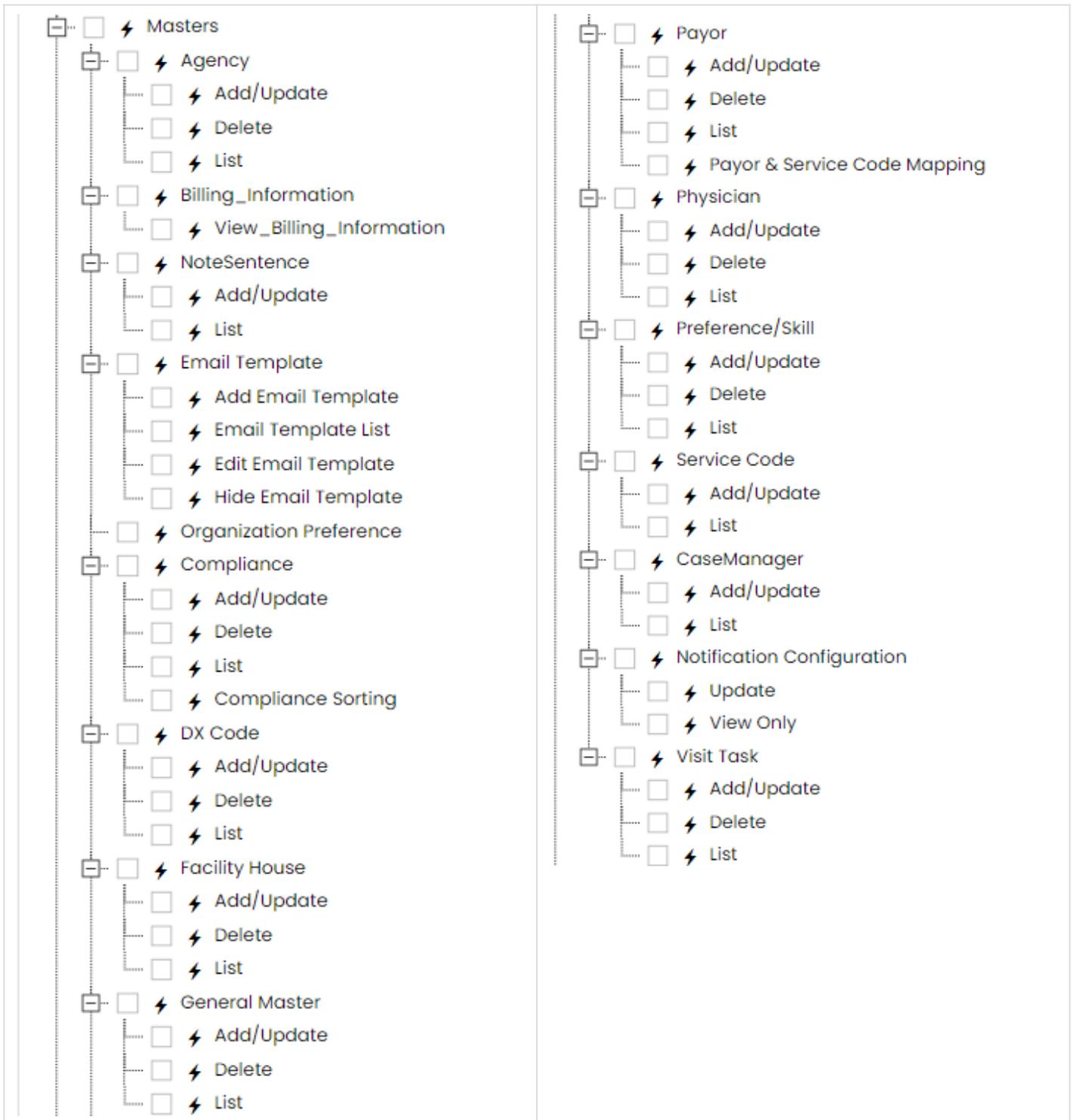
The Permissions for the Employee to access the application can be given under the Employee option in Roles and Permissions. The user can select the checkbox to give access to only view, Add/Update the information in the application and also to Delete the records for the Employees.



## Patient

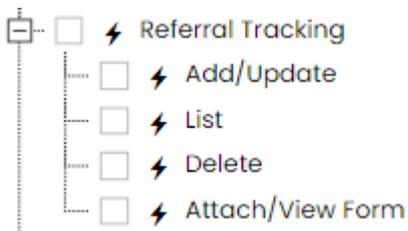
The Permissions for the Employee to access the Patient details can be given under the Patient option in Roles and Permissions. The user can select the checkbox to give access to only view, Add/Update the information in the application and also to Delete the records for the patient.





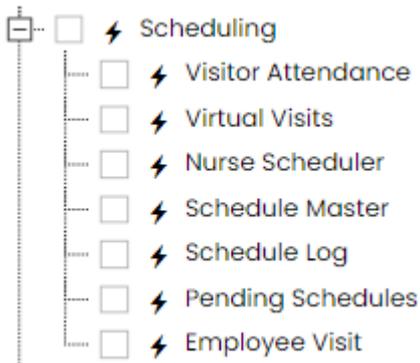
## Referral Tracking - Prospects

The Permissions for the Employee to access the Prospects can be given under the option Referral Tracking in Roles and Permissions. The user can select the checkbox to give access to only view, Add/Update the information in the application and also to Delete the records in the application.



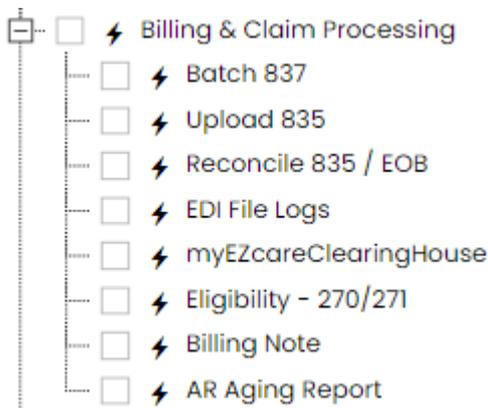
## Scheduling

The Permissions for the Employee to access the Scheduling can be given under the option Scheduling in Roles and Permissions.



## Billing & Claim Processing

The Permissions for the Employee to access the Billing & Claim Processing can be given under the option Billing & Claim Processing in Roles and Permissions.



# System Roles and Permissions

## Super Admin

The Super Admin plays a pivotal role in overseeing and managing the administrative aspects of the organization. This role involves managing information systems, ensuring data security and compliance, and providing technical support to optimize workflow and enhance patient care delivery.

- Create, modify, and deactivate user accounts as needed.

- Assign roles and permissions to users based on their responsibilities and access requirements.
- Configure and customize system settings based on organizational requirements.
- Oversee the implementation, maintenance, and optimization of information systems and electronic health record (EHR) platforms used within the organization.
- Provide training and support to staff members on security awareness, data handling best practices, and compliance with privacy regulations.
- Monitor data integrity and implement measures to maintain data quality and consistency.
- Implement and enforce security protocols to safeguard sensitive data and protect against unauthorized access.

## **Registered Nurse (RN)**

The Registered Nurse (RN) plays a pivotal role in delivering comprehensive and compassionate healthcare services to patients in their homes. This position involves providing skilled nursing care, coordinating interdisciplinary care teams, and promoting patient education and self-management.

- Provide skilled nursing interventions such as wound care, medication management, intravenous therapy, and disease management in accordance with physician orders and nursing protocols.
- Perform clinical procedures safely and competently, ensuring adherence to infection control practices and patient safety standards.
- Assess patients' response to treatment, monitor for changes in health status, and modify care plans as necessary.
- Collaborate with physicians, therapists, social workers, and other healthcare professionals to ensure continuity of care and effective care transitions.
- Empower patients to actively participate in their care and make informed decisions about their health.

## **Administrator**

The Administrator is responsible for overseeing the overall operation of the organization, including strategic planning, financial management, regulatory compliance, and quality improvement initiatives. This leadership position plays a pivotal role in ensuring the delivery of high-quality, patient-centered care and the attainment of organizational goals.

- Establish and maintain effective communication channels with stakeholders, including staff members, patients, caregivers, referral sources, and community partners.
- Develop and implement policies, procedures, and protocols to promote regulatory compliance, patient safety, and quality of care.
- Conduct regular audits, assessments, and performance reviews to monitor adherence to standards of practice, identify areas for improvement, and mitigate risks.
- Provide leadership and supervision to administrative and clinical staff, fostering a positive work environment, professional growth, and teamwork.
- Recruit, hire, train, and retain qualified staff members, ensuring sufficient staffing levels to meet patient care needs and organizational objectives.

## **PCA / CNA - Personal Care Aide (PCA) / Certified Nursing Assistant (CNA)**

The Personal Care Aide (PCA) or Certified Nursing Assistant (CNA) plays a vital role in supporting patients with activities of daily living (ADLs), providing personal care, and assisting with basic medical tasks under the supervision of a registered nurse or other healthcare professional. This position is critical in ensuring the comfort, safety, and well-being of patients receiving care in their homes.

- Help patients with personal hygiene tasks such as bathing, grooming, oral care, and toileting.
- Provide assistance with mobility, including transferring, positioning, and ambulation as needed.
- Provide feeding assistance to patients who require help with eating or drinking, ensuring proper nutrition and hydration.
- Assist patients with medication administration, including opening medication containers, handing pills, and providing water as needed.
- Measure and record vital signs such as temperature, pulse, respiration rate, and blood pressure under the direction of a registered nurse or healthcare professional.
- Provide companionship and emotional support to patients, engaging in conversation, activities, and social interaction to promote mental and emotional well-being.

## **HHA - Home Health Aide**

The Home Health Aide (HHA) plays a fundamental role in providing essential personal care and support to patients who require assistance with activities of daily living (ADLs) and instrumental activities of daily living (IADLs) in the comfort of their own homes. Working under the supervision of a registered nurse or other healthcare professional, the HHA helps to promote the independence, safety, and well-being of patients receiving home health care services.

- Assist patients with personal hygiene tasks such as bathing, showering, grooming, oral care, and toileting.
- Encourage and support patients in performing range of motion exercises and other prescribed mobility exercises.
- Assist patients with meal preparation, including planning, cooking, and serving nutritious meals based on their dietary preferences and restrictions.
- Remind patients to take prescribed medications according to their medication schedules.
- Assist with laundry, including washing, drying, folding, and putting away clothes and linens.
- Monitor and record patients' food and fluid intake, as well as any dietary changes or concerns.

## **Clinical Team**

The Clinical Team consists of healthcare professionals who collaborate to provide comprehensive and coordinated care to patients in their homes. This interdisciplinary team plays a critical role in

assessing patients' needs, developing individualized care plans, and delivering skilled medical services to promote optimal health outcomes and quality of life.

- Conduct comprehensive assessments of patients' medical, functional, and psychosocial needs in the home environment.
- Assess patients' psychosocial needs, social support systems, and environmental factors that may impact their health and well-being.
- Facilitate communication and collaboration among members of the clinical team, including nurses, therapists, social workers, and other healthcare professionals.
- Communicate regularly with patients, families, and caregivers to provide updates on the patient's progress, address concerns, and promote adherence to the care plan.
- Coordinate care transitions, discharge planning, and long-term care arrangements in collaboration with patients, caregivers, and other healthcare providers.
- Coordinate physical therapy, occupational therapy, speech therapy, and other rehabilitative services as needed to help patients regain or maintain functional independence.

## **Nurse**

The Nurse is responsible for delivering skilled nursing services to patients in their homes, collaborating with interdisciplinary team members, and promoting continuity of care to support patients' health and well-being in the community setting.

- Provide skilled nursing services such as wound care, medication management, intravenous therapy, catheter care, and disease management in accordance with physician orders and evidence-based practice guidelines.
- Conduct thorough assessments of patients' physical, emotional, and psychosocial needs in the home environment, including comprehensive health histories and ongoing monitoring of health status.
- Collaborate with interdisciplinary team members, including therapists, social workers, home health aides, and other healthcare professionals, to ensure coordinated and holistic care delivery.
- Perform clinical procedures safely and competently, adhering to infection control protocols, patient safety standards, and regulatory requirements.
- Communicate regularly with patients, families, and caregivers to provide updates on the patient's progress, address concerns, and promote adherence to the care plan.

## **Staffing**

The Staffing Coordinator is responsible for managing the needs of the organization, ensuring adequate coverage for patient visits, and coordinating schedules for healthcare professionals to optimize efficiency and meet patient care requirements.

- Coordinate and manage the scheduling of patient visits and caregiver assignments based on patient needs, staffing availability, and organizational priorities.

- Monitor and adjust schedules as needed to accommodate changes in patient condition, caregiver availability, or unexpected events.
- Coordinate orientation and onboarding activities for new hires, providing training on policies and procedures.
- Collaborate with clinical and administrative teams to ensure effective communication and coordination of care delivery.
- Serve as the primary point of contact for staff members regarding scheduling inquiries, shift changes, and other staffing-related issues.

## Office Assistant

The Office Assistant provides administrative support to the clinical and administrative teams, assisting with various office tasks to ensure the smooth operation of the organization and the delivery of high-quality care to patients in their homes.

- Assist with the intake process for new patients, collecting demographic information, insurance details, and medical history forms as required.
- Maintain accurate and up-to-date appointment calendars, ensuring that patient visits are coordinated efficiently and effectively.
- Answer incoming calls, take messages, and route calls to the appropriate staff members, ensuring timely and accurate communication.
- Assist with scheduling patient visits, coordinating appointments, and updating schedules for healthcare professionals using scheduling software or systems.
- Assist patients and caregivers with billing inquiries, payment arrangements, and financial assistance programs as needed.

## Organization Settings

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

The screenshot shows the 'Organization Settings' page. On the left is a sidebar with 'Organization Settings' and 'Forms Library'. The main content area contains three sections:

- 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

Buttons for 'Cancel' and 'Save' are located in the top right corner of the form area.

### Site Logo Settings

#### Login Screen Logo\*

 Upload Image

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



#### 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

### SMTP Settings

[Test Email](#)

#### Network Host

officemail.myeazycare.com

#### Network Port

465

#### From Title

Myezcare Support

#### From Email

noreply@myeazycare.com

#### Password

Password

#### Enable SSL

True

### FAX Settings

#### Fax No

Fax No

### IVR Details

#### Country Code

 +1

#### IVR Phone No

IVR Phone No

### Billing Settings

#### Submitter Details

##### Company Name

Company Name

##### NPI Number

NPI Number

##### Contact Name

Contact Name

##### Phone

Phone

##### Email

Email

**Billing Provider Details**

**Billing Provider Name**  
Billing Provider Name

**NPI Number**  
NPI Number

**Billing Provider Address**  
Billing Provider Address

**Billing Provider City**  
Billing Provider City

**State**  
State

**Zipcode**  
XXXXXX

**Tax ID/EIN**  
Tax ID/EIN

---

**ClaimMD**

**ClaimMD Account Key**  
ClaimMD Account Key

**ClaimMD User ID**  
ClaimMD User ID

---

**Has Aggregator?**

---

**Schedule Type**

Enforce across all clients  
 With PriorAuth  
 Without PriorAuth

---

**Environment Type**

Demo  
 Live

## Billing

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

INVOICE LIST							
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 breeches and maintaining online privacy.



## Login into account

Use your credentials to access your account.

Remember
 [Forgot Password?](#)

LOGIN

GET IT ON  


Download on the  


## Announcement

### What's new in Ver. 2.1.36

Posted On: 📅 6/24/2023

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**Bugs:**

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

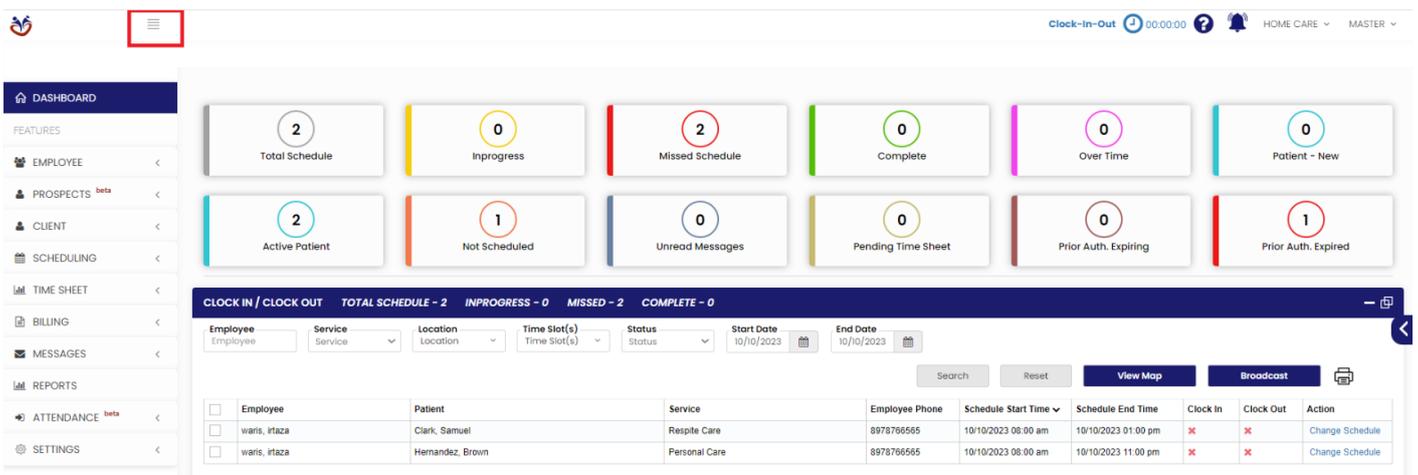
**Features:**

- 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
?
🔔
HOME CARE
MASTER

🏠 DASHBOARD

FEATURES

👤 EMPLOYEE

👤 PROSPECTS beta

👤 CLIENT

📅 SCHEDULING

📅 TIME SHEET

📄 BILLING

📧 MESSAGES

📊 REPORTS

👤 ATTENDANCE beta

⚙️ SETTINGS

2  
Total Schedule

0  
Inprogress

2  
Missed Schedule

0  
Complete

0  
Over Time

0  
Patient - New

2  
Active Patient

1  
Not Scheduled

0  
Unread Messages

0  
Pending Time Sheet

0  
Prior Auth. Expiring

1  
Prior Auth. Expired

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

Employee	Service	Location	Time Slot(s)	Status	Start Date	End Date				
<input type="checkbox"/>	Employee	Service	Location	Time Slot(s)	Status	10/10/2023	10/10/2023			
<input type="checkbox"/>	waris, itaza	Clark, Samuel		Respite Care	8978766555	10/10/2023 08:00 am	10/10/2023 01:00 pm	✗	✗	Change Schedule
<input type="checkbox"/>	waris, itaza	Hernandez, Brown		Personal Care	8978766555	10/10/2023 08:00 am	10/10/2023 11:00 pm	✗	✗	Change Schedule

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

The screenshot shows a dashboard with a notification bell icon in the top right corner, highlighted with a red arrow. The dashboard displays various metrics in colored boxes: Total Schedule (2), Inprogress (0), Missed Schedule (2), Complete (0), Over Time (0), Patient - New (0), Active Patient (2), Not Scheduled (1), Unread Messages (0), Pending Time Sheet (0), Prior Auth. Expiring (0), and Prior Auth. Expired (1). Below these is a table 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, itaza	Clark, Samuel	Respite Care	8978766565	10/10/2023 08:00 am	10/10/2023 01:00 pm	✗	✗	<a href="#">Change Schedule</a>
<input type="checkbox"/> waris, itaza	Hernandez, Brown	Personal Care	8978766565	10/10/2023 08:00 am	10/10/2023 11:00 pm	✗	✗	<a href="#">Change Schedule</a>

## Notification

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

The screenshot shows the same dashboard as above, but with the notification bell icon in the top right corner highlighted by a red box. The dashboard layout and data are identical to the previous image.

## 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 dashboard with the 'HOME CARE' dropdown menu open in the top right corner, highlighted by a red box. The dropdown menu lists options: HOME CARE, CASE MANAGEMENT, DAY CARE, and RAL. The dashboard layout and data are identical to the previous images.