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.

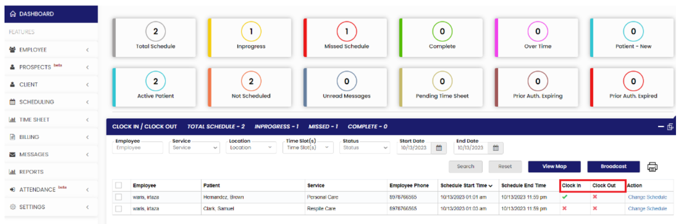
Dashboard Overview

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.**

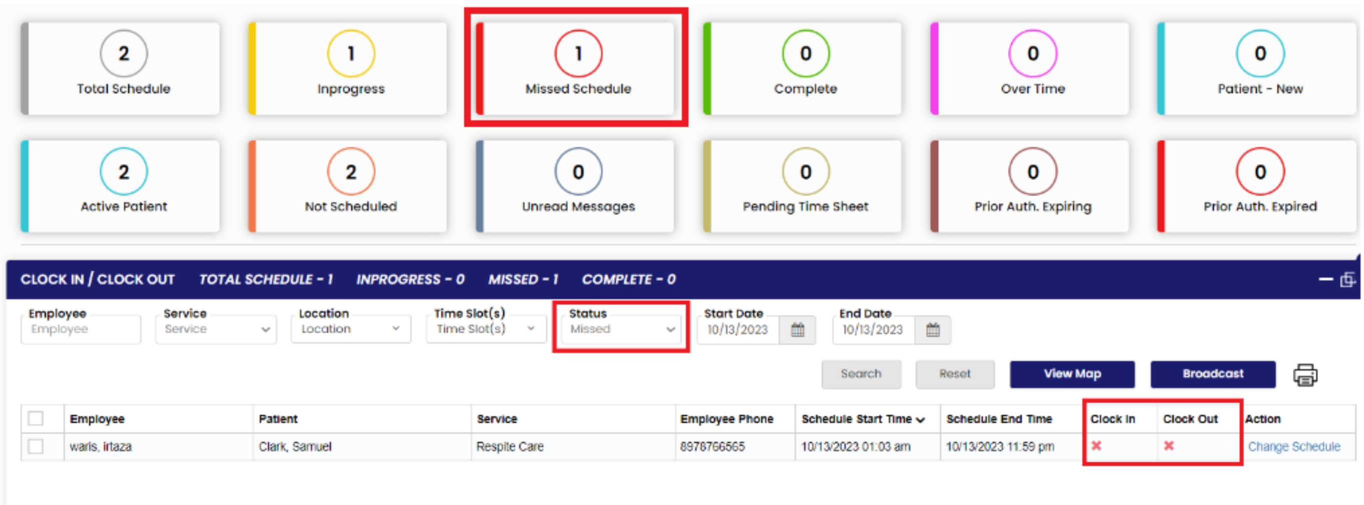
Features in Dashboard

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.



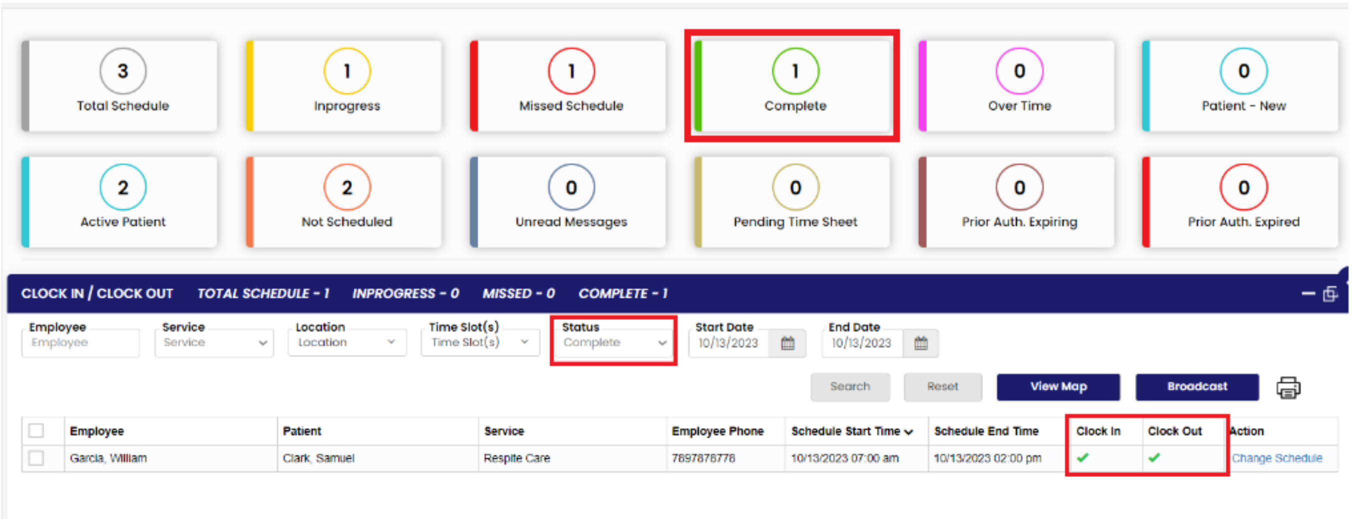
Missed Schedules

The user can tract 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.



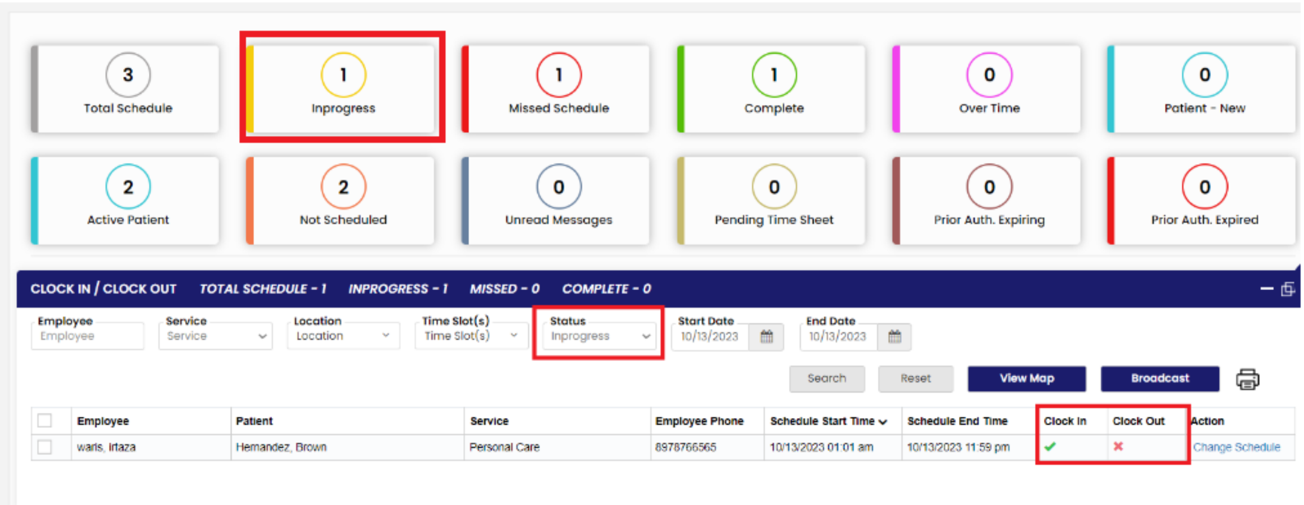
Complete Schedules

The user can tract 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.



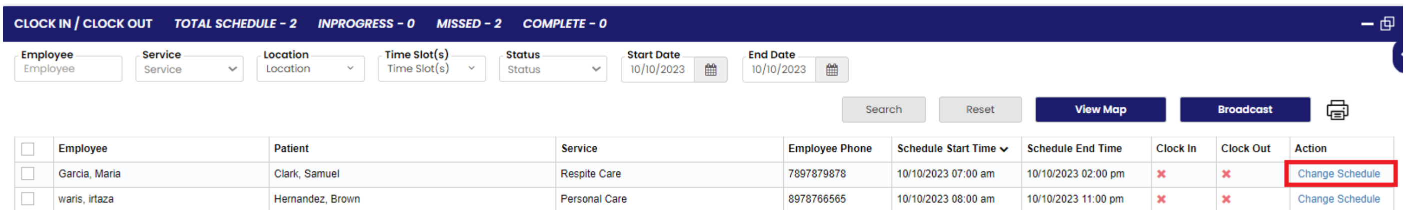
In-progress Schedules

The user can tract 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.

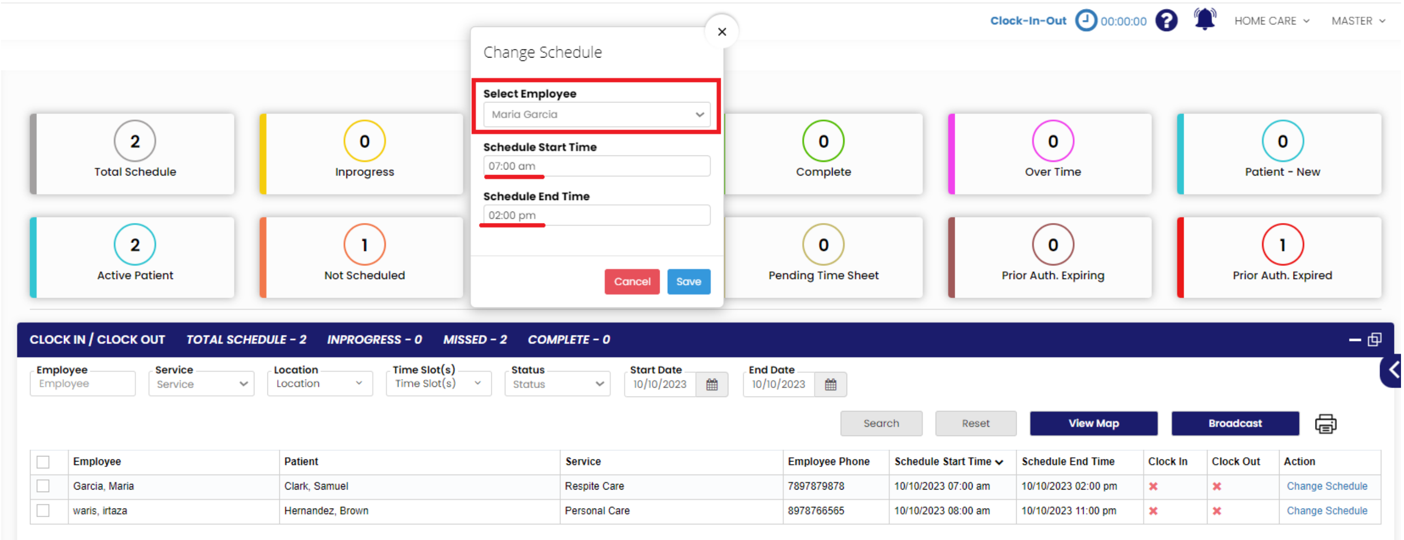


Change Schedule

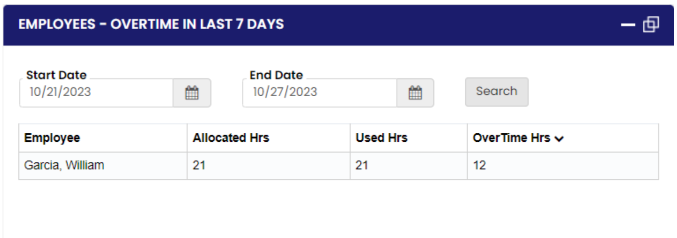
The option change schedule is used to change the schedule with required Employee name and the available timings. Click change schedule option under Actions.



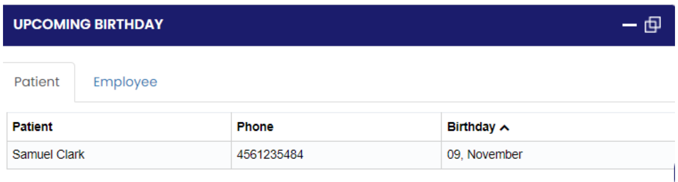
Now, select the Employee name and enter the available timings and then click Save. The schedule will be changed to the respective Employee with Start time and End time.



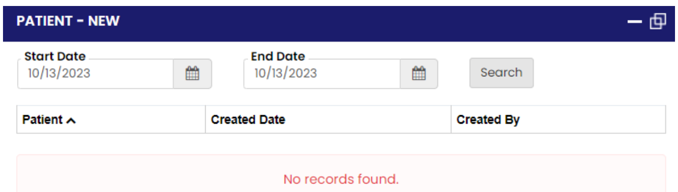
Employees Overtime:
The employees' overtime section displays the number of employees who have accumulated overtime hours in the last seven days. It helps organizations track and manage overtime effectively, ensuring compliance with labor regulations and managing workload distribution.



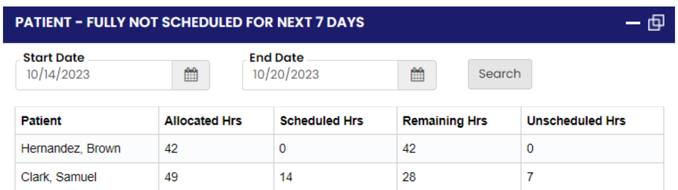
Upcoming Birthday:
This section presents information about upcoming birthdays of both patients and employees. It serves as a reminder to celebrate and acknowledge birthdays, fostering a positive work environment and patient care experience.



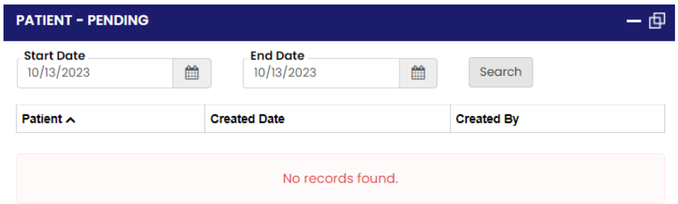
Patient - New:
The new patient section provides information about recently admitted or registered patients. It allows staff to stay informed about new arrivals and helps initiate the necessary procedures and documentation for these patients.



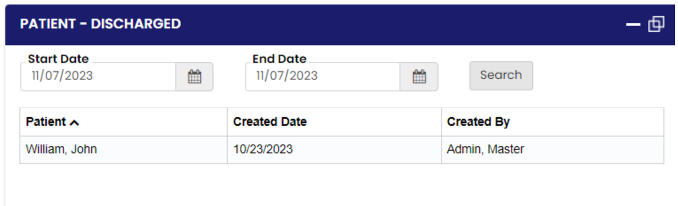
Patient - Fully not scheduled:
This section highlights patients who are not yet fully scheduled for the next seven days. It alerts staff to ensure proper scheduling and avoid any gaps in patient care or appointments.



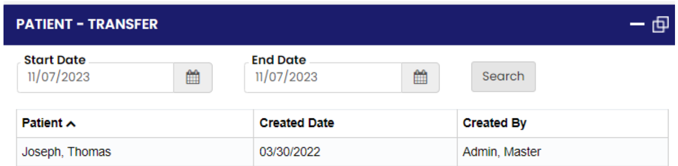
Patient - Pending:
The pending patient section displays information about patients whose status is pending. It helps staff stay updated on patients whose cases are awaiting further actions or approvals, ensuring timely follow-up and resolution.



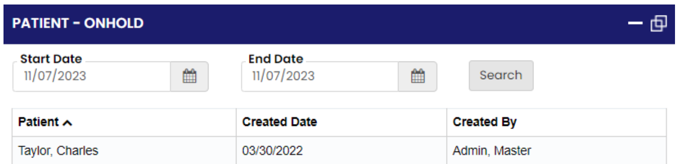
Patient - Discharged:
This section provides information about patients who have been discharged from the organization's care. It helps track the number of discharged patients and their relevant details for record-keeping and reporting purposes.



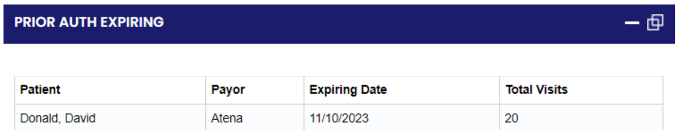
Patient - Transfer:
The patient transfer section provides information about patients who have been transferred to another location or facility. It enables seamless coordination between different departments or facilities involved in the patient's care.



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.



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.

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

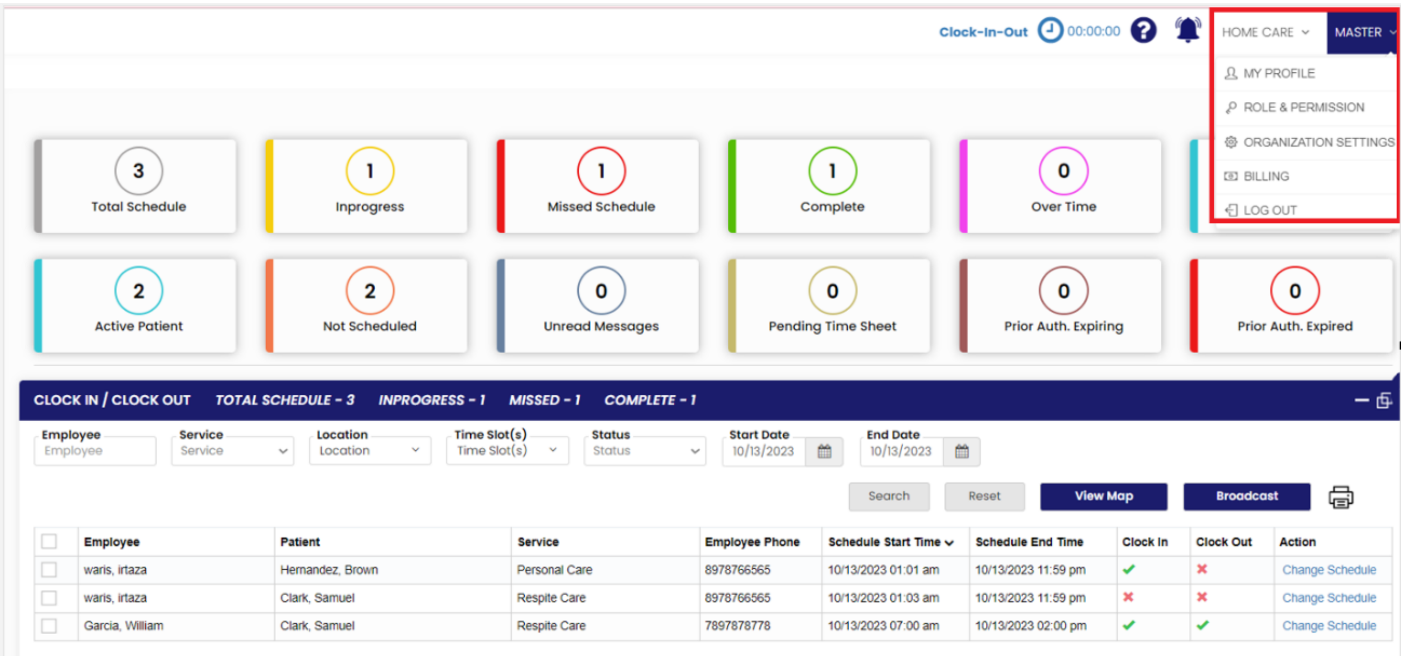
Setting up an application is the process of installing, configuring, and customizing software or systems to ensure they work as intended. It involves tailoring the application to specific needs, setting user permissions, and preparing it for use, ensuring a smooth and effective operation.

> 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

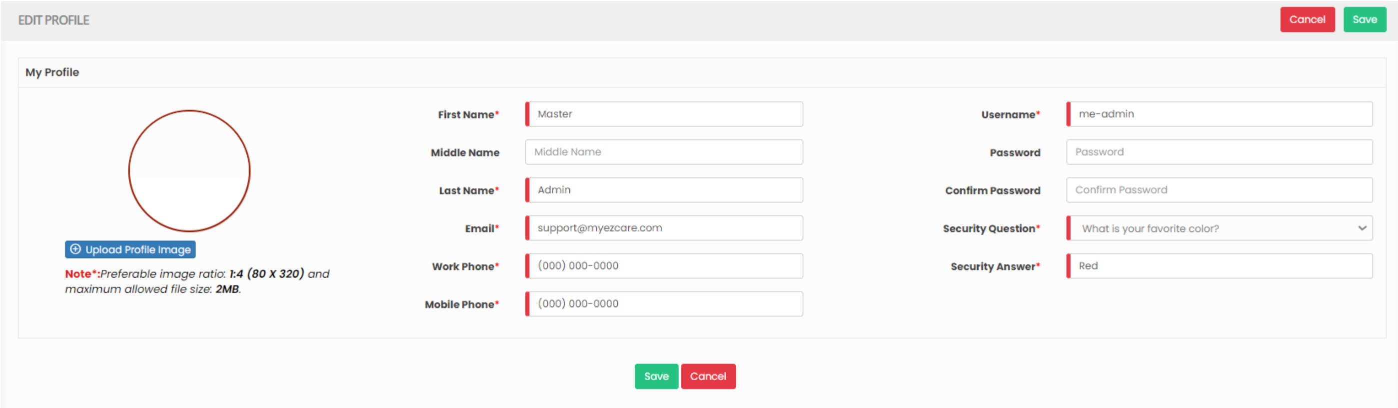
The User Login on the top right corner of the software contains the following features:

- **My Profiles**
- **Roles and Permissions**
- **Organization Settings**
- **Billing**
- **Log Out**



My Profiles

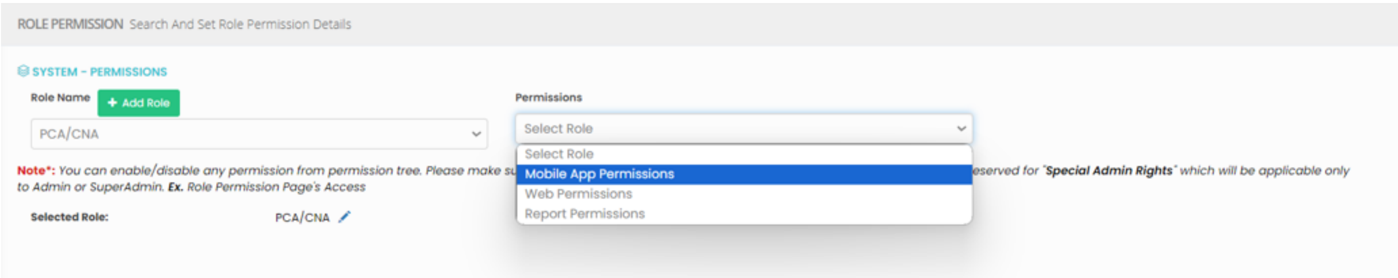
The user can update the Profile information under My Profiles option. Update the required fields, upload the Profile image and click Save option.



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.

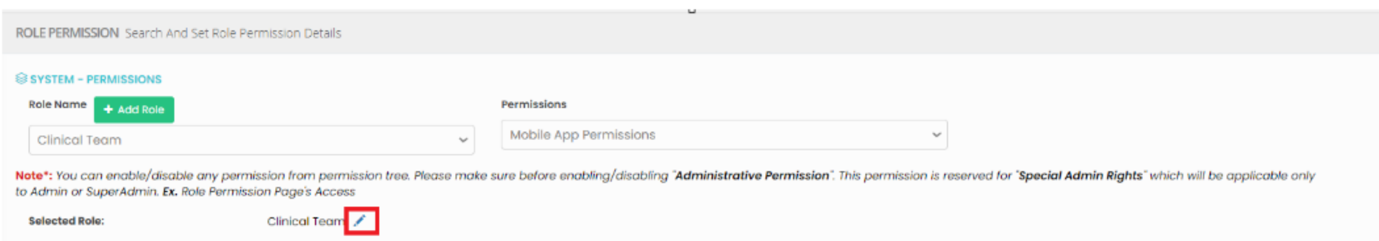
- **Mobile App Permissions**
- **Web Permissions**
- **Report Permissions**

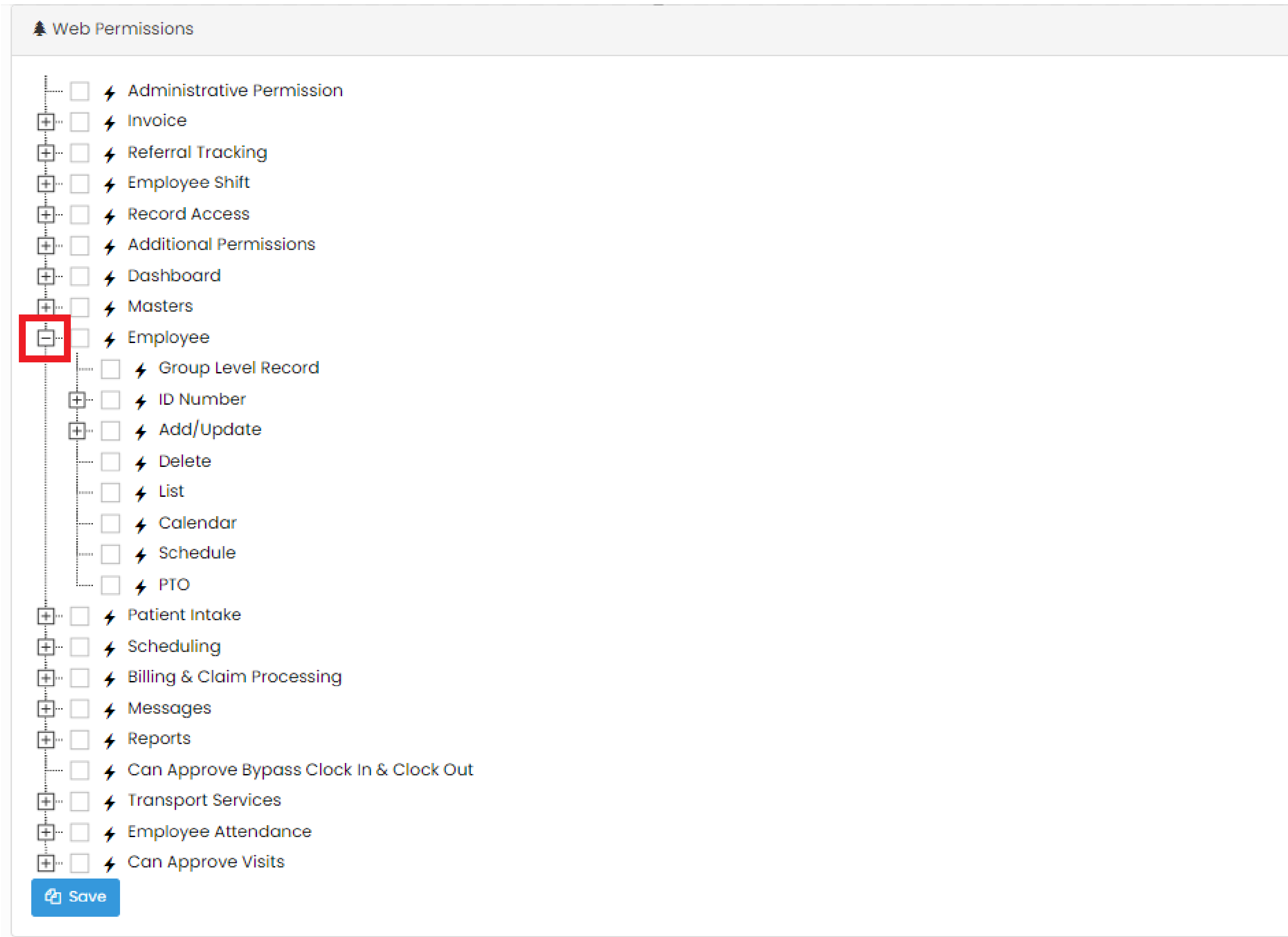


Editing the Role

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

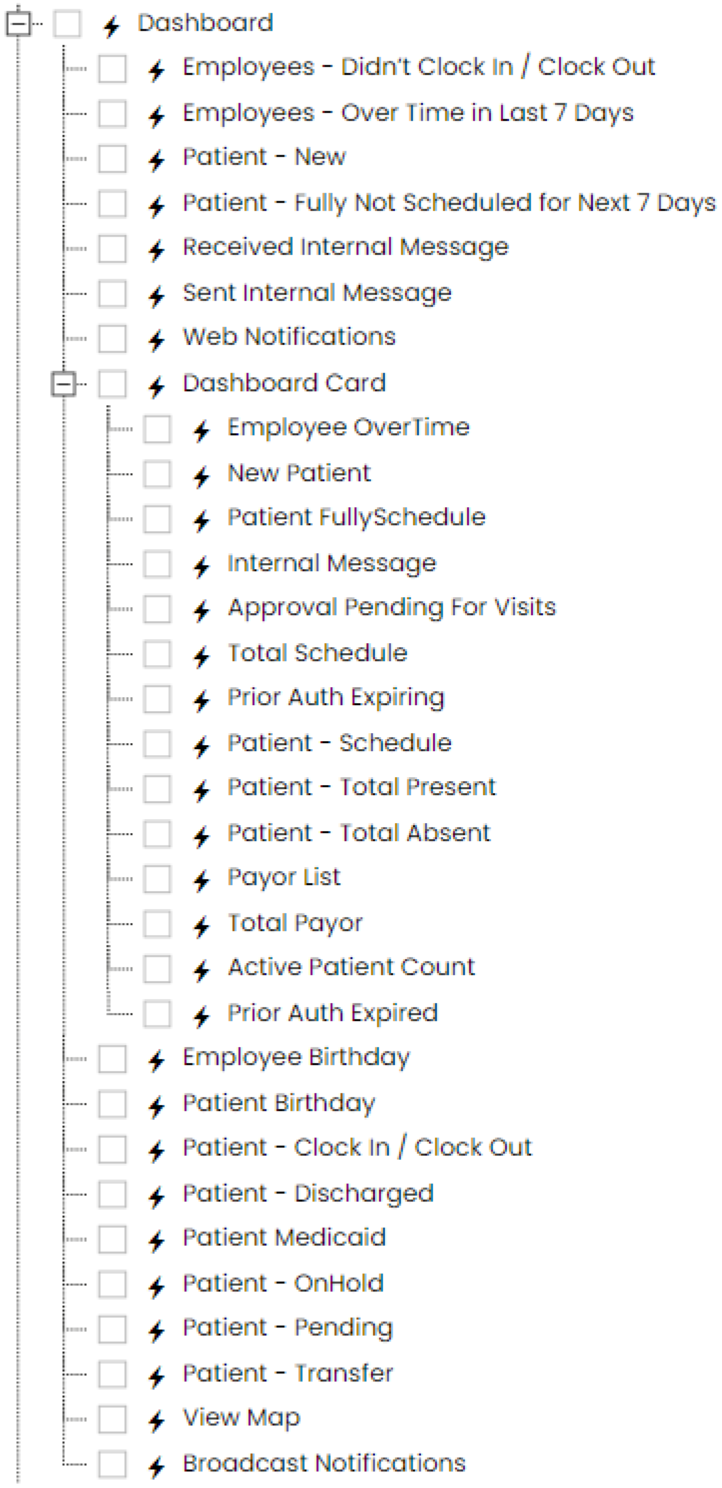
Please find the list of permissions for all the features in the application. Click on the + button to view all the permission for each Tab.





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.



Employee

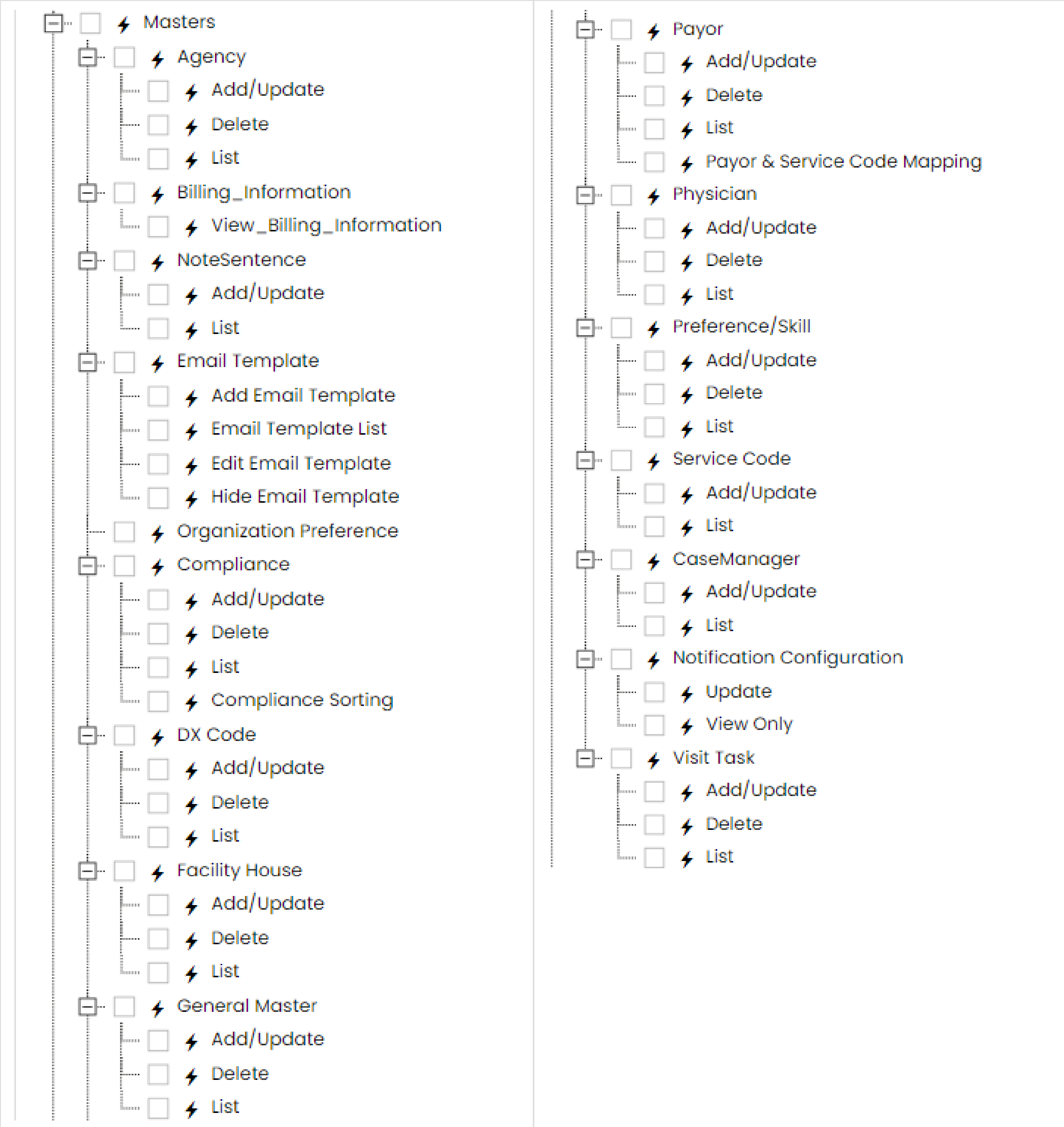
The Permissions for the Employee to access the application can be given under the Employee option in Roles and Permissions. The user can select the checkbox to give access to only view, Add/Update the information in the application and also to Delete the records for the Employees.

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.

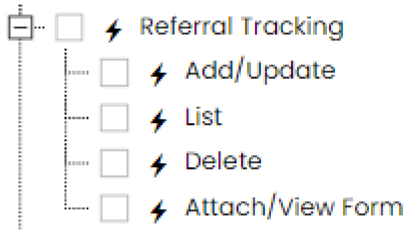
Masters - Settings

The Permissions for the Employee to access the Settings can be given under the Masters 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 in the application.



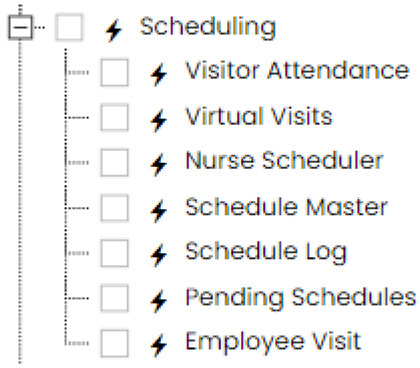
Referral Tracking - Prospects

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.



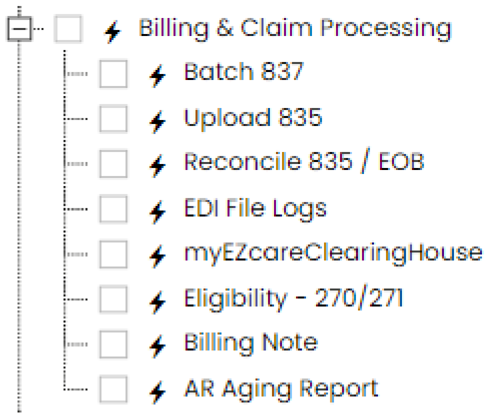
Scheduling

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.

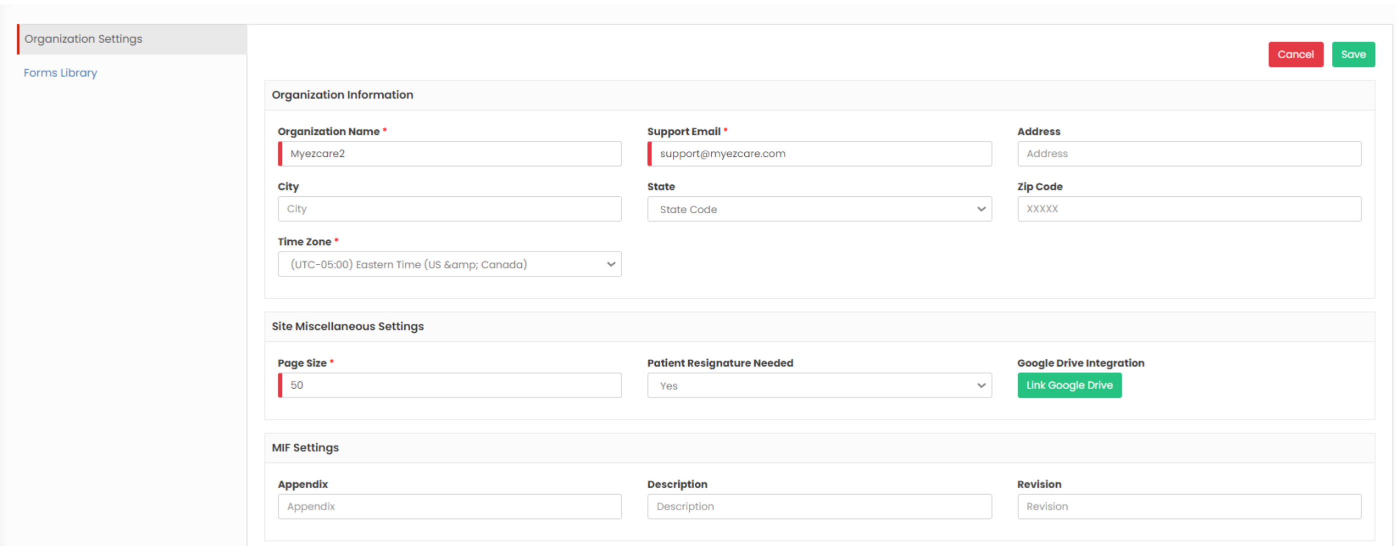
Office Assistant

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.



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

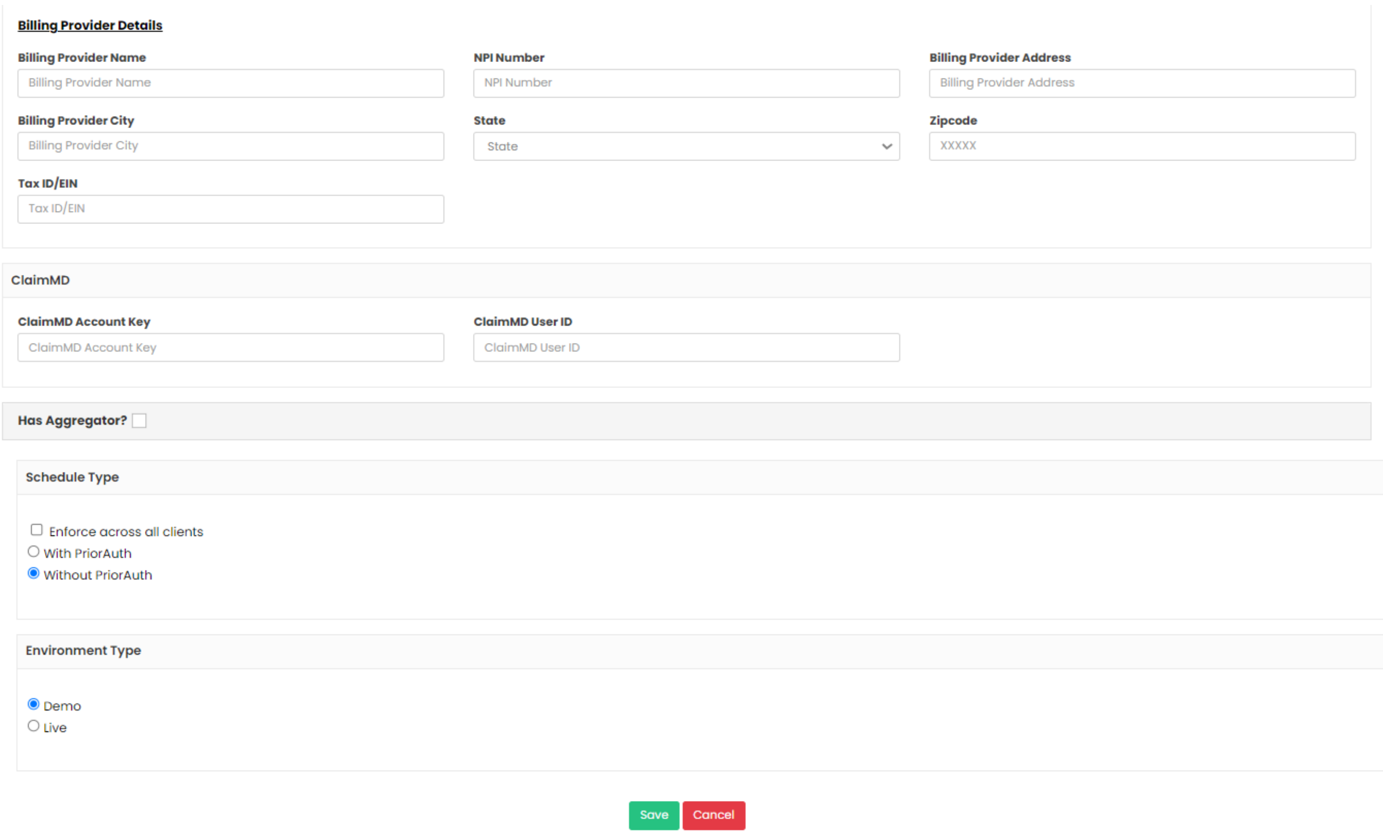
Company Name: Company Name

NPI Number: NPI Number

Contact Name: Contact Name

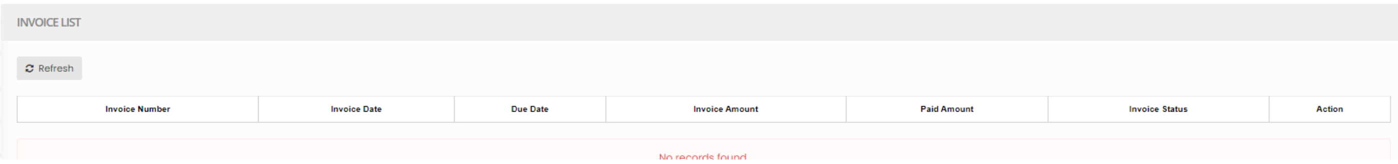
Phone: Phone

Email: Email



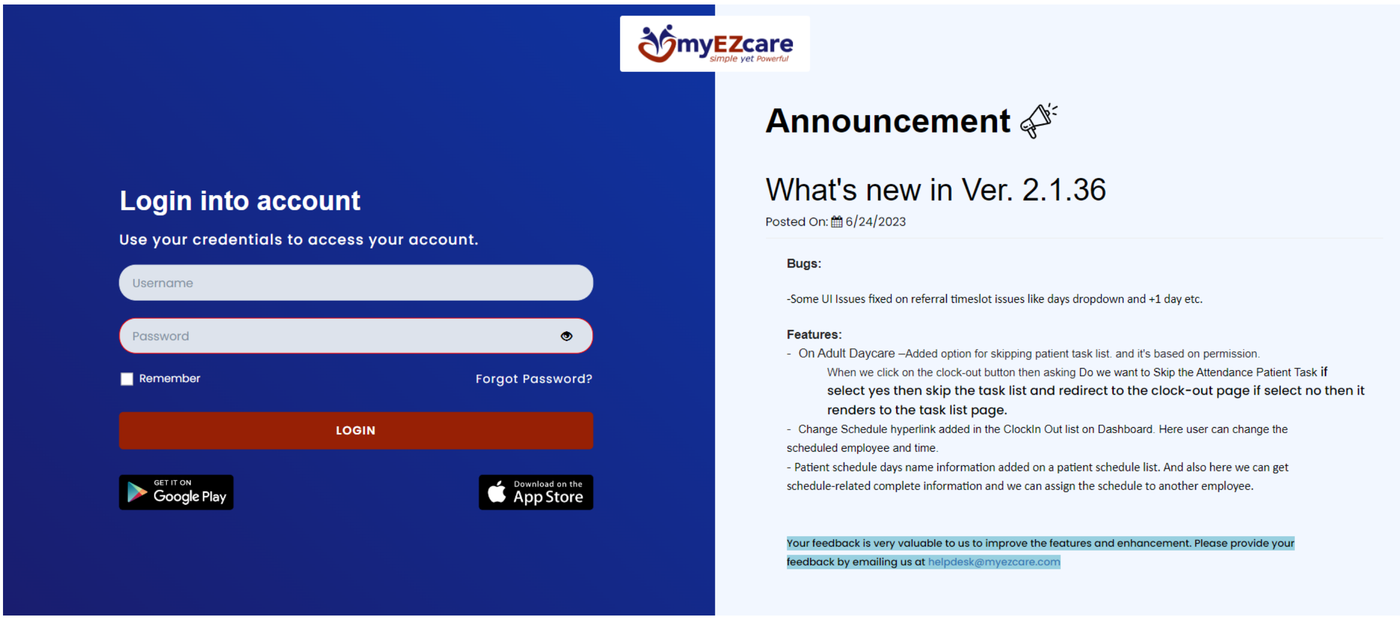
Billing

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



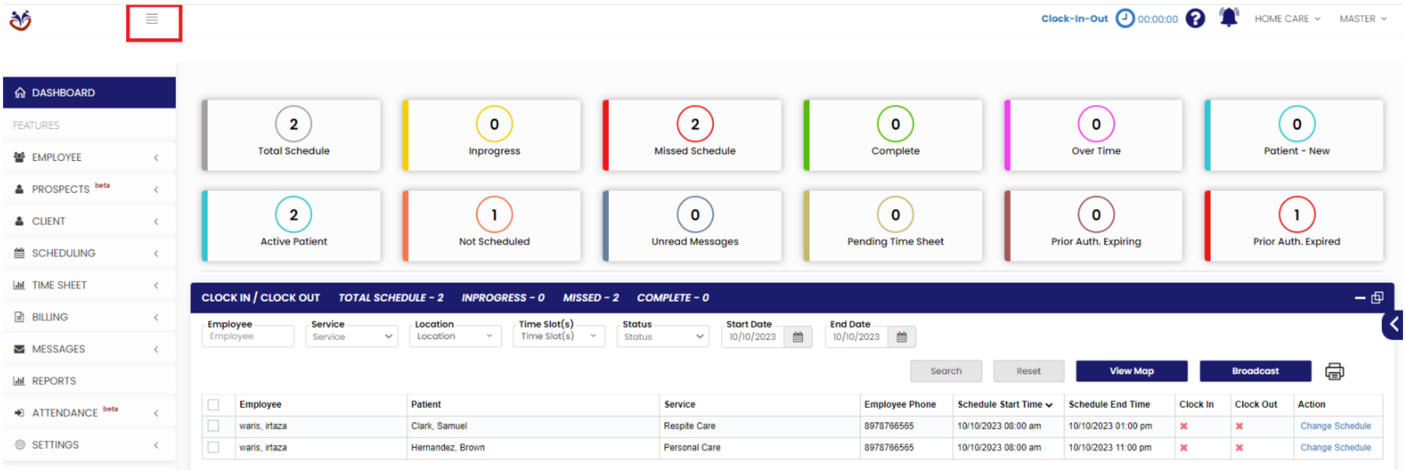
Log Out

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

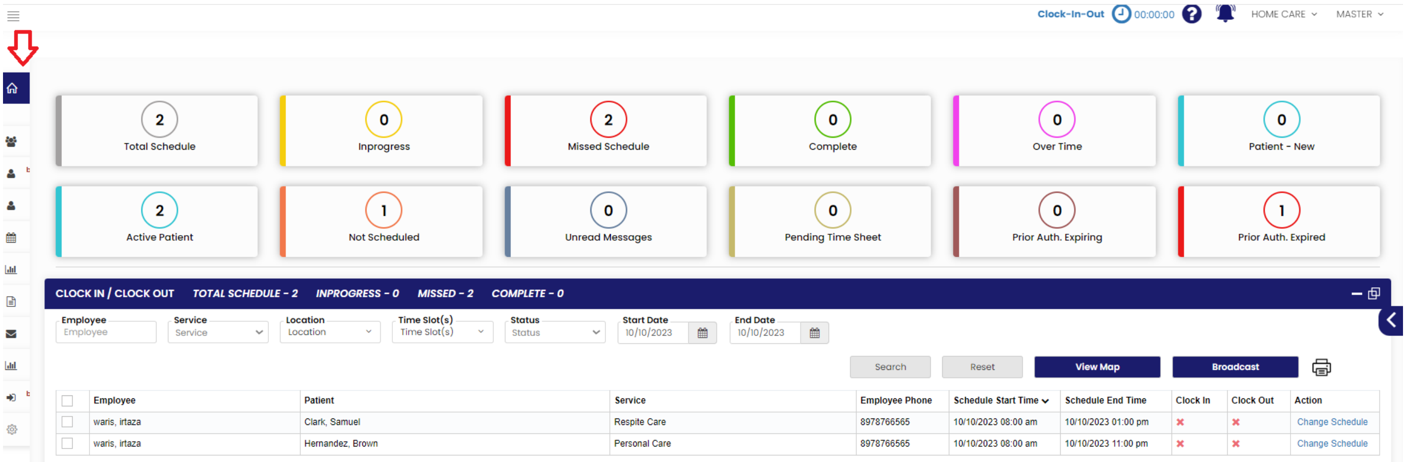


Hide Features

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

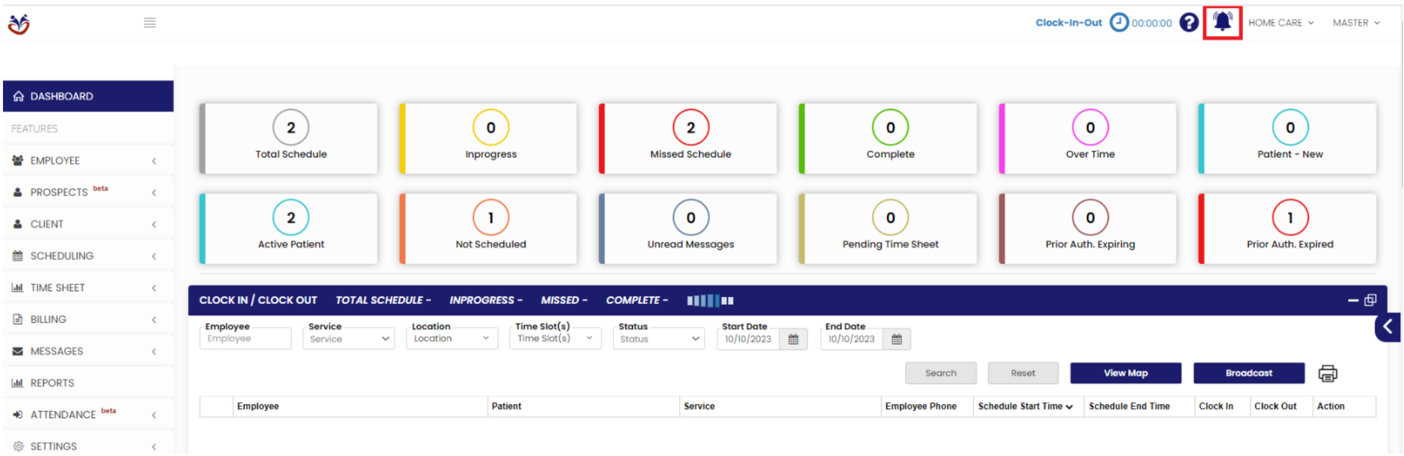


Now, the Features name is not visible in the Dashboard screen and we can work in the large screen.



Notification

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



Care Type

The user can choose the type of care by using the dropdown option on the top right corner in the software.