

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.

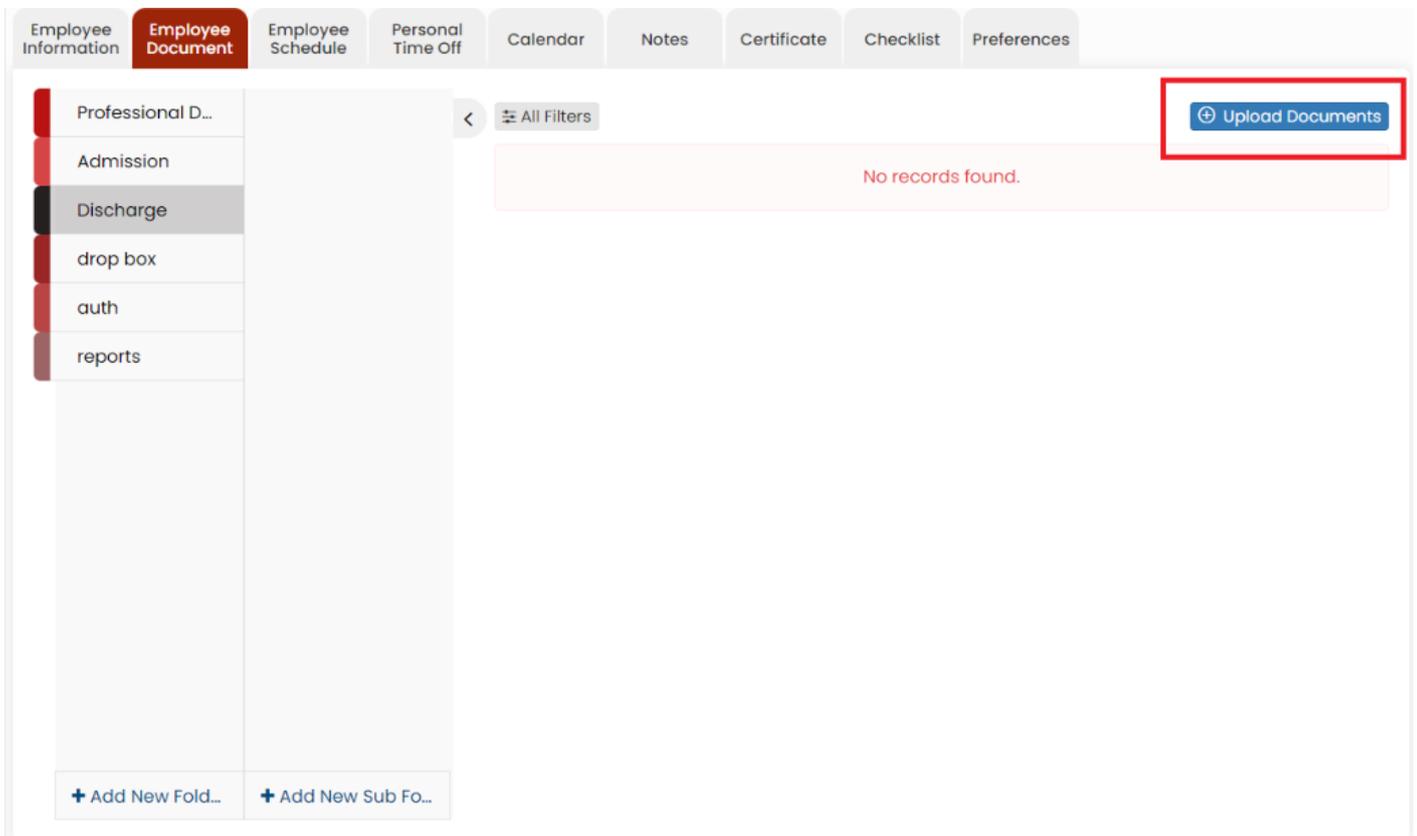
Uploading Employee Document

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

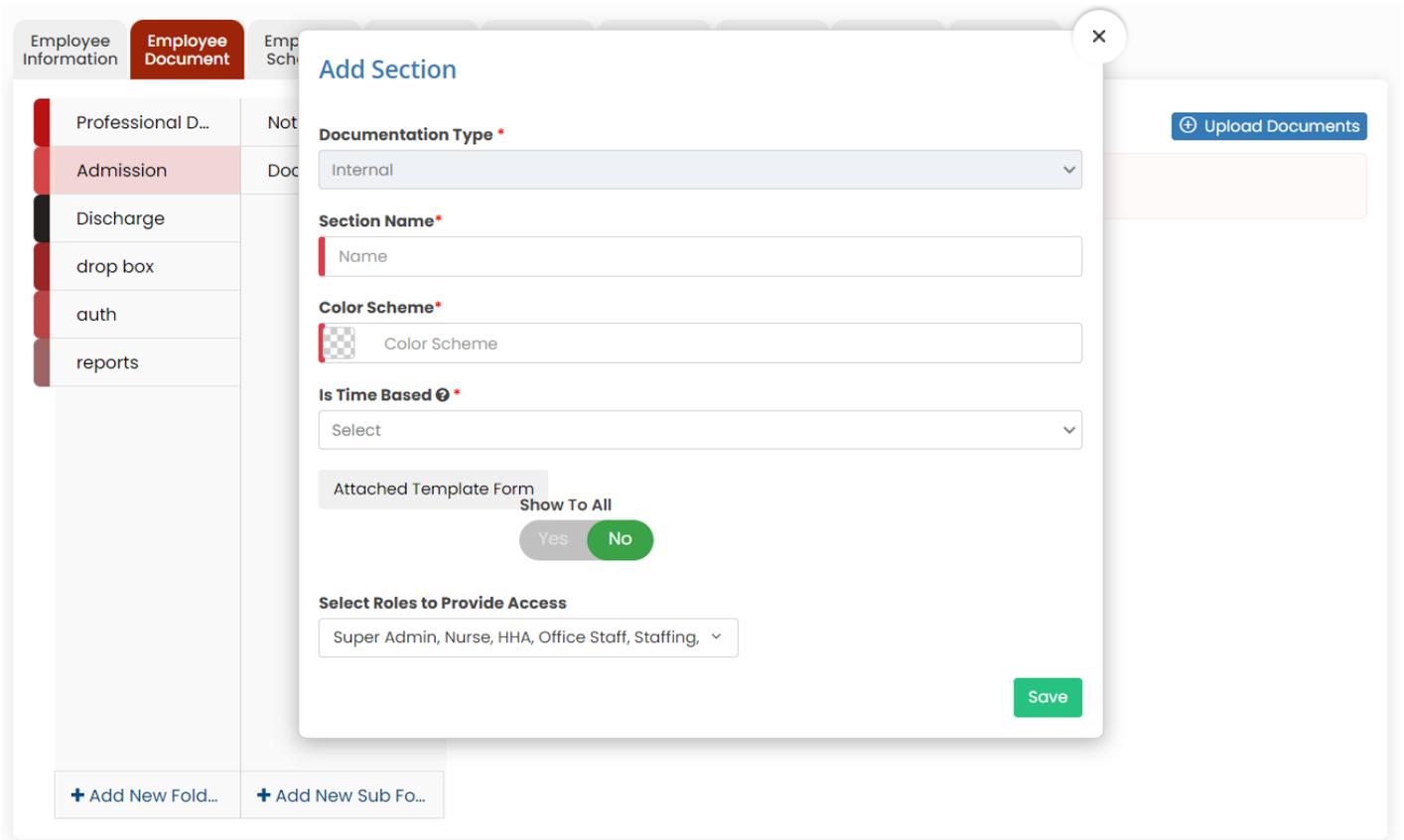
The screenshot shows a web application interface for managing employee documents. On the left is a sidebar menu with options like DASHBOARD, EMPLOYEE, PROSPECTS, CLIENT, SCHEDULING, TIME SHEET, BILLING, MESSAGES, REPORTS, ATTENDANCE, and SETTINGS. The main area is titled 'LIST OF EMPLOYEES' and contains a table with columns for Employee ID and Name. A modal window is open over the table, showing a list of document types: Professional D..., Admission, Discharge, drop box, auth, and reports. At the top of the modal, there are tabs for Employee Information, Employee Document (which is selected), Employee Schedule, Personal Time Off, Calendar, Notes, Certificate, Checklist, and Preferences. An 'Upload Documents' button is located in the top right corner 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.

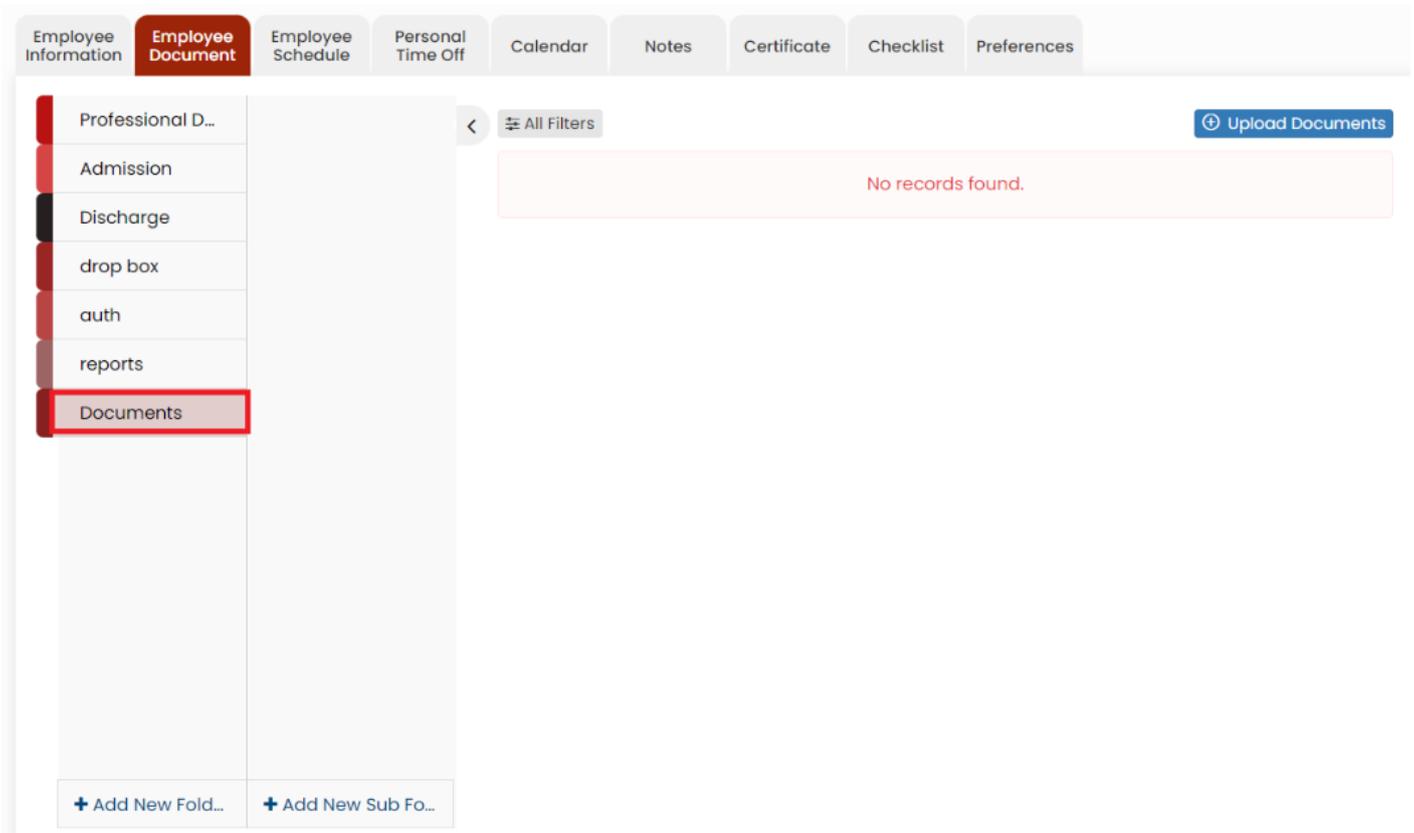


Adding New Folder in Employee document

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

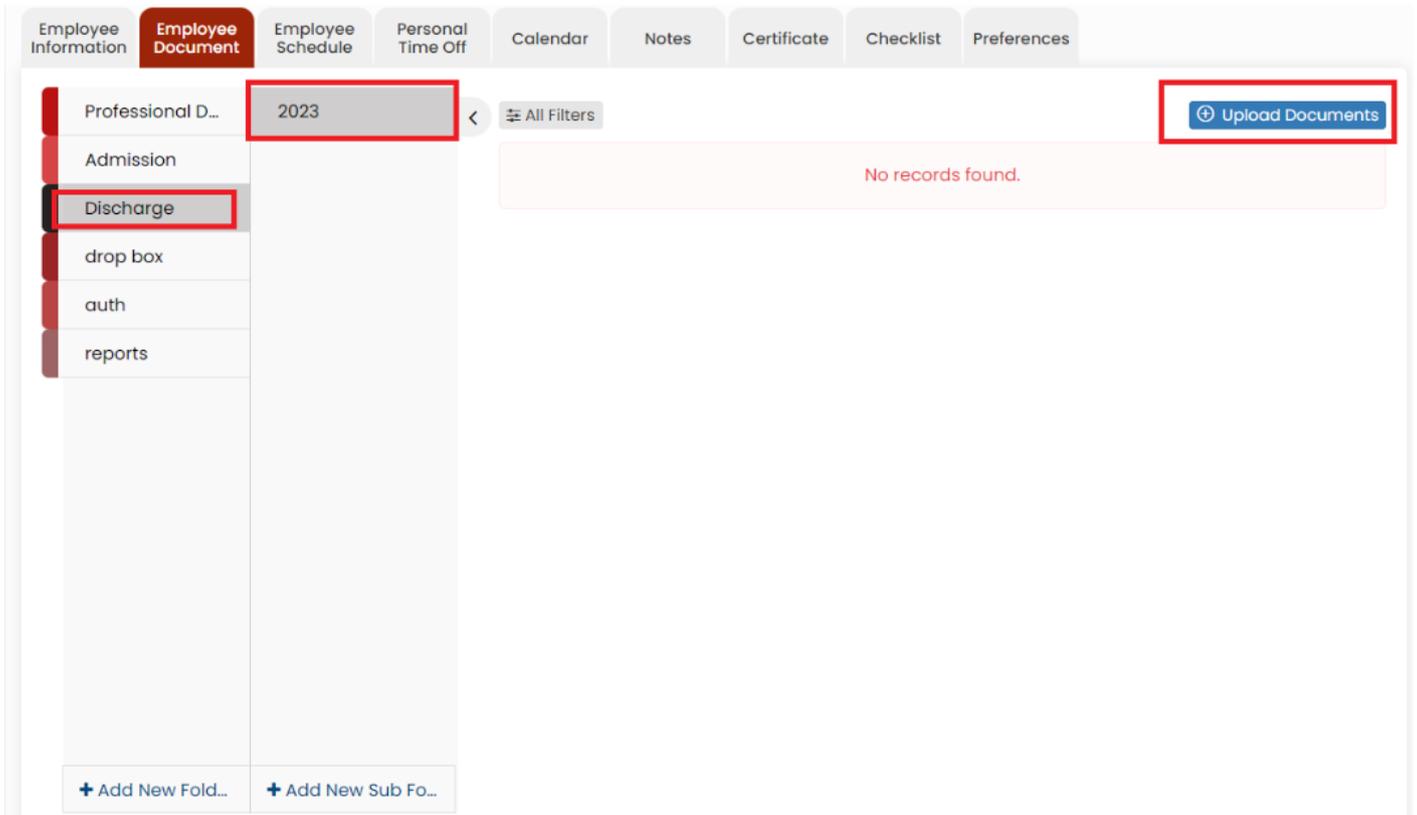
Select the folder name and click the option +Add New Sub Folder option. The following screen appears, update the required information. Also in the option Show to All, if the user needs the Sub folder name to be added for all the employee click Yes option. If the user wants the folder to be added only 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 like '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.

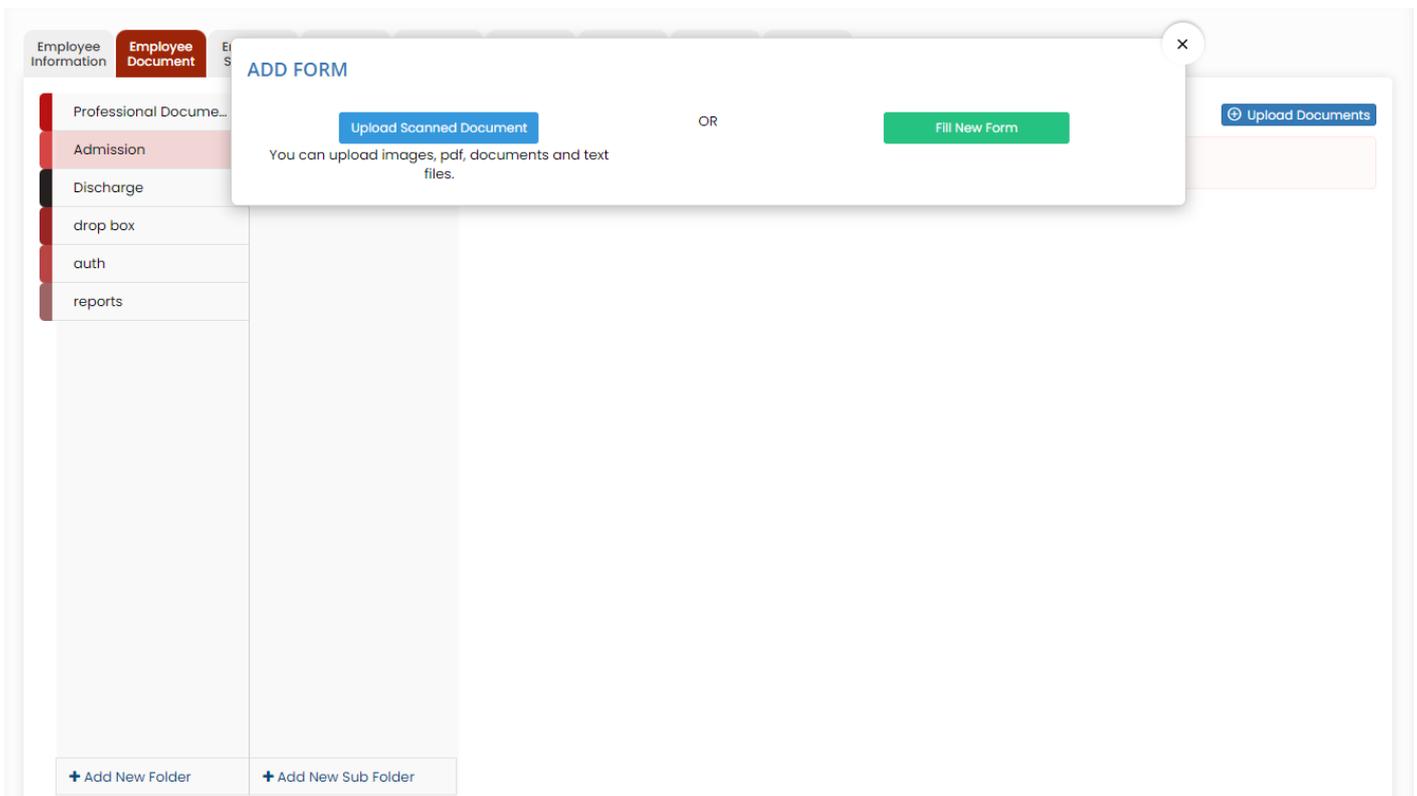
The Sub folder 2023 is now added under folder name Discharge to upload the required documents of the Employee.



Uploading Documents

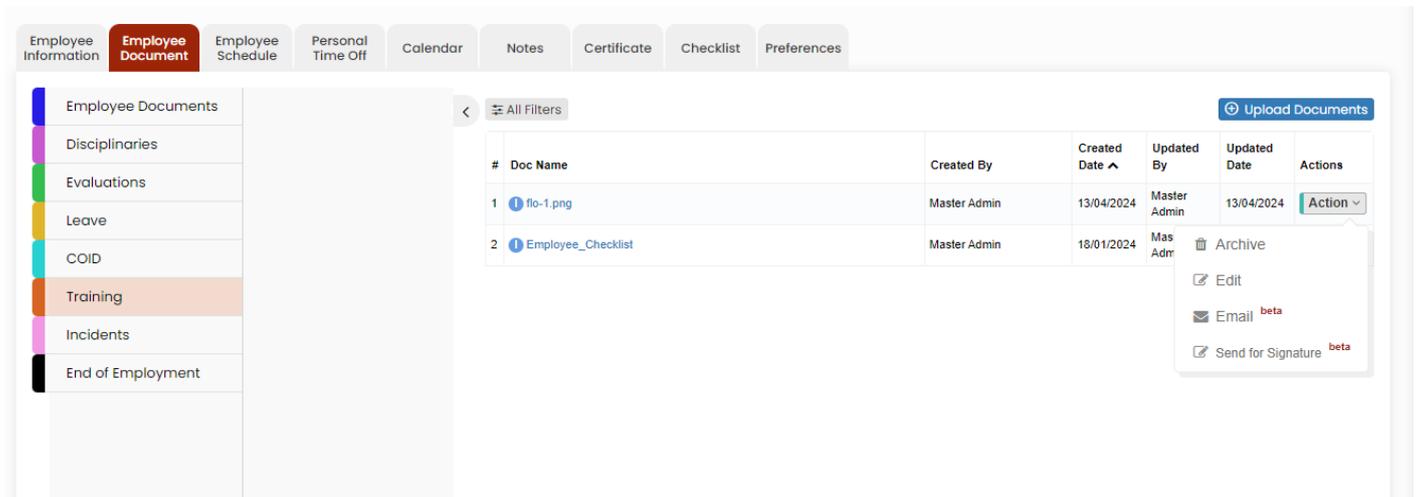
To upload the documents, select the folder name and click Upload documents.

When we click the option Upload Documents, the following screen appears,



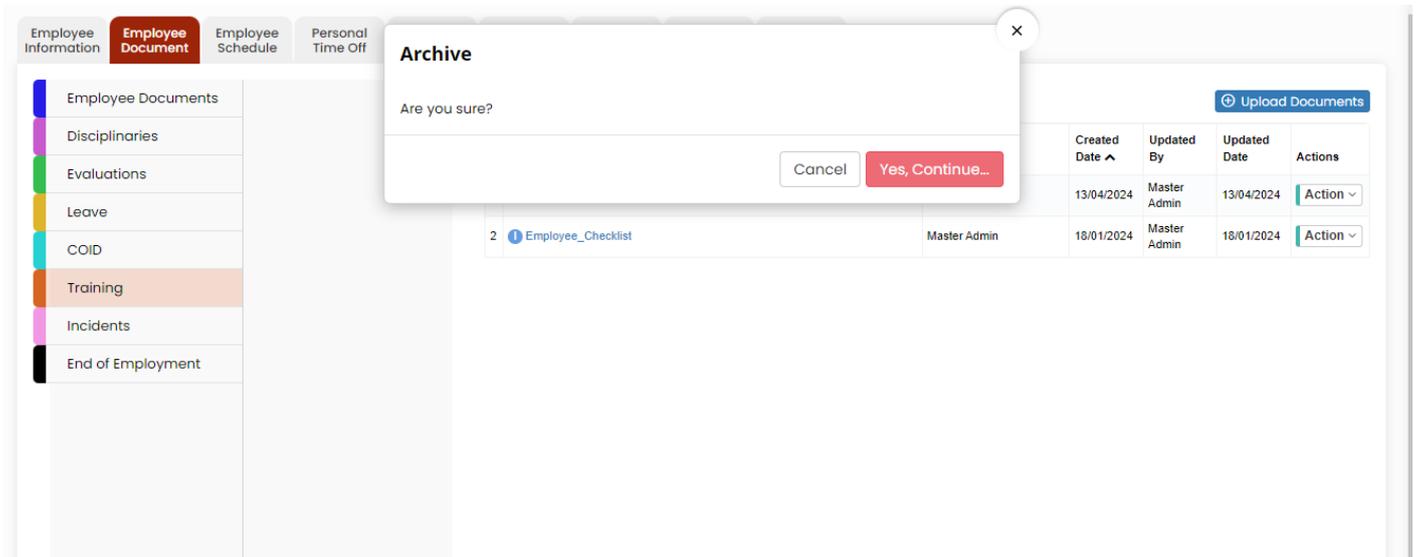
The Scanned documents can be uploaded using the option Upload Scanned Document option. The forms in the system can be uploaded using Fill New Form option.

For each scanned document under action we have the following options.

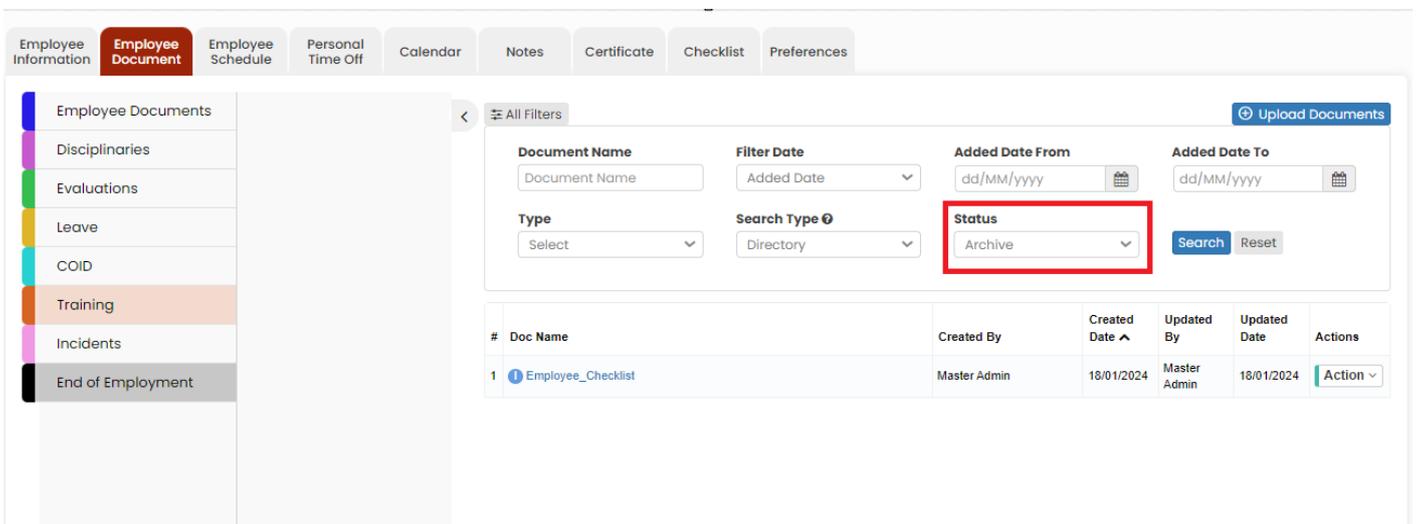


Archive option

Click the option Archive to delete the uploaded scanned document. The following pop-up appears. Click Yes Continue option.

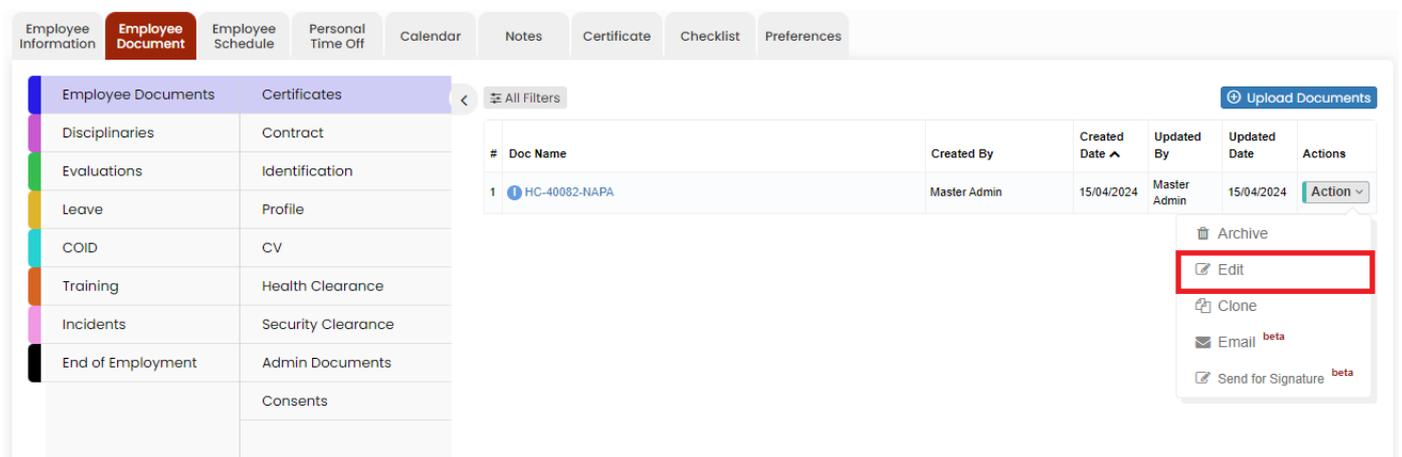


The document is now deleted from the Active documents list. To view the deleted document, Click All Filters option and select the Status Archive.



Edit Option

Click Edit option to edit the required information in the uploaded forms. Also we can edit the Document name of the uploaded scanned document using the Edit option.



Email Option

The uploaded scanned document can be sent through Email using the Email option. Click Email option under Actions of the scanned document. The following screen appears, update the Email address, Subject and content of the Email and click Send option. The Email will be sent along with the scanned document.

We can also create templates for the Email under Settings >> Email Template option. The user can use the created email template by using the option Templates in the Email Screen.

The screenshot displays the 'Send Email' interface. On the left, a sidebar menu lists various document categories: Employee Documents, Disciplinarys, Evaluations, Leave, COID, Training, Incidents, and End of Employment. The main area shows the 'Send Email' modal with the following details:

- From:** noreply@myezcare.com
- Attach:** flo-1.png
- CC to myself:**
- To:** [Empty field with 'Add recipient' link]
- CC:** [Empty field]
- BCC:** [Empty field]
- Subject:** [Empty field]

Below the fields is a rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Text Color (T), and Source Code (</>). The modal includes 'Close' and 'Send' buttons at the bottom. In the background, a table shows the following data:

Updated By	Updated Date	Actions
Master Admin	15/04/2024	Action
Master Admin	15/04/2024	Action

Send for Signature option

The user can send the forms in the system to get the Electronic Signature from the Employee by using the option Send for Signature under Actions.

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

Employee Documents Certificates < All Filters Upload Documents

#	Doc Name	Created By	Created Date ^	Updated By	Updated Date	Actions
1	flo-1.png	Master Admin	15/04/2024	Master Admin	15/04/2024	Action ▾
2	HC-40082-NAPA	Master Admin	15/04/2024	Master Admin	15/04/2024	Action ▾

- Archive
- Edit
- Clone
- Email beta
- Send for Signature beta**

+ Add New Folder + Add New Sub Folder

Click the option Send for Signature, the following screen appears,

From: noreply@myezcare.com

To:

Add recipient

Subject:

B *I* U **T1** `</>`

Access Document

Close Send

Update the required details and Click Send option. Now the email will be sent with the Document for signature. When the employee click on the Access Document, the following screen appears. On clicking the Send option, the employee will receive a 5 digit OTP for verification. Once the verification is completed, the Document automatically opens in which the employee can update their signature and save the document. The Signature updated document will be visible under the folders.

Document Access

We'll send you a one-time password (OTP) to your email address (a*****@myezcare.com). This OTP helps protect your account by adding an extra layer of security. Please check your inbox and enter the OTP below to verify your account.

You can send the OTP by clicking the button below.

Send

The Signature updated document will be visible under the folders.

Employee Docum...
Disciplinarys
Evaluations
Leave
COVID
Training
Incidents
End of Employme...

+ Add New Folder + Add New Sub Folder

Please Enter 42 Characters Only

Goals: KEEP PATIENT & ENVIRONMENT CLEAN. HELP PATIENT BE INDEPENDENT.

Personal care needs will be met Promote safe environment Adequate nutrition/hydration

Return to independence in ADL Increase participation in ADL Compliance with exercise program

Nurse's Signature: 

Date: MM/DD/YYYY

CHHA Signature:

Date: MM/DD/YYYY

Patient Signature:

Date: MM/DD/YYYY

Revision #15

Created 7 October 2023 18:11:42 by Thamarai

Updated 24 May 2024 18:52:29 by Thamarai