

# 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**



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.

Employee Information

Employee Document

Employee Schedule

Professional D...

Admission

Discharge

drop box

auth

reports

+ Add New Fold...

+ Add New Sub Fo...

Add Section

Documentation Type \*

Internal

Section Name \*

Name

Color Scheme \*

Color Scheme

Is Time Based ? \*

Select

Attached Template Form

Show To All

Yes

No

Select Roles to Provide Access

Super Admin, Nurse, HHA, Office Staff, Staffing,

Save

Upload Documents

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

Employee Information

Employee Document

Employee Schedule

Personal Time Off

Calendar

Notes

Certificate

Checklist

Preferences

Professional D...

Admission

Discharge

drop box

auth

reports

Documents

+ Add New Fold...

+ Add New Sub Fo...

< All Filters

Upload Documents

No records found.

# Adding New Sub Folder in Employee Document

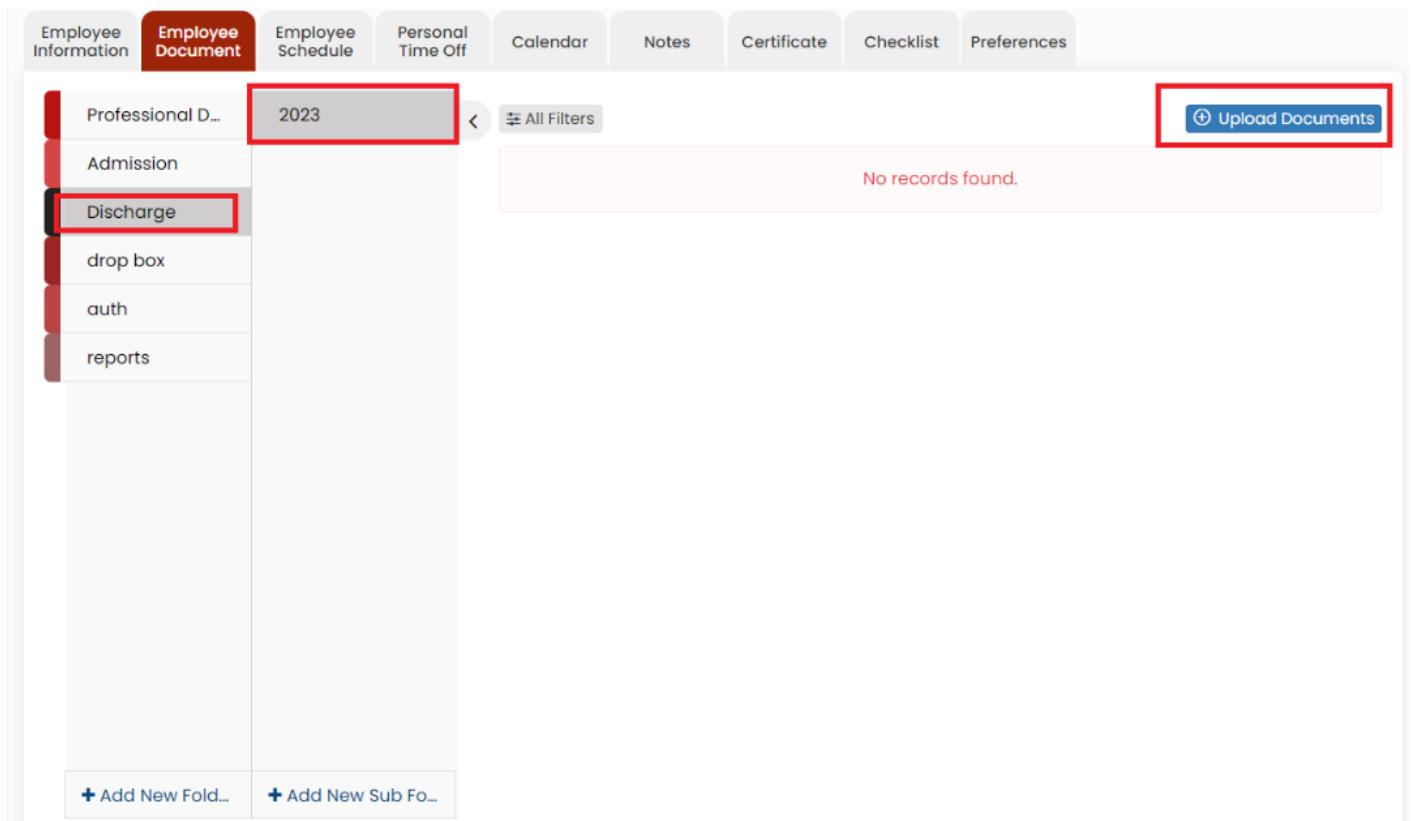
Select the folder name and click the option +Add New Sub Folder option. The following screen appears, update the required information. Also in the option Show to All, if the user needs the Sub folder name to be added for all the employee click Yes option. If the user wants the folder to be added only for the particular employee click No option and click Save.

The screenshot shows the 'Employee Document' tab selected in the top navigation bar. On the left, a sidebar lists document categories: Professional D..., Admission, Discharge (highlighted), drop box, auth, reports, and Documents. At the bottom of the sidebar are two buttons: '+ Add New Fold...' and '+ Add New Sub Fo...'. The main area displays a modal dialog titled 'Add Sub Section' with a close button (X) in the top right corner. 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 label above a 'Show To All' section.
- Show To All**: 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, to the right of the dialog, there is a button labeled '+ Upload Documents' and a red rectangular area.

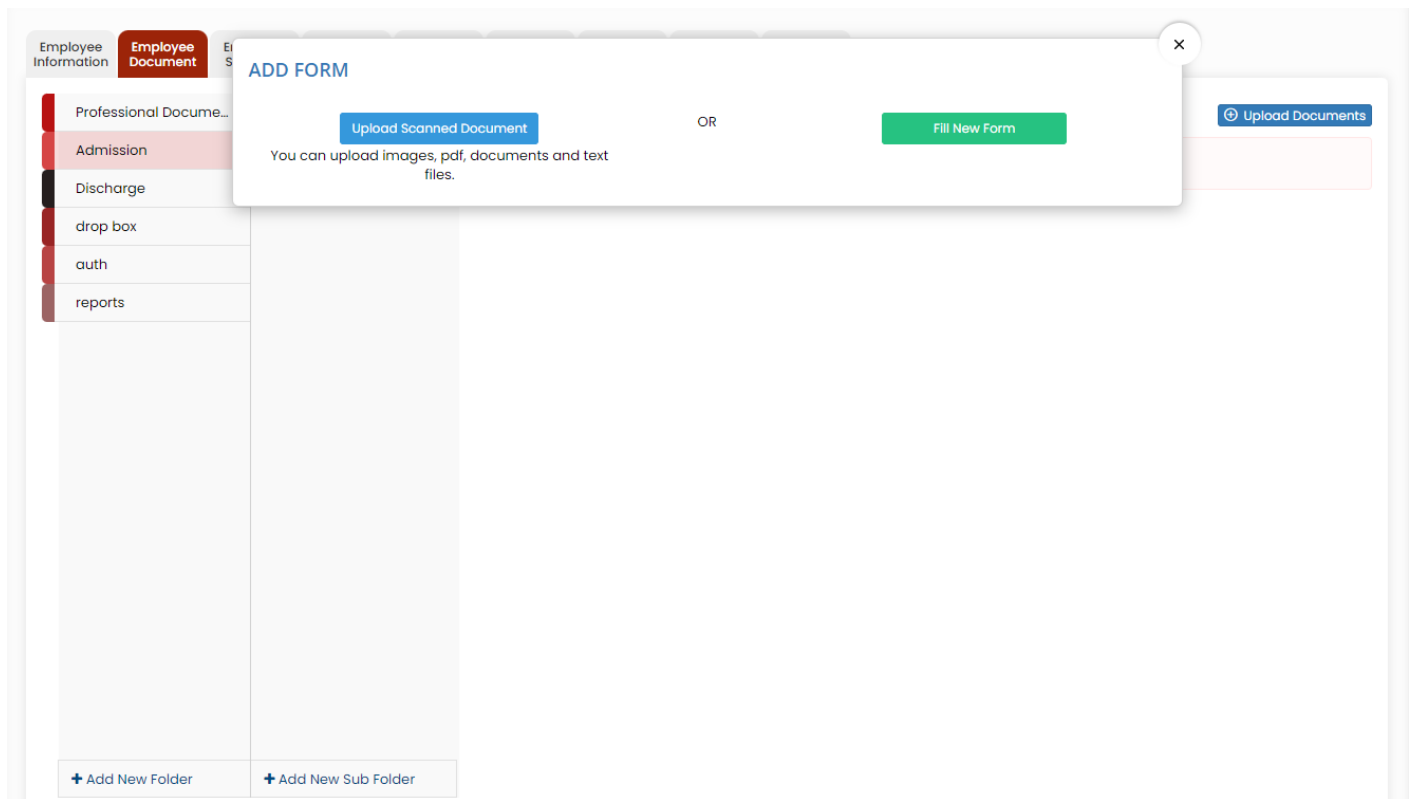
The Sub folder 2023 is now added under folder name Discharge to upload the required documents of the Employee.



## Uploading Documents

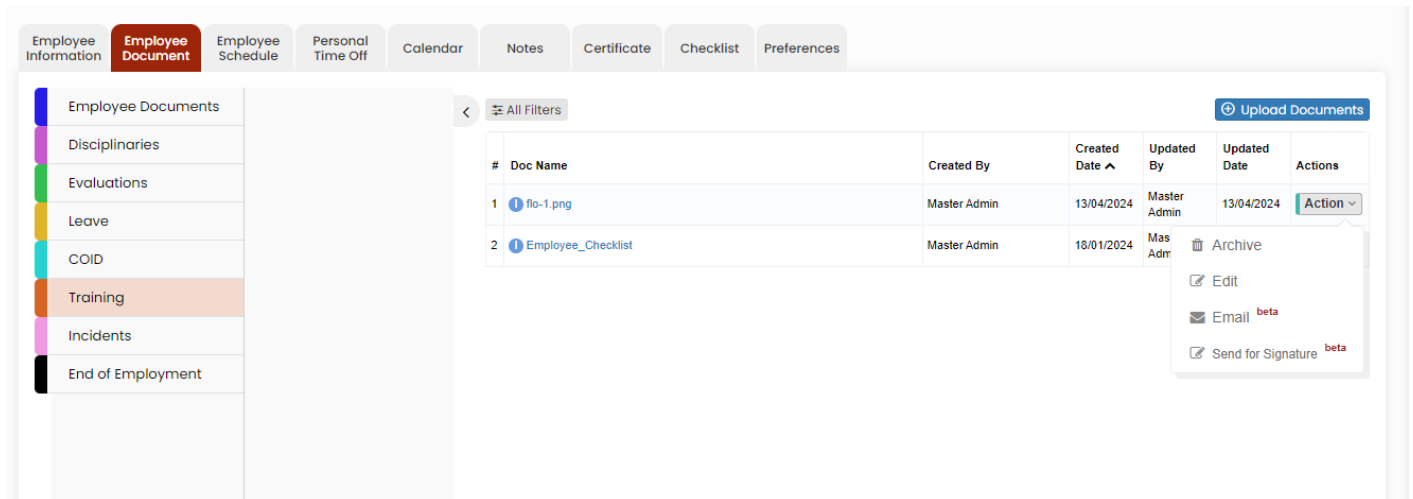
To upload the documents, select the folder name and click Upload documents.

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



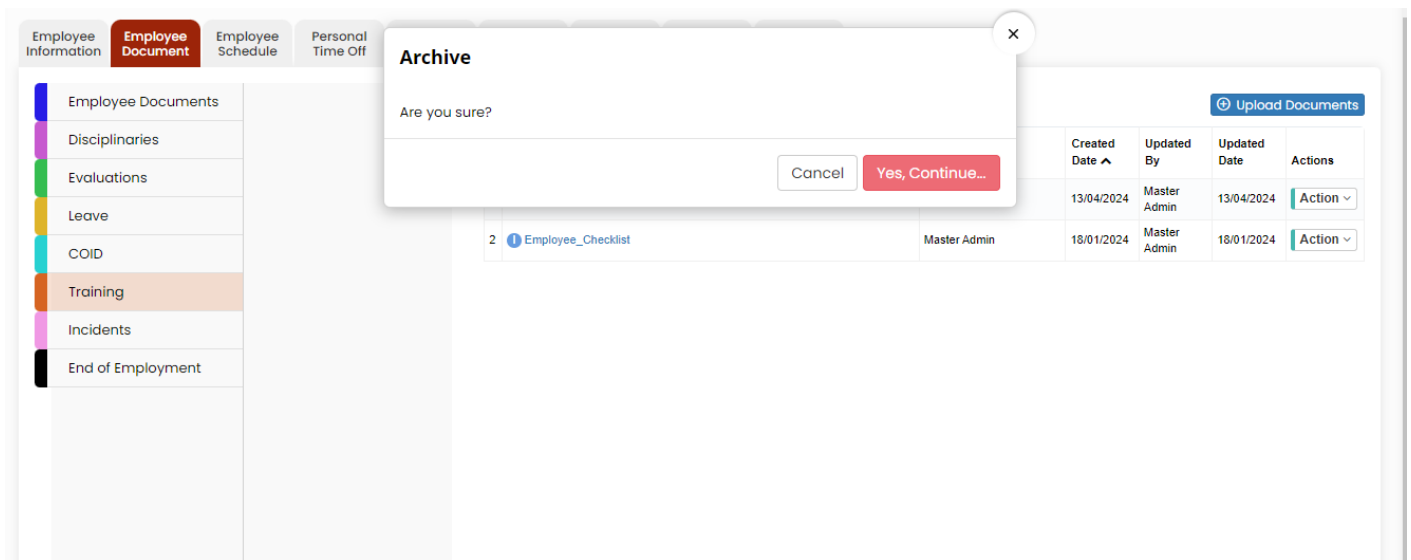
The Scanned documents can be uploaded using the option Upload Scanned Document option. The forms in the system can be uploaded using Fill New Form option.

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

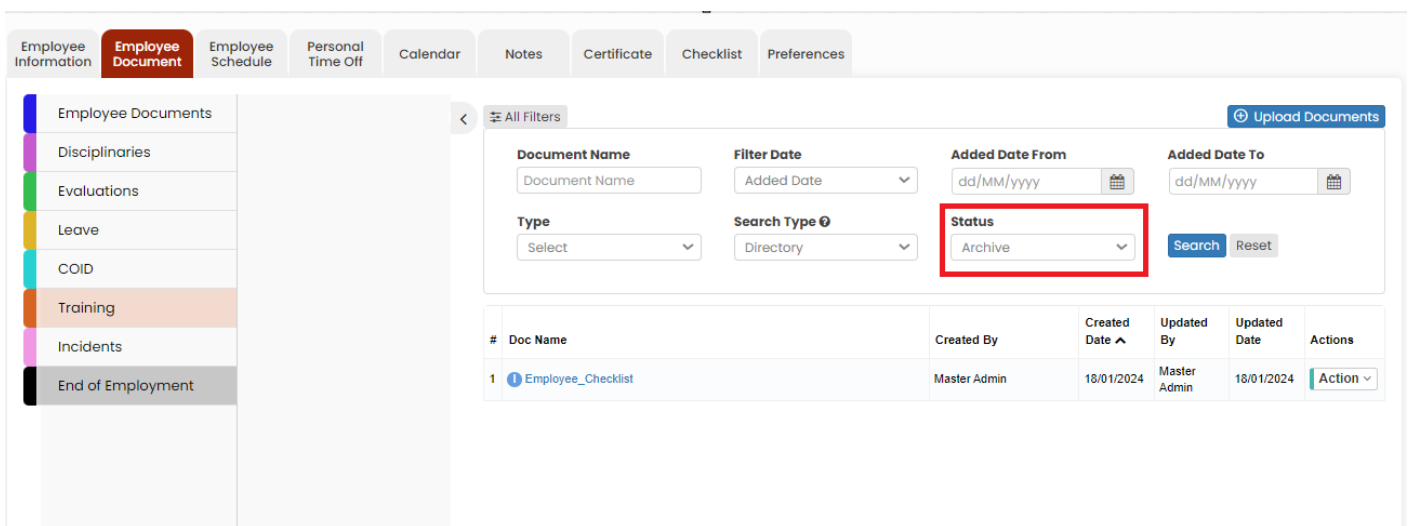


## Archive option

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

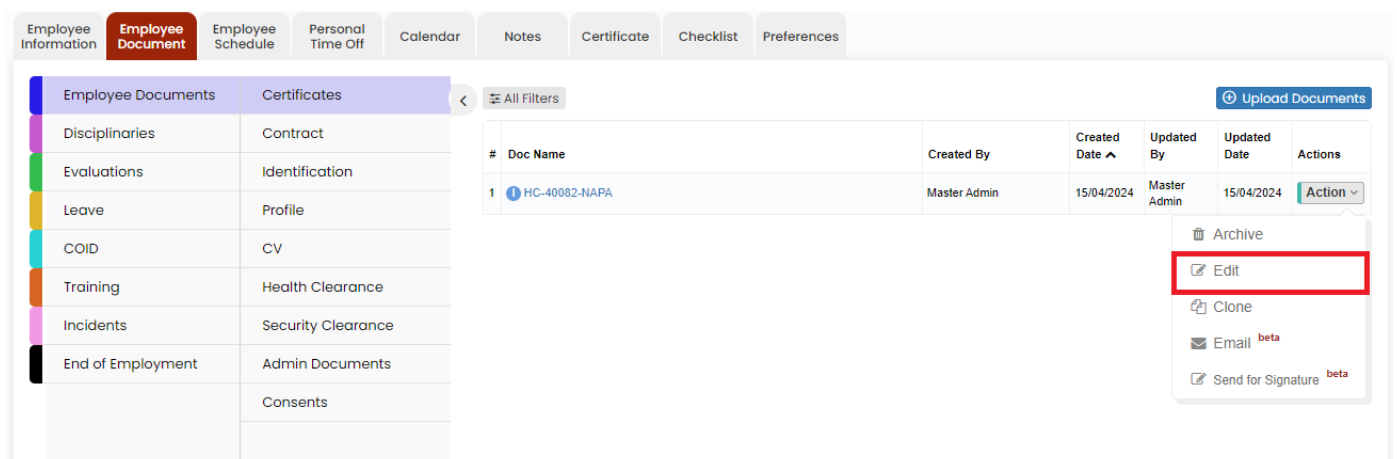


The document is not deleted from the Active documents list. To view the deleted document, Click All Filters option and select the Status Archive.



## 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 shows the 'Send Email' modal window. On the left, there is a sidebar with tabs: 'Employee Information', 'Employee Document' (selected), and 'Employee Schedule'. Under 'Employee Document', there is a list of categories: 'Employee Documents', 'Disciplinarys', 'Evaluations', 'Leave', 'COLD', 'Training', 'Incidents', and 'End of Employment'. The main area of the modal is titled 'Send Email' and includes a 'Template: Select Template' dropdown. Below this, there are fields for 'From:' (noreply@myezcare.com), 'To:', 'CC:', 'BCC:', and 'Subject:'. There is an 'Attach' button and a 'CC to myself' checkbox. A rich text editor is present for the email body, with buttons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Text Color (T), and Source Code (</>). At the bottom, there are 'Close' and 'Send' buttons. In the background, a table with columns 'Updated By', 'Updated Date', and 'Actions' is visible, showing two entries for 'Master Admin' on '15/04/2024'.

## 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

Disciplinarys

Contract

Evaluations

Identification

Leave

Profile

COD

CV

Training

Health Clearance

Incidents

Security Clearance

End of Employment

Admin Documents

Consents

+ Add New Folder

+ Add New Sub Folder

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

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

From:  noreply@myezcare.com 


To:  [Add recipient](#)


Subject:


B


I

U






T 



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

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Revision #13

Created 7 October 2023 18:11:42 by Thamarai

Updated 13 May 2024 23:14:03 by Thamarai