

# 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 InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Professional D...AdmissionDischargedrop boxauthreports

+ 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 FormShow To AllYesNo

Select Roles to Provide AccessSuper Admin, Nurse, HHA, Office Staff, Staffing, ▾

Save

Upload Documents

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

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Professional D...AdmissionDischargedrop boxauthreportsDocuments

+ Add New Fold...+ Add New Sub Fo...

All Filters

No records found.

Upload Documents

# Adding New Sub Folder in Employee Document

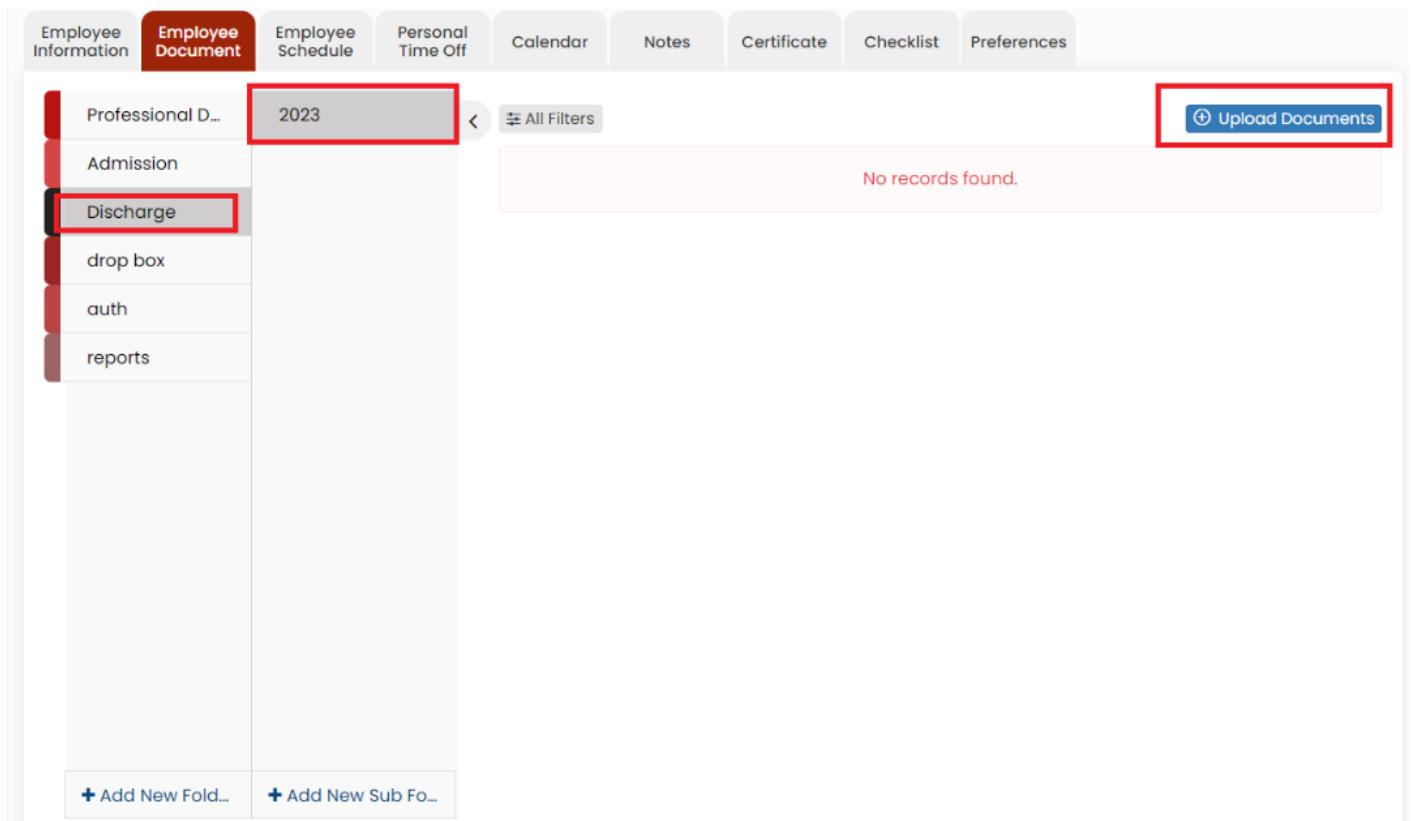
Select the folder name and click the option +Add New Sub Folder option. The following screen appears, update the required information. Also in the option Show to All, if the user needs the Sub folder name to be added for all the employee click Yes option. If the user wants the folder to be added only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

The screenshot shows a web application interface for managing employee documents. On the left, a sidebar lists folders: Professional D..., Admission, Discharge (selected), drop box, auth, reports, and Documents. At the bottom of the sidebar are buttons: '+ Add New Fold...' and '+ Add New Sub Fo...'. The main area displays the 'Add Sub Section' dialog box. The dialog has a title bar with a close button (X). It contains the following fields and options:

- Documentation Type \***: A dropdown menu with 'Internal' selected.
- Sub Section Name \***: A text input field with 'Name' entered.
- 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' (selected) and 'No'.
- 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, a document upload area is visible with a blue button labeled '+ Upload Documents' and a red rectangular area below it.

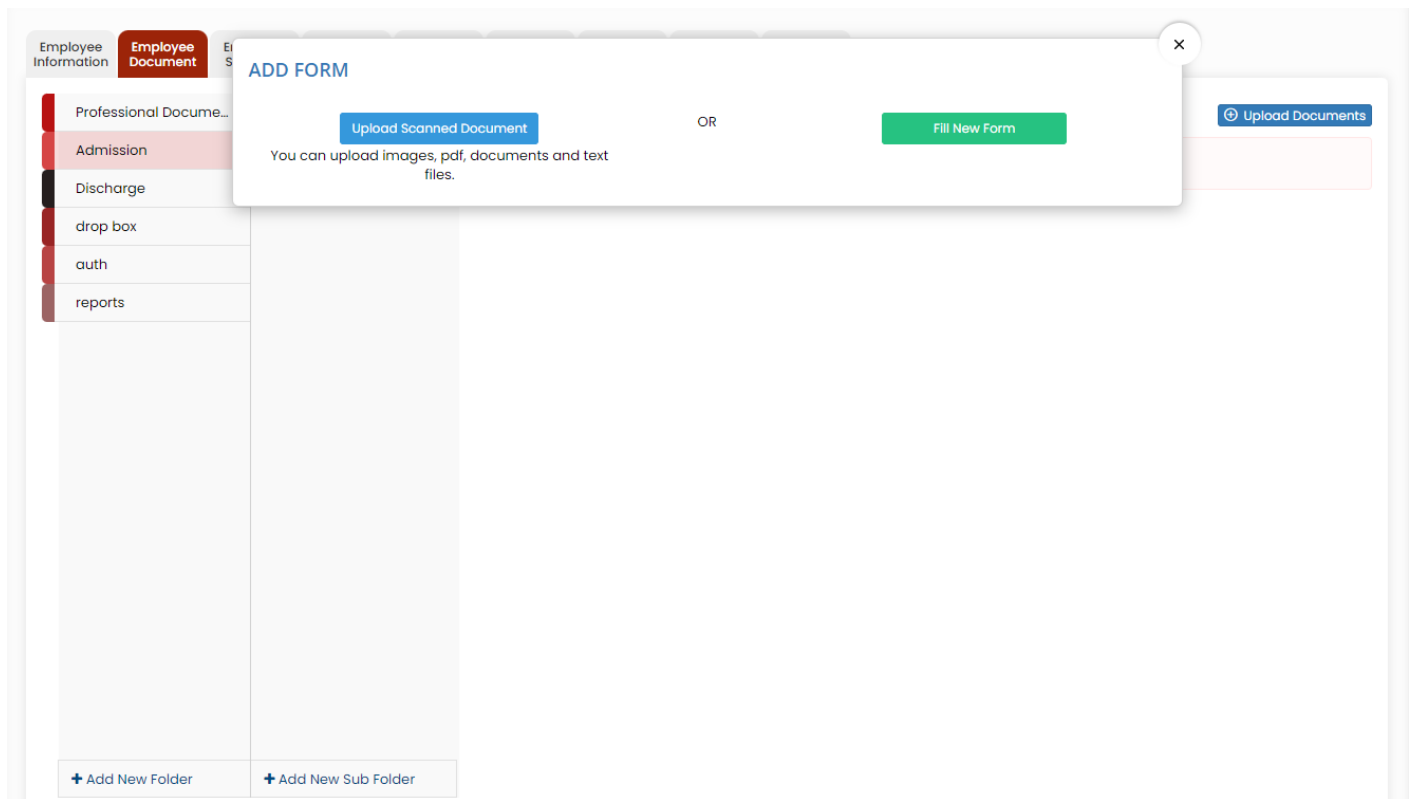
The Sub folder 2023 is now added under folder name Discharge to upload the required documents of the Employee.



## Uploading Documents

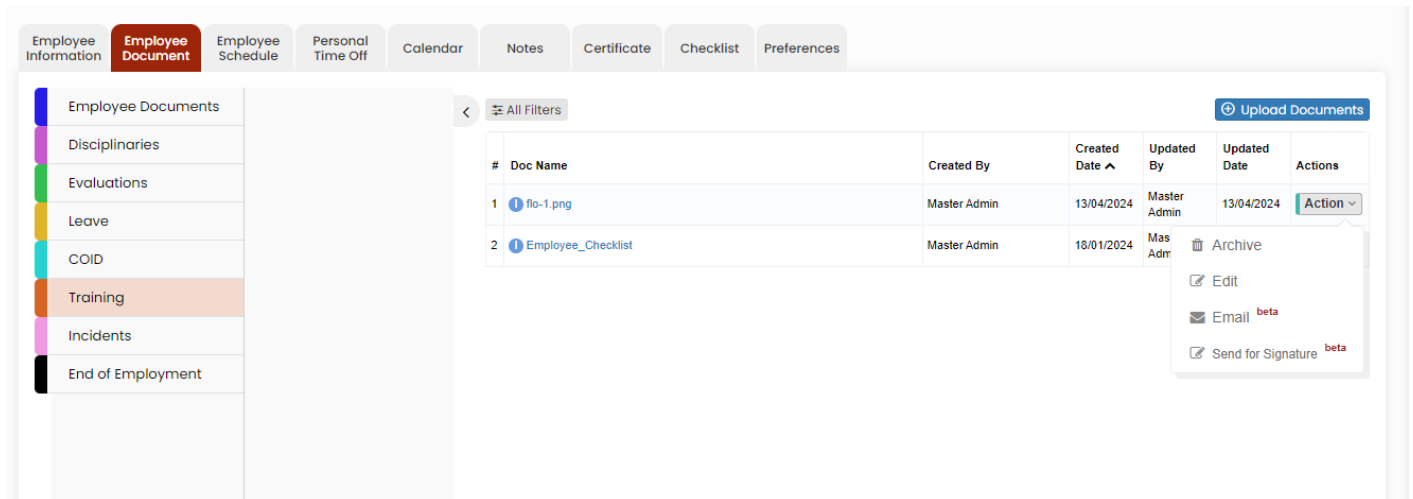
To upload the documents, select the folder name and click Upload documents.

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



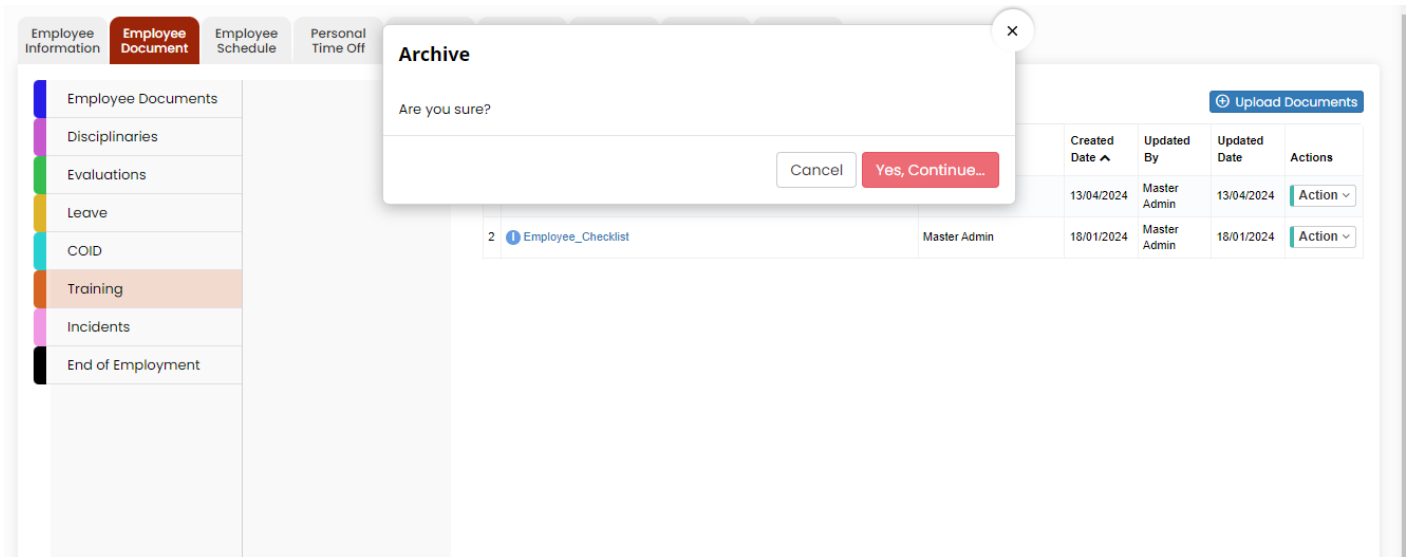
The Scanned documents can be uploaded using the option Upload Scanned Document option. The forms in the system can be uploaded using Fill New Form option.

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

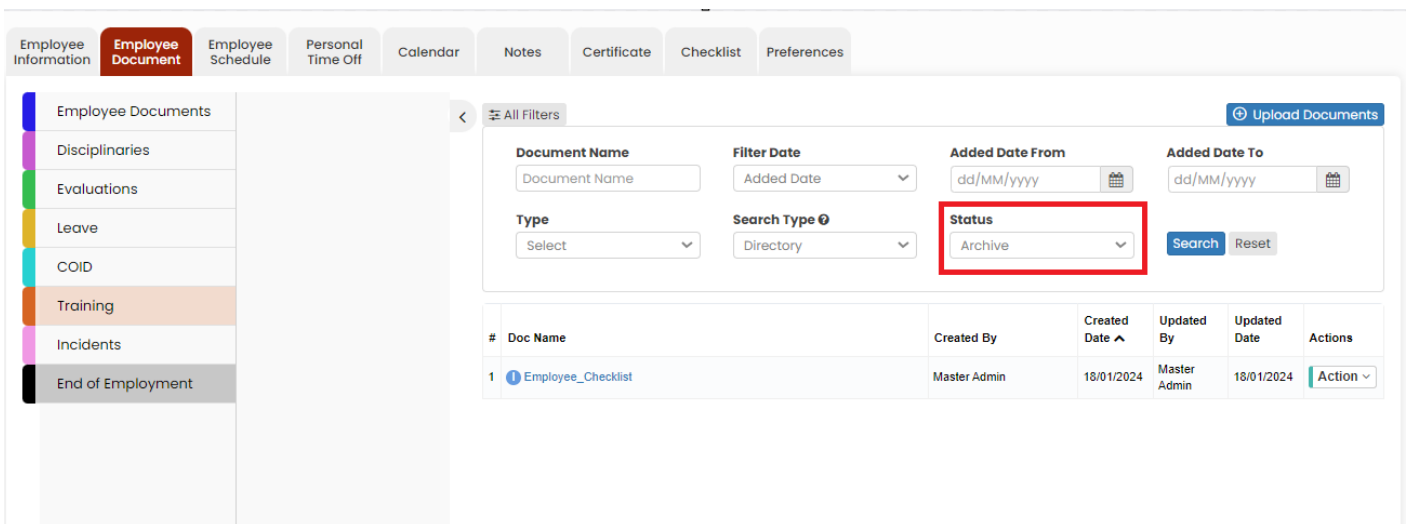


## Archive option

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

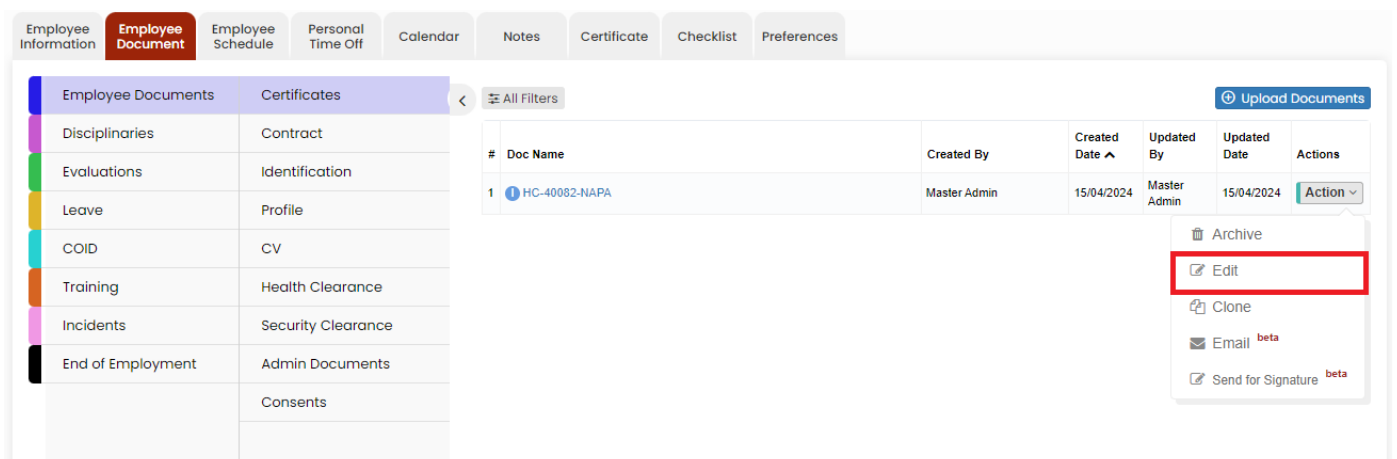


The document is now deleted from the Active documents list. To view the deleted document, Click All Filters option and select the Status Archive.



## Edit Option

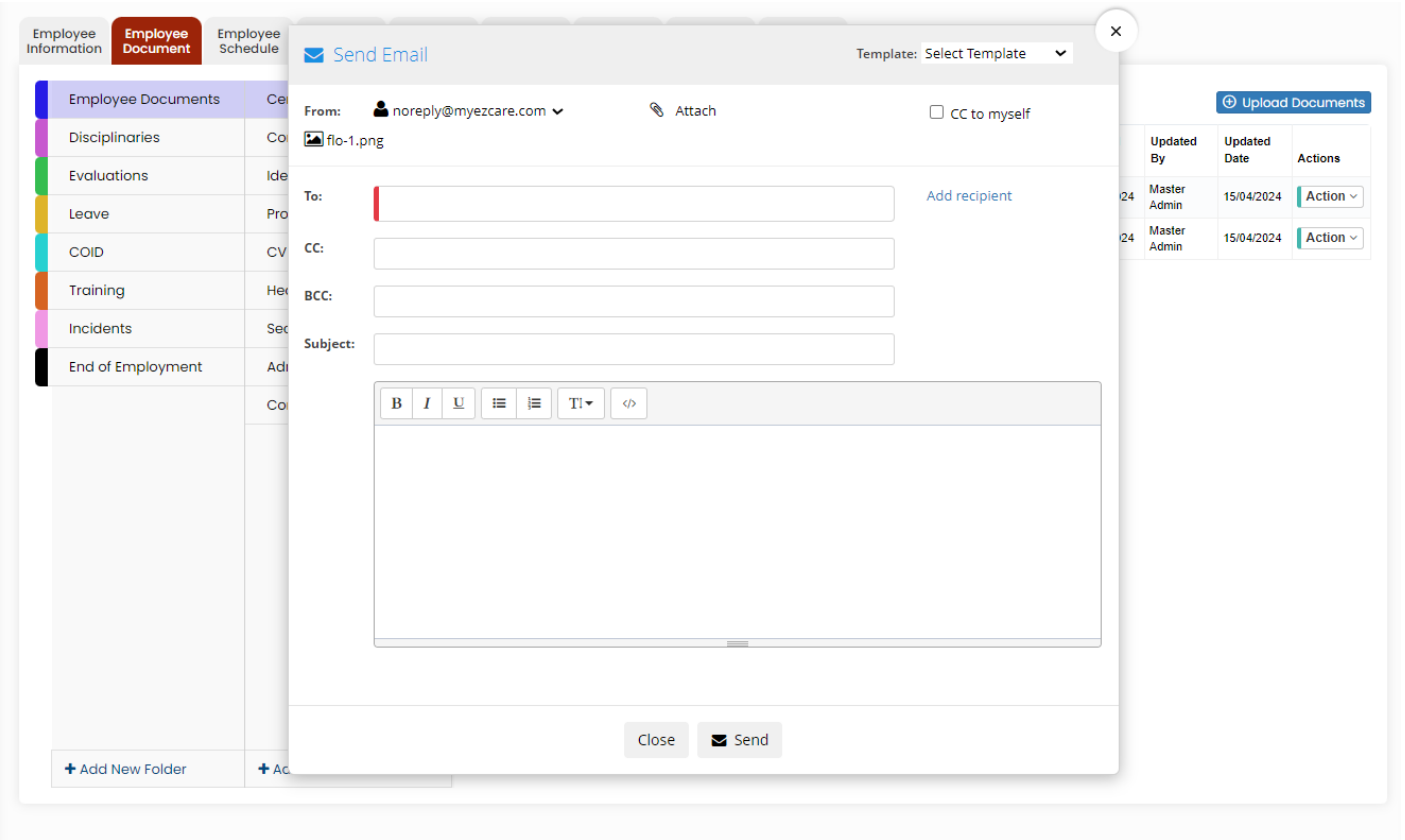
Click Edit option to edit the required information in the uploaded forms. Also we can edit the Document name of the uploaded scanned document using the Edit option.



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.



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

Disciplinaries

Evaluations

Leave

COVID

Training

Incidents

End of Employment

Contract

Identification

Profile

CV

Health Clearance

Security Clearance

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

The Signature updated document will be visible under the folders.

Employee Docum...

Disciplinaries

Evaluations

Leave

COD

Training

Incidents


End of Employme...


+ Add New Folder


+ Add New Sub Folder


Please Enter 42 Characters Only


Goals: KEEP PATIENT & ENVIRNONMENT 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:  
  
✕ Clear

Date:  
MM/DD/YYYY 

CHHA Signature:  
  
✕ Clear

Date:  
MM/DD/YYYY 

Patient Signature:  
  
✕ Clear

Date:  
MM/DD/YYYY 

Save

Cancel

PDF

Revision #15

Created 7 October 2023 18:11:42 by Thamarai

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