

# 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

Clock-In-Out00:00:00?

HOME CAREMASTER

MY PROFILE

ROLE & PERMISSION

ORGANIZATION SETTINGS

BILLING

LOG OUT

3Total Schedule

1Inprogress

1Missed Schedule

1Complete

0Over Time

2Active Patient

2Not Scheduled

0Unread Messages

0Pending Time Sheet

0Prior Auth. Expiring

0Prior Auth. Expired

CLOCK IN / CLOCK OUT

TOTAL SCHEDULE - 3

INPROGRESS - 1

MISSED - 1

COMPLETE - 1

EmployeeEmployee

ServiceService

LocationLocation

Time Slot(s)Time Slot(s)

StatusStatus

Start Date10/13/2023

End Date10/13/2023

Search

Reset

View Map

Broadcast

	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

CancelSave

My Profile



Upload Profile Image

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

First Name\*

Mister

Middle Name

Middle Name

Last Name\*

Admin

Email\*

support@myezcare.com

Work Phone\*

(000) 000-0000

Mobile Phone\*

(000) 000-0000

Username\*

me-admin

Password

Password

Confirm Password

Confirm Password

Security Question\*

What is your favorite color?

Security Answer\*

Red

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

PCA/CNA

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

Clinical Team

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

Permissions

Mobile App Permissions

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

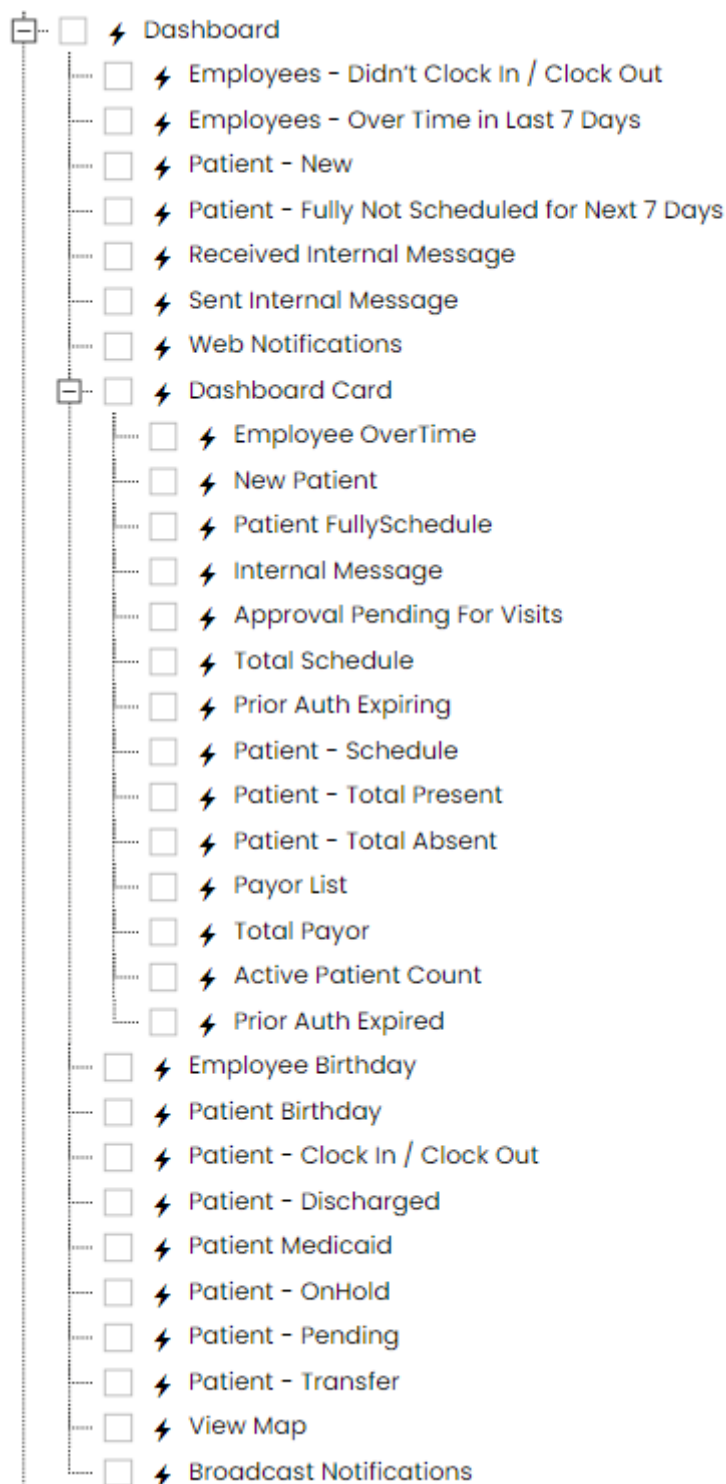
Employee Attendance

Can Approve Visits

Save

**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.



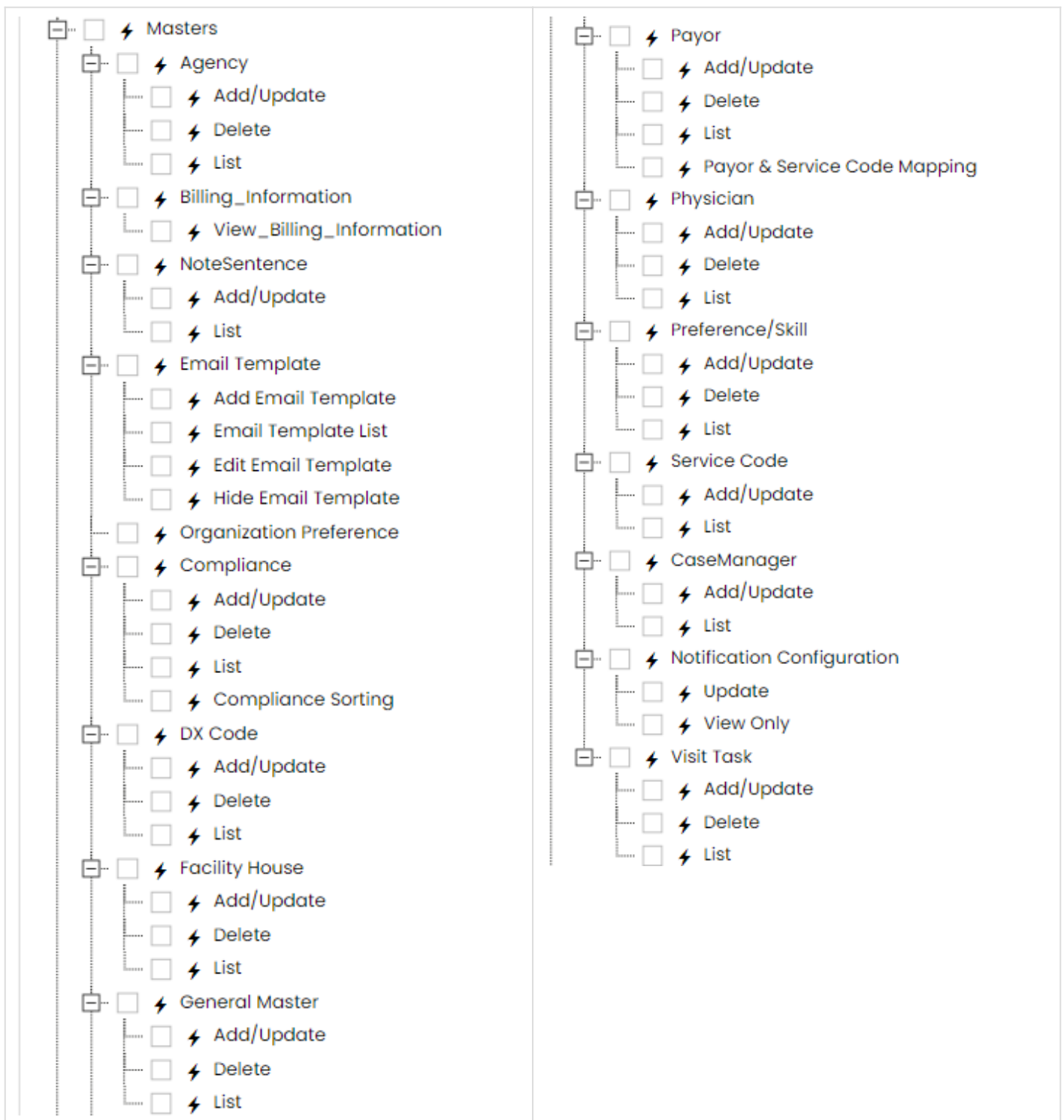
## Patient

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.



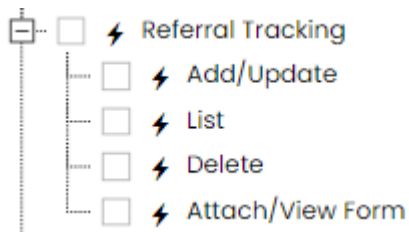
## Masters - Settings

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.



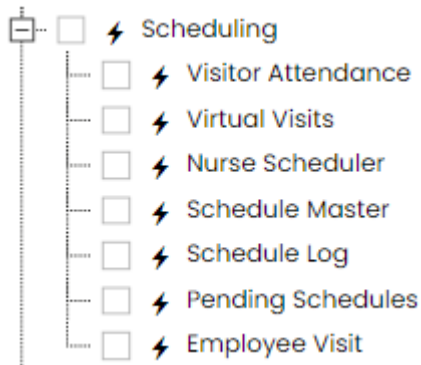
## Referral Tracking - Prospects

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.



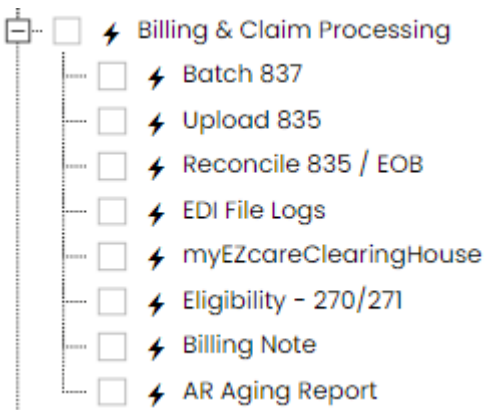
## Scheduling

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.

Organization Settings

Forms Library

Cancel

Save

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

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

**Billing Provider City**  
Billing Provider City

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

**NPI Number**  
NPI Number

**State**  
State

**Billing Provider Address**  
Billing Provider Address

**Zipcode**  
XXXXXX

**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

Save

Cancel


# Billing

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

INVOICE LIST						
<div>Refresh</div>						
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





## Announcement

### What's new in Ver. 2.1.36

Posted On: 6/24/2023

**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
MISSSED - 2
COMPLETE - 0

Employee

Service

Location

Time Slot(s)

Status

Start Date

End Date

☐

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	8978766555	10/10/2023 08:00 am	10/10/2023 01:00 pm	<span style="color: red;">✗</span>	<span style="color: red;">✗</span>	<a href="#">Change Schedule</a>
<input type="checkbox"/>	waris, itaza	Hernandez, Brown	Personal Care	8978766555	10/10/2023 08:00 am	10/10/2023 11:00 pm	<span style="color: red;">✗</span>	<span style="color: red;">✗</span>	<a href="#">Change Schedule</a>

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

Home icon highlighted with a red arrow.

**Dashboard Metrics:**

- 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
- Prior Auth. Expired: 1

**Summary Bar:** CLOCK IN / CLOCK OUT TOTAL SCHEDULE - 2 INPROGRESS - 0 MISSED - 2 COMPLETE - 0

**Filters:** Employee, Service, Location, Time Slot(s), Status, Start Date, End Date

**Actions:** Search, Reset, View Map, Broadcast

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.

Notification bell icon highlighted in the top right corner.

## Care Type

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

Dropdown menu for Care Type is open, showing options: HOME CARE, CASE MANAGEMENT, DAY CARE, RAL.

Revision #27

Created 13 October 2023 18:41:13 by Thamarai

Updated 17 February 2024 16:50:42 by Thamarai