

Employee

Our system allows for the secure and centralized storage of all employee information and documents. Accessible only to authorized personnel, this feature ensures data confidentiality and compliance with data protection regulations.

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New Employee

A new employee in home health care is a recently hired individual who provides healthcare services in a patient's home. Their role includes assisting with daily tasks, medication administration, and health monitoring.

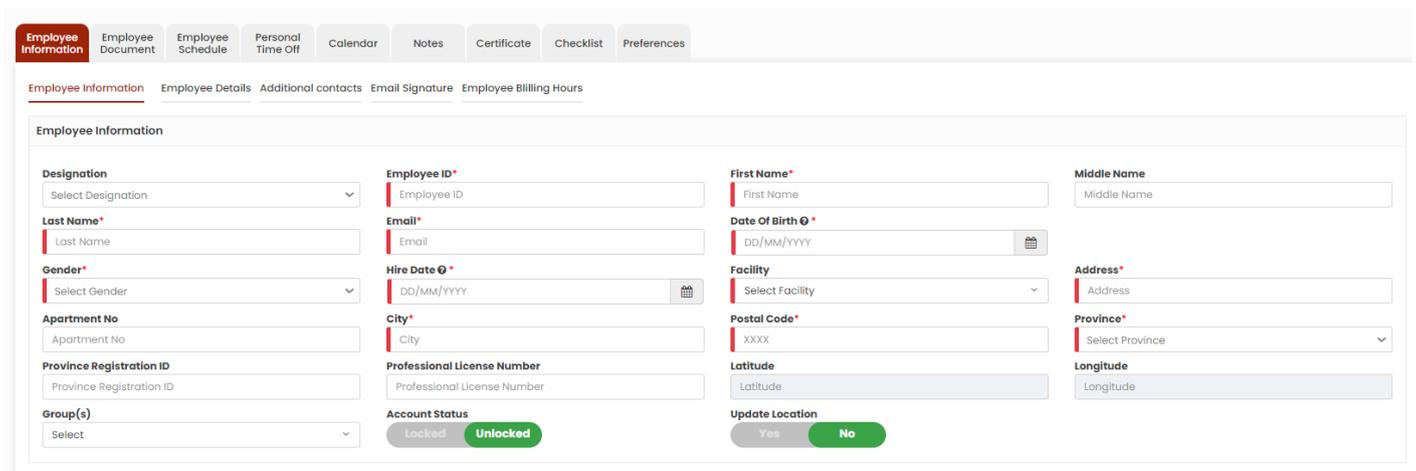
Adding Employee Information

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.

1. Locate the +Add option under Employee Tab.



2. Click +Add option to update the Employee Information. Enter the Employee information in the required field and Click Next option.

A screenshot of a web application showing the "Employee Information" form. The form is divided into several sections with labels and input fields. The "Employee Information" section includes fields for Designation (dropdown), Last Name*, Gender*, Apartment No, Province Registration ID, and Group(s) (dropdown). The "Employee ID*" field is a text input. The "Email*" field is a text input. The "Hire Date*" field is a date picker. The "City*" field is a text input. The "Professional License Number" field is a text input. The "Account Status" section has two buttons: "Locked" (disabled) and "Unlocked" (active). The "First Name*" field is a text input. The "Date Of Birth*" field is a date picker. The "Facility" field is a dropdown menu. The "Postal Code*" field is a text input. The "Latitude" field is a text input. The "Update Location" section has two buttons: "Yes" (disabled) and "No" (active). The "Middle Name" field is a text input. The "Address*" field is a text input. The "Province*" field is a dropdown menu. The "Longitude" field is a text input.

Account Status: Locked / UnLocked

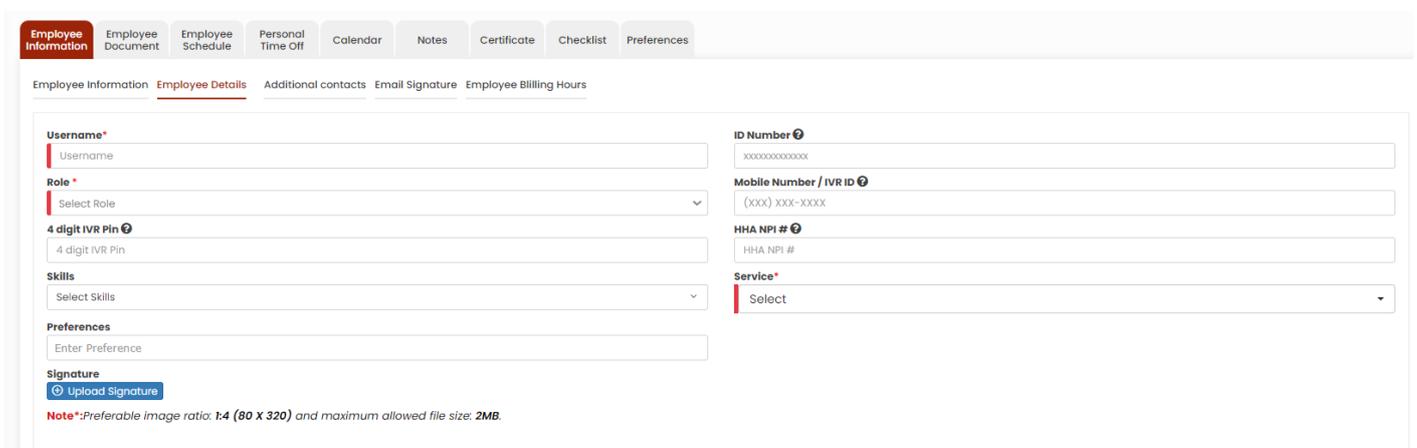
If the Account of any Employee has been locked due to incorrect password in Web Application and Myezcare EVV Mobile App, the Super Admin or Administrator who has the access for adding and

editing the employee details can unlock the account in Employee Information.

Update Location: Yes / No

If the Employee facing difficulties in Clocking In at patient's home due to Geographical Coordinates Mismatch (usually when the Apartment Complex is Big), the Super Admin or the Administrator having access in Employee Information can give access in Update Location Yes for the Employee to update the location of the employee in Myezcare EVV mobile app. The user can deny the access of Update Location later when the Employee has successfully Clocked In.

3. The Employee details screen appears. In Employee details, update the username with the format (first name initials and last name). Also enter the 4 digit IVR Pin which is used to login using Mobile Application for each employee. The user can add the signature of the Employee by using the option Upload Signature. After completing the required field, Click Next option.

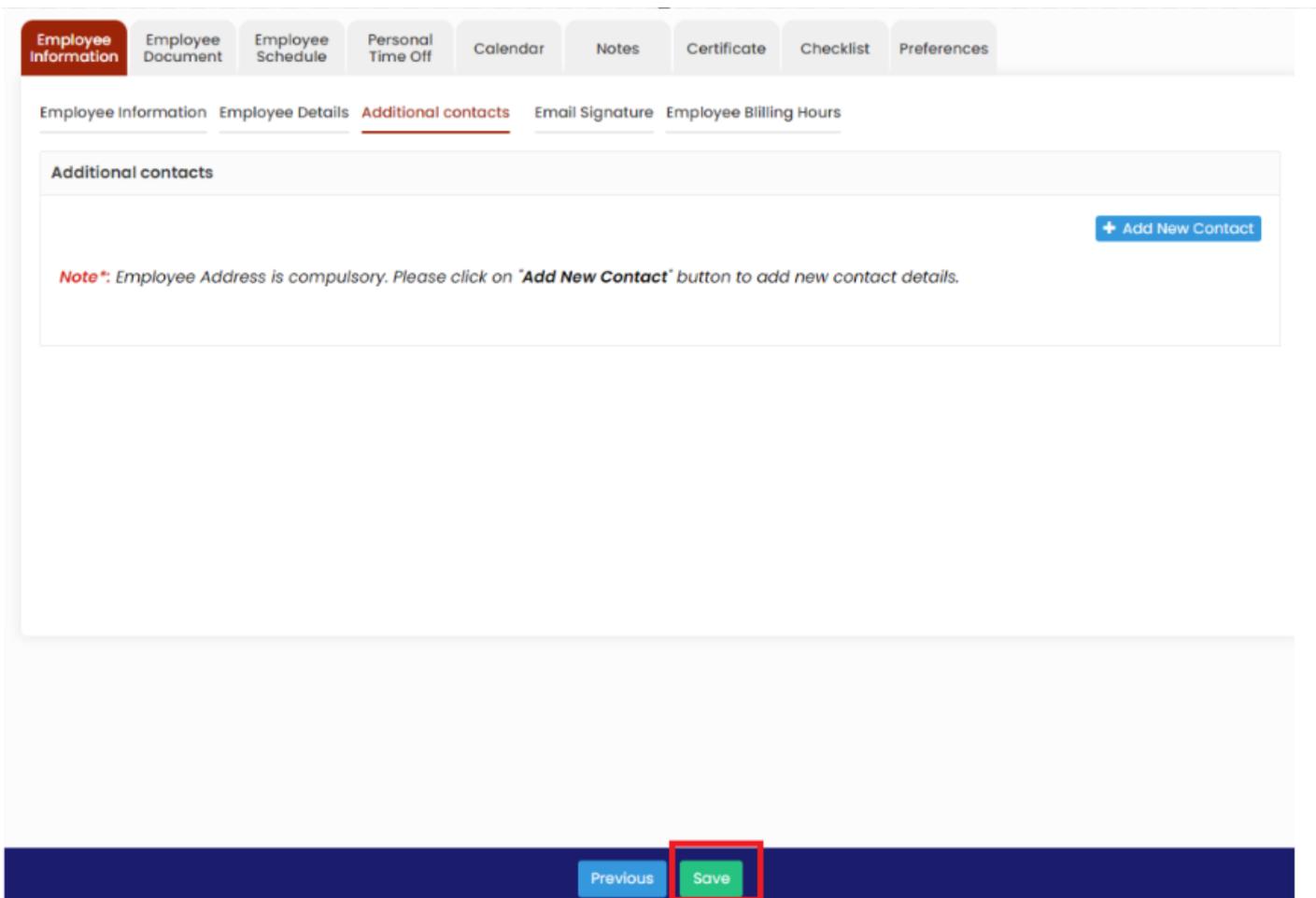


The screenshot shows the 'Employee Details' form with the following fields and options:

- Username***: Text input field.
- Role***: Dropdown menu with 'Select Role' selected.
- 4 digit IVR Pin***: Text input field.
- Skills**: Dropdown menu with 'Select Skills' selected.
- Preferences**: Text input field with 'Enter Preference' placeholder.
- Signature**: 'Upload Signature' button.
- ID Number**: Text input field with placeholder 'xxxxxxxxxxxx'.
- Mobile Number / IVR ID**: Text input field with placeholder '(XXX) XXX-XXXX'.
- HHA NPI #**: Text input field with placeholder 'HHA NPI #'.
- Service***: Dropdown menu with 'Select' selected.

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

4. The Additional Contacts screen appears in which the user can update the additional contact details of the employee by using the +Add New Contact option and Click Save button.



Editing Employees Information

To navigate through the process of editing Employee information, follow these steps:

1. Locate List option under Employee Tab



2. Select the Employee from the list to edit the information. Click the Edit option under Action on the right side of the screen for editing the Employee information or click on the Employee name.

LIST OF EMPLOYEES

Refresh Active Select + Add Employee

Employee ID: Employee ID Name: Name Email: Email Designation: Designation Role: Select Role Mobile Number: Mobile Number Group(s): Select Search Reset

<input type="checkbox"/>	Employee ID	Name ^	Email	Designation	Role	Mobile Number	Group(s)	App installed	Action
<input type="checkbox"/>	008	Tanya Catts	101hunter101sam@gmail.com	Registered Nurse	Registered Nurse	(666) 666-6666	Demo ALEX	✗	
<input type="checkbox"/>	E01	David D	david@myezcare.com	Administrator	Super Admin	(343) 535-3535		✗	
<input type="checkbox"/>	Maria456	Maria Garcia	Maria@gamil.com	Registered Nurse	HHA	(789) 787-9678		✗	
<input type="checkbox"/>	William1122	William Garcia	William@gmail.com	PCA/CNA	Office Assistant	(789) 787-8778		✓	
<input type="checkbox"/>	James789	James Johnson	James@gmail.com	Service Facilitator	Clinical Team	(457) 878-7887		✗	
<input type="checkbox"/>	DEMO-12	Moshe Lubel	moshe@zrpath.com	Administrative	Super Admin	N/A		✗	
<input type="checkbox"/>	12398	fayyaz m	fahadneymarjr@gmail.com	Administrator	PCA/CNA	(031) 311-1019		✗	
<input type="checkbox"/>	James123	James Smith	jamesmith@gmail.com	Administrator	Administrator	(123) 456-7899		✗	
<input type="checkbox"/>	Robert321	Robert Smith	Robert@gmail.com	Administrative	Clinical Team	(656) 565-6665		✗	
<input type="checkbox"/>	E-Demo-001	Alex Toth	paymagnet@gmail.com	Administrator	Administrator	(347) 480-9560	Demo ALEX	✓	

3. The following screen appears to edit the required information of the Employee.

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

Employee Information Employee Details Additional contacts Email Signature Employee Billing Hours

HOMELEIGH NURSING SERVICES

test demo
Caregiver
EMP ID : e-6

Signature

Powered by Myezcare LLC Print

Employee Information

Designation Caregiver	Employee ID* e-6	First Name* test	Middle Name Middle Name
Last Name* demo	Email* akamal@myezcare.com	Date Of Birth * 01/01/1990	
Gender* Female	Hire Date * 01/01/2023	Facility Test	Address* 1547 Elevado Street
Apartment No Apartment No	City* Los Angeles	Postal Code* 9002	Province* Eastern Cape
Province Registration ID Province Registration ID	Professional License Number Professional License Number	Latitude 34.0869178	Longitude -118.2730831
Group(s) Select	Account Status Locked Unlock	Update Location Yes No	

Cancel
Next

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

Employee Information | **Employee Details** | Additional contacts | Email Signature | Employee Billing Hours

Username*
tdemo

Password
Password

Resend Registration Email

Role *
PCA/CNA

4 digit IVR Pin
1234

Skills
Select Skills

Preferences
Enter Preference

Signature
Upload Signature

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

ID Number
xxxxxxxxxxxxxxxx

Confirm Password
Confirm Password

Mobile Number / IVR ID
(265) 548-7989

HHA NPI #
HHA NPI #

Service*
Respite Care, Personal Care Services, Respite Care, ...

Previous Next

Click Update option in Additional contact screen to update the edited information for the Employee.

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

Employee Information Employee Details **Additional contacts** Email Signature Employee Billing Hours

Additional contacts

[+ Add New Contact](#)

Note: Employee Address is compulsory. Please click on "Add New Contact" button to add new contact details.*

Contact Type	Name	Phone	Address	Email	Added By	Actions
Relative	new test, testing	(146) 549-8797	po box 1547, Stellenbosch, EC- 7600	newtest@gmail.com	Master, Admin	✎ ✕

[Previous](#) [Update](#)

Resend Registration Email

The option Resend Registration Email in Employee Details is used to send Registration Email to Employee to access the Web Application. In the Registration Email, Click Set Password option to create the password for the Username mentioned in the email and access the application.

Username*

tdemo

Password

Password

Resend Registration Email

Role*

PCA/CNA

4 digit IVR Pin ?

1234

Skills

Select Skills

Preferences

Enter Preference

Signature

Upload Signature

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

Signature

ID Number ?

xxxxxxxxxxxx

Confirm Password

Confirm Password

Mobile Number / IVR ID ?

(265) 548-7989

HHA NPI # ?

HHA NPI #

Service*

Respite Care, Personal Care Services, Respite Care, ...



myezcare
simple yet powerful

Hello Williams Alexander,

Your account is created on MYEZCARE LLC. Followings are your account details. Please use username & password to log in.

UserName: **five**

IVR Code:

IVR Pin: **1234**

Note: To create your Password please click on the below link.

<http://pallav.myezcare.com/k/mz0NrvH1vA8Fhn6SJwnhTA2>

OR

Set Password

Thank You.

Email signature

The user can update the email signature by using the email signature option. Update the required information and Click Save option.

Employee Tab>>List>>Employee name>>Email signature

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

Employee Information | Employee Details | Additional contacts | **Email Signature** | Employee Billing Hours

Email Signature

Name*

Description

B **I** **U** **T1**

Testing

[Save](#)

Employee Billing Hours

In Employee Billing Hours option, the user can update the Regular working hours, Regular Working / Hour Rate and Overtime Rate of the employee and click Save option.

Employee Tab>>List>>Employee name>>Employee Billing Hours

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

Employee Information | Employee Details | Additional contacts | Email Signature | **Employee Billing Hours**

Employee Working Hours/Rate

Regular Working Hours per **Day**

Regular Working/Hour Rate

Overtime/Hour Rate

[Save](#) [Cancel](#)

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.

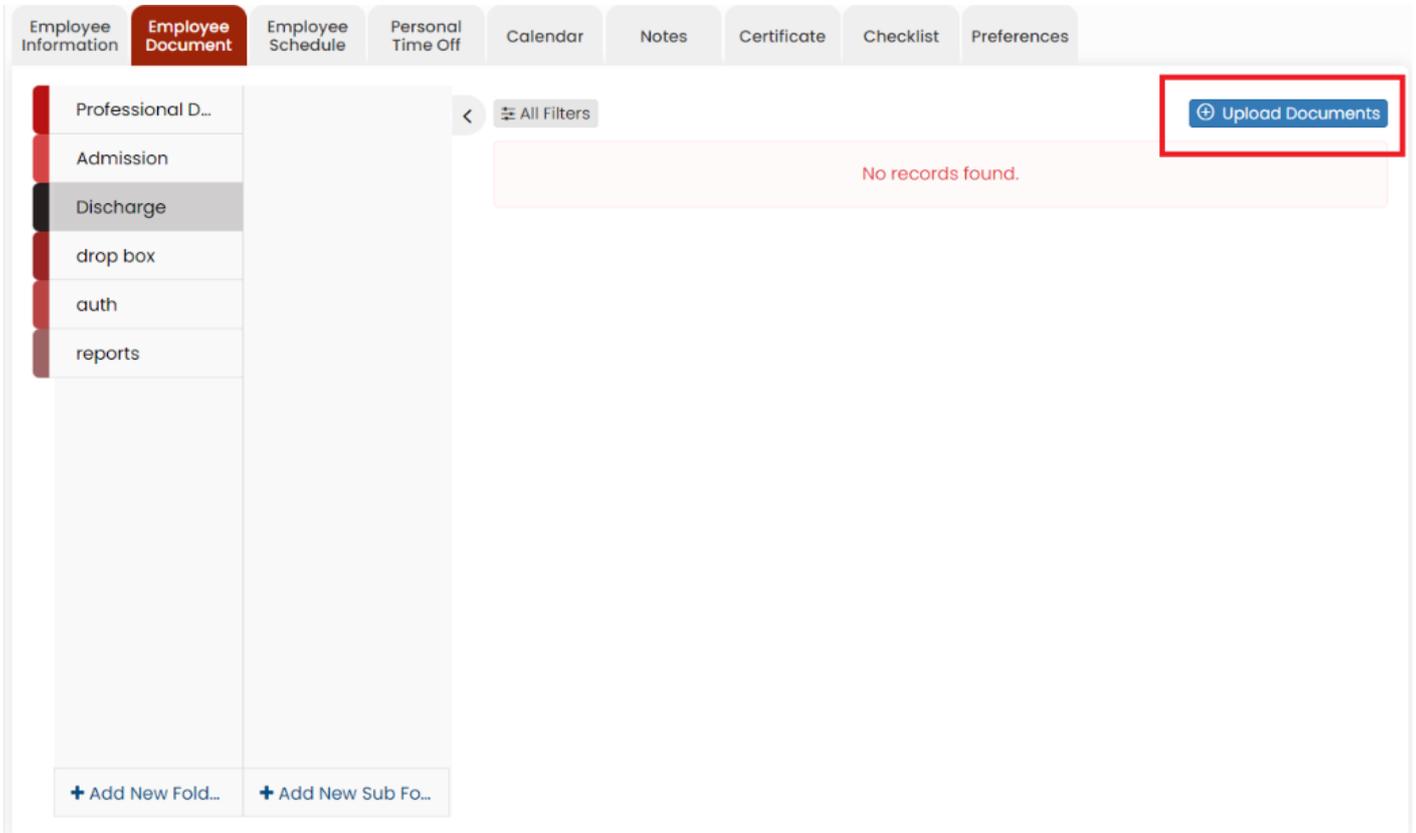
Uploading Employee Document

The required documents of the Employee can be uploaded in the system by using the option Employee Document.

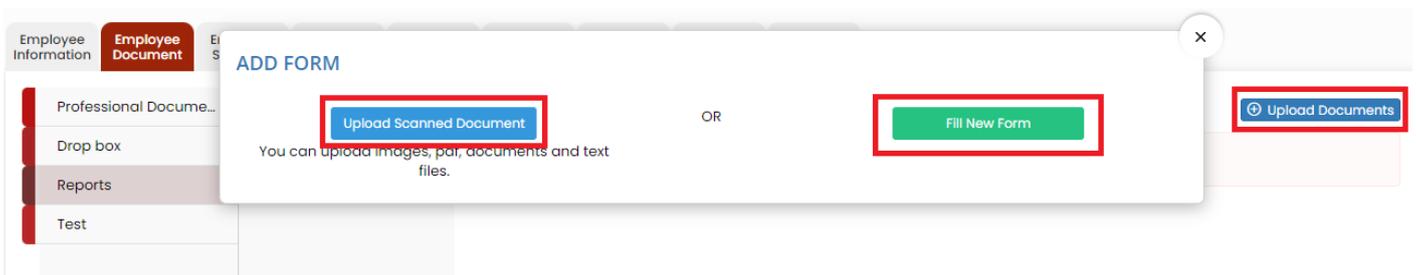
Employee Tab >> List >> Select Employee >> Employee Document

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...'.

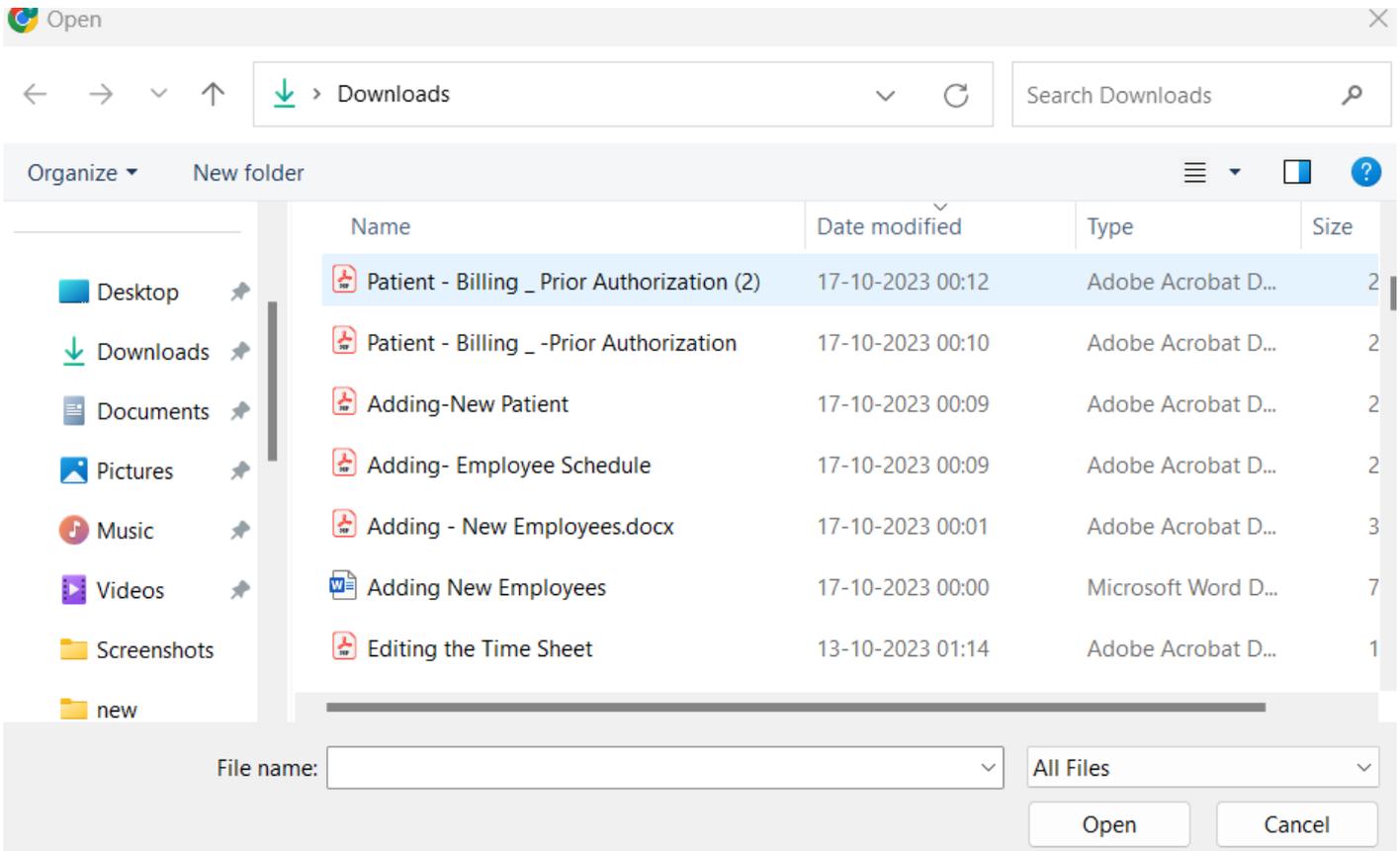
Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.



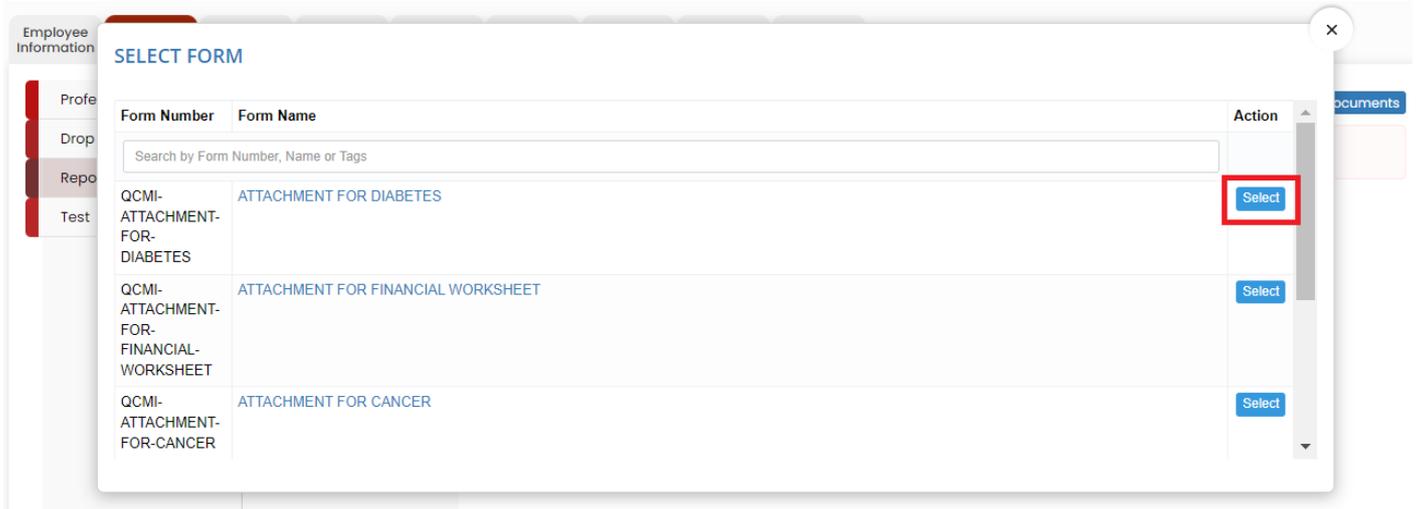
When we click upload documents, the following screen appears. The user can choose the options whether to Upload Scanned Documents or to Fill New form.



Upload Scanned Document option allows the user to upload the scanned documents as per requirement.



Fill New Form option allows the user to select the form from the list.



After selecting the form, the following pop-up appears whether to Map Form. Click Yes option if the user wants to preserve this preference for future use, if not Click No. The user can now edit the form and click save option.

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

Professional Docume... 2023

Drop box

Reports

Test

+ Add New Folder + Add New Sub Folder

Advanced Directive Acknowledgment

Please check all that are applicable

The federal and state laws regarding Advance Directives have been explained to me and I have received materials about these laws from myEZcare

I have formulated Advance Directives on Date MM/DD/YYYY

Please Enter 60 Characters Only

I have not formulated Advance Directives.

I have executed a Power of Attorney with medical decision-making authority to:

Please Enter 30 Characters Only.

I have been advised to give a copy of my Advance Directives to my physician.

I understand that the Home Health Care Agency does not require that I develop Advance Directives in order to receive care.

I understand that I can make changes to my Advance Directives at any time.

Date MM/DD/YYYY

Date MM/DD/YYYY

Patient Signature

Nurse Signature

Clear Clear

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

Professional Docume... 2023

Drop box

Reports

Test

+ Add New Folder + Add New Sub Folder

I have been advised to give a copy of my Advance Directives to my physician.

I understand that the Home Health Care Agency does not require that I develop Advance Directives in order to receive care.

I understand that I can make changes to my Advance Directives at any time.

Date MM/DD/YYYY

Date MM/DD/YYYY

Patient Signature

Nurse Signature

Clear Clear

As does not have decision making capacity, I as the

Please Enter 30 Characters Only. Please Enter 25 Characters Only.

(Patient Name) (Name and Relationship to Patient) representative, attest to the above information.

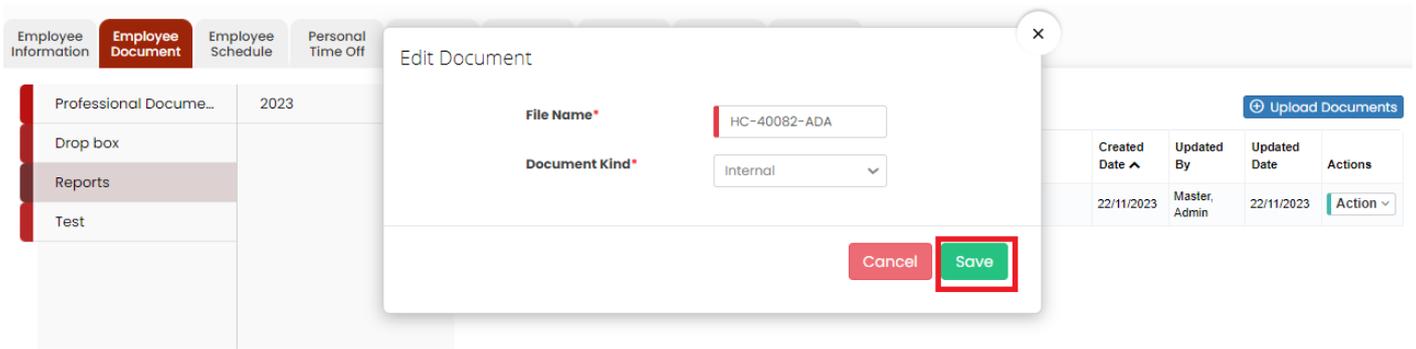
Testing

(Representative for Patient Signature)

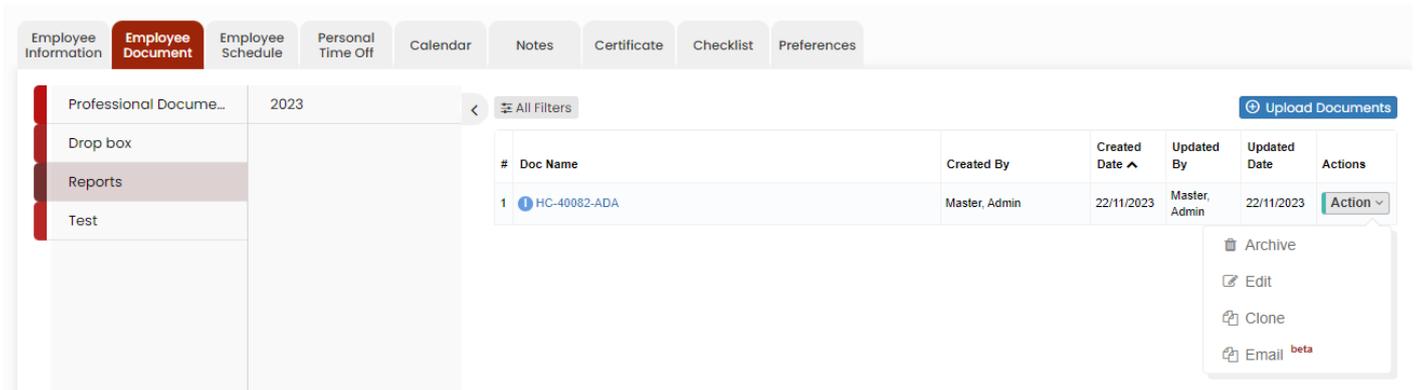
Date 11/2/2023

Clear

The following screen appears, click Save option.



Under Action, we have the following options like Archive, Edit, Clone and Email.

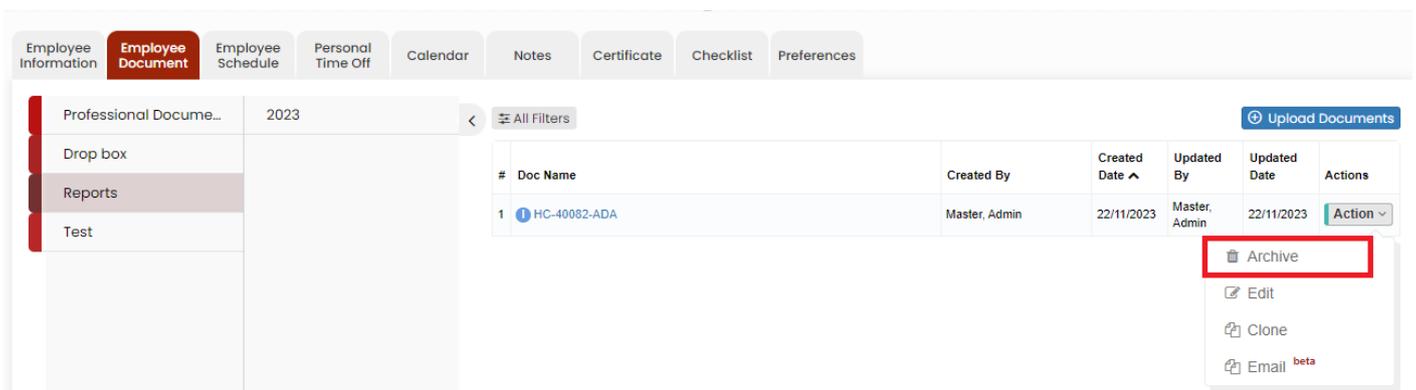


The features under Actions are :

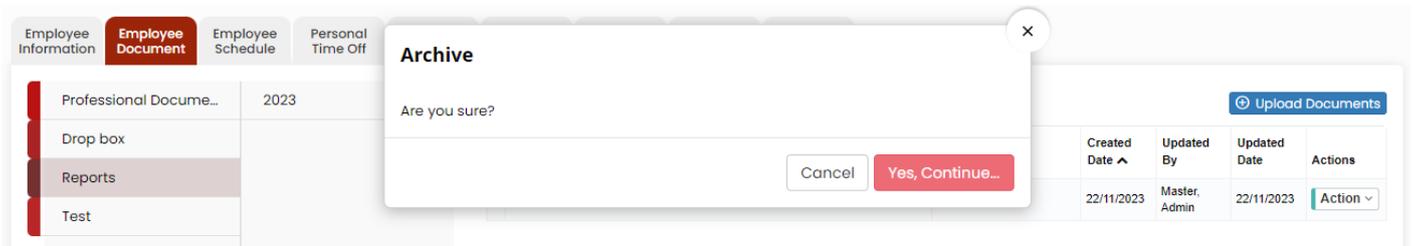
- Archive
- Edit
- Clone
- Email

Archive

To Delete the uploaded document, click Archive option under Actions.

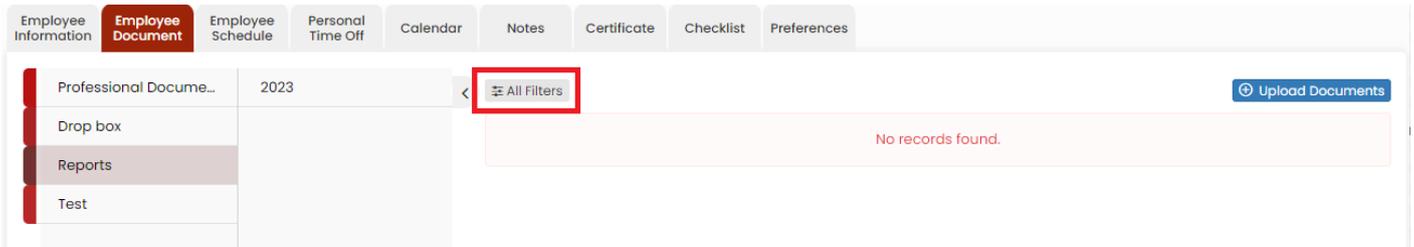


The following pop-up appears, click Yes to continue. The document will be deleted from the folder.

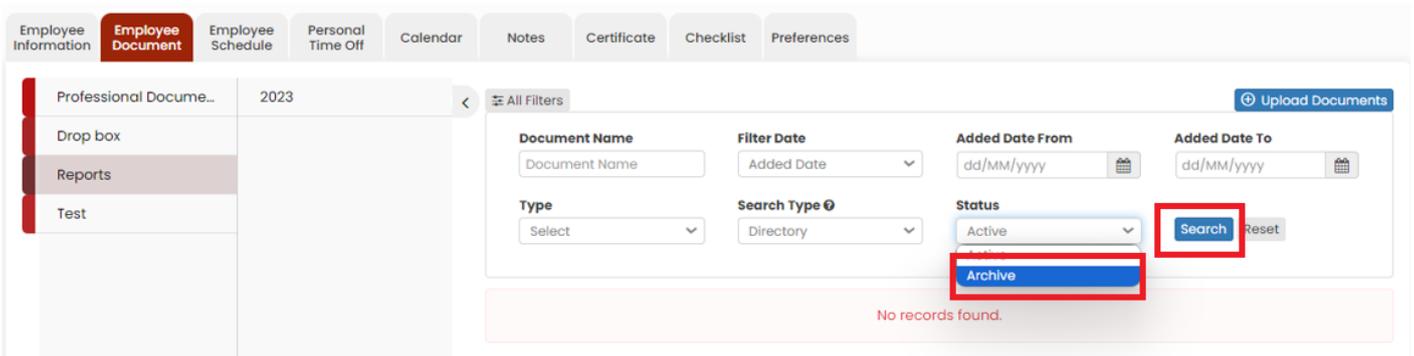


Restore deleted document

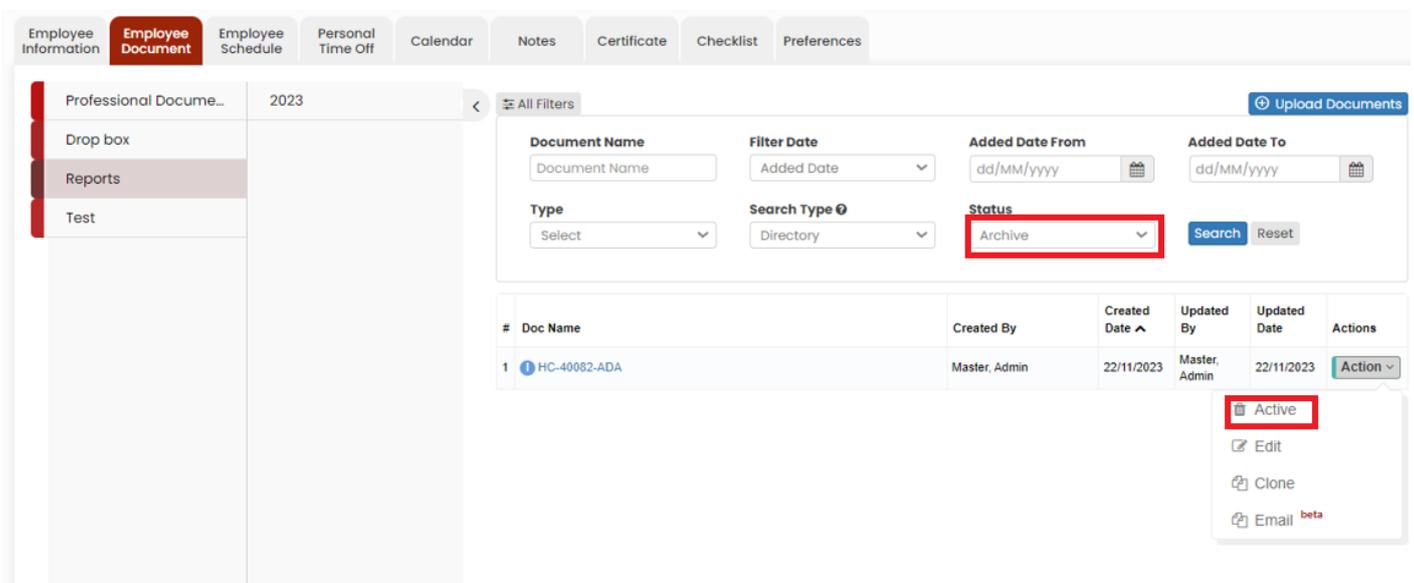
To Restore the deleted click All filters option.



Select the Status Archive and click Search option.



The deleted document is found in Archive Status. The user can click Active option under Action to Restore the deleted document.



The document is now restored under Active Status in the system.

The screenshot shows a web application interface for managing employee documents. At the top, there are navigation tabs: Employee Information, Employee Document (highlighted), Employee Schedule, Personal Time Off, Calendar, Notes, Certificate, Checklist, and Preferences. Below the tabs, there is a sidebar with a tree view containing 'Professional Docume...', 'Drop box', 'Reports', and 'Test'. The main content area displays a document titled 'Professional Docume...' for the year '2023'. A filter section is visible with fields for Document Name, Filter Date, Added Date From, and Added Date To. The Status dropdown menu is highlighted with a red box and set to 'Active'. Below the filters is a table with columns: #, Doc Name, Created By, Created Date, Updated By, Updated Date, and Actions. The table contains one row with the document ID 'HC-40082-ADA' and an 'Action' dropdown menu.

Edit

The Edit option is used to edit the information in the document. Click Edit option under Actions to make the changes in the document and click Save.

The screenshot shows the 'Advanced Directive Acknowledgment' form. At the top, there is a header with the logo and the text 'Advanced Directive Acknowledgment'. Below the header, the form title 'Advanced Directive Acknowledgment' is displayed. The main content area contains a section titled 'Please check all that are applicable' with four checkboxes and their corresponding text:

- The federal and state laws regarding Advance Directives have been explained to me and I have received materials about these laws from myEZcare
- I have formulated Advance Directives on Date
Please Enter 60 Characters Only
- I have not formulated Advance Directives.
- I have executed a Power of Attorney with medical decision-making authority to:
Please Enter 30 Characters Only.

- I have been advised to give a copy of my Advance Directives to my physician.
- I understand that the Home Health Care Agency does not require that I develop Advance Directives in order to receive care.
- I understand that I can make changes to my Advance Directives at any time.

Date	Date
<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>

Patient Signature	Nurse Signature
<input type="text"/>	<input type="text"/>
<input type="button" value="x Clear"/>	<input type="button" value="x Clear"/>

As <input type="text" value=""/>	does not have decision making capacity, I	<input type="text" value=""/>	as the
<small>Please Enter 30 Charactres Only.</small>		<small>Please Enter 25 Characters Only.</small>	
(Patient Name)	(Name and Relationship to Patient)	representative, attest to the above information.	
<input type="text"/>	<input type="text"/>		

(Representative for Patient Signature)	Date
<input type="text"/>	<input type="text" value="11/2/2023"/>
<input type="button" value="x Clear"/>	<input type="button" value="Calendar"/>

<input type="button" value="Save"/>	<input type="button" value="Cancel"/>	<input type="button" value="PDF"/>
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Clone Option

The Clone option is in progress within the application.

Email - Beta (This is an optional beta feature, which may not be stable at this time. Use it at your own risk and we appreciate your valuable feedback to improve the user experience.)

The Email option is used to send documents to patients and to get the electronic signature from the patient. Enter the required fields in the Send Email screen and Click Send option. The user can also send Attachments with the email.

Most of the options are under Beta in Send Email screen.

Send Email

Template: Select Template

From: noreply@myezcare.com

Attach

CC to myself

To: test123@gmail.com

Add recipient

CC:

BCC:

Subject: Test Demo

B *I* U T1

Testing 123

Close

Send

The patient will receive the email from the Employee to sign the document. The patient has to click Open Form option to Sign the document.

Hello ,

Note: To Open digital form please click on the below link.

[http://\[redacted\].myezcare.com/hc/form/OrbeonLoadHtmlForm?FormURL=/ezcare/HC-40082-ADA/edit/76ebc469f9744c042e6f51cc7c9775f4382dedbb?form-version=1&orbeon-embeddable=true&OrgPageID=ReferralDocument&IsEditMode=true&ReferralID=0&EmployeeID=52&FormName=\[object HTMLInputElement\]&OrganizationId=40177&UserId=47](http://[redacted].myezcare.com/hc/form/OrbeonLoadHtmlForm?FormURL=/ezcare/HC-40082-ADA/edit/76ebc469f9744c042e6f51cc7c9775f4382dedbb?form-version=1&orbeon-embeddable=true&OrgPageID=ReferralDocument&IsEditMode=true&ReferralID=0&EmployeeID=52&FormName=[object HTMLInputElement]&OrganizationId=40177&UserId=47)

OR

Open Form

Thank You.

After the signing the document, it has to be saved using the the Save option in the document. Now, the Employee can open the signed document in the application.

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.

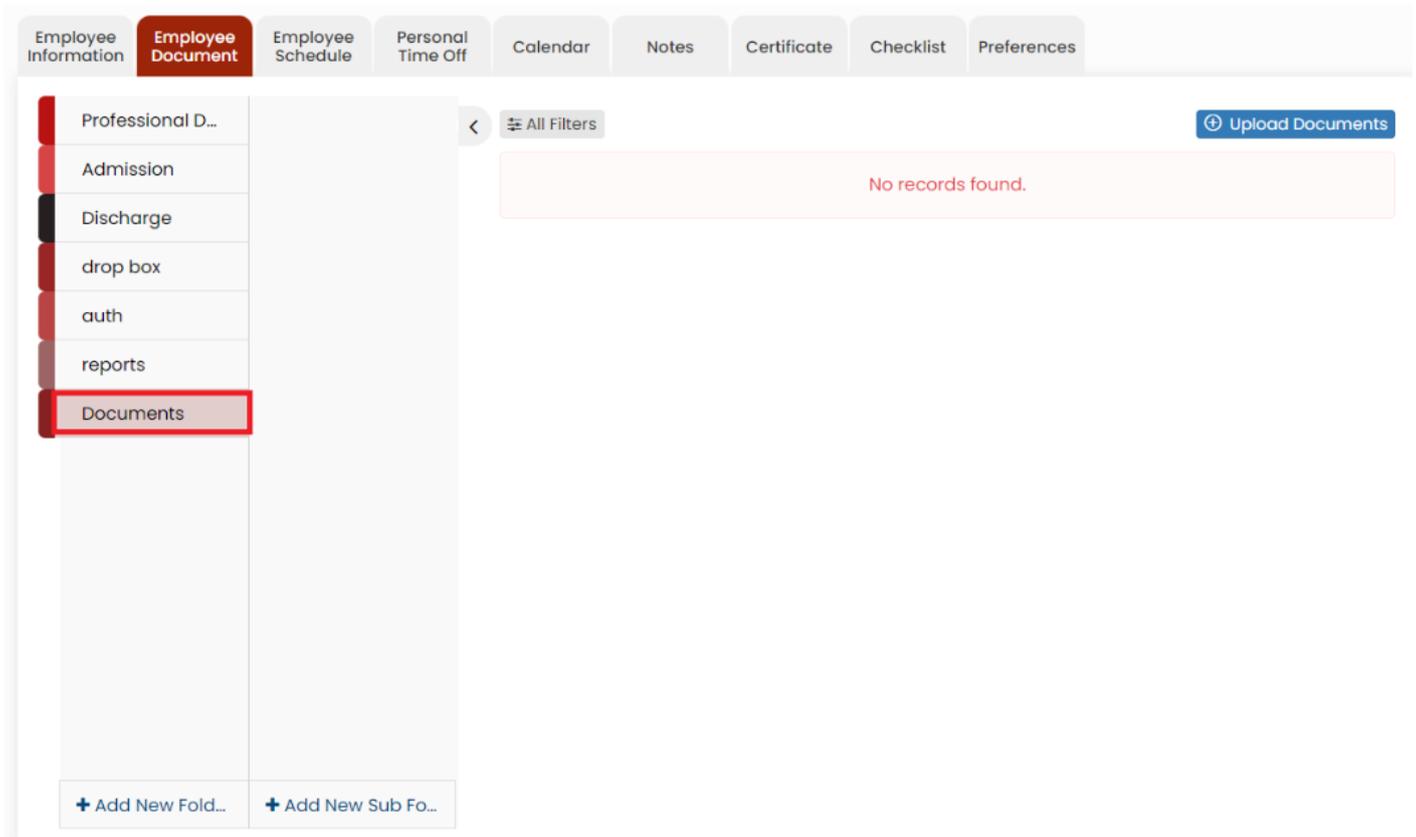
Also the user can select the Roles to access the document and click Save option.

The screenshot shows the 'Add Section' dialog box in an application. The dialog is overlaid on a sidebar menu with options like 'Professional D...', 'Admission', 'Discharge', 'drop box', 'auth', and 'reports'. The 'Add Section' dialog has the following fields and options:

- Documentation Type ***: A dropdown menu with 'Internal' selected.
- Section Name ***: A text input field with a placeholder 'Name'.
- Color Scheme ***: A color selection field with a placeholder 'Color Scheme'.
- Is Time Based Ⓞ ***: A dropdown menu with 'Select' selected.
- Attached Template Form**: A section with a 'Show To All' label and two buttons: 'Yes' (disabled) and 'No' (active).
- 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.

At the bottom of the sidebar, there are two buttons: '+ Add New Fold...' and '+ Add New Sub Fo...'.

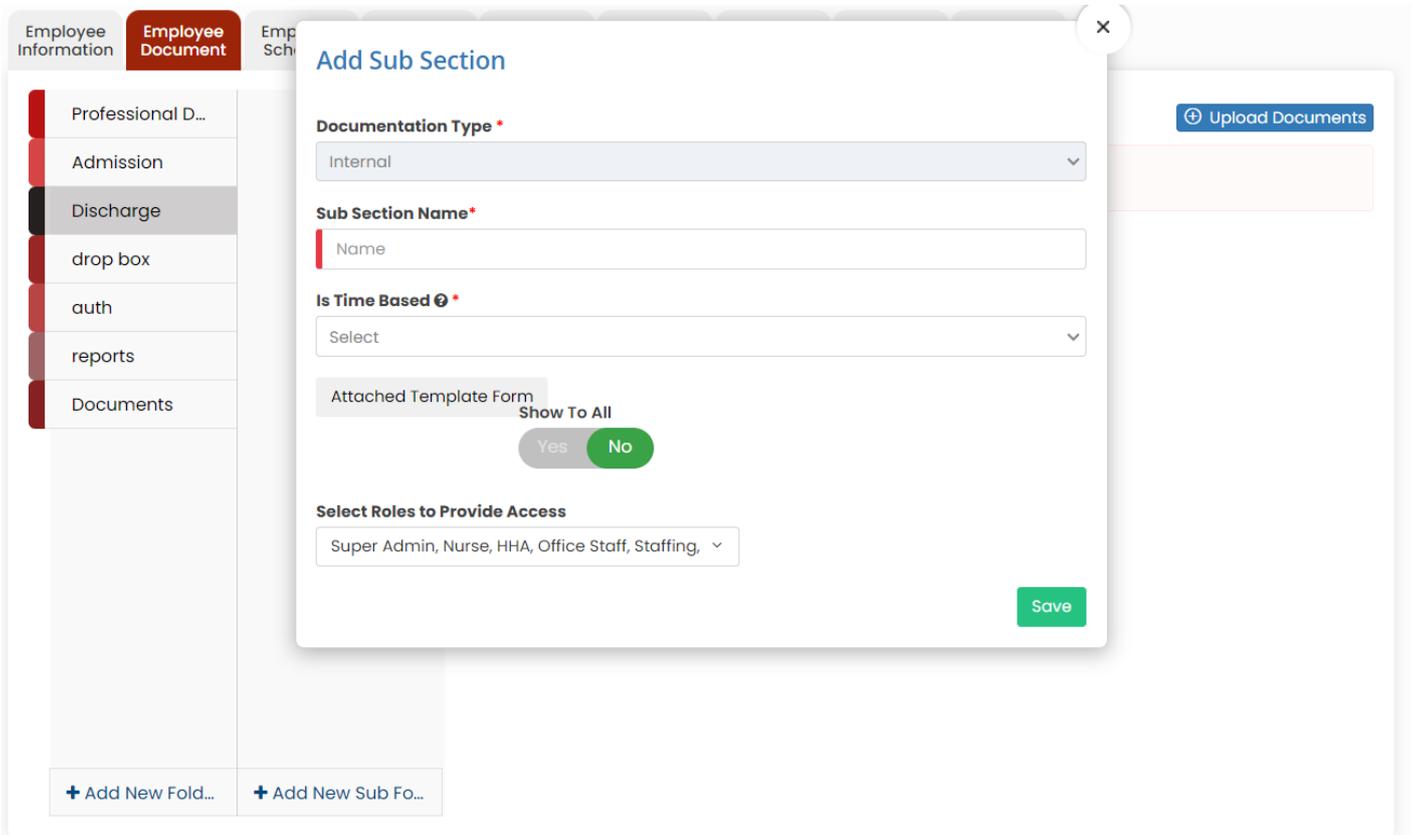
The folder Documents is added successfully to upload the required documents of the employee.



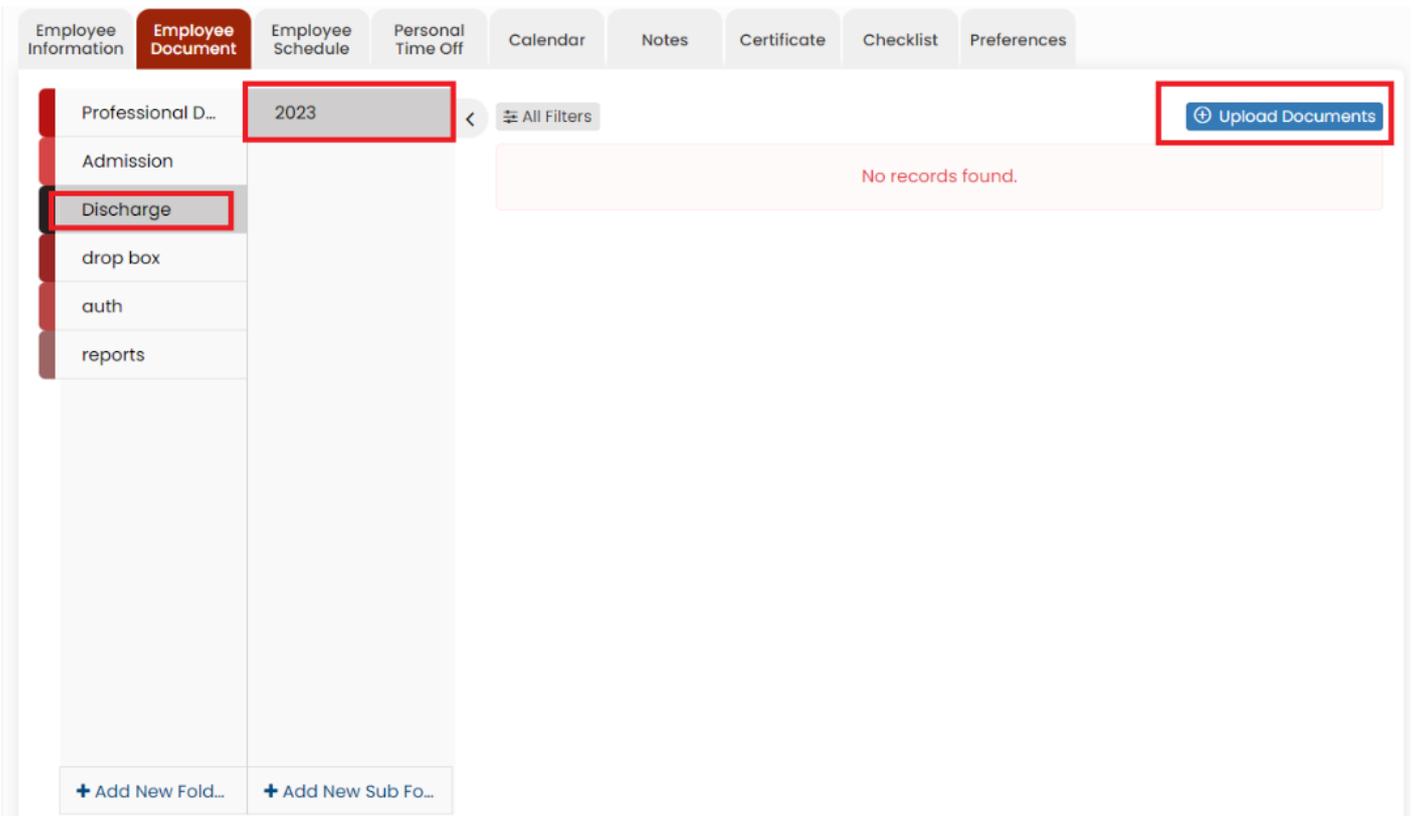
Adding New Sub Folder in Employee Document

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.

Also the user can select the Roles to access the document and click Save option.



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



Employee Schedule

An employee schedule in home health care is a structured plan outlining staff work hours and compliance with regulations. It ensures continuous patient care, staff well-being, and communication to ensure quality care delivery.

Adding Employee Schedule

The user can update the Employee Schedule for their visits by selecting the +Add Employee Schedule button.

Employee Tab >> List >> Select Employee from List>> Employee Schedule or Employee Tab >> Schedule

The screenshot shows a web application interface for managing employee schedules. On the left is a navigation 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. Below the table is a search bar with 'David D' entered. To the right of the search bar is a green button labeled '+ Add Employee Schedule', which is highlighted with a red rectangular box. Below the search bar is a table with columns: Name, Start Date, End Date, Slots #, Information, and Action. The table is currently empty and displays the message 'No records found.' in red text.

Click +Add Employee Schedule button, the following screen appears. Update the Start Date and End Date (optional) of the Schedule and Click Save & Add Time Slot button.

Add Employee Schedule

Employee* Start Date* End Date End Date*

To Add the Time Slot of the Employee the user has to Select the Days, Start Time, End Time and check the option All Day or Is 24hrs of the Employee Schedule and Click Add.

Update Employee Schedule

Employee* Start Date* End Date End Date*

Add Time Slot

Day* Start Time* End Time* All Day Is 24 Hrs? Notes

Select All Day

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

The Time Slot of the Employee Schedule is created successfully with the required details.

Update Employee Schedule

Employee*

Marry Delna

Start Date*

05/02/2023

End Date

End Date*

06/30/2023

Update Schedule

Add Time Slot

Day*

Select

Start Time*

Start Time

End Time*

End Time

All Day

Is 24 Hrs?

Notes

Notes

Add

Day	Start Time	End Time	All Day	Is 24 Hrs?	Notes	Action
Sunday	12:00 AM	11:50 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		 
Monday	12:00 AM	11:50 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		 
Tuesday	12:00 AM	11:50 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		 
Wednesday	12:00 AM	11:50 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		 
Thursday	12:00 AM	11:50 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		 
Friday	12:00 AM	11:50 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		 
Saturday	12:00 AM	11:50 PM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		 

Showing 1 to 7 of 7 records

Employee Personal Time Off, Calendar & Notes

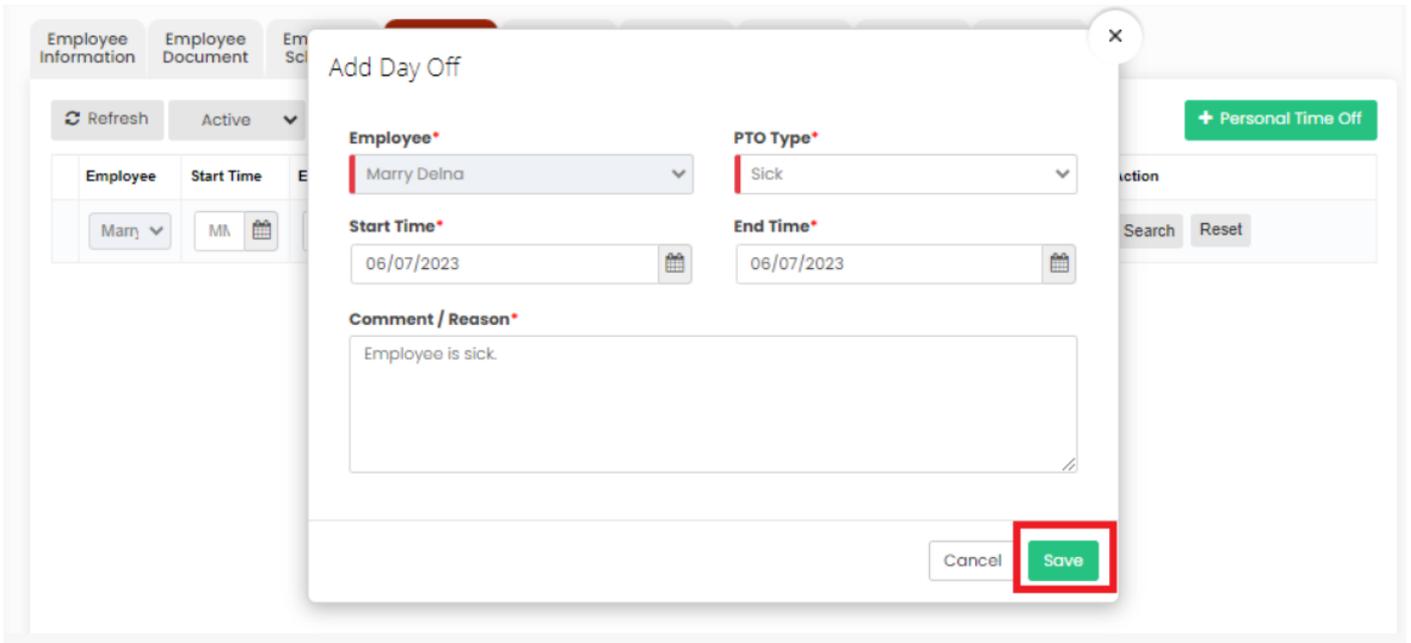
Employee Personal Time Off

The Employee PTO (Personal Time Off) can be updated by selecting the Personal Time Off Tab.

Employee Tab >> Personal Time Off (PTO)

The screenshot displays the myEZcare web application interface. On the left is a navigation sidebar with a 'myEZcare' logo and a menu including Dashboard, Features, Employee (selected), Prospects, Client, Scheduling, Time Sheet, Billing, Messages, Reports, Invoice, Attendance, and Settings. The main content area is titled 'LIST OF EMPLOYEES' and shows a table of employees with columns for Employee ID, Name, and a selection checkbox. A 'Personal Time Off' tab is active in the top navigation bar. Below the tab, there is a '+ Personal Time Off' button and a table with columns: Employee, Start Time, End Time, Submitted By, Submitted Date, Status, Type, Comment / Reason, and Action. The table is currently empty, displaying a 'No records found.' message. The interface also includes search and refresh controls.

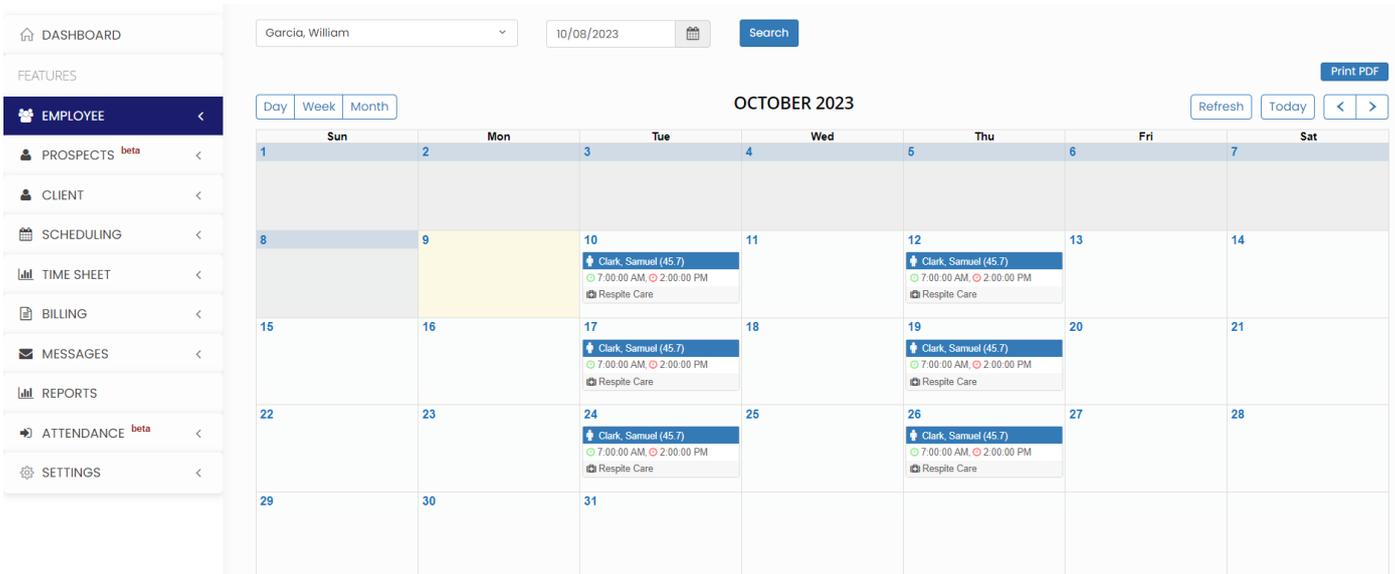
Select the + Personal Time Off option. The following screen appears, update the required information of the Employee Time Off and Click Save.



Employee Calendar

The user can view the Employee calendar for their scheduled visits. The Employee calendar has the details of the client name, Care type and the scheduled time.

Employee Tab >> Calendar



Employee Notes

The Notes Tab is used to add notes of the employee in the system. Click the option +Add Note. Select the required fields and update the notes of the employee and Click Save option.



Employee Certificate, Checklist and Preferences

Employee Certificate

The Employee Certificate can be uploaded in the system by using the Certificate Tab. Click + Add Certificate option, update the required information and upload the Certificate.

Employee Tab >> List >> Employee Name >> Certificate

Employee Information Employee Document Employee Schedule Personal File CM Calendar Notes **Certificate** Checklist Preferences

Close (X)

Add Certificate

Certificate

Name*
Name

Certificate Authority*
Select

Valid From*
MM/DD/YYYY

Valid To*
MM/DD/YYYY

Upload Certificate

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

Cancel Save

Add Certificate

Employee Checklist

The user can check the documents in the checklist and update the Expiration date and Date of Completion in the checklist.

Employee Tab >> List >> Employee Name >> Checklist

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

Checklist

Name: Marry Delna Email: delnamarry@gmail.com Date: 06/07/2023 Address: Aathir Ladies Hostel

Cell: Cell Mobile Phone: Mobile Phone

Identification Requirements	Expiration Date	Date of Completion
<input type="checkbox"/> Driver's License <input type="checkbox"/> State ID <input type="checkbox"/> Alien Card <input type="checkbox"/> Passport <small>Copy of one, but if ALIEN, copy of Alien Card is required</small>	MM/DD/YYYY	MM/DD/YYYY
<input type="checkbox"/> Copy of SS Card	MM/DD/YYYY	MM/DD/YYYY
Competency and Continued Competency Requirement		
<input type="checkbox"/> RN <input type="checkbox"/> LPN <input type="checkbox"/> LSW <input type="checkbox"/> CNA <input type="checkbox"/> Other	MM/DD/YYYY	MM/DD/YYYY
<input type="checkbox"/> Current Certificate of Continuing Education or Training	MM/DD/YYYY	MM/DD/YYYY
<input type="checkbox"/> Current Resume	MM/DD/YYYY	MM/DD/YYYY

Employee Preferences

The user can update the Employee Preferences by using the Preferences option. Check the Preferences from the list and click Save Notification Preferences option.

Employee Tab >> List >> Employee Name >> Preferences

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

Notification Preferences

Send Email
 Send SMS
 Web notification
 Mobile-app notification

Save Notification Preferences

Employee List

An employee list in home health care is a record of staff providing in-home clinical and non-clinical services.

Bulk update Employee Group

The Employee Group information can be bulk updated for the list of employees in the system. Click the check-box before the Employee ID in employee list and click Update Group.

Employee Tab >> List

LIST OF EMPLOYEES

Refresh Active Delete Selected Select Update Group Add Employee

Employee ID	Name	Email	Designation	Role	Mobile Number	Group(s)	App Installed	Action
<input type="checkbox"/>	Tanya Catts	101hunter101sam@gmail.com	Registered Nurse	Registered Nurse	(656) 666-6666	Demo ALex	✗	 
<input type="checkbox"/>	David D	david@myezcare.com	Administrator	Super Admin	(343) 535-3535		✗	 
<input type="checkbox"/>	Maria Garcia	Maria@gamil.com	Registered Nurse	HHA	(789) 787-9878		✗	 
<input checked="" type="checkbox"/>	William Garcia	William@gmail.com	PCA/CNA	Office Assistant	(789) 787-8778		✓	 
<input checked="" type="checkbox"/>	James Johnson	James@gmail.com	Service Facilitator	Clinical Team	(457) 878-7887		✗	 
<input type="checkbox"/>	Moshe Lubel	moshe@zrpath.com	Administrative	Super Admin	N/A		✗	 
<input type="checkbox"/>	James Smith	jamesmith@gmail.com	Administrator	Administrator	(123) 456-7899		✗	 
<input type="checkbox"/>	Robert Smith	Robert@gmail.com	Administrative	Clinical Team	(656) 565-6665		✗	 
<input type="checkbox"/>	Alex Toth	paymagnet@gmail.com	Administrator	Administrator	(347) 480-9560	Demo ALex	✓	 
<input type="checkbox"/>	irtaza wans	irtazawarishussain@yahoo.com	Administrative	Super Admin	(897) 876-6565		✓	 

The following screen appears, select the Group from list and click Save option.

Update Bulk Employee Group

Select Group(s)
Select

Cancel Save

LIST OF EMPLOYEES

Refresh Active Delete Selected Select

Employee ID Name Email

Mobile Number Group(s)

Search Reset

+ Add Employee

<input type="checkbox"/>	Employee ID	Name	Email	Designation	Role	Mobile Number	Group(s)	App Installed	Action
<input type="checkbox"/>	008	Tanya Catts	101hunter101sam@gmail.com	Registered Nurse	Registered Nurse	(666) 666-6666	Demo ALEX	✗	
<input type="checkbox"/>	E01	David D	david@myezcare.com	Administrator	Super Admin	(343) 535-3535		✗	
<input type="checkbox"/>	Maria456	Maria Garcia	Maria@gamil.com	Registered Nurse	HHA	(789) 787-9878		✗	
<input checked="" type="checkbox"/>	William1122	William Garcia	William@gmail.com	PCA/CNA	Office Assistant	(789) 787-8778		✓	
<input checked="" type="checkbox"/>	James789	James Johnson	James@gmail.com	Service Facilliator	Clinical Team	(457) 878-7887		✗	
<input type="checkbox"/>	DEMO-12	Moshe Lubel	moshe@zrpath.com	Administrative	Super Admin	N/A		✗	
<input type="checkbox"/>	James123	James Smith	jamesmith@gmail.com	Administrator	Administrator	(123) 456-7899		✗	
<input type="checkbox"/>	Robert321	Robert Smith	Robert@gmail.com	Administrative	Clinical Team	(656) 565-6665		✗	
<input type="checkbox"/>	E-Demo-001	Alex Toth	paymagnet@gmail.com	Administrator	Administrator	(347) 480-9560	Demo ALEX	✓	
<input type="checkbox"/>	E00100	irtaza waris	irtazavarishussain@yahoo.com	Administrative	Super Admin	(897) 876-6565		✓	

Delete Employee

The Employee can be deleted from the system by using the option Delete in Employee List. Select the Employee name by using the check box and click delete option.

Employee Tab >> List

LIST OF EMPLOYEES

Refresh Active Delete Selected Select Update Group

Employee ID Name Email Designation Role Mobile Number Group(s)

Search Reset

+ Add Employee

<input type="checkbox"/>	Employee ID	Name	Email	Designation	Role	Mobile Number	Group(s)	App Installed	Action
<input type="checkbox"/>	008	Tanya Catts	101hunter101sam@gmail.com	Registered Nurse	Registered Nurse	(666) 666-6666	Demo ALEX	✗	
<input type="checkbox"/>	E01	David D	david@myezcare.com	Administrator	Super Admin	(343) 535-3535		✗	
<input type="checkbox"/>	Maria456	Maria Garcia	Maria@gamil.com	Registered Nurse	HHA	(789) 787-9878		✗	
<input type="checkbox"/>	William1122	William Garcia	William@gmail.com	PCA/CNA	Office Assistant	(789) 787-8778		✓	
<input type="checkbox"/>	James789	James Johnson	James@gmail.com	Service Facilliator	Clinical Team	(457) 878-7887		✗	
<input type="checkbox"/>	DEMO-12	Moshe Lubel	moshe@zrpath.com	Administrative	Super Admin	N/A		✗	
<input checked="" type="checkbox"/>	12398	fayyaz m	fahadneymarj@gmail.com	Administrator	PCA/CNA	(031) 311-1019		✗	
<input type="checkbox"/>	James123	James Smith	jamesmith@gmail.com	Administrator	Administrator	(123) 456-7899		✗	
<input type="checkbox"/>	Robert321	Robert Smith	Robert@gmail.com	Administrative	Clinical Team	(656) 565-6665		✗	
<input type="checkbox"/>	E-Demo-001	Alex Toth	paymagnet@gmail.com	Administrator	Administrator	(347) 480-9560	Demo ALEX	✓	
<input type="checkbox"/>	E00100	irtaza waris	irtazavarishussain@yahoo.com	Administrative	Super Admin	(897) 876-6565		✓	

Restore Deleted Employee

Select Deleted from the dropdown box. The Deleted employee can also be restored in the system by using the option Active.

