

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.

- [New Employee](#)
- [Employee Document](#)
- [Employee Schedule](#)
- [Employee Personal Time Off, Calendar & Notes](#)
- [Employee Certificate, Checklist and Preferences](#)
- [Employee List](#)

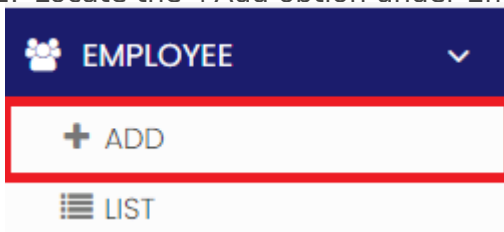
New Employee

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 part of a larger interface with a top navigation bar containing tabs like 'Employee Information', 'Employee Document', 'Employee Schedule', 'Personal Time Off', 'Calendar', 'Notes', 'Certificate', 'Checklist', and 'Preferences'. Below the navigation bar, there are sub-tabs: 'Employee Information', 'Employee Details', 'Additional contacts', 'Email Signature', and 'Employee Billing Hours'. The 'Employee Information' sub-tab is active, showing a form with various fields. The form is organized into columns. The first column contains 'Designation' (a dropdown menu), 'Last Name*' (a text field), 'Gender*' (a dropdown menu), 'Apartment No' (a text field), 'Province Registration ID' (a text field), and 'Group(s)' (a dropdown menu). The second column contains 'Employee ID*' (a text field), 'Email*' (a text field), 'Hire Date*' (a date picker), 'City*' (a text field), 'Professional License Number' (a text field), and 'Account Status' (a toggle switch between 'Locked' and 'Unlocked'). The third column contains 'First Name*' (a text field), 'Date Of Birth*' (a date picker), 'Facility' (a dropdown menu), 'Postal Code*' (a text field), 'Latitude' (a text field), and 'Update Location' (a toggle switch between 'Yes' and 'No'). The fourth column contains 'Middle Name' (a text field), 'Address*' (a text field), 'Province*' (a dropdown menu), and 'Longitude' (a text field). The 'Unlocked' toggle is currently selected.

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.

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Employee InformationEmployee DetailsAdditional contactsEmail SignatureEmployee Billing Hours

Username*

Username

Role *

Select Role

4 digit IVR Pin ?

4 digit IVR Pin

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 ?

xxxxxxxxxxxxxx

Mobile Number / IVR ID ?

(xxx) xxx-xxxx

HHA NPI # ?

HHA NPI #

Service*

Select

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.

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Employee InformationEmployee DetailsAdditional contactsEmail SignatureEmployee Billing Hours

Additional contacts

+ Add New Contact

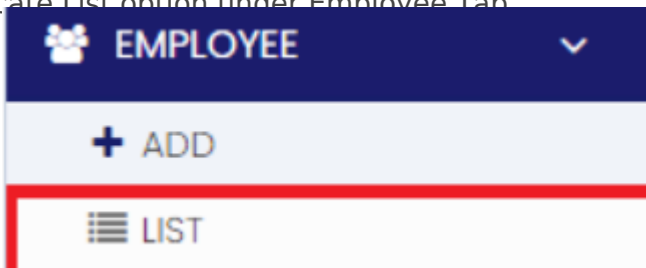
Note*: Employee Address is compulsory. Please click on "Add New Contact" button to add new contact details.

PreviousSave

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 | jamessmith@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

LockedUnlock

Update Location

YesNo

Cancel

Next

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Employee InformationEmployee DetailsAdditional contactsEmail SignatureEmployee 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.

Signature

ID Number

xxxxxxxxxxxxxx

Confirm Password

Confirm Password

Mobile Number / IVR ID

(265) 548-7989

HHA NPI #

HHA NPI #

Service*

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

PreviousNext

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

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Employee InformationEmployee DetailsAdditional contactsEmail SignatureEmployee 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 | ✎ ✕ |

PreviousUpdate

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.

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.

Signature

ID Number ?

xxxxxxxxxxxxxx

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



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 InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Employee InformationEmployee DetailsAdditional contactsEmail SignatureEmployee Billing Hours

Email Signature

Name*

Testing

Description

BBIU[icon][icon]T[icon]</>

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 InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Employee InformationEmployee DetailsAdditional contactsEmail SignatureEmployee Billing Hours

Employee Working Hours/Rate

Regular Working Hours

8perDay

Regular Working/Hour Rate

72

Overtime/Hour Rate

82

SaveCancel

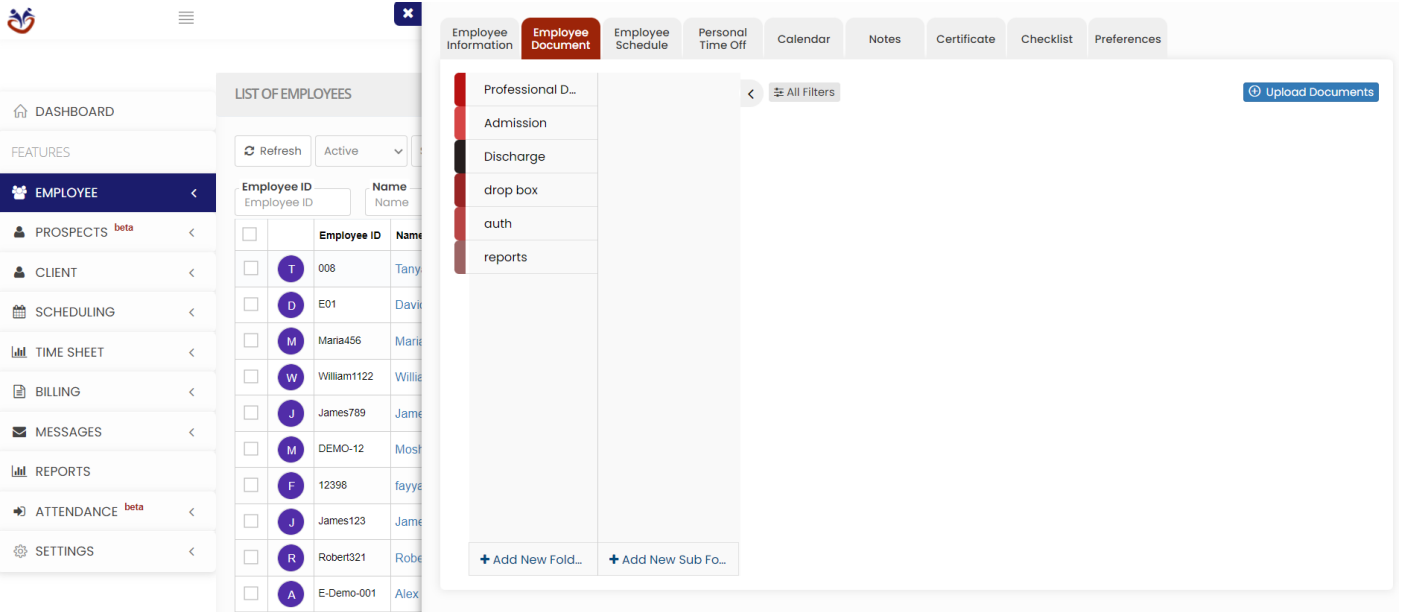
Employee Document

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.

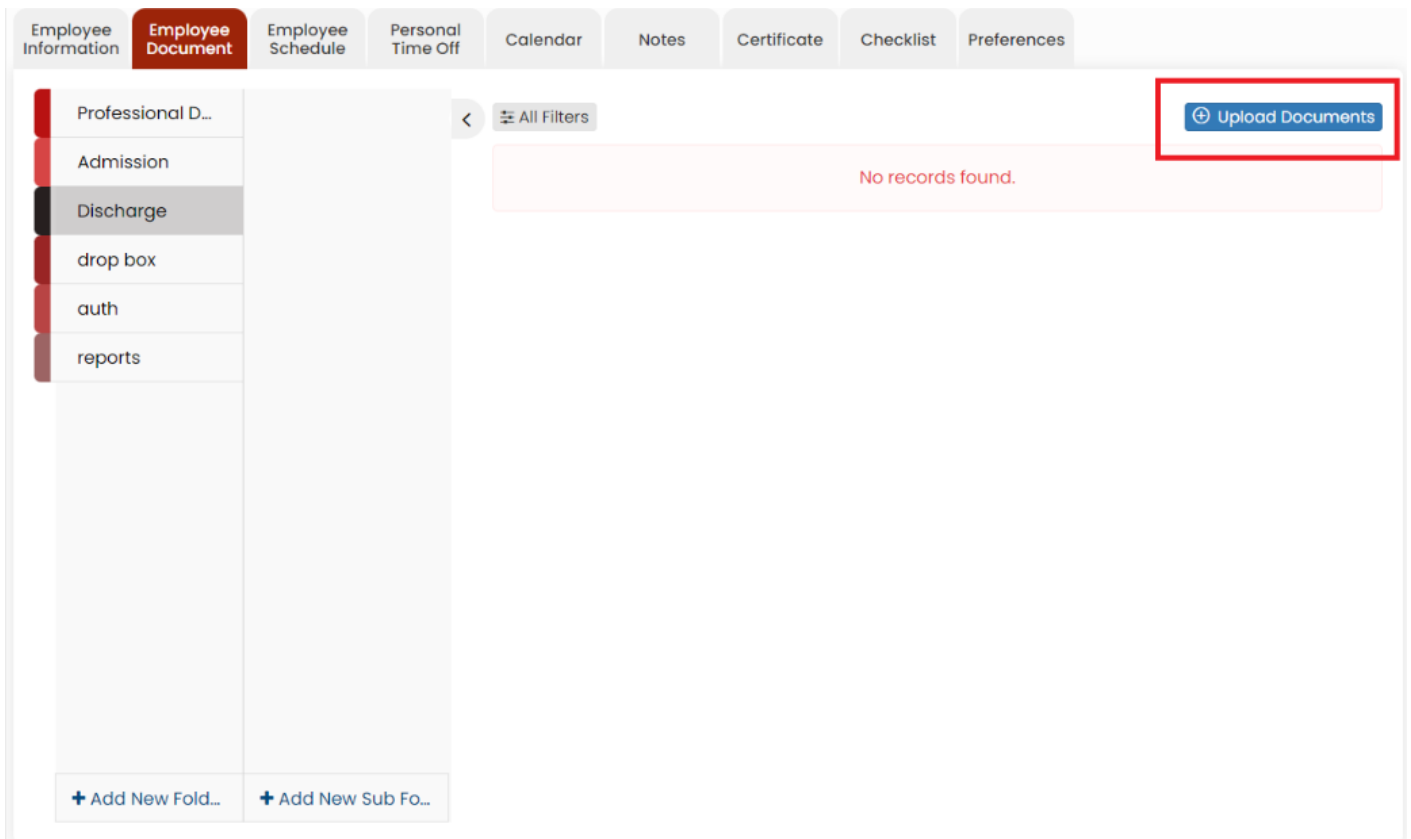
Uploading Employee Document

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

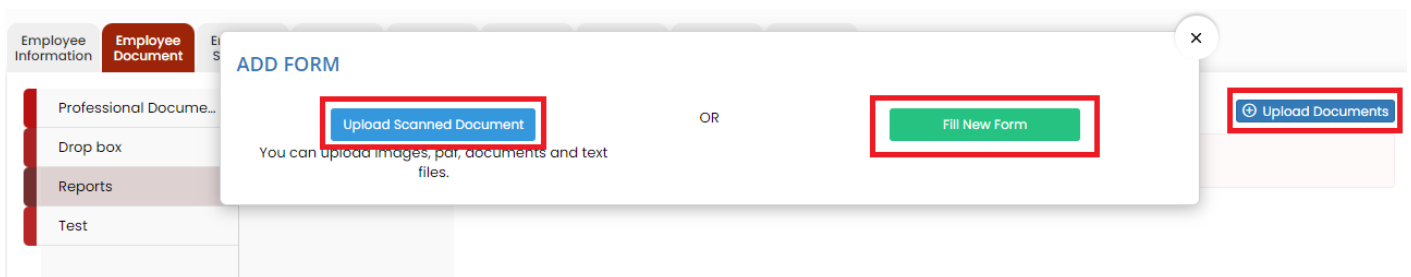
Employee Tab >> List >> Select Employee >> Employee Document



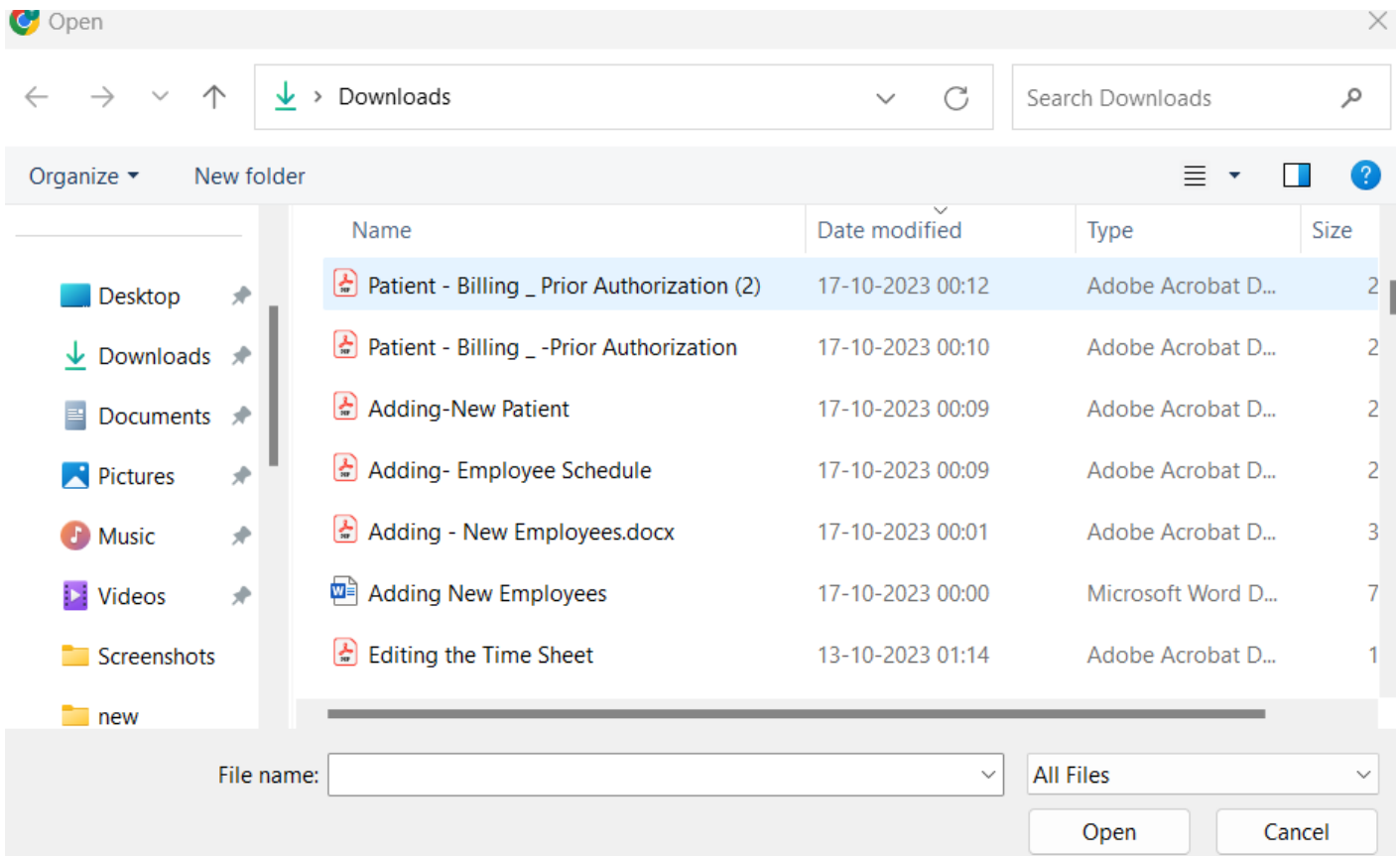
Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.



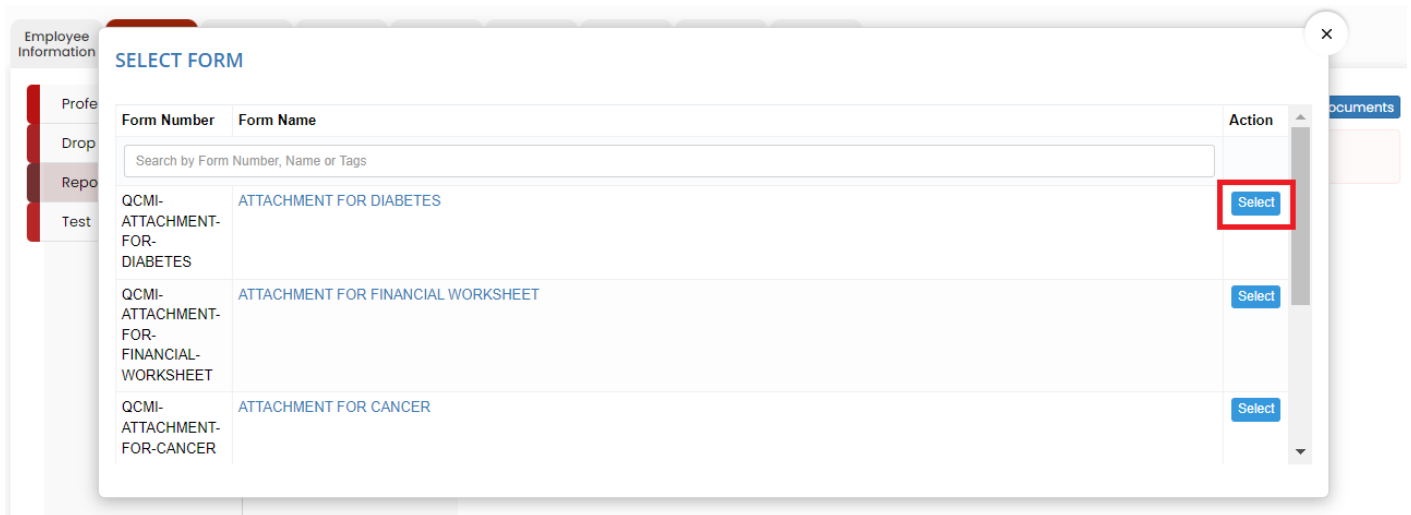
When we click upload documents, the following screen appears. The user can choose the options whether to Upload Scanned Documents or to Fill New form.



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

Advanced Directive Acknowledgment

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

Please Enter 60 Characters Only MM/DD/YYYY

☐ 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

MM/DD/YYYY MM/DD/YYYY

Patient Signature Nurse Signature

Clear Clear

Add New Folder Add New Sub Folder

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

Professional Docume... 2023
Drop box
Reports
Test

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

MM/DD/YYYY 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

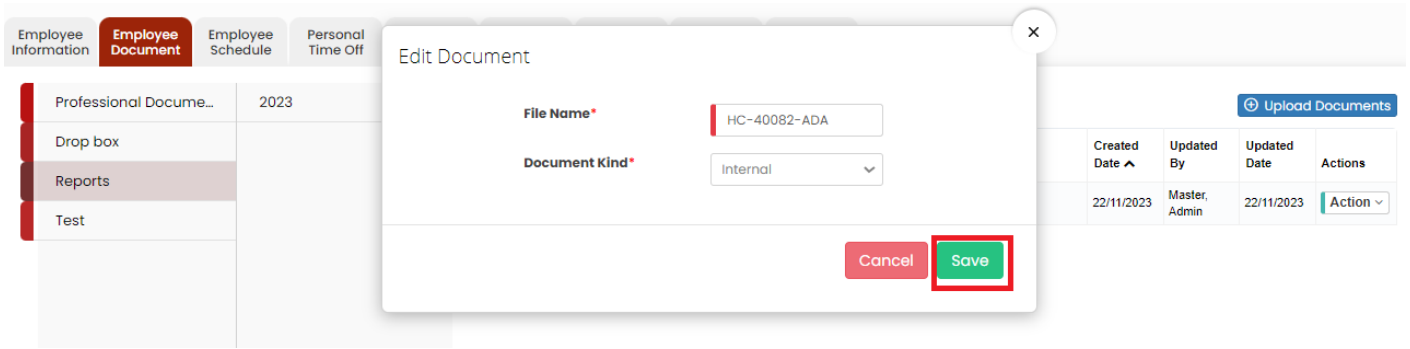
11/2/2023

Clear

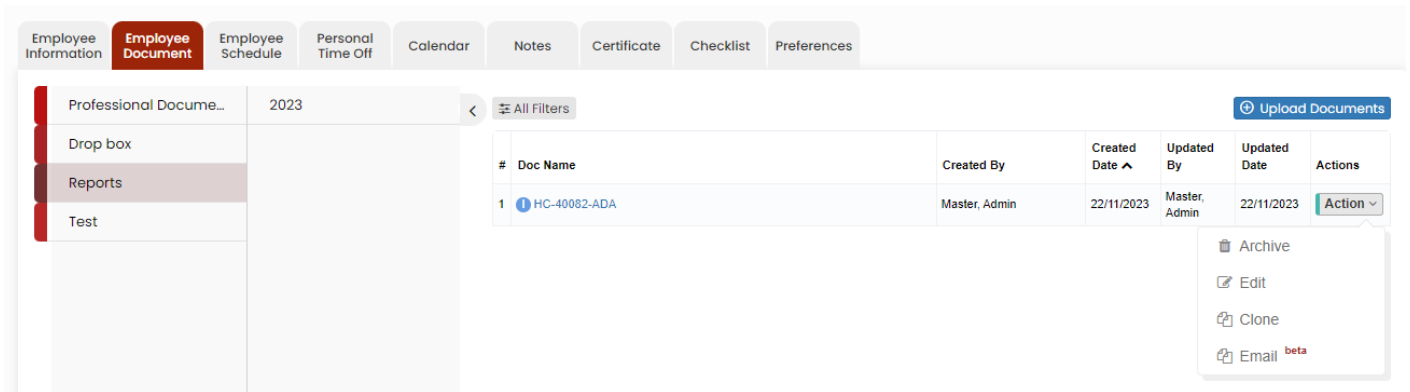
Save

Cancel
PDF

The following screen appears, click Save option.



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

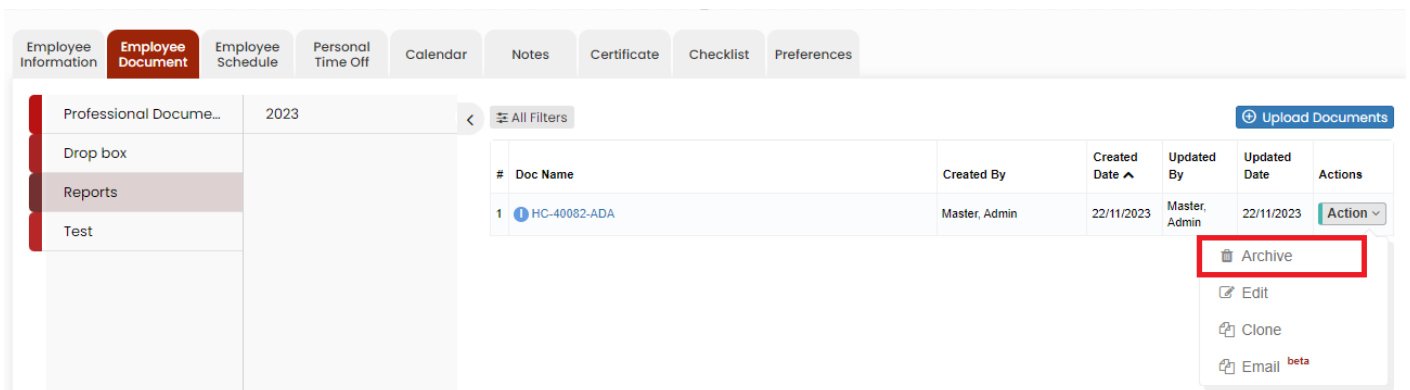


The features under Actions are :

- 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.

Employee InformationEmployee DocumentEmployee SchedulePersonal Time Off

Professional Docume...2023

Drop box

Reports

Test

Archive

Are you sure?

CancelYes, Continue...

Upload Documents

| Created Date | Updated By | Updated Date | Actions |
|--------------|---------------|--------------|---------|
| 22/11/2023 | Master, Admin | 22/11/2023 | Action |

Restore deleted document

To Restore the deleted click All filters option.

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Professional Docume...2023

Drop box

Reports

Test

All Filters

No records found.

Upload Documents

Select the Status Archive and click Search option.

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Professional Docume...2023

Drop box

Reports

Test

All Filters

Document NameDocument Name

Filter DateAdded Date

Added Date Fromdd/MM/yyyy

Added Date To dd/MM/yyyy

TypeSelect

Search TypeDirectory

StatusActive

Search

Reset

Archive

No records found.

Upload Documents

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

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Professional Docume...2023

Drop box

Reports

Test

All Filters

Document NameDocument Name

Filter DateAdded Date

Added Date Fromdd/MM/yyyy

Added Date To dd/MM/yyyy

TypeSelect

Search TypeDirectory

StatusArchive

Search

Reset

| # | Doc Name | Created By | Created Date | Updated By | Updated Date | Actions |
|---|--------------|---------------|--------------|---------------|--------------|---------|
| 1 | HC-40082-ADA | Master, Admin | 22/11/2023 | Master, Admin | 22/11/2023 | Action |

Active

Edit

Clone

Email beta

Upload Documents

- ☐ 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 | |
| <div><div></div><div>✕ Clear</div></div> | | <div><div></div><div>✕ Clear</div></div> | |
| As | <input type="text"/> | does not have decision making capacity, I | <input type="text"/> |
| | <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 | |
| <div><div></div><div>✕ Clear</div></div> | | <input type="text" value="11/2/2023"/> | |
| | | | |
| <div><div>Save</div><div>Cancel</div><div>PDF</div></div> | | | |

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:

[Add recipient](#)

CC:

BCC:

Subject:

B

I

U






Tl ▼



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.

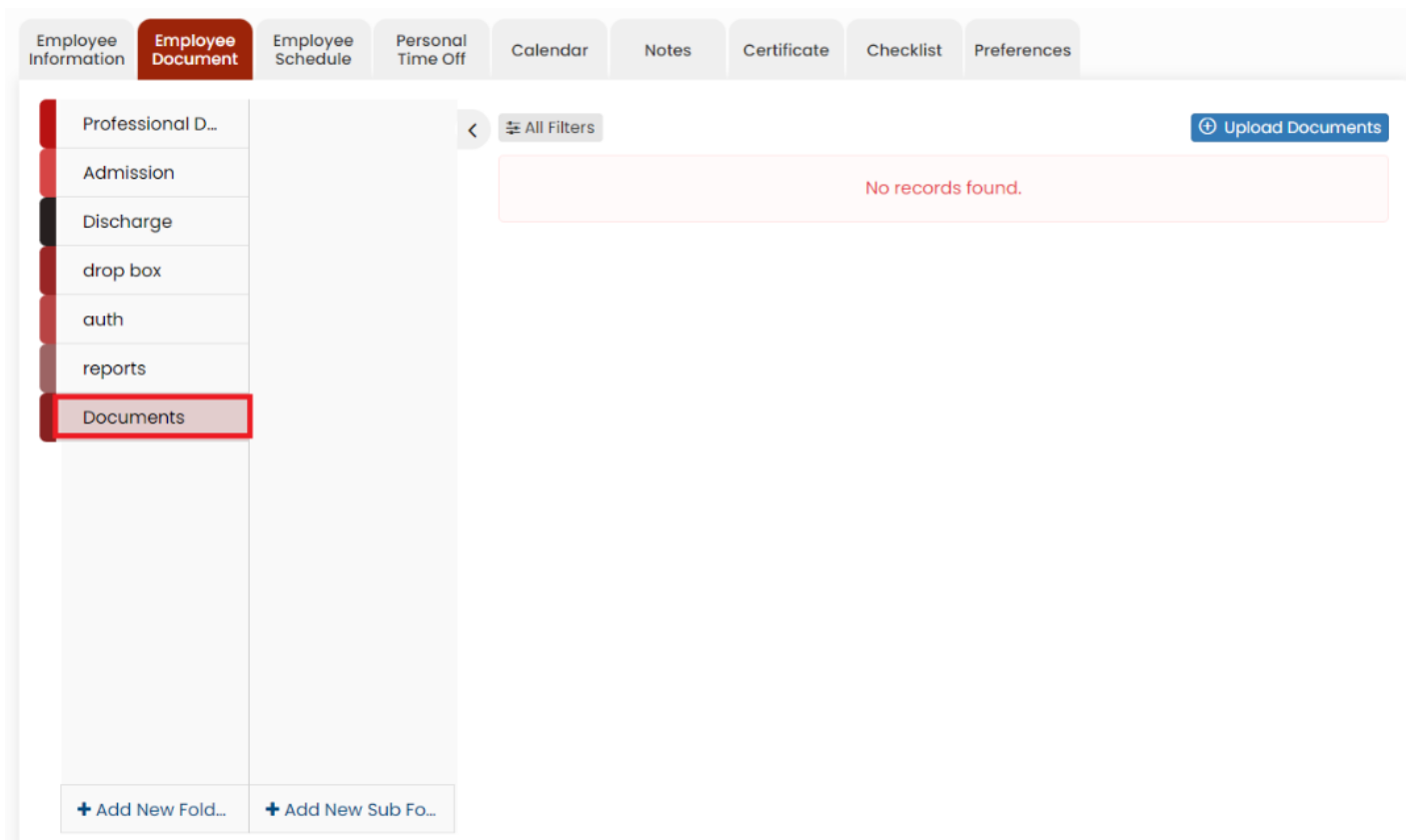
Also the user can select the Roles to access the document and click Save option.

The screenshot shows the 'Add Section' dialog box overlaid on the 'Employee Document' interface. The dialog box contains the following fields and options:

- Documentation Type ***: A dropdown menu with 'Internal' selected.
- Section Name ***: A text input field with 'Name' entered.
- Color Scheme ***: A color selection area with a checkered icon and the text '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 text input field with 'Super Admin, Nurse, HHA, Office Staff, Staffing, ' selected.
- Save**: A green button at the bottom right of the dialog.

The background interface shows a sidebar with 'Employee Information' and 'Employee Document' tabs. The 'Employee Document' tab is active, showing a list of documents: 'Professional D...', 'Admission', 'Discharge', 'drop box', 'auth', and 'reports'. At the bottom of the sidebar, there are two buttons: '+ Add New Fold...' and '+ Add New Sub Fo...'. On the right side of the background interface, there is an 'Upload Documents' button and a red rectangular area.

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.

Employee InformationEmployee DocumentEmployee Schedule

Professional D...AdmissionDischarge
drop boxauthreportsDocuments

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

Add Sub Section

Documentation Type *
Internal

Sub Section Name *
Name

Is Time Based ⓘ *
Select

Attached Template Form
Show To All
YesNo

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

Save

+ Upload Documents

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

Employee InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Professional D...2023
AdmissionDischarge
drop boxauthreports

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

All Filters

No records found.

+ Upload Documents

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

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*

Marry Delna

Start Date*

05/02/2023

☒ End Date

End Date*

06/30/2023

Save & Add Time Slots

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.

Employ
Informa

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

☐ 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 | 11:59 PM | ✓ | ✗ | |   |
| Monday | 12:00 AM | 11:59 PM | ✓ | ✗ | |   |
| Tuesday | 12:00 AM | 11:59 PM | ✓ | ✗ | |   |
| Wednesday | 12:00 AM | 11:59 PM | ✓ | ✗ | |   |
| Thursday | 12:00 AM | 11:59 PM | ✓ | ✗ | |   |
| Friday | 12:00 AM | 11:59 PM | ✓ | ✗ | |   |
| Saturday | 12:00 AM | 11:59 PM | ✓ | ✗ | |   |

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 application interface. On the left is a sidebar menu with options: 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 contains a table with columns: Employee ID, Name, and a checkbox. Below this table is a 'Personal Time Off' section with a tabbed interface. The 'Personal Time Off' tab is active, showing a table with columns: Employee, Start Time, End Time, Submitted By, Submitted Date, Status, Type, Comment / Reason, and Action. A '+ Personal Time Off' button is located in the top right corner of the PTO section. The table currently displays no records, with a message 'No records found.' at the bottom.

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

Add Day Off

Employee* Marry Delna

PTO Type* Sick

Start Time* 06/07/2023

End Time* 06/07/2023

Comment / Reason* Employee is sick.

Cancel 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

DASHBOARD

FEATURES

EMPLOYEE

PROSPECTS beta

CLIENT

SCHEDULING

TIME SHEET

BILLING

MESSAGES

REPORTS

ATTENDANCE beta

SETTINGS

Garcia, William

10/08/2023

Search

Print PDF

Day

Week

Month

OCTOBER 2023

Refresh

Today

<

>

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|---|-----|---|-----|-----|
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| 8 | 9 | 10 Clark, Samuel (45.7) 7:00:00 AM - 2:00:00 PM Respite Care | 11 | 12 Clark, Samuel (45.7) 7:00:00 AM - 2:00:00 PM Respite Care | 13 | 14 |
| 15 | 16 | 17 Clark, Samuel (45.7) 7:00:00 AM - 2:00:00 PM Respite Care | 18 | 19 Clark, Samuel (45.7) 7:00:00 AM - 2:00:00 PM Respite Care | 20 | 21 |
| 22 | 23 | 24 Clark, Samuel (45.7) 7:00:00 AM - 2:00:00 PM Respite Care | 25 | 26 Clark, Samuel (45.7) 7:00:00 AM - 2:00:00 PM Respite Care | 27 | 28 |
| 29 | 30 | 31 | | | | |

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 InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

Role*

Assignee is required

Assignee*

Assignee is required

Category

Category is required

isPrivate

☒

Note*

Note

Cancel

Save

+ Add Note

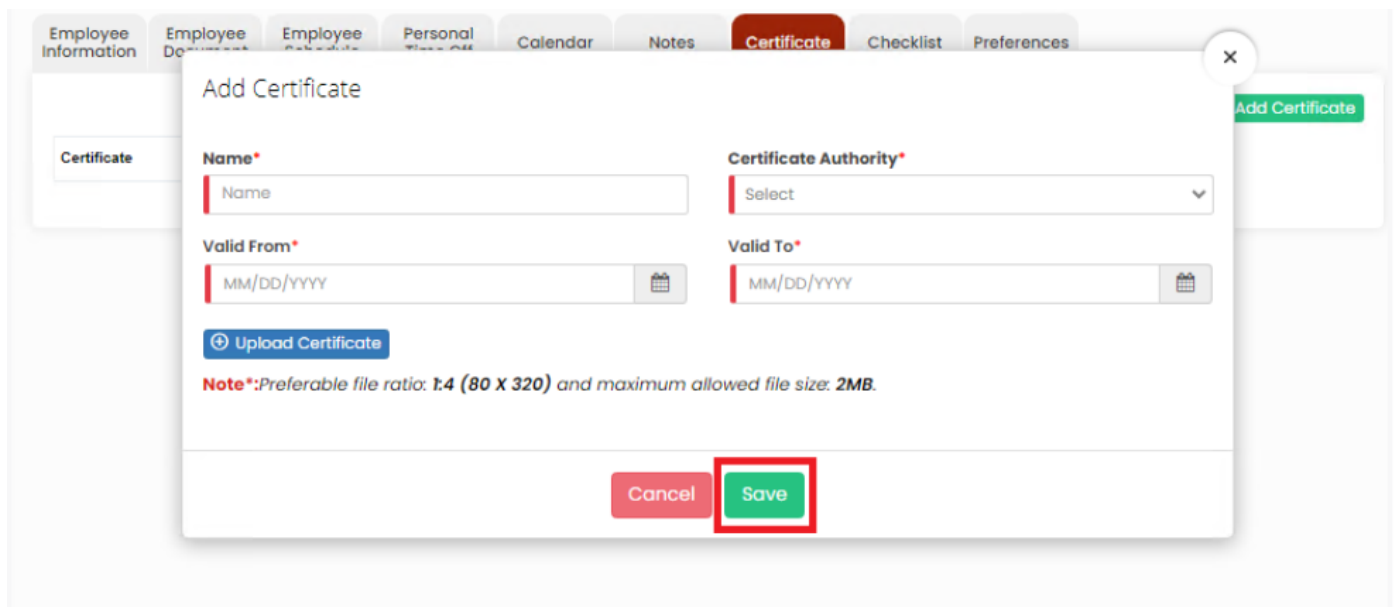
+ Add Note Sentence

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



The screenshot shows the 'Add Certificate' modal form. The form has a title 'Add Certificate' and a close button (X) in the top right corner. It contains the following fields and controls:

- Name***: A text input field with a red vertical bar on the left.
- Certificate Authority***: A dropdown menu with 'Select' as the current value and a downward arrow.
- Valid From***: A date input field with the placeholder 'MM/DD/YYYY' and a calendar icon.
- Valid To***: A date input field with the placeholder 'MM/DD/YYYY' and a calendar icon.
- Upload Certificate**: A blue button with a plus icon and the text 'Upload Certificate'.
- Note***: A red text note stating 'Preferable file ratio: 1:4 (80 X 320) and maximum allowed file size: 2MB.'
- Cancel**: A red button.
- Save**: A green button, which is highlighted with a red rectangular box.

On the right side of the modal, there is a green button labeled '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 InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

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

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 InformationEmployee DocumentEmployee SchedulePersonal Time OffCalendarNotesCertificateChecklistPreferences

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

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

LIST OF EMPLOYEES

Refresh

Active

Delete Selected

Select

Employee ID

Name

Email

| <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 Facilitator | 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 | irtazawarishussain@yahoo.com | Administrative | Super Admin | (897) 876-6565 | | ✓ | |

Update Bulk Employee Group

Select Group(s)*

Select

Cancel

Save

Mobile Number

Group(s)

Search

Reset

+ Add Employee

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 Facilitator | 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 | fahadneymarji@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 | irtazawarishussain@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.

DASHBOARD

FEATURES

EMPLOYEE

PROSPECTS

CLIENT

SCHEDULING

TIME SHEET

BILLING

MESSAGES

REPORTS

ATTENDANCE

SETTINGS

LIST OF EMPLOYEES

Refresh

Active

Select

+ Add Employee

Employee ID

All Records

Deleted

Email

Designation































Role

Mobile Number

Group(s)

Search

Reset

| <input type="checkbox"/> | Employee ID | Name | Email | Designation | Role | Mobile Number | Group(s) | App Installed | Action |
|--------------------------|---|----------------|------------------------------|---------------------|------------------|----------------|-----------|---------------|---|
| <input type="checkbox"/> |  000 | Tanya Calts | 10thunter10tsam@gmail.com | Registered Nurse | Registered Nurse | (666) 666-6666 | Demo ALex | ✗ |   |
| <input type="checkbox"/> |  E91 | 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 Facilitator | Clinical Team | (457) 878-7887 | | ✗ |   |
| <input type="checkbox"/> |  DEMO-12 | Moshe Lubel | moshe@zpath.com | Administrative | Super Admin | N/A | | ✗ |   |
| <input type="checkbox"/> |  James123 | James Smith | jamessmith@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 | | ✓ |   |

Click the check box for the employee to be restored and click Active option. Now, the deleted employee is successfully restored.

LIST OF EMPLOYEES

Refresh

Deleted

Active Selected

Select

Update Group

+ Add Employee

Employee ID

Name

Email

Designation







Role

Mobile Number

Group(s)

Search

Reset

| <input type="checkbox"/> | Employee ID | Name | Email | Designation | Role | Mobile Number | Group(s) | App Installed | Action |
|-------------------------------------|---|-------------|--------------------------|----------------|-------------|----------------|----------|---------------|---|
| <input checked="" type="checkbox"/> |  12398 | fayyaz m | fahadneymarji@gmail.com | Administrator | PCA/CNA | (831) 311-1019 | | ✗ |   |
| <input type="checkbox"/> |  E009233 | Vijay Saini | vijaysainisemt@gmail.com | Administrative | Super Admin | (546) 474-2342 | | ✓ |   |