

# 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.

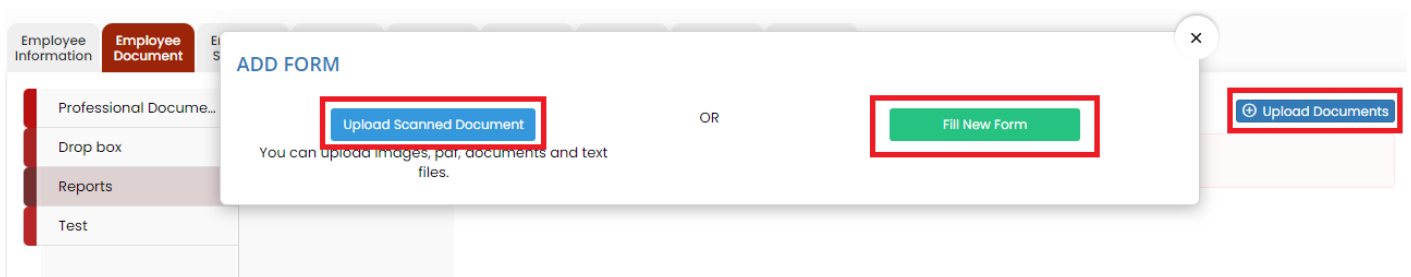
**Employee Tab >> List >> Select Employee >> Employee Document**



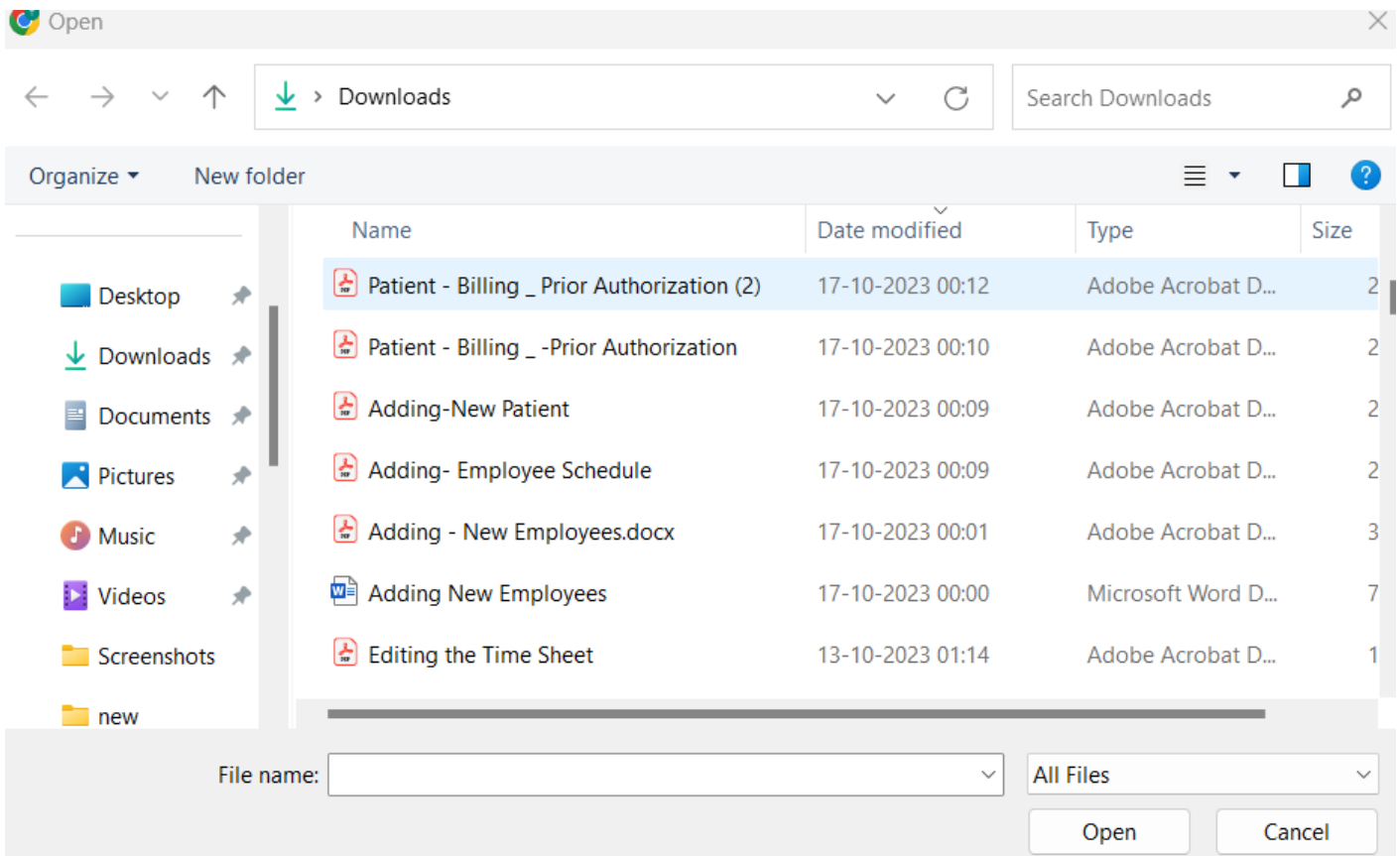
Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.



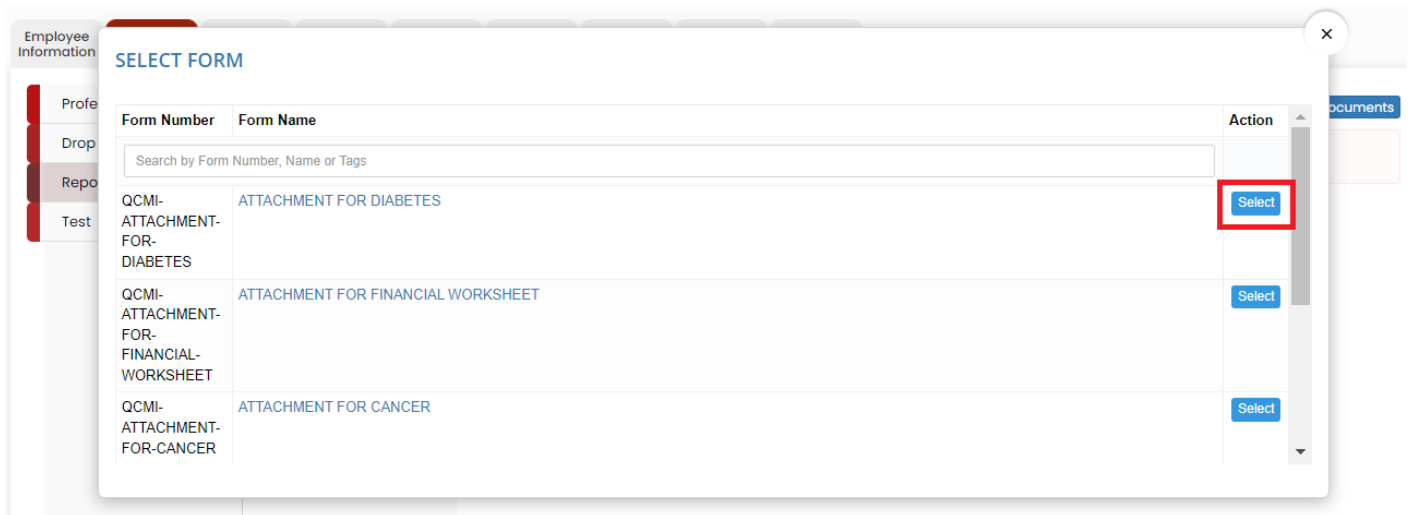
When we click upload documents, the following screen appears. The user can choose the options whether to Upload Scanned Documents or to Fill New form.



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 Document... 2023

Drop box
Reports
Test

☐ 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

Patient Signature

Nurse Signature

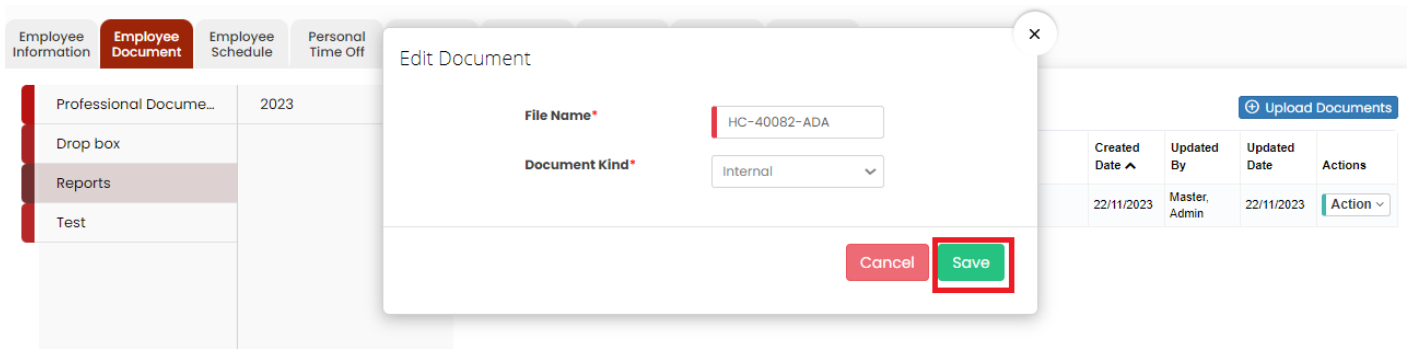
As  does not have decision making capacity, I  as the

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

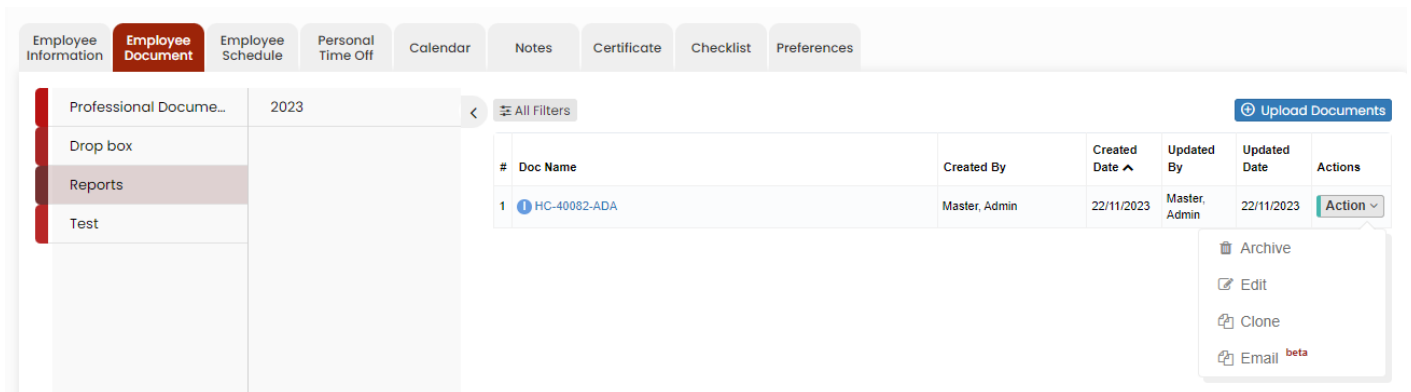
(Representative for Patient Signature)  Date

+ Add New Folder
+ Add New Sub Folder
Save
Cancel
PDF

The following screen appears, click Save option.



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

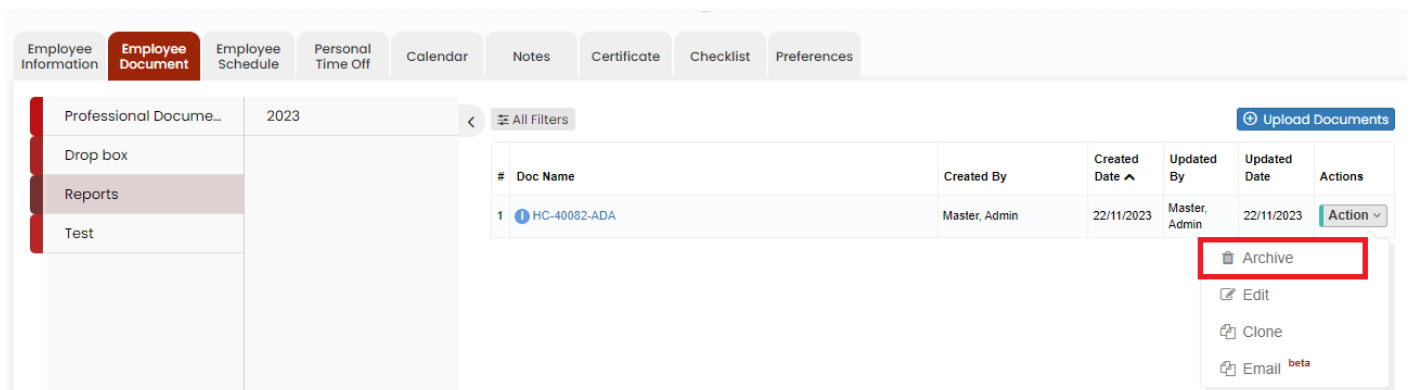


**The features under Actions are :**

- 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

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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

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

Employee Information

**Employee Document**

Employee Schedule

Personal Time Off

Calendar

Notes

Certificate

Checklist

Preferences

Professional Docume...

2023

<

All Filters

Upload Documents

Document Name

Document Name

Filter Date

Added Date

Added Date From

dd/MM/yyyy

Added Date To

dd/MM/yyyy

Type

Select

Search Type

Directory

Status

Active


Search

Reset

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	<a href="#">HC-40082-ADA</a>	Master, Admin	22/11/2023	Master, Admin	22/11/2023	Action

## 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.

 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

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.

Date

11/1/2023

- ☐ 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.

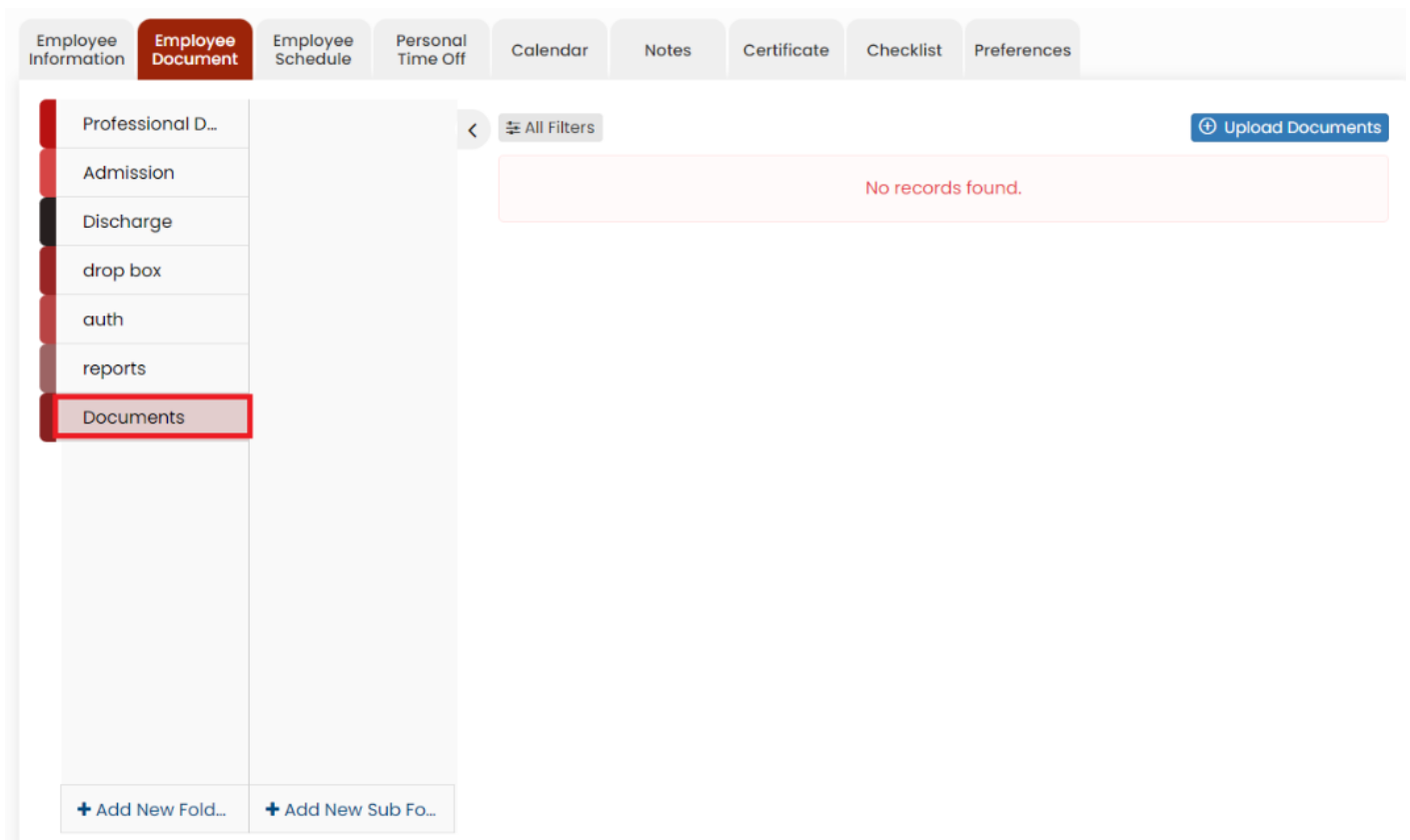
Also the user can select the Roles to access the document and click Save option.

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 dropdown menu 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, displaying a list of document types: 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

+ Upload Documents

No records found.

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Revision #8

Created 22 November 2023 19:33:29 by Thamarai

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