

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.

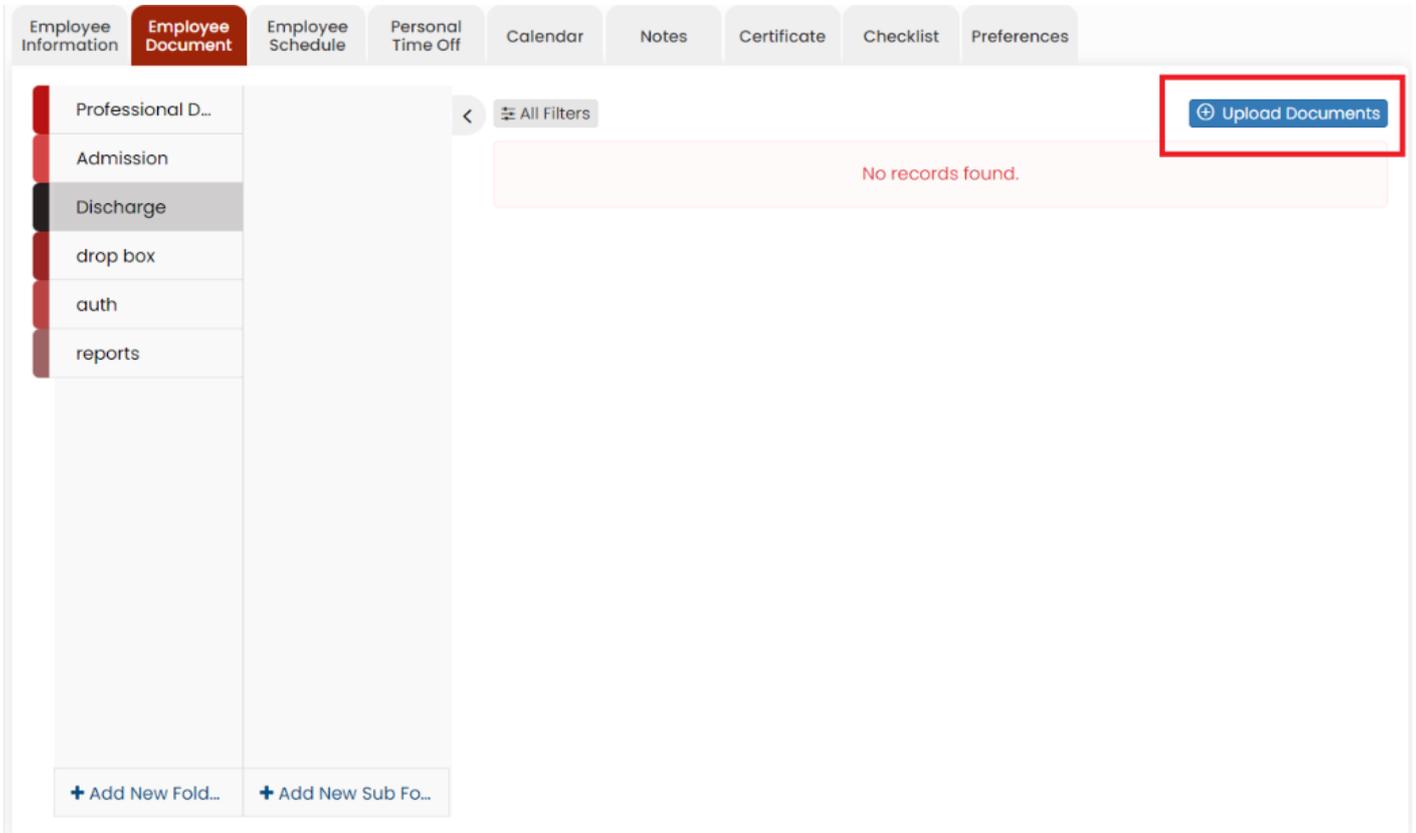
Uploading Employee Document

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

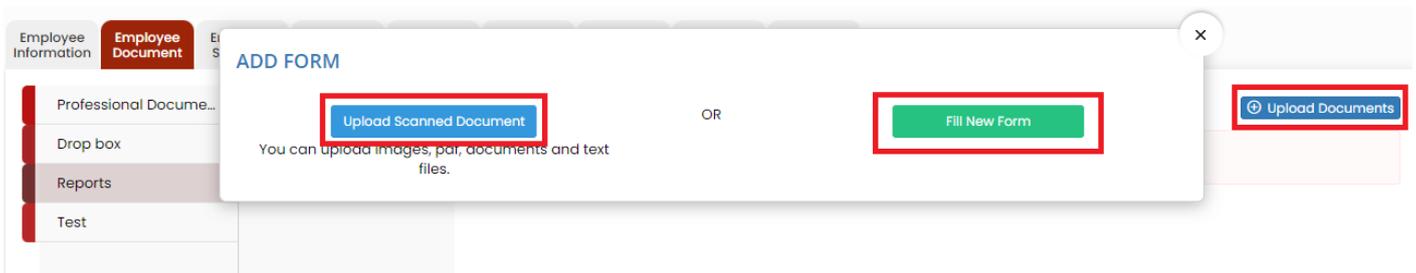
Employee Tab >> List >> Select Employee >> Employee Document

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. An 'Upload Documents' button is visible in the top right of the modal. At the bottom of the modal, there are options to '+ Add New Fold...' and '+ Add New Sub Fo...'.

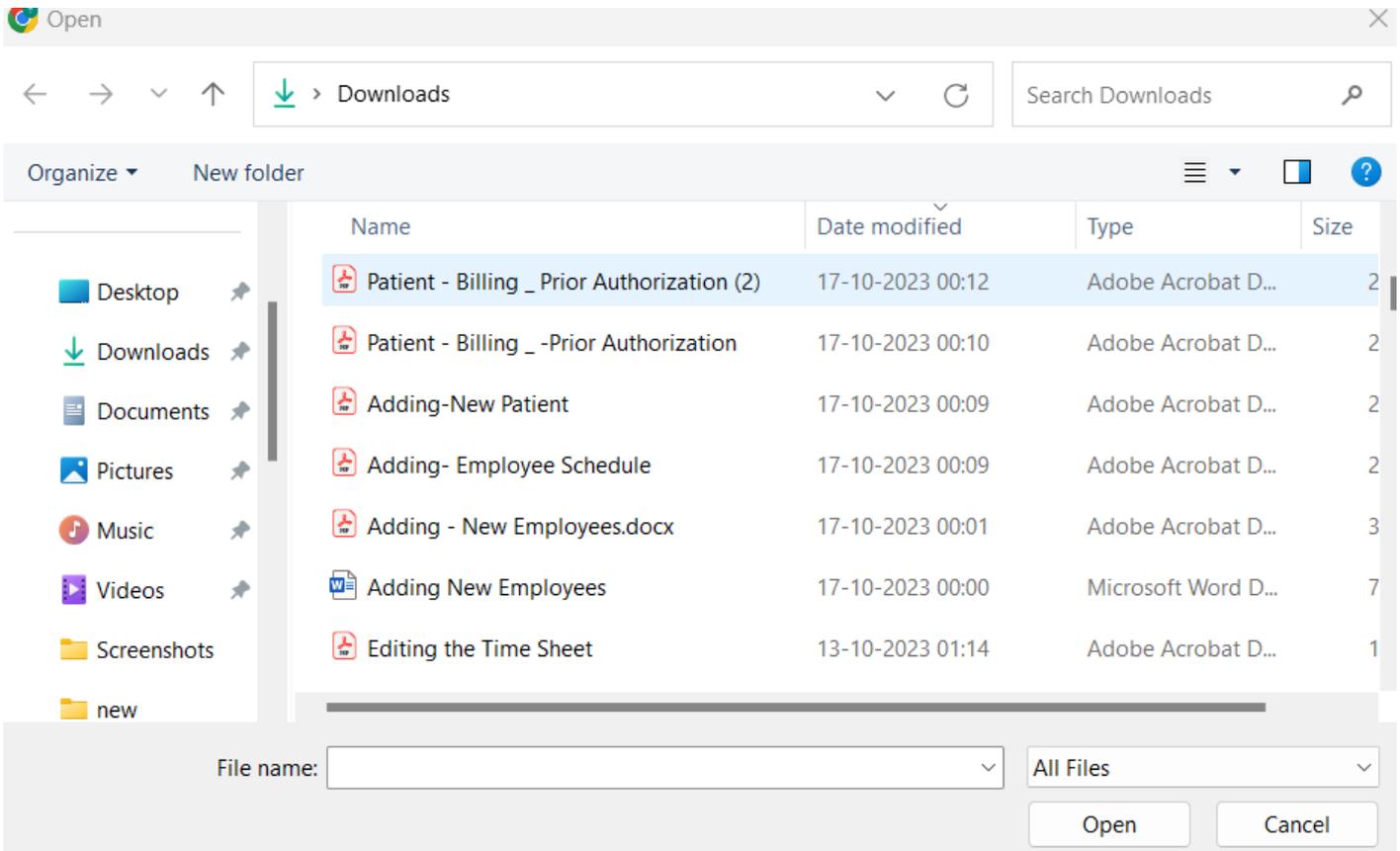
Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.



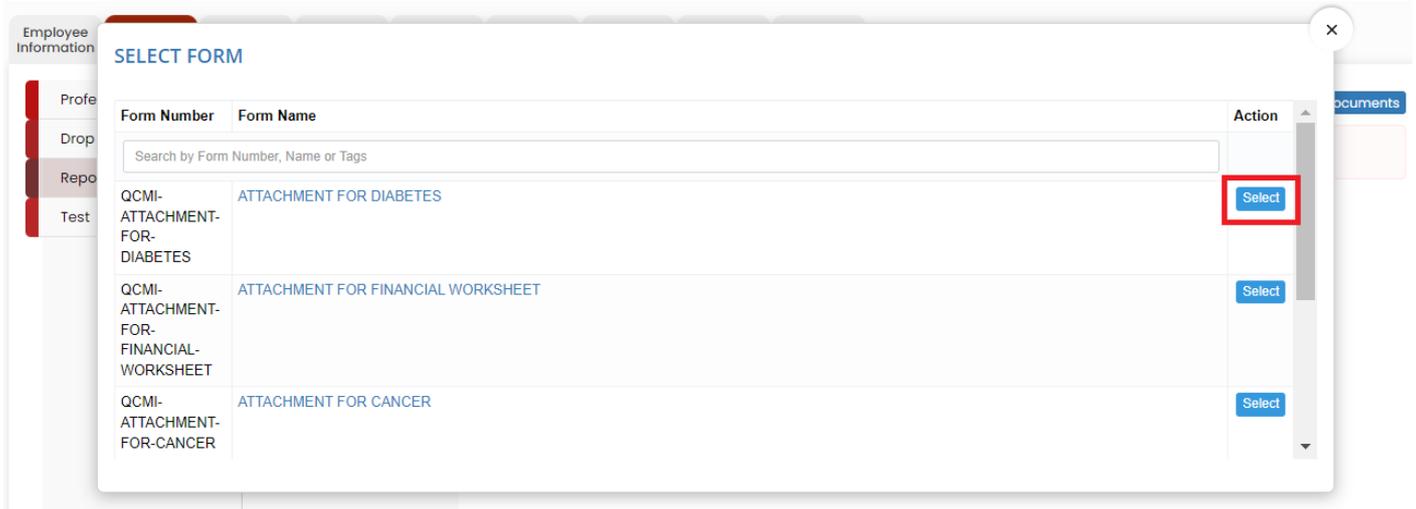
When we click upload documents, the following screen appears. The user can choose the options whether to Upload Scanned Documents or to Fill New form.



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

x Clear x 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. Please Enter 30 Characters Only.

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

x Clear x Clear

As does not have decision making capacity, I as the

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

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

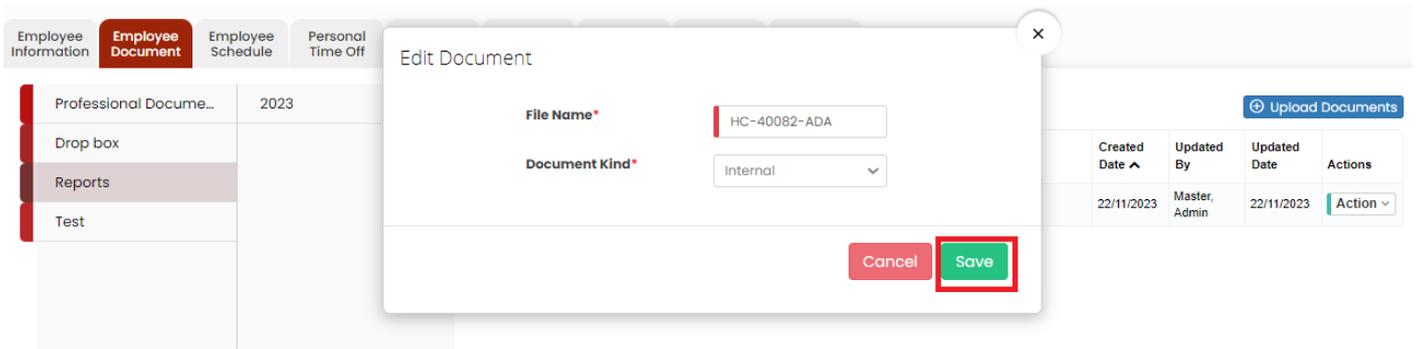
Testing

(Representative for Patient Signature) Date 11/2/2023

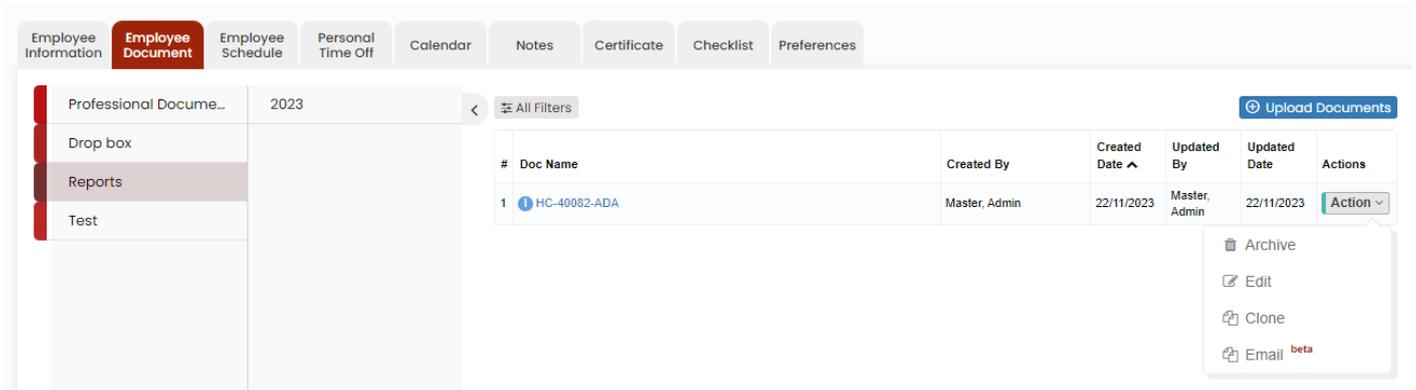
x Clear

Save Cancel PDF

The following screen appears, click Save option.



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

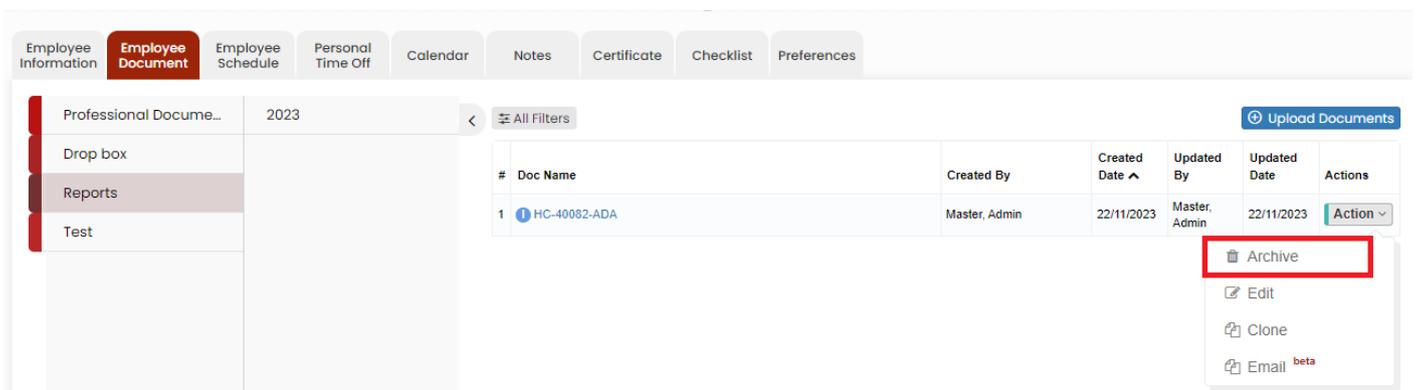


The features under Actions are :

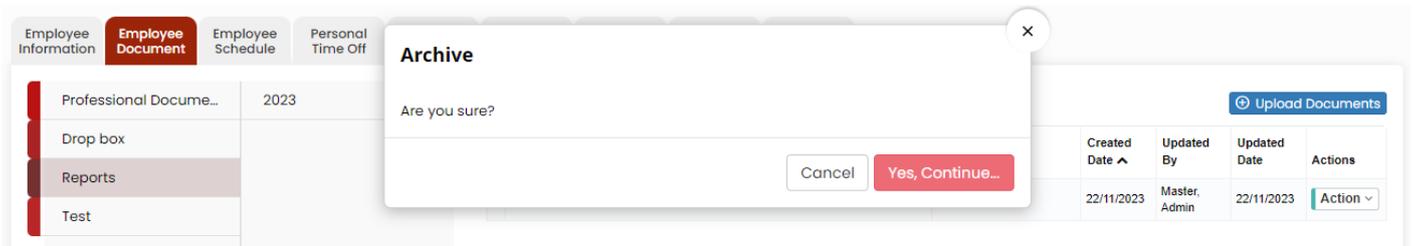
- Archive
- Edit
- Clone
- Email

Archive

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

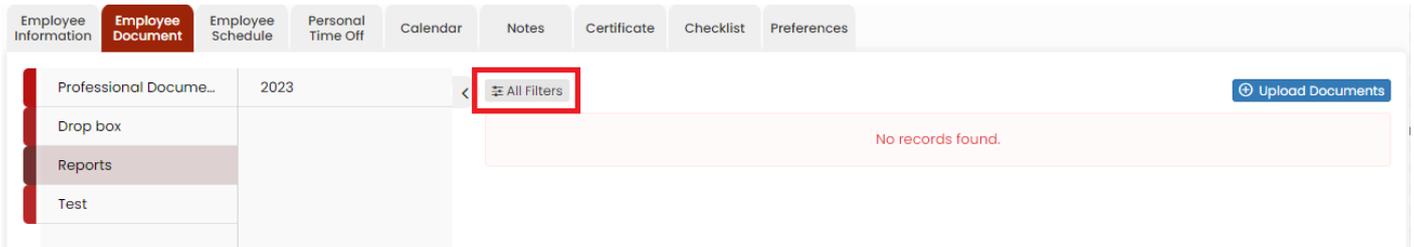


The following pop-up appears, click Yes to continue. The document will be deleted from the folder.

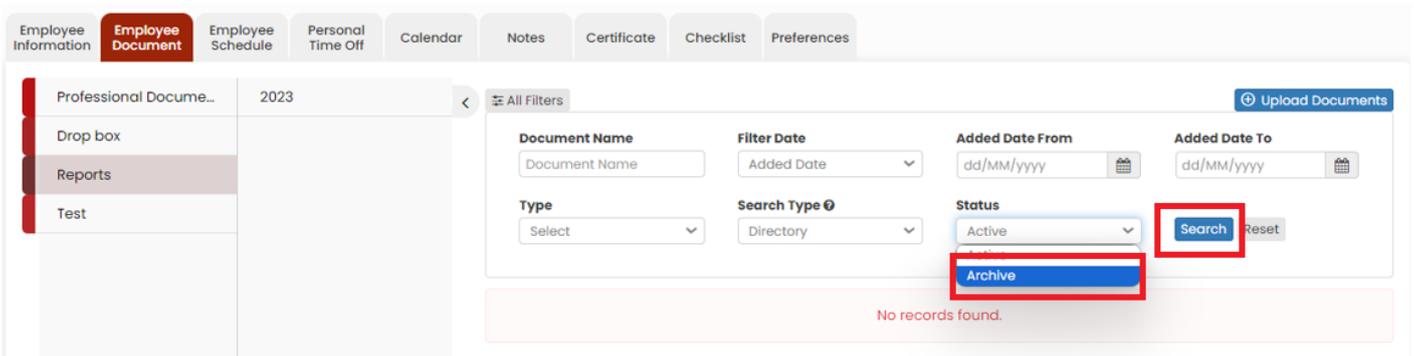


Restore deleted document

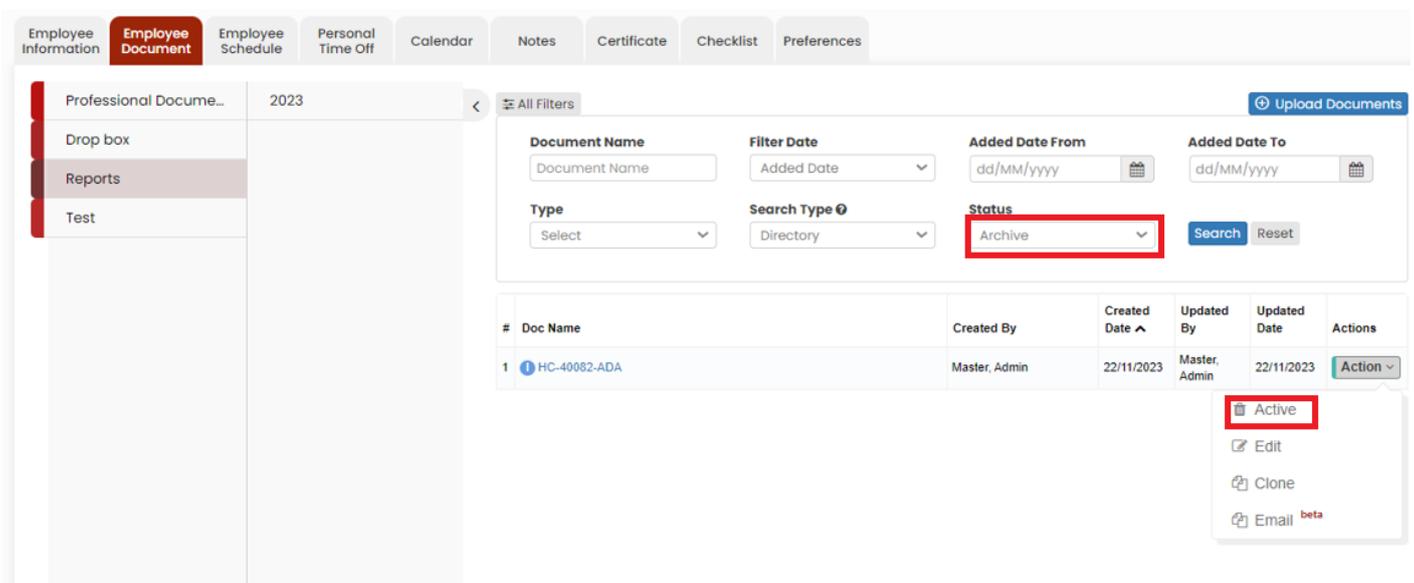
To Restore the deleted click All filters option.



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 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's a sidebar with a tree view containing 'Professional Docume...', 'Drop box', 'Reports', and 'Test'. The main area has a search filter section with fields for Document Name, Filter Date, Added Date From, and Added Date To. The Status dropdown 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.

#	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

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's a header with a logo and the text 'Advanced Directive Acknowledgment'. Below the header, the form title 'Advanced Directive Acknowledgment' is displayed. The main content area contains a heading 'Please check all that are applicable' followed by four checkboxes. The second checkbox is selected and has a date field set to '11/1/2023'. The first checkbox is 'The federal and state laws regarding Advance Directives have been explained to me and I have received materials about these laws from myEZcare'. The second checkbox is 'I have formulated Advance Directives on' followed by a text input field and a date field. The third checkbox is 'I have not formulated Advance Directives.'. The fourth checkbox is 'I have executed a Power of Attorney with medical decision-making authority to:' followed by a text input field.

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

I have not formulated Advance Directives.

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

- 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"/>	does not have decision making capacity, I	<input type="text"/>	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.

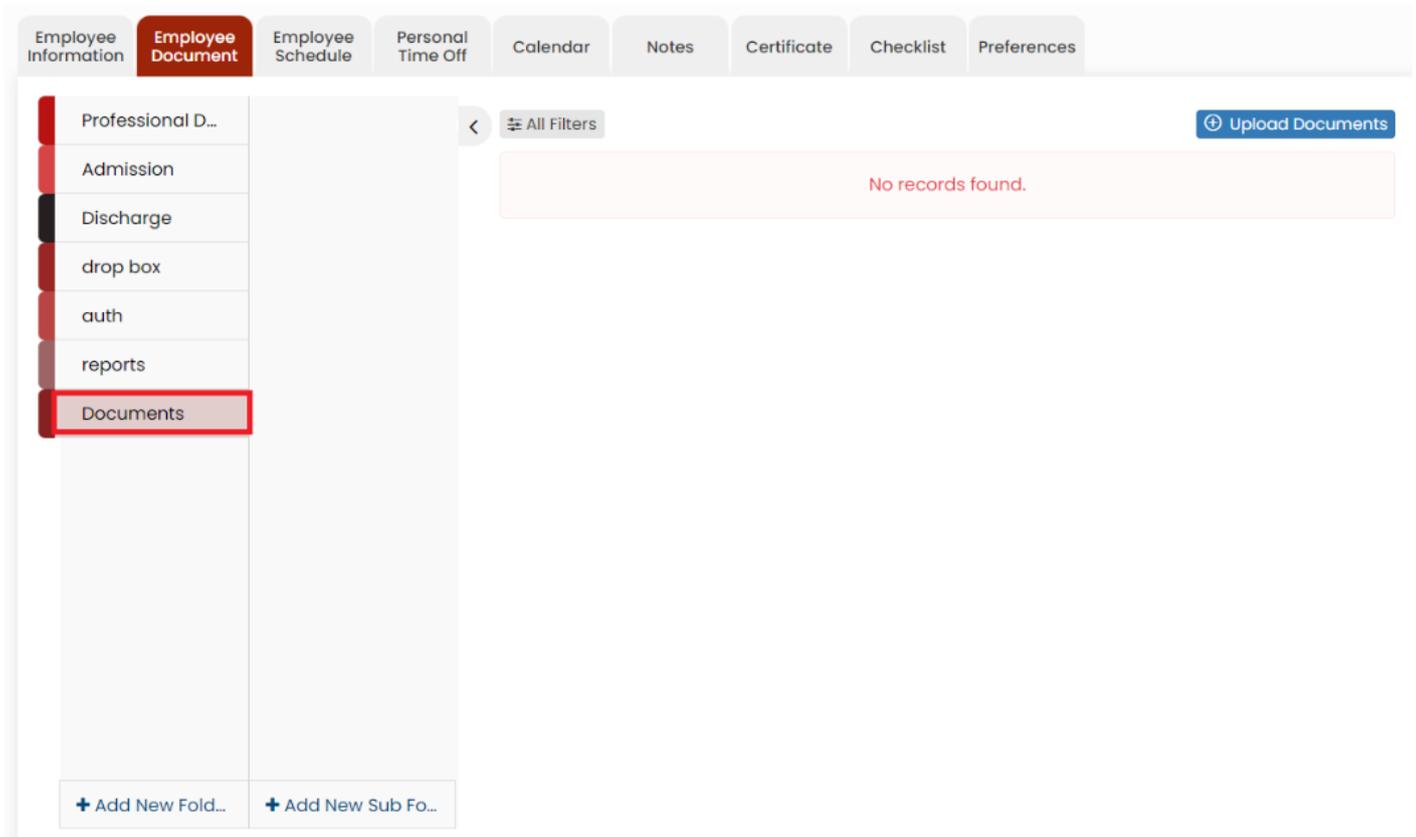
Also the user can select the Roles to access the document and click Save option.

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, v' selected.
- Save**: A green button at the bottom right.

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

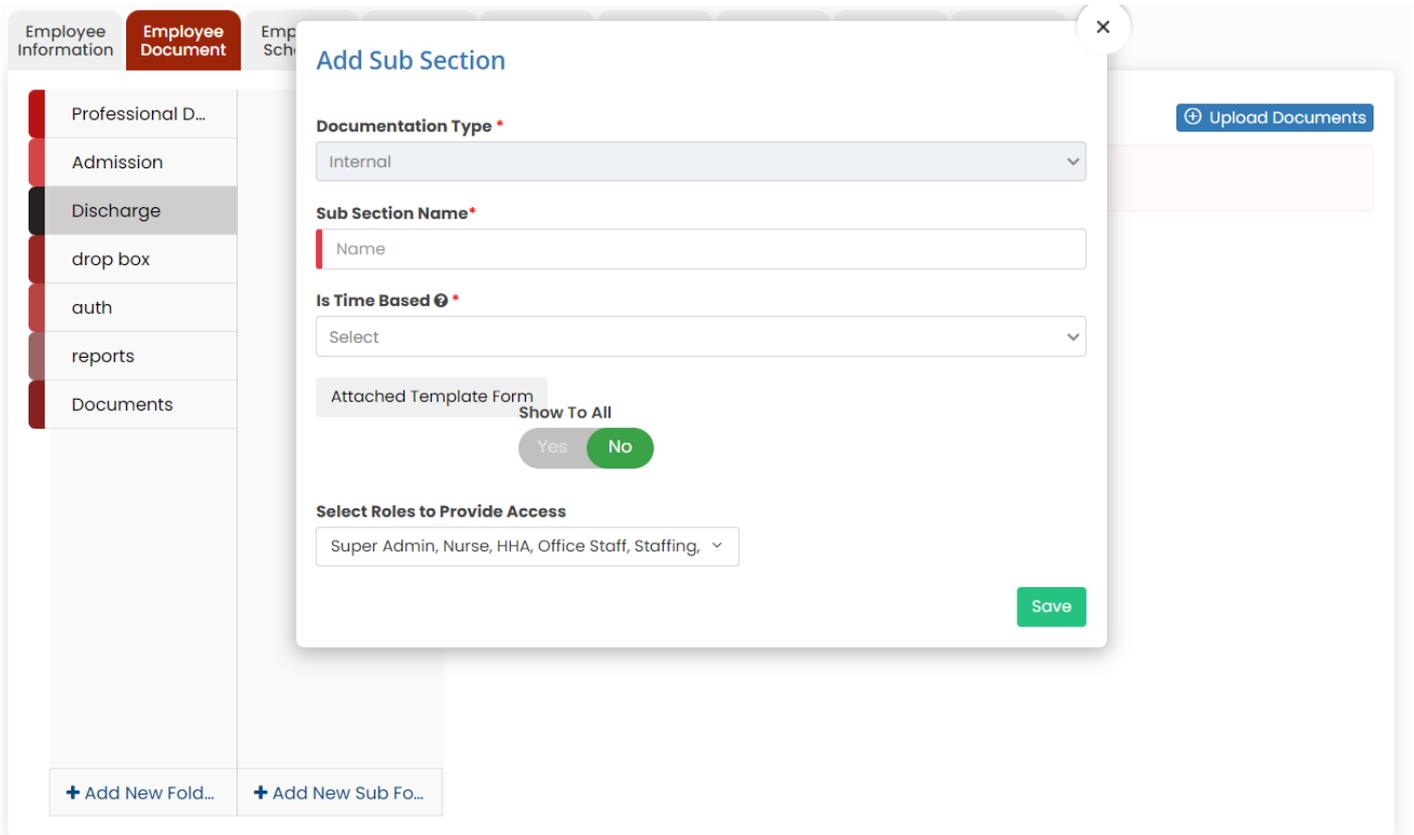
The folder Documents is added successfully to upload the required documents of the employee.



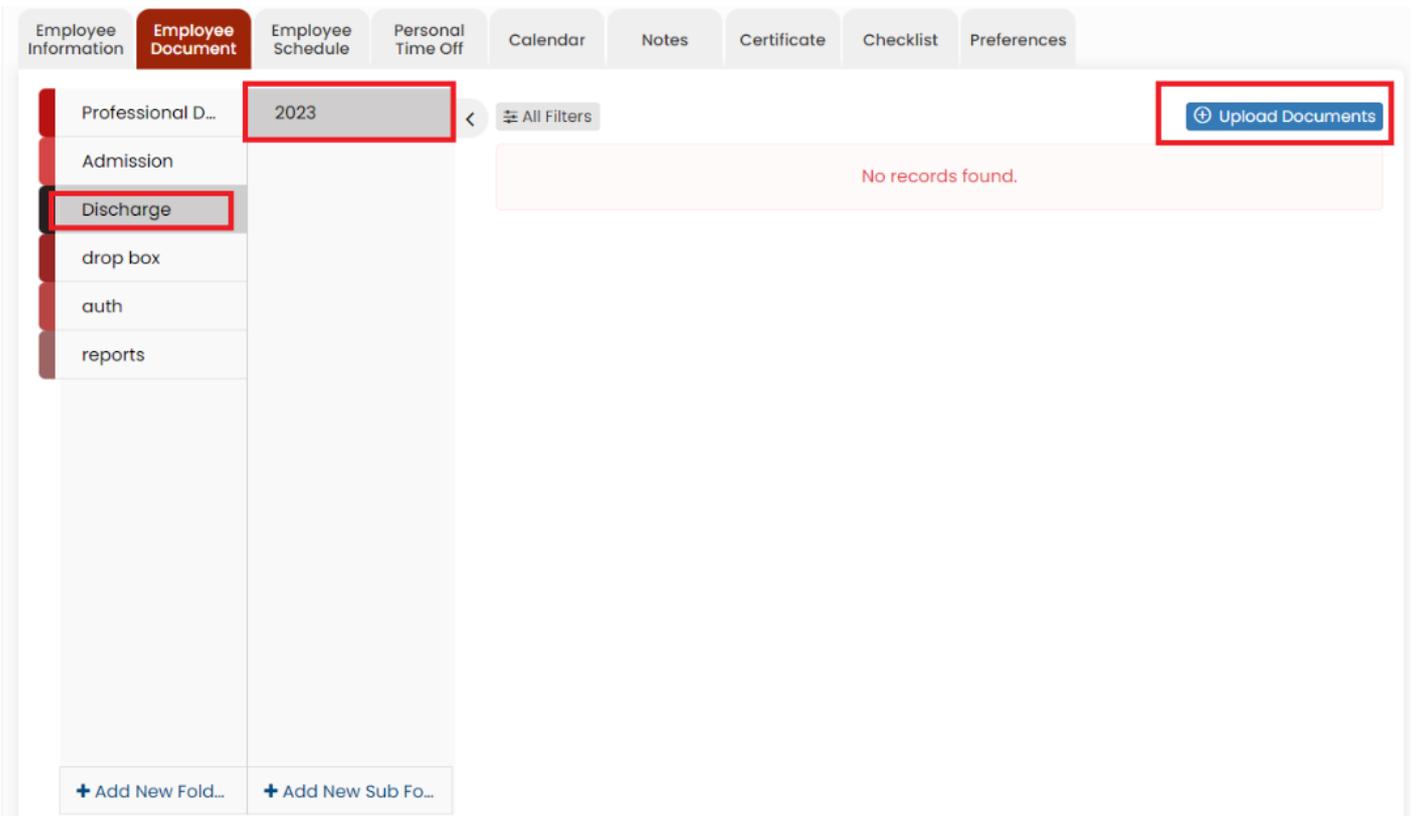
Adding New Sub Folder in Employee Document

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.



Revision #8

Created 22 November 2023 19:33:29 by Thamarai

Updated 24 November 2023 21:39:50 by Thamarai