

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 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 includes a table with columns for Employee ID, Name, and a selection checkbox. Below this table is a 'Personal Time Off' tab, which is active. The tab contains 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 'No records found.' at the bottom. A green '+ Personal Time Off' button is located in the top right corner of the tab area.

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

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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 Tab >> List >> Employee Name >> Notes

The screenshot shows a web application interface with a top navigation bar containing tabs: Employee Information, Employee Document, Employee Schedule, Personal Time Off, Calendar, Notes (active), Certificate, Checklist, and Preferences. A modal window titled 'Add Note' is open in the center. The modal has a close button (X) in the top right corner. Inside the modal, there are four dropdown menus: 'Role*' (with a red error bar and the text 'Assignee is required'), 'Assignee*' (also with a red error bar and 'Assignee is required'), 'Category' (with 'Category is required'), and 'isPrivate' (checked). There is a green button '+ Add Note Sentence' to the right of the 'isPrivate' checkbox. Below these fields is a large text area labeled 'Note*' with a red error bar and the text 'Note'. At the bottom of the modal are two buttons: 'Cancel' (red) and 'Save' (green, highlighted with a red border). In the background, a sidebar on the right shows a '+ Add Note' button and a partially visible 'ction' label.

Revision #1

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