

# Patient Document

Patient document consist of essential medical records, treatment plans, and progress notes. These documents track the patient's health history, medications, diagnoses, and care schedules.

## Uploading Patient Documents

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

Client >> List >> Select Patient >> Document

EDIT PATIENT - MICHAEL, DANIEL 61Y 11M MALE / #76491585 / LOCATION: ROCKY MOUNT / STATUS: ACTIVE

Patient DetailsDocumentsBilling/Prior AuthorizationCare PlanCalendarBlock EmployeesInternal MessagingNotes

New ReferralIncident ReportVisitsPatient AuthorizationsRN SupervisoryPC Plan of CareAuthorization requestDMAS-225

< All Filters

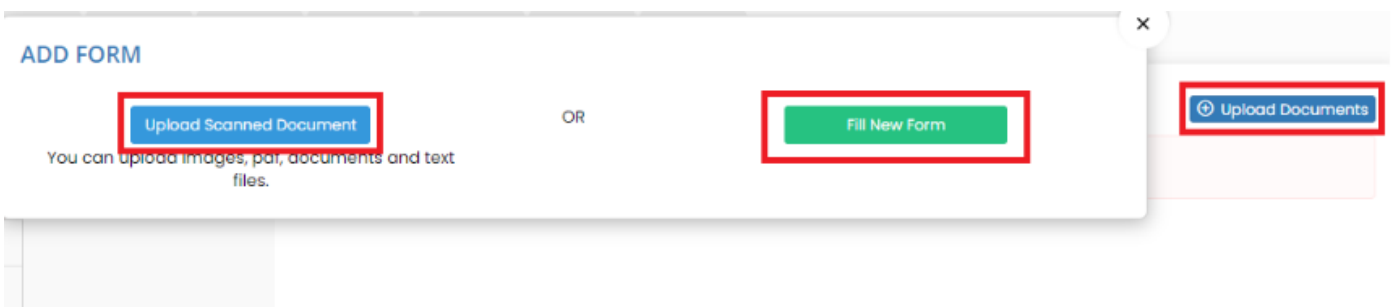
Upload Documents

+ Add New Folder+ Add New Sub Folder

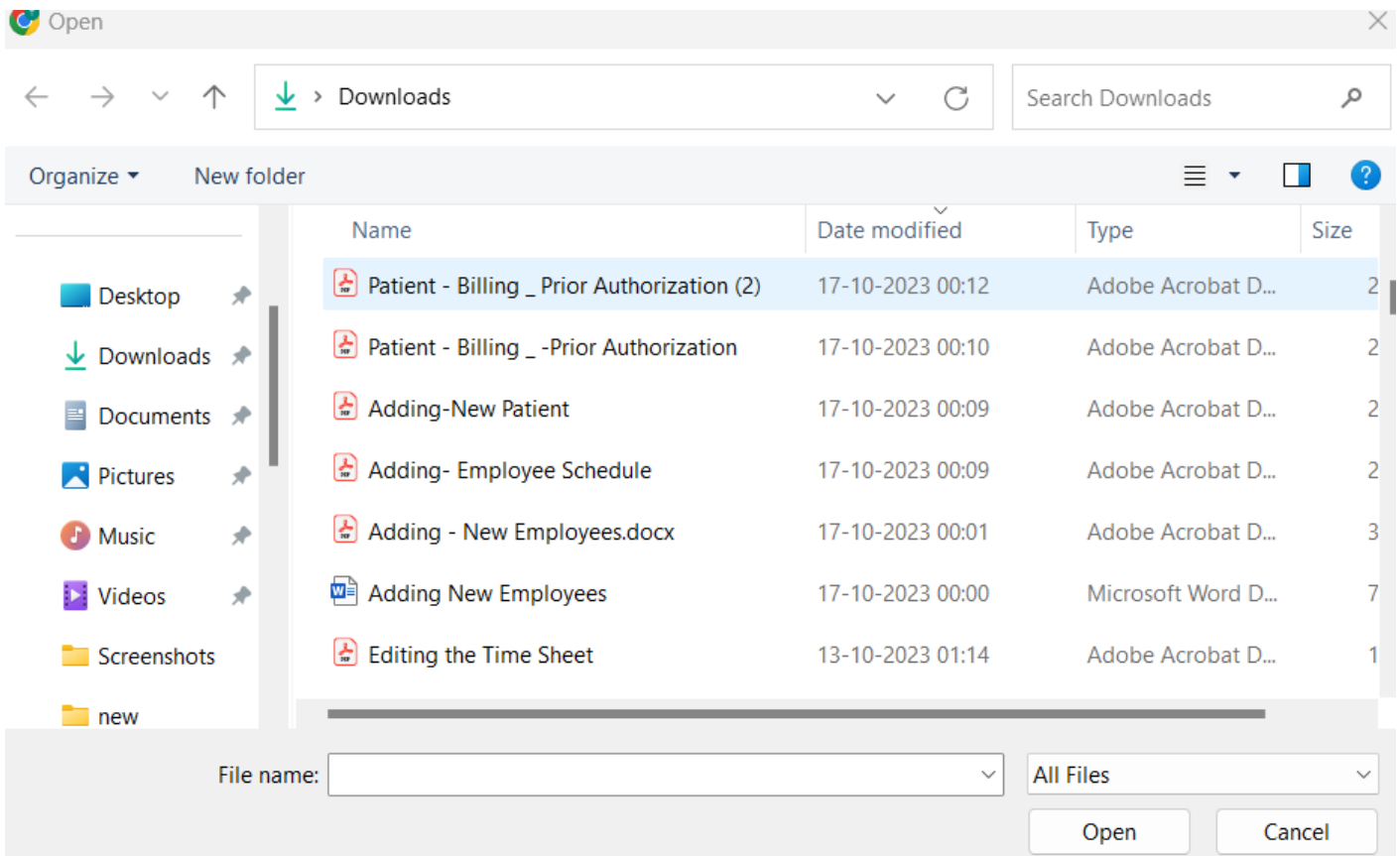
Select the type of document from the list and Click the Upload Documents option. The user can also Add New Folders and Subfolders to upload the documents.



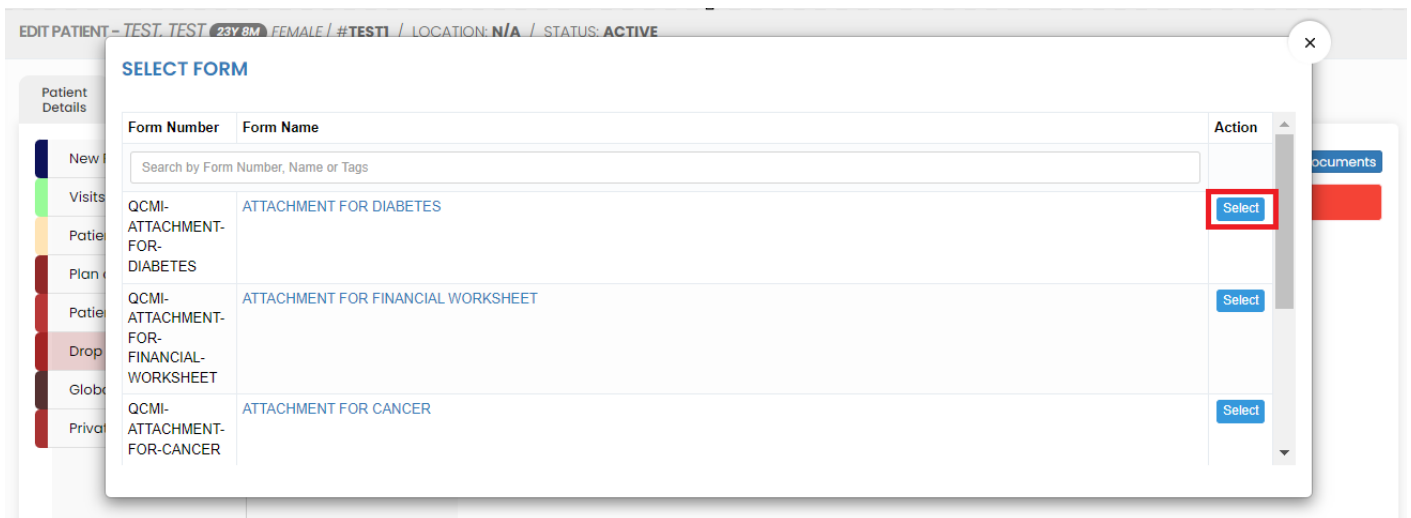
When we click upload documents, the following screen appears. The user can choose the options whether to Upload Scanned Documents or to Fill New form.



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 at the bottom of the document.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient Details Documents Billing Care Plan Calendar Block Employees Internal Messaging Notes

New Referral 2023

Visits

Patient Authorizations

Plan of Care (485)

Patient Test Report

Drop Box

Global

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

The following screen appears, click Save option.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient Details Documents Billing Care Plan

New Referral 2023

Visits

Patient Authorizations

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Patient Test Report

Drop Box

Global

Test

### Edit Document

File Name\*  HC-40082-ADA

Document Kind\*  Internal

Cancel Save

Upload Documents

Created Date	Updated By	Updated Date	Actions
24/11/2023	Master, Admin	24/11/2023	Action

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

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient Details Documents Billing Care Plan Calendar Block Employees Internal Messaging Notes

New Referral 2023 < All Filters Upload Documents

#	Doc Name	Created By	Created Date ^	Updated By	Updated Date	Actions
1	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action ▾ <ul style="list-style-type: none"><li>Archive</li><li>Edit</li><li>Clone</li><li>Email <small>beta</small></li></ul>

The features under Actions are :

- Archive
- Edit
- Clone
- Email

## Archive

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

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient Details Documents Billing Care Plan Calendar Block Employees Internal Messaging Notes

New Referral 2023 < All Filters Upload Documents

#	Doc Name	Created By	Created Date ^	Updated By	Updated Date	Actions
1	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action ▾ <ul style="list-style-type: none"><li>Archive</li><li>Edit</li><li>Clone</li><li>Email <small>beta</small></li></ul>

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

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient Details Documents Billing Care Plan

New Referral 2023 < All Filters Upload Documents

#	Doc Name	Created By	Created Date ^	Updated By	Updated Date	Actions
1	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action ▾

**Archive**

Are you sure you want to Archive this document?

Cancel Yes, Continue...

Restore deleted document

To Restore the deleted click All filters option.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient DetailsDocumentsBillingCare PlanCalendarBlock EmployeesInternal MessagingNotes

New ReferralVisitsPatient AuthorizationsPlan of Care (485)Patient Test ReportDrop Box

2023

All Filters

Upload Documents

No records found.

Select the Status Archive and click Search option.

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient DetailsDocumentsBillingCare PlanCalendarBlock EmployeesInternal MessagingNotes

New ReferralVisitsPatient AuthorizationsPlan of Care (485)Patient Test ReportDrop Box

2023

All Filters

Upload Documents

Document NameFilter DateAdded Date FromAdded Date To

Document NameAdded Datedd/MM/yyyydd/MM/yyyy

TypeSearch TypeStatus

SelectDirectoryActiveArchive

SearchReset

No records found.

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

EDIT PATIENT - TEST, TEST 23Y 8M FEMALE / #TEST1 / LOCATION: N/A / STATUS: ACTIVE

Patient DetailsDocumentsBillingCare PlanCalendarBlock EmployeesInternal MessagingNotes

New ReferralVisitsPatient AuthorizationsPlan of Care (485)Patient Test ReportDrop BoxGlobalTest

2023

All Filters

Upload Documents

Document NameFilter DateAdded Date FromAdded Date To

Document NameAdded Datedd/MM/yyyydd/MM/yyyy

TypeSearch TypeStatus

SelectDirectoryArchive

SearchReset

#	Doc Name	Created By	Created Date	Updated By	Updated Date	Actions
1	HC-40082-ADA	Master, Admin	24/11/2023	Master, Admin	24/11/2023	Action
2	1.PNG	Master, Admin	08/11/2023	Master, Admin		Active Edit Clone Email beta

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

Patient Details
Documents
Billing
Care Plan
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Test

2023

All Filters

Document Name

Filter Date

Added Date From

Added Date To

Type

Search Type

Status

Document Name

Added Date

dd/MM/yyyy

dd/MM/yyyy

Select

Directory

Active

Search

Reset

#

Doc Name

Created By

Created Date

Updated By

Updated Date

Actions

1

HC-40082-ADA

Master, Admin

24/11/2023

Master, Admin

24/11/2023

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

Date

11/1/2023

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

Please Enter 30 Characters Only.

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- ☐ 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 Characteres 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> Save</div>	<div>Cancel</div>
		<div> PDF</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 from the patients to the Caregiver/Staff. The user has to enter the required fields and Click Send option.


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:

Test Demo

**B**

*I*

U






**Tl** 



Testing 123

Close

 Send

## Adding New Folder

Click + Add New Folder option in Patient 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 patient click Yes option. If the user wants the folder to be added only for the particular patient click No option and click Save.

EDIT PATIENT - MICHAEL, DANIEL 61Y 11M MALE / #76491585 / LOCATION: ROCKY MOUNT / STATUS: ACTIVE

Patient Details Documents Billing/Prior Authorization Care Plan Calendar

New Referral  
Incident Report  
Visits  
Patient Authorizations  
RN Supervisory  
PC Plan of Care  
Authorization request  
DMAS-225

+ Add New Folder + Add New Sub Folder

### Add Section

Documentation Type \*  
Select

Section Name \*  
Name

Color Scheme \*  
Color Scheme

Is Time Based \*  
Select

Attached Template Form  
Show To All  
Yes No

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

Save

Upload Documents

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

Patient Details Documents Billing/Prior Authorization Care Plan Calendar Block Employees Internal Messaging Notes

New Referral  
Incident Report  
Visits  
Patient Authorizations  
RN Supervisory  
PC Plan of Care  
Authorization request  
DMAS-225  
Reports

+ Add New Folder + Add New Sub Folder

< All Filters

No records found.

Upload Documents

Adding New Sub Folder

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 patient click Yes option. If the user wants the folder to be added only for the particular patient click No option and click Save.

The screenshot shows a web application interface with a sidebar menu on the left and a main content area on the right. The sidebar menu includes tabs for Patient Details, Documents (selected), Billing/Prior Authorization, Care Plan, and Calendar. Under the Documents tab, there is a list of document types: New Referral, Incident Report, Visits, Patient Authorizations, RN Supervisory, PC Plan of Care, Authorization request, DMAS-225, and Reports (highlighted in red). At the bottom of the sidebar, there are two buttons: '+ Add New Folder' and '+ Add New Sub Folder'. The main content area displays a modal dialog box titled 'Add Sub Section'. The dialog box contains the following fields and options:

- Documentation Type \***: A dropdown menu with 'Select' as the current value.
- Sub Section Name \***: A text input field with 'Name' as the placeholder.
- Is Time Based \***: A dropdown menu with 'Select' as the current value.
- Attached Template Form**: A section with a 'Show To All' toggle. The toggle has two buttons: 'Yes' (disabled) and 'No' (active).
- Select Roles to Provide Access**: A dropdown menu with 'Super Admin, Nurse, HHA, Office Staff, Staffing, ' as the current value.
- Save**: A green button at the bottom right of the dialog box.

In the background, the main content area shows a red header bar with an 'Upload Documents' button.

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

Patient Details

Documents

Billing/Prior Authorization

Care Plan

Calendar

Block Employees

Internal Messaging

Notes

New Referral

Incident Report

Visits

Patient Authorizations

RN Supervisory

PC Plan of Care

Authorization request

DMAS-225

Reports

2023

<

All Filters

Upload Documents

No records found.

+ Add New Folder

+ Add New Sub Folder

Revision #5  
Created 22 November 2023 19:33:29 by Thamarai  
Updated 24 November 2023 22:46:07 by Thamarai