Set up

Setting up an application is the process of installing, configuring, and customizing software or systems to ensure they work as intended. It involves tailoring the application to specific needs, setting user permissions, and preparing it for use, ensuring a smooth and effective operation.

> 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.

User Login

The User Login on the top right corner of the software contains the following features:

- **My Profiles**
- **Roles and Permissions**
- **Organization Settings**
- **Billing**
- **Log Out**

My Profiles

The user can update the Profile information under My Profiles option. Update the required fields, upload the Profile image and click Save option.

Roles & Permissions

The user can give permissions to the respective Role of the Employee. Select and Role and choose the permission to be given for the Role.

- **Mobile App Permissions**
- **Web Permissions**
- **Report Permissions**

Editing the Role

The Role of the Employee can also be edited by using the option Edit in the Selected Role.

Roles and Permissions - Web Permissions Configuration

For Web Permissions Configuration, Select the Role and Click Web Permissions under Permissions Tab.

ROLE PERMISSION Search And Set Role Permission Details

SYSTEM – PERMISSIONS

Role Name **+ Add Role**

Ad-Hoc Clinical ⌄

Permissions

Web Permissions ⌄

Note*: You can enable/disable any permission from permission tree. Please make sure before enabling/disabling "**Administrative Permission**". This permission is reserved for "**Special Admin Rights**" which will be applicable only to Admin or SuperAdmin. **Ex.** Role Permission Page's Access

Selected Role: Ad-Hoc Clinical ✏

Dashboard - The Dashboard permissions includes the feature to view all the Information in the Dashboard screen. The user can check the required permission to be given for the particular role in the Dashboard Permission under Roles and Permissions Tab in the application.

The selected Role have access to view only the permissions that has been selected in the checkbox.

- ⚡ Dashboard
  - ⚡ Employees – Didn't Clock In / Clock Out
  - ⚡ Employees – Over Time in Last 7 Days
  - ⚡ Patient – New
  - ⚡ Patient – Fully Not Scheduled for Next 7 Days
  - ⚡ Received Internal Message
  - ⚡ Sent Internal Message
  - ⚡ Web Notifications
  - ⚡ Dashboard Card
    - ⚡ Employee OverTime
    - ⚡ New Patient
    - ⚡ Patient FullySchedule
    - ⚡ Internal Message
    - ⚡ Approval Pending For Visits
    - ⚡ Total Schedule
    - ⚡ Prior Auth Expiring
    - ⚡ Patient – Schedule
    - ⚡ Patient – Total Present
    - ⚡ Patient – Total Absent
    - ⚡ Payor List
    - ⚡ Total Payor
    - ⚡ Active Patient Count
    - ⚡ Prior Auth Expired
  - ⚡ Employee Birthday
  - ⚡ Patient Birthday
  - ⚡ Patient – Clock In / Clock Out
  - ⚡ Patient – Discharged
  - ⚡ Patient Medicaid
  - ⚡ Patient – OnHold
  - ⚡ Patient – Pending
  - ⚡ Patient – Transfer
  - ⚡ View Map
  - ⚡ Broadcast Notifications

Employee - This feature shows the list of permissions that can be given for the particular role in accessing the application. The user can check the roles to only view, Add/ update the data in the application and also to delete the information in the application.

- ⊟ ☐ ⚡ Employee
  - ☐ ⚡ Group Level Record
  - ⊟ ☐ ⚡ ID Number
    - ☐ ⚡ Can See
    - ☐ ⚡ Can't See
    - ☐ ⚡ Can See Last Four Digit
  - ⊟ ☐ ⚡ Add/Update
    - ⊟ ☐ ⚡ Notification Preferences
      - ☐ ⚡ Update
      - ☐ ⚡ View Only
    - ☐ ⚡ Email Signature
    - ☐ ⚡ Can Update Location
    - ⊟ ☐ ⚡ Role
      - ☐ ⚡ Can See
      - ☐ ⚡ Can Update
    - ⊟ ☐ ⚡ Employee Information
      - ☐ ⚡ Group Add/Update
      - ☐ ⚡ View Only
      - ☐ ⚡ Add/Update
    - ⊟ ☐ ⚡ Employee Documents
      - ☐ ⚡ Add Section
      - ☐ ⚡ Add Subsection
      - ☐ ⚡ View Documents
      - ☐ ⚡ Add/Update Documents
      - ☐ ⚡ Delete Documents

- ⊟ ☐ ⚡ Employee Schedule
  - ☐ ⚡ View Only
  - ☐ ⚡ Add/Update
- ⊟ ☐ ⚡ Personal Time Off
  - ☐ ⚡ View Only
  - ☐ ⚡ Add/Update
  - ☐ ⚡ Delete
- ☐ ⚡ Calendar
- ⊟ ☐ ⚡ TimeSheet
  - ☐ ⚡ View Only
  - ☐ ⚡ Add/Update
  - ☐ ⚡ Delete
- ⊟ ☐ ⚡ Notes
  - ☐ ⚡ View Only
  - ☐ ⚡ Add/Update
  - ☐ ⚡ Delete
- ⊟ ☐ ⚡ Certificate
  - ☐ ⚡ View Only
  - ☐ ⚡ Add/Update
  - ☐ ⚡ Delete
- ⊟ ☐ ⚡ Checklist
  - ☐ ⚡ View Only
  - ☐ ⚡ Add/Update
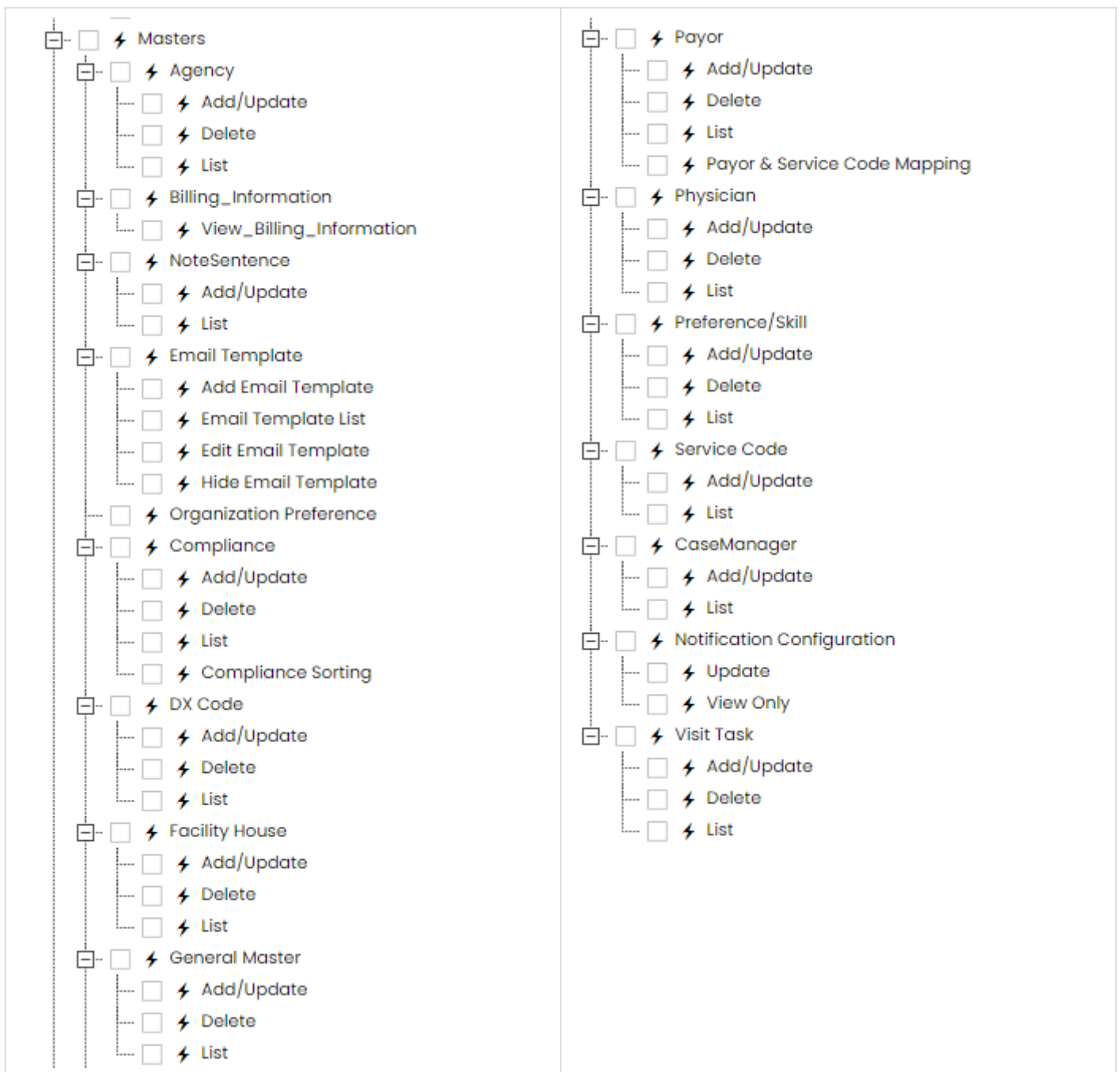- ☐ ⚡ Delete
- ☐ ⚡ List
- ☐ ⚡ Calendar
- ☐ ⚡ Schedule
- ☐ ⚡ PTO

Patient - This feature shows the list of permissions that can be given for the particular role in accessing the application. The user can check the roles to only view, Add/ update the data in the application and also to delete the information in the application.
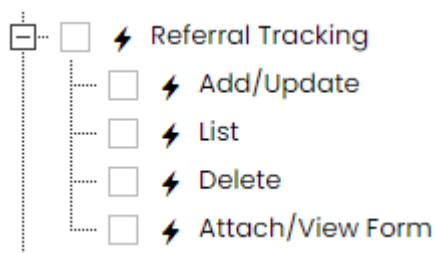
Column 1

- ⚡ Patient Intake
  - ⚡ Patient Chart Internal
  - ⚡ Incident Report
  - ⚡ Add Notes
  - ⚡ FaceSheet Form
  - ⚡ Vital Sign Tracking
  - ⚡ Patient Chart External
  - ⚡ Group Level Record
  - ⚡ ID Number
    - ⚡ Can See
    - ⚡ Can't See
    - ⚡ Can See Last Four Digit
  - ⚡ Add/Update
    - ⚡ Patient Details
      - ⚡ Referral History
        - ⚡ View Only
        - ⚡ Add/Update
        - ⚡ Delete
      - ⚡ Physician
        - ⚡ View Only
        - ⚡ Add/Update
        - ⚡ Delete
      - ⚡ DxCode
        - ⚡ View Only
        - ⚡ Add/Update
        - ⚡ Delete
      - ⚡ Medication
        - ⚡ View Only
        - ⚡ Add/Update
        - ⚡ Delete
      - ⚡ View Audit Log
      - ⚡ Allergy
        - ⚡ View Only
        - ⚡ Add/Update
        - ⚡ Delete
      - ⚡ Group Add/Update
      - ⚡ View Only
      - ⚡ Add/Update

Column 2

- ⚡ Documents
  - ⚡ Document Email
  - ⚡ Add Section
  - ⚡ Add Subsection
  - ⚡ View Documents
  - ⚡ Add/Update Documents
  - ⚡ Delete Documents
- ⚡ Billing
  - ⚡ Patient Payors
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
  - ⚡ Billing Details
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
  - ⚡ Prior Authorization
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
- ⚡ Care Plan
  - ⚡ Tasks Mapping
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
  - ⚡ Patient Schedule
    - ⚡ View Only
    - ⚡ Add/Update
  - ⚡ Frequency
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
  - ⚡ Case Load
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
- ⚡ Calendar

Column 3

- ⚡ Block Employees
  - ⚡ View Only
  - ⚡ Add/Update
  - ⚡ Delete
- ⚡ Internal Messaging
  - ⚡ View Only
  - ⚡ Add/Update
  - ⚡ Delete
- ⚡ TimeSheet
  - ⚡ View Only
  - ⚡ Add/Update
  - ⚡ Delete
- ⚡ Notes
  - ⚡ View Only
  - ⚡ Add/Update
  - ⚡ Delete
- ⚡ Forms
  - ⚡ DMAS97
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
  - ⚡ DMAS99
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
  - ⚡ CMS485
    - ⚡ View Only
    - ⚡ Add/Update
    - ⚡ Delete
  - ⚡ View Only
  - ⚡ Add/Update
- ⚡ Delete
- ⚡ List
- ⚡ Calendar
- ⚡ Schedule

Masters - Settings - Settings in software refer to configurable options that allow users to customize various aspects of the application to suit their preferences or requirements. The access for list of features under Settings in the application can be given by using the option Masters in the Roles and Permissions. The user can check the roles to only view, Add/ update the data in the application and also to delete the information in the application.

```
├─□ ⚡ Masters                              ├─□ ⚡ Payor
│  ├─□ ⚡ Agency                            │  ├─□ ⚡ Add/Update
│  │  ├─□ ⚡ Add/Update                     │  ├─□ ⚡ Delete
│  │  ├─□ ⚡ Delete                         │  ├─□ ⚡ List
│  │  └─□ ⚡ List                           │  └─□ ⚡ Payor & Service Code Mapping
│  ├─□ ⚡ Billing_Information               ├─□ ⚡ Physician
│  │  └─□ ⚡ View_Billing_Information       │  ├─□ ⚡ Add/Update
│  ├─□ ⚡ NoteSentence                      │  ├─□ ⚡ Delete
│  │  ├─□ ⚡ Add/Update                     │  └─□ ⚡ List
│  │  └─□ ⚡ List                           ├─□ ⚡ Preference/Skill
│  ├─□ ⚡ Email Template                    │  ├─□ ⚡ Add/Update
│  │  ├─□ ⚡ Add Email Template             │  ├─□ ⚡ Delete
│  │  ├─□ ⚡ Email Template List            │  └─□ ⚡ List
│  │  ├─□ ⚡ Edit Email Template            ├─□ ⚡ Service Code
│  │  └─□ ⚡ Hide Email Template            │  ├─□ ⚡ Add/Update
│  ├─□ ⚡ Organization Preference           │  └─□ ⚡ List
│  ├─□ ⚡ Compliance                        ├─□ ⚡ CaseManager
│  │  ├─□ ⚡ Add/Update                     │  ├─□ ⚡ Add/Update
│  │  ├─□ ⚡ Delete                         │  └─□ ⚡ List
│  │  ├─□ ⚡ List                           ├─□ ⚡ Notification Configuration
│  │  └─□ ⚡ Compliance Sorting             │  ├─□ ⚡ Update
│  ├─□ ⚡ DX Code                           │  └─□ ⚡ View Only
│  │  ├─□ ⚡ Add/Update                     ├─□ ⚡ Visit Task
│  │  ├─□ ⚡ Delete                         │  ├─□ ⚡ Add/Update
│  │  └─□ ⚡ List                           │  ├─□ ⚡ Delete
│  ├─□ ⚡ Facility House                    │  └─□ ⚡ List
│  │  ├─□ ⚡ Add/Update
│  │  ├─□ ⚡ Delete
│  │  └─□ ⚡ List
│  ├─□ ⚡ General Master
│  │  ├─□ ⚡ Add/Update
│  │  ├─□ ⚡ Delete
│  │  └─□ ⚡ List
```

Referral Tracking - Prospects

The access for list of features under Prospects in the application can be given by using the option Referral Tracking in the Roles and Permissions. The user can check the roles to only view, Add/update the data in the application and also to delete the information in the application.

```
├─□ ⚡ Referral Tracking
│  ├─□ ⚡ Add/Update
│  ├─□ ⚡ List
│  ├─□ ⚡ Delete
│  └─□ ⚡ Attach/View Form
```

System Roles and Permissions

Super Admin

The Super Admin plays a pivotal role in overseeing and managing the administrative aspects of the organization. This role involves managing information systems, ensuring data security and compliance, and providing technical support to optimize workflow and enhance patient care delivery.

- Create, modify, and deactivate user accounts as needed.
- Assign roles and permissions to users based on their responsibilities and access requirements.
- Configure and customize system settings based on organizational requirements.
- Oversee the implementation, maintenance, and optimization of information systems and electronic health record (EHR) platforms used within the organization.
- Provide training and support to staff members on security awareness, data handling best practices, and compliance with privacy regulations.
- Monitor data integrity and implement measures to maintain data quality and consistency.
- Implement and enforce security protocols to safeguard sensitive data and protect against unauthorized access.

Registered Nurse (RN)

The Registered Nurse (RN) plays a pivotal role in delivering comprehensive and compassionate healthcare services to patients in their homes. This position involves providing skilled nursing care, coordinating interdisciplinary care teams, and promoting patient education and self-management.

- Provide skilled nursing interventions such as wound care, medication management, intravenous therapy, and disease management in accordance with physician orders and nursing protocols.
- Perform clinical procedures safely and competently, ensuring adherence to infection control practices and patient safety standards.
- Assess patients' response to treatment, monitor for changes in health status, and modify care plans as necessary.
- Collaborate with physicians, therapists, social workers, and other healthcare professionals to ensure continuity of care and effective care transitions.
- Empower patients to actively participate in their care and make informed decisions about their health.

Administrator

The Administrator is responsible for overseeing the overall operation of the organization, including strategic planning, financial management, regulatory compliance, and quality improvement initiatives. This leadership position plays a pivotal role in ensuring the delivery of high-quality, patient-centered care and the attainment of organizational goals.

- Establish and maintain effective communication channels with stakeholders, including staff members, patients, caregivers, referral sources, and community partners.

- Develop and implement policies, procedures, and protocols to promote regulatory compliance, patient safety, and quality of care.
- Conduct regular audits, assessments, and performance reviews to monitor adherence to standards of practice, identify areas for improvement, and mitigate risks.
- Provide leadership and supervision to administrative and clinical staff, fostering a positive work environment, professional growth, and teamwork.
- Recruit, hire, train, and retain qualified staff members, ensuring sufficient staffing levels to meet patient care needs and organizational objectives.

PCA / CNA - Personal Care Aide (PCA) / Certified Nursing Assistant (CNA)

The Personal Care Aide (PCA) or Certified Nursing Assistant (CNA) plays a vital role in supporting patients with activities of daily living (ADLs), providing personal care, and assisting with basic medical tasks under the supervision of a registered nurse or other healthcare professional. This position is critical in ensuring the comfort, safety, and well-being of patients receiving care in their homes.

- Help patients with personal hygiene tasks such as bathing, grooming, oral care, and toileting.
- Provide assistance with mobility, including transferring, positioning, and ambulation as needed.
- Provide feeding assistance to patients who require help with eating or drinking, ensuring proper nutrition and hydration.
- Assist patients with medication administration, including opening medication containers, handing pills, and providing water as needed.
- Measure and record vital signs such as temperature, pulse, respiration rate, and blood pressure under the direction of a registered nurse or healthcare professional.
- Provide companionship and emotional support to patients, engaging in conversation, activities, and social interaction to promote mental and emotional well-being.

HHA - Home Health Aide

The Home Health Aide (HHA) plays a fundamental role in providing essential personal care and support to patients who require assistance with activities of daily living (ADLs) and instrumental activities of daily living (IADLs) in the comfort of their own homes. Working under the supervision of a registered nurse or other healthcare professional, the HHA helps to promote the independence, safety, and well-being of patients receiving home health care services.

- Assist patients with personal hygiene tasks such as bathing, showering, grooming, oral care, and toileting.
- Encourage and support patients in performing range of motion exercises and other prescribed mobility exercises.
- Assist patients with meal preparation, including planning, cooking, and serving nutritious meals based on their dietary preferences and restrictions.
- Remind patients to take prescribed medications according to their medication schedules.

- Assist with laundry, including washing, drying, folding, and putting away clothes and linens.
- Monitor and record patients' food and fluid intake, as well as any dietary changes or concerns.

Clinical Team

The Clinical Team consists of healthcare professionals who collaborate to provide comprehensive and coordinated care to patients in their homes. This interdisciplinary team plays a critical role in assessing patients' needs, developing individualized care plans, and delivering skilled medical services to promote optimal health outcomes and quality of life.

- Conduct comprehensive assessments of patients' medical, functional, and psychosocial needs in the home environment.
- Assess patients' psychosocial needs, social support systems, and environmental factors that may impact their health and well-being.
- Facilitate communication and collaboration among members of the clinical team, including nurses, therapists, social workers, and other healthcare professionals.
- Communicate regularly with patients, families, and caregivers to provide updates on the patient's progress, address concerns, and promote adherence to the care plan.
- Coordinate care transitions, discharge planning, and long-term care arrangements in collaboration with patients, caregivers, and other healthcare providers.
- Coordinate physical therapy, occupational therapy, speech therapy, and other rehabilitative services as needed to help patients regain or maintain functional independence.

Nurse

The Nurse is responsible for delivering skilled nursing services to patients in their homes, collaborating with interdisciplinary team members, and promoting continuity of care to support patients' health and well-being in the community setting.

- Provide skilled nursing services such as wound care, medication management, intravenous therapy, catheter care, and disease management in accordance with physician orders and evidence-based practice guidelines.
- Conduct thorough assessments of patients' physical, emotional, and psychosocial needs in the home environment, including comprehensive health histories and ongoing monitoring of health status.
- Collaborate with interdisciplinary team members, including therapists, social workers, home health aides, and other healthcare professionals, to ensure coordinated and holistic care delivery.
- Perform clinical procedures safely and competently, adhering to infection control protocols, patient safety standards, and regulatory requirements.
- Communicate regularly with patients, families, and caregivers to provide updates on the patient's progress, address concerns, and promote adherence to the care plan.

Staffing

The Staffing Coordinator is responsible for managing the needs of the organization, ensuring adequate coverage for patient visits, and coordinating schedules for healthcare professionals to optimize efficiency and meet patient care requirements.

- Coordinate and manage the scheduling of patient visits and caregiver assignments based on patient needs, staffing availability, and organizational priorities.
- Monitor and adjust schedules as needed to accommodate changes in patient condition, caregiver availability, or unexpected events.
- Coordinate orientation and onboarding activities for new hires, providing training on policies and procedures.
- Collaborate with clinical and administrative teams to ensure effective communication and coordination of care delivery.
- Serve as the primary point of contact for staff members regarding scheduling inquiries, shift changes, and other staffing-related issues.

Office Assistant

The Office Assistant provides administrative support to the clinical and administrative teams, assisting with various office tasks to ensure the smooth operation of the organization and the delivery of high-quality care to patients in their homes.

- Assist with the intake process for new patients, collecting demographic information, insurance details, and medical history forms as required.
- Maintain accurate and up-to-date appointment calendars, ensuring that patient visits are coordinated efficiently and effectively.
- Answer incoming calls, take messages, and route calls to the appropriate staff members, ensuring timely and accurate communication.
- Assist with scheduling patient visits, coordinating appointments, and updating schedules for healthcare professionals using scheduling software or systems.
- Assist patients and caregivers with billing inquiries, payment arrangements, and financial assistance programs as needed.

Organization Settings

The user can update the Organization information under Organization Settings. It has features like Logo Settings, Invoice Settings, Billing Settings etc.

Cancel   Save

Organization Information

Organization Name *
Myezcare2

Support Email *
support@myezcare.com

Address
Address

City
City

State
State Code

Zip Code
XXXXX

Time Zone *
(UTC-05:00) Eastern Time (US & Canada)

Site Miscellaneous Settings

Page Size *
50

Patient Resignature Needed
Yes

Google Drive Integration
Link Google Drive

MIF Settings

Appendix
Appendix

Description
Description

Revision
Revision

Site Logo Settings

Login Screen Logo*
⊕ Upload Image

Note*: Preferable resolution: *300px x 40px (7.5:1)*

Sidebar Logo*
⊕ Upload Image

Note*: Preferable resolution: *128px x 14px (7:1)*

Fav Icon*
⊕ Upload Image

Note*: Preferable resolution: *32px x 32px (1:1)*

Template Logo*
⊕ Upload Image

Note*: Preferable resolution: *600px x 200px (3:1)*

Invoice Settings

Invoice Generation Frequency
Visit Wise

Invoice Tax Rate
0

Invoice Due Days
0

Invoice Notes
Invoice Notes

☐ **Bill to Payor**
☐ Include Patient Address
☐ Include Patient DOB
☐ Include Addressline 1
☐ Include Addressline 2
☐ Include AddressZip

SMTP Settings

Test Email

Network Host	**Network Port**	**From Title**
officemail.myeazycare.com	465	Myezcare Support
From Email	**Password**	**Enable SSL**
noreply@myeazycare.com	Password	True

FAX Settings

Fax No

Fax No

IVR Details

Country Code

+1

IVR Phone No

IVR Phone No

Billing Settings

Submitter Details

Company Name	**NPI Number**	**Contact Name**
Company Name	NPI Number	Contact Name
Phone	**Email**	
Phone	Email	

Billing Provider Details

Billing Provider Name	**NPI Number**	**Billing Provider Address**
Billing Provider Name	NPI Number	Billing Provider Address
Billing Provider City	**State**	**Zipcode**
Billing Provider City	State	XXXXX
Tax ID/EIN		
Tax ID/EIN		

ClaimMD

ClaimMD Account Key	**ClaimMD User ID**
ClaimMD Account Key	ClaimMD User ID

Has Aggregator? ☐

Schedule Type

☐ Enforce across all clients
◯ With PriorAuth
🔘 Without PriorAuth

Environment Type

🔘 Demo
◯ Live

Save **Cancel**

Billing

The Billing option gives us information about the list of Invoices generated in the software.

INVOICE LIST

⟳ Refresh

Invoice Number	Invoice Date	Due Date	Invoice Amount	Paid Amount	Invoice Status	Action
			No records found			

Log Out

By clicking the "Log Out " button, the user can prevent unauthorized access to the account, reducing the data breeches and maintaining online privacy.

Hide Features

The four line in the Dashboard is used to hide the Feature names in the Dashboard screen.

Now, the Features name is not visible in the Dashboard screen and we can work in the large screen.

Clock-In-Out

The Staff Attendance can be maintained by using the option Clock-In-Out. The details can be viewed in Settings >> Attendance >> Calendar.

Support

The Support option is used to view the knowledge base documents of the Application.

The user has to Sign up to view the knowledge base documents.

Notification

The Notification Bell option represents to Notify messages in the system.

This option is currently in progress within the application.

Care Type

The user can choose the type of care by using the dropdown option on the top right corner in the software.

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