Easy Note Care SRS

1. Quick Reference
    - T-Logs
    - Incident Reports
    - Client Notes (ISP Data)
    - Payroll
    - Direct Messaging (Group chat options included)
    - Approvals
        - Service authorizations
        - ISP Programs
        - Incident Reports
        - Monthly Reports
        - Quarterly Reports

~~1. Todo~~

~~**Description:** In Todo there are two topics.~~

- ~~T-Log~~
- ~~ISP Data~~

~~1. T-Log~~

~~T-Log allows you to collect and communicate day-to-day information and progress notes with other staff members.~~

~~2. ISP Data~~

~~**ISP (Individualized Support Plan)** when someone is ill, health care professionals develop an individualized treatment plan. The treatment plan is designed to correct, or limit, the harmful symptoms.~~

2. Individual

Description: In individual there are ~~two~~ 4 Modules.

- Care

- Deleted Materials

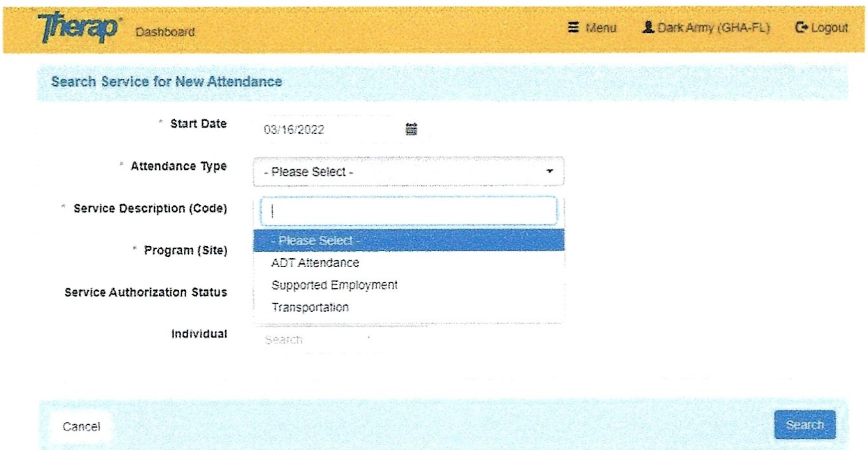
2. Agency Wide Document Storage
   - Document Storage

5. Questionnaire Forms
   - Staff/Visitor Log [Version 2021.0]

6. **Billing**
   - There are major 2 modules in Billing
     - ✓ Attendance
     - ✓ Professional Claim

Attendance module. 10-client

Using this, we can add new person attendance. Following are the types of attendance This is customizable and built in the billing module based on services.



Professional Claim

Following are the modules in Professional Claim

- Service Authorization 6-client - then go back to enrollment
- Billing data
- Billing Conversion

- Claim Template
- Professional Claim 11 - client
- Claim Submission 12 - client
- Agency Based Reports 13 - client
- Caseload based reports
- Remittance

7. **Admin**

   Thera are total 5 modules in this Major module

   - ✓ General
   - ✓ Care 1. Client
   - ✓ Personal Finance
   - ✓ Billing
   - ✓ Service Directory
   - ✓ Priority List
   - ✓ Scheduling
   - ✓ Individual Plan
   - ✓ Data Driven Outcome

General Module

- Provider
- User 1. - staff onboarding
- User privileges 2. - staff onboarding
- Admin Roles
- Super Role
- Default notification profile
- Program
- Site
- IDF Provider configuration
- Individual Home page
- Custom field
- GER event category rule
- Signup agreement
- Consent type

- Social history type
- Individual document type
- Agency document type
- Questionnaire
- Case note template
- Business intelligence
- Age configuration
- Consultation form configuration
- Change Password
- Activity Tracking
- Caseload
- Shared Contact 4. - client
- Shared contact type
- Privileges

Care

- Individual Demographics 3. - client
- Individual Intake 2. - client
- Enrollment 5. - client
- Contact
- Insurance
- ISP Program Scoring Method
- Type of habilitation service
- Restraint
- Behavior/ Antecedent/ Intervention(s)
- Behavior/ Antecedent/ Intervention Categories
- Behavior Intensity Configuration

Personal Finance

- Institution
- Merchant
- Types and Categories

Service Directory

- Service Directory

- Service Category
- Waiver
- Service Provider
- Provider Service Approval
- Rate
- Taxonomy Code
- Holiday

- Scheduling
  - Provider

- Individual Plan
  - Plan Template

- Billing
  - Payer Setting
  - Funding Source
  - Description/Code
  - Cost Center Type
  - Attendance Type
  - Custom Attendance PDF Configuration
  - Leave Rule
  - Taxonomy Code
  - Billing Provider
  - Custom PDF Invoice
  - CMS-1500 Print Calibration
  - Professional Template Group
  - Unit Calculation Rule
  - Carrier
  - Policy Holder
  - Professional Claim: Service Authorization
- Data Driven Outcome
  - Outcome Measure Types
  - ISP Template Mapping

12.SComm

- Inbox
- Sent Items
- Compose
- Drafts
- Custom User Group

13.Classes

- Overdue
- Due
- Signup
- View Signup(s)
- View results/notes
- Training History
- Training Profile

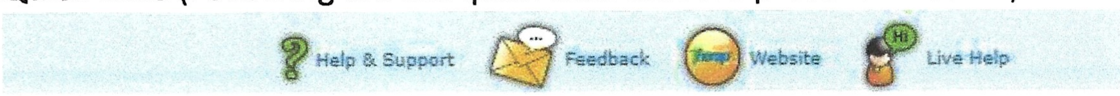
14.Schedule

- View
- Print Schedule

15.Payment Method

- We can integrate payment method to get the money like **PayPal, Stripe.**
- Generating the payment invoices

16. **Quick links** (Following are the quick links that are present in footer)



Payroll Module

Payroll

- Dashboard
- Schedule
- Timesheets
- Documents
- Reports
- Time Off Requests
- Team
    - Roster
    - Job Detail
        - Roles
        - Rates
        - History
    - Performance
        - Performance Data
        - Attendance rate
        - On-time rate
        - Missed Breaks
        - Missed Clock-ins
        - Missed Clock-outs

        - Shifts Worked
        - Performance Reviews
        - Disciplinary Counseling
    - Time Off Requests
    - Documents
        - Training Certificates/Dates
        - Licenses
        - Onboarding HR Documents (customizable list option)
            - W2 (fillable)
            - Direct Deposit (fillable)
            - ID/Driver's License (upload)
            - Education Requirement (upload)
            - References (fillable)
        - Performance Reviews
        - Disciplinary Counseling
- Hiring
- Manager Log
- Safety