Quick Guide: Navigating Completed Forms

OneView V2 allows you to easily access relevant records and documents for providers, both in all-provider view and single-provider view. A new Completed Forms grid allows you to access any Forms completed through Modio's DocuSign integration for your providers.

You'll see the new Completed Forms grid after the Documents grid in your Sections filter, and last on your V2 page by default. If you want to disable the grid or move its position in the grid order, you can do so in Grid Settings.

USING THE GRID

Access the grid from all-provider view to see available completed forms for all your providers or narrow down to single-provider view to see available completed forms for one provider at a time. The filters will help you quickly find the exact form you're looking for, using the form name, type, or even associated dates!

Just like in other V2 grids, you can use the grid menu customize your personal settings and display the columns you need, or you can drag and drop columns within the grid to reorder then. You can also use actions to quickly download the completed form or flag it for follow up.

Need extra support? Find more info in our comprehensive [Forms Tip Guide](#).

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