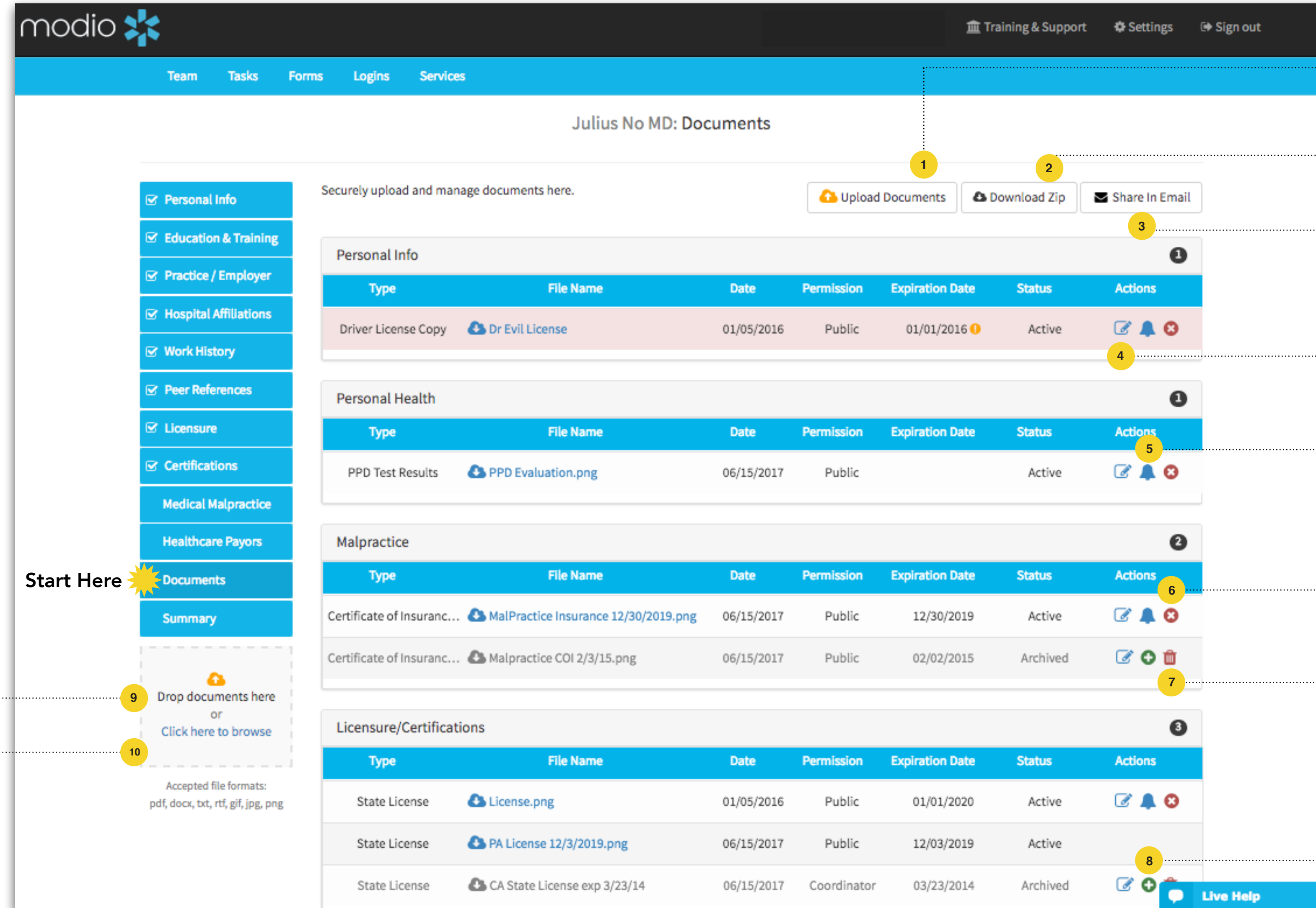# OneView

Tip Guide : Documents

DOCUMENTS

Upload, download, and share from the Documents tab in your providers' profiles. Attach documents to specific credentialing records in these sections: Education & Training, Peer References, Licensure, Certifications, Medical Malpractice, & Healthcare Payors.

Upload Documents :
Upload one or more files directly into your provider's file.

Download Zip :
Download a zip file of all documents.

Share in Email :
Share these documents with any coordinator or recruiter on your team.

Edit:
Change the permissions, category, or due date here.

Alerts:
Enable or disable alert notifications from compliance reports.

Archive:
Click here to archive (deactivate) a file. It will be greyed out.

Delete:
Files must be archived first before they can be deleted.

Restore:
Clicking the plus icon will re-activate your archived document.

Drag and Drop:
To upload a single document, simply drag and drop it into this box.

Batch Document Uploading:
Upload one or more files directly into the provider's profile.

DOCUMENTS: FILE UPLOAD

Upload and store documents directly into your provider's profile.

modio ✳

1 File Name:

Choose a name for the document that makes it easy to identify. For example, if you're uploading a CV named ABCD1234, we suggest renaming it "John CV 102215." Remember that other people may view these files, so you want the names to be as clear as possible.

2 File Type:

This determines which section of Documents the file is organized under. This makes it easy to find the file later. If you can't find the right type for your file, you can set it to "Other" in the Miscellaneous section.
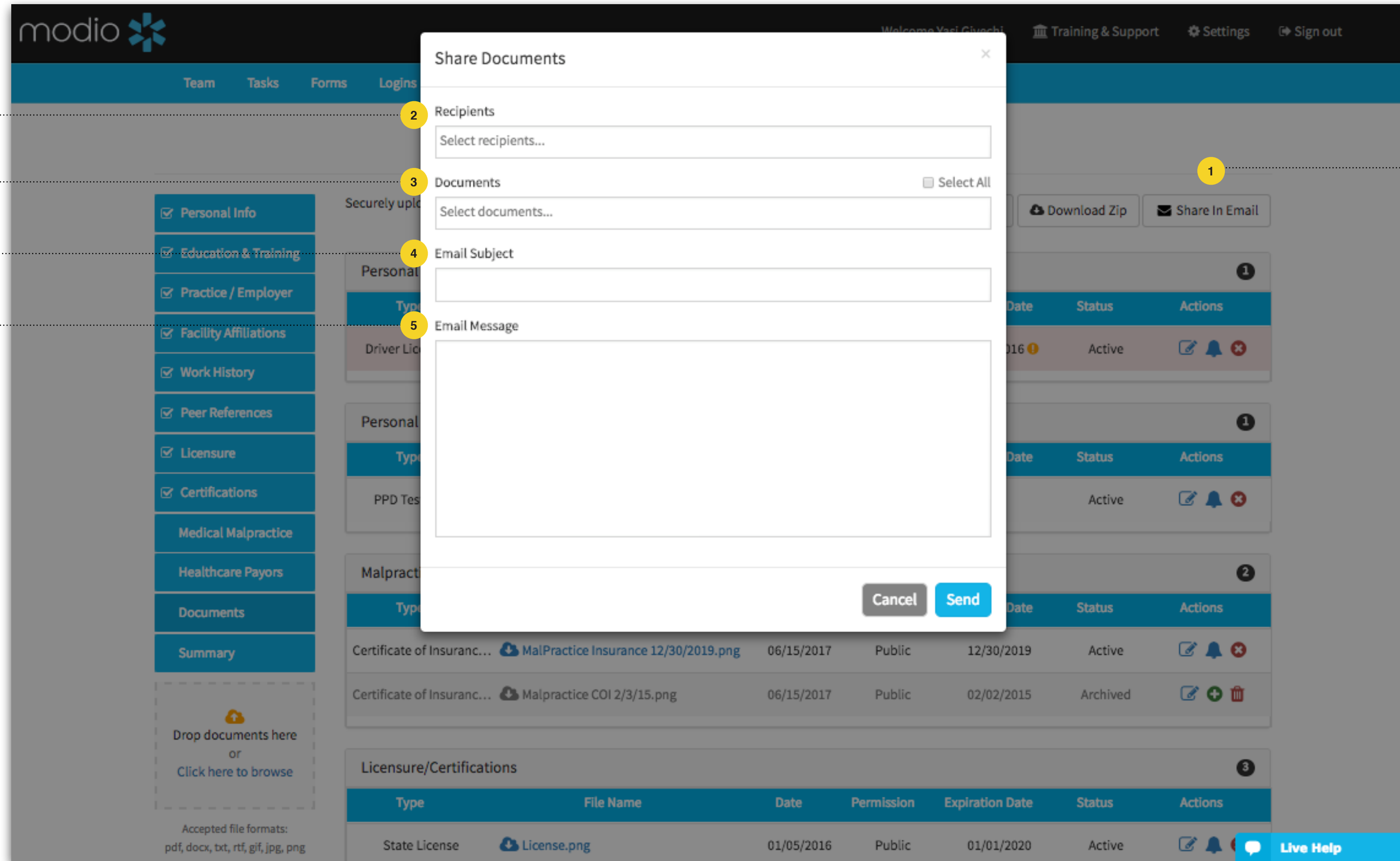
3 Expiration: Choose an expiration date (optional). Expired/expiring documents will show up in the Issues report.

4 Permissions:

Public - Visible only to your team(s)

Coordinator - Visible only to Coordinator(s)

---

modio ✳   🏛 Training & Support   ⚙ Settings   ➡ Sign out

Team   Tasks   Forms   Logins   Services

Julius No MD: Documents

Start Here

Securely upload and manage documents here.   ☁ Upload Documents   ☁ Download Zip   ✉ Share In Email

☑ Personal Info
☑ Education & Training
☑ Practice / Employer
☑ Hospital Affiliations

Personal Info   ①

Type	File Name	Date	Permission	Expiration Date	Status	Actions

File Upload for Julius No MD

File name	File size	Type	Expiration	Permission
SC State License Card exp 9/1/2017.pdf	1.37 MB	State License	9/1/2017 📅	Public

Cancel   Upload

Healthcare Payors

Documents

Summary

Type	File Name	Date	Permission	Expiration Date	Status	Actions
State License	☁ License.png	01/05/2016	Public	01/01/2020	Active	📝 🔔 ❌
State License	☁ 8.31.16 Orchard Supply Hardware.JPG	06/01/2017	Public	12/31/2017	Active	

☁ Drop documents here
or
Click here to browse

Accepted file formats:
pdf, docx, txt, rtf, gif, jpg, png

Education   ⓪

Miscellaneous   ③

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Other	☁ new modio logo blue 2.png	05/25/2017	Public		Active	📝 🔔 ❌
Other	☁ enrollhub-decryption-issue.png	03/31/2017	Public		Archived	📝 ➕ 🗑

💬 Live Help

DOCUMENTS: FILE SHARE

Share documents with yourself or anyone in your organization.

modio

2 Recipients:
Select the coordinator or recruiter with whom to share documents.

3 Documents:
Choose the files you want to share.

4 Email Subject:
Give your email a title.

5 Email Message:
Enter notes and instructions for your team.

1 Share in Email:
Click here to start.

---

modio

Welcome Yasi Givechi | 🏛 Training & Support | ⚙ Settings | ⏻ Sign out

Team   Tasks   Forms   Logins

Share Documents ✕

2 Recipients
Select recipients...

3 Documents   ☐ Select All
Select documents...

4 Email Subject

5 Email Message

Cancel   Send

☑ Personal Info
☑ Education & Training
☑ Practice / Employer
☑ Facility Affiliations
☑ Work History
☑ Peer References
☑ Licensure
☑ Certifications
Medical Malpractice
Healthcare Payors
Documents
Summary

☁
Drop documents here
or
Click here to browse

Accepted file formats:
pdf, docx, txt, rtf, gif, jpg, png

Securely upl...   ☁ Download Zip   ✉ Share In Email   1

Personal   1
Type   Date   Status   Actions
Driver Lic...   016❗   Active   ☑ 🔔 ❌

Personal   1
Type   Date   Status   Actions
PPD Tes...   Active   ☑ 🔔 ❌

Malpract...   2
Type   Date   Status   Actions
Certificate of Insuranc...   ☁ MalPractice Insurance 12/30/2019.png   06/15/2017   Public   12/30/2019   Active   ☑ 🔔 ❌
Certificate of Insuranc...   ☁ Malpractice COI 2/3/15.png   06/15/2017   Public   02/02/2015   Archived   ☑ ➕ 🗑

Licensure/Certifications   3
Type   File Name   Date   Permission   Expiration Date   Status   Actions
State License   ☁ License.png   01/05/2016   Public   01/01/2020   Active   ☑ 🔔

💬 Live Help

DOCUMENTS: UPLOADING LICENSURE

Upload a state license file directly into licensure.

1 Documents:
Click on "Documents" to expand this section.

2 Click / Drag & Drop:
Upload the corresponding license document here. It will appear in the Documents section as well. To remove the file, you'll need to delete it from the Licensure section.

Start Here ✳

Welcome Yasi Ghvechi | Training & Support | Settings | Services | Sign out

Team | Forms | Logins | Tasks

Add State License for Leonard McCoy MD ✕

License # *   ☐ Primary License?

License State *   Issue Date   Expiration Date
                       mm/dd/yyyy 📅   mm/dd/yyyy 📅

License Type
Select a license type   ▾

Status *   Taxonomy Code 🔍

Primary Source Link 🔍

Notes

Documents   **0**

☁
Drop documents here
or
Click here to browse

Accepted file formats:
pdf, docx, txt, rtf, gif, jpg, png

File Name   Permission   Expiration

Cancel   Save

Personal Info
Education & Training
Practice / Employer
Facility Affiliations
Work History
Peer References
Licensure
Certifications
Medical Malpractice
Healthcare Payors
Documents
Summary

State Licen...
License Stat...
AZ - Arizona

DEA Licens...
License Stat...
CA - Californ...

State Cont...
License Stat...
CA - Cali...

☁
Drop documents here
or
Click here to browse

Accepted file formats:
pdf, docx, txt, rtf, gif, jpg, png

Last Updated   Actions
1/10/2016   🔔 ✏ ✕
                Add + Find 🔍

6/30/2017   🔄 🔔 ✏ ✕
                Add + Find 🔍

5/26/2017   🔔 ✏ ✕
                Add +

DOCUMENTS: NAMING CONVENTIONS

How to name your documents.

You can use our built-in detection system to get category and date details from the name of the file. For example, you can name a file like this on your computer: *'John Doe CV EXP 01022018'*. When you upload that file to our platform, it will automatically fill in the category and expiration date (Curriculum Vitae expiring on 01/02/2018). Following these guidelines will help organize your files and optimize Modio for you.

Below is a formatting guide for naming your files:

1 FirstName LastName DocumentType EXP MMDDYYYY. (**MMDDYY is also acceptable.**)

2 You can separate each word with a space, or any punctuation in this list:

- period (.)
- underscore (_)
- hyphen (-)
- plus (+)

Use the guide to the right to help you name your files appropriately. Following these guides will help organize both your computer files and your Modio files.

Document Type	Possible Names	Example (First Name Last Name Document Name EXP MMDDYYYY)
Curriculum Vitae (CV)	cv, resume, vitae	Jane Doe CV EXP 01022018
Color Photo	photo, image	Jane Doe Photo EXP 01022018
PPD Test Results	ppd	Jane Doe PPD EXP 01022018
Certificate of Insurance (COI)	coi, insurance	Jane Doe COI EXP 01022018
ECFMG Certificate	ecfmg	Jane Doe ECFMG EXP 01022018
MD Diploma	diploma, school	Jane Doe Diploma EXP 01022018
Residency, Internship, Fellowship Certificates	residen, resident, residency, intern, fellow	Jane Doe Residency EXP 01022018
Social Security Card	ssn, social	Jane Doe SSN EXP 01022018
Immunization Information	immun, flu	Jane Doe Immun EXP 01022018
Case Logs	case, logs	Jane Doe Case EXP 01022018
Board Certification Certificate(s)	board, abms	Jane Doe ABMS EXP 01022018
NPDB Self-Query	npdb	Jane Doe NPDB EXP 01022018
Facility Applications	app	Jane Doe App EXP 01022018
Facility Attestations	attest	Jane Doe Attestation EXP 01022018
Payor Contracts	payor, medicare, medicaid, aetna, etc.	Jane Doe Payor EXP 01022018
Driver License Copy	dl, driver	Jane Doe DL EXP 01022018
Passport Copy	passport	Jane Doe Passport EXP 01022018
DD214	dd214	Jane Doe dd214 EXP 01022018
State Controlled Substance Document	csl	Jane Doe CSL EXP 01022018
DEA	dea	Jane Doe DEAl EXP 01022018
State Medical License	license	Jane Doe License EXP 01022018
Other Certs (ATLS, BLS, PALS etc)	atls, acls, arls, bls, pals, nals, nccpa, also,	Jane Doe ATLS EXP 01022018
Exam Scores	score, usmle	Jane Doe Score EXP 01022018
Malpractice Case Response	malpractice, mal practice	Jane Doe Malpractice EXP 01022018
Tax Documents	tax, w9, w-9	Jane Doe Tax EXP 01022018
Delineation of Privileges (DOP)	dop, privilege	Jane Doe DOP EXP 01022018
Reference Letters	peer, refer	Jane Doe Peer EXP 01022018
Modio Health	admin	Jane Doe Admin EXP 01022018
Background Check	bgc, background	Jane Doe Background EXP 01022018
CME	cme	Jane Doe CME EXP 01022018
AMA Profile	ama profile	Jane Doe AMA Profile EXP 01022018
Facility Contracts	contract	Jane Doe Contract EXP 01022018
Transcripts	transcripts	Jane Doe Transcripts EXP 01022018
Other	"unknown"	Jane Doe Unknown EXP 01022018

Please call us if you have comments or feedback.

Online: Sign in to chat live
Call us: 844.696.6346
Email us: support@modiohealth.com

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