



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.

- 1 **Upload Documents:** Upload one or more files directly into your provider's file.
- 2 **Download Zip:** Download a zip file of all documents.
- 3 **Share in Email:** Share these documents with any coordinator or recruiter on your team.
- 4 **Edit:** Change the permissions, category, or due date here.
- 5 **Alerts:** Enable or disable alert notifications from compliance reports.
- 6 **Archive:** Click here to archive (deactivate) a file. It will be greyed out.
- 7 **Delete:** Files must be archived first before they can be deleted.
- 8 **Restore:** Clicking the plus icon will re-activate your archived document.

- 9 **Drag and Drop:** To upload a single document, simply drag and drop it into this box.
- 10 **Batch Document Uploading:** Upload one or more files directly into the provider's profile.

Start Here 

DOCUMENTS:FILE UPLOAD

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

modio

Team Tasks Forms Logins Services

Training & Support Settings Sign out

Julius No MD: Documents

Start Here

Securely upload and manage documents here.

Upload Documents Download Zip Share In Email

Personal Info

1

2

3

4

File Upload for Julius No MD

1

File name

File size

Type

Expiration

3

Permission

4

Cancel Upload

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	

Healthcare Payors

Documents

Summary

Drop documents here or Click here to browse

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

Education

Miscellaneous

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

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.

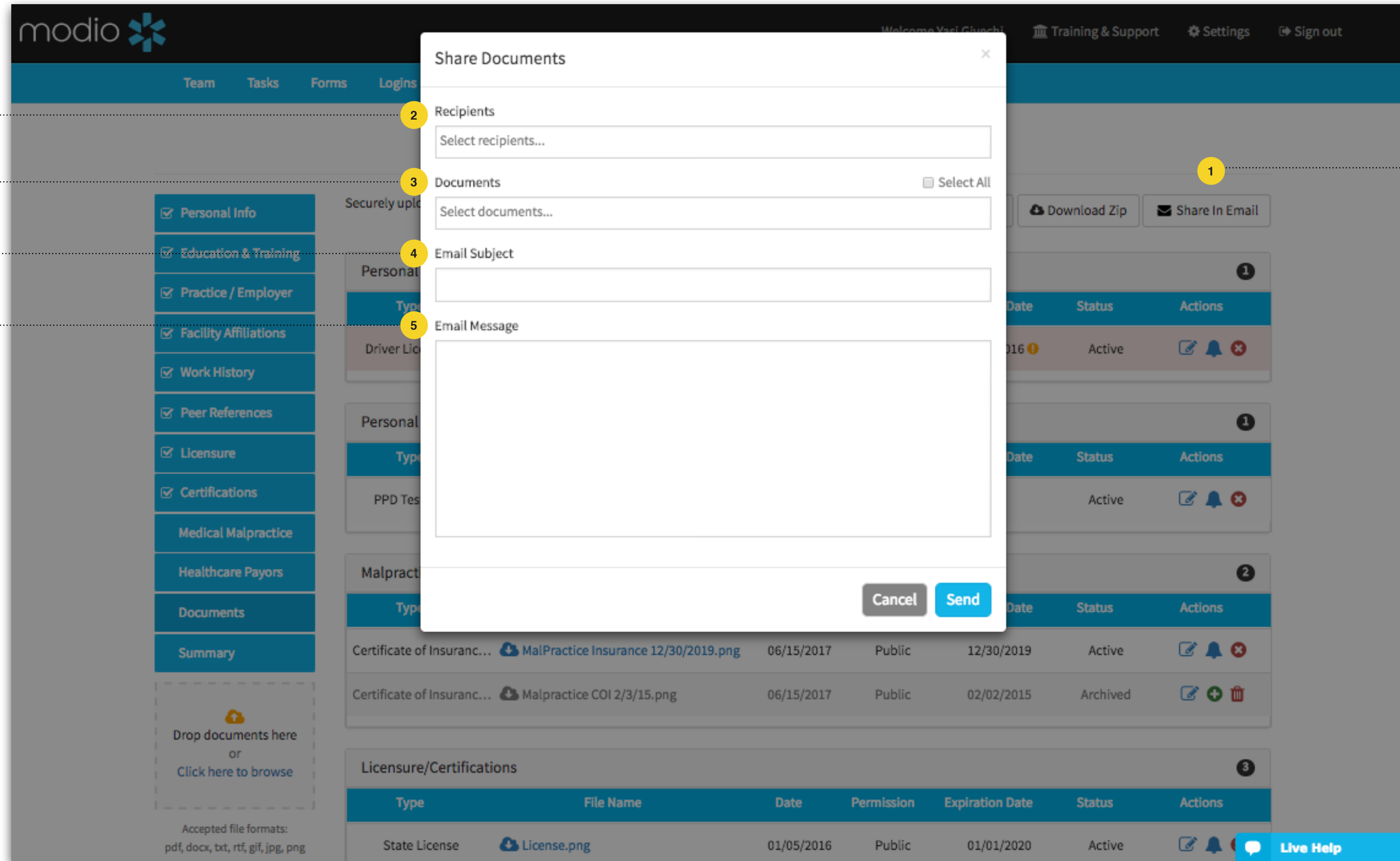
3 Expiration: Choose an expiration date (optional). Expired/expiring documents will show up in the Issues report.

4 Permissions:
General - Visible only to the provider and to coordinator(s) on the same team(s)
Coordinator Only - Visible only to the Coordinator(s) on the same team(s) as the provider

DOCUMENTS:FILE SHARE

Share documents with yourself or anyone in your organization.

- 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.



Share Documents

2 Recipients
Select recipients...

3 Documents Select All
Select documents...

4 Email Subject

5 Email Message

1 **Share In Email:**
Click here to start.

Download Zip Share In Email

Date	Status	Actions
01/16	Active	
	Active	
	Active	
	Active	
	Archived	
	Active	

Drop documents here or Click here to browse

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

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.

The screenshot displays the Modio web application interface. A modal window titled "Add State License for Leonard McCoy MD" is open, showing a form with the following fields:

- License # * (with a "Primary License?" checkbox)
- License State * (dropdown menu)
- Issue Date (calendar icon, format mm/dd/yyyy)
- Expiration Date (calendar icon, format mm/dd/yyyy)
- License Type (dropdown menu, "Select a license type")
- Status * (dropdown menu)
- Taxonomy Code (with a search icon)
- Primary Source Link (with a search icon)
- Notes (text area)

A "Documents" dialog box is also open, showing a file upload area with the text "Drop documents here or Click here to browse". Below this, it lists "Accepted file formats: pdf, docx, txt, rtf, gif, jpg, png". At the bottom of the dialog, there is a table with columns for "File Name", "Permission", and "Expiration".

On the left side of the main application, a sidebar menu is visible with the following items:

- Personal Info (checked)
- Education & Training
- Practice / Employer (checked)
- Facility Affiliations (checked)
- Work History
- Peer References (checked)
- Licensure (checked)
- Certifications
- Medical Malpractice
- Healthcare Payors
- Documents (highlighted with a yellow star and "Start Here" label)
- Summary

Two numbered callouts are present:

- 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.

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 (+)

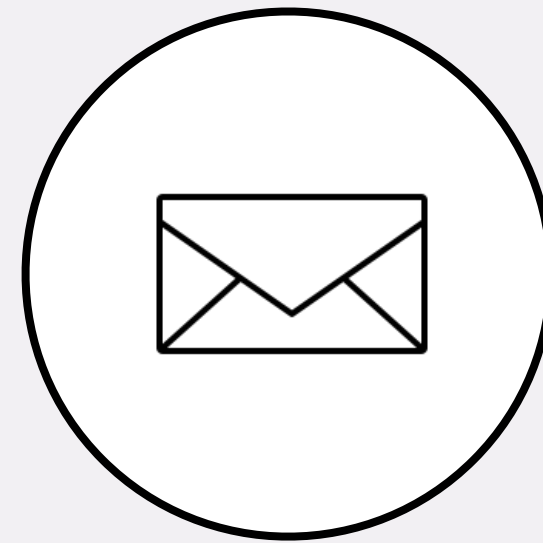
Use the guide to the right to help you name your files appropriately. Following these guides will help organize both your computer files and your Modio files.

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 DEA 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

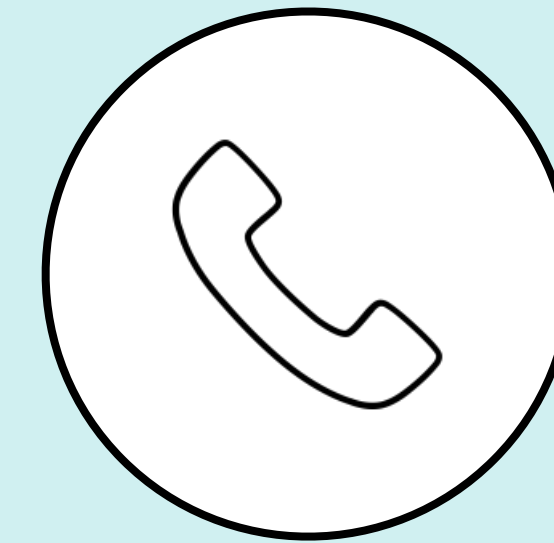
For additional questions or further training,
contact the Modio Team:



Online:
Live Chat Support



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