



OneView[®]

TIP GUIDE : FORMS

Find this guide and additional tip guides here.

INTRODUCTION:

FORMS

The Forms tab gives you access to our digital forms center, where you can create and store forms like facility applications, payor contracts, and more. When your form is added to OneView™, you can send it to other people on your team for them to fill out and electronically sign. Forms can automatically be pre-filled with details from your providers' profiles to save time.

FORM REQUESTS

Modio will convert your PDF/Word file(s) into a DocuSign template that supports pre-filling provider credentialing data. Once the mapping is complete (usually takes 5-7 business days), the form will be listed as "Available" on the Forms dashboard and can be sent to coordinators or providers. To request a custom form, send your files to updates@modiohealth.com.

The screenshot shows the Modio Health QA (San Francisco, CA) Forms dashboard. The interface includes a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below the navigation, there's a search bar and a table of forms. The table has columns for Status, Form Name, Form Type, Tag, Last Updated, and Actions. The forms listed are:

Status	Form Name	Form Type	Tag	Last Updated	Actions
Available	MO - Missouri CAQH Credentialing Applications	Payor Contracts		04/09/2019	[Send] [Edit] [Delete]
Available	Modio Health QA - Form Template	Modio Health		03/05/2018	[Send] [Edit] [Delete] [Download]
Available	NFM-HPL-PHL-02 Physician Application	Facility Applications	NMH	06/29/2017	[Send] [Edit] [Delete]
Available	Test 1/10	Modio Health	3/22	04/09/2019	[Send] [Edit] [Delete] [Download]

At the bottom of the dashboard, there are pagination controls showing '1 / 1' and '200 items per page', and a footer with 'Privacy Policy', '©2019 Modio Health. All rights reserved.', 'Terms and Conditions', and a 'Live Help' button.

FORMS: DASHBOARD

modio

Training & Support | New Features | Settings | Services | Sign out

Team | **Forms** | Tracking | Logins | Tasks | Notes

Modio Health QA (San Francisco, CA)

All

Status	Form Name	Form Type	Tag	Last Updated	Actions
Available	MO - Missouri CAQH Credentialing Application	Payor Contracts		02/08/2018	Send Form, Edit, Remove
Available	Modio Health QA - Form Template	Modio Health		03/05/2018	Send Form, Edit, Remove, Download
Available	NFM-HPL-PHL-02 Physician Application	Facility Applications	NMH	06/29/2017	Send Form, Edit, Remove
Available	Test 1/10	Modio Health	3/22	01/10/2019	Send Form, Edit, Remove, Download

1 | 1 | 200 items per page | 1 of 4 items

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Status:
Forms can be filtered by status:

- New
- In Process
- Available
- Rejected
- Archived

Actions Icon Key:

- Send Form:** Click here to send your forms to anyone in your team.
- Edit:** Click here to edit details about your form.
- Removing a Form:** If you click this before a provider has completed the form, they can still finish filling it out and sign it, but you won't be able to send anyone else that form.
- Download:** Download the original file used to create the electronic form.

Live Help:
Stuck? We are here to help. Click here to chat with our support team.

FORMS: EDITING FORM DETAILS

The screenshot shows the Modio Health interface with a modal window titled "Edit MO - Missouri CAQH Credentialing Application". The modal contains the following fields:

- Form Name:** MO - Missouri CAQH Credentialing Application
- Form Type:** Payor Contracts
- Due Date:** mm/dd/yyyy
- Status:** Available
- Tag:** (empty)
- Notes:** (empty text area)

Background elements include a navigation bar with "Team", "Forms", "Tracking", "Logins", "Tasks", and "Notes". A table of forms is visible with columns for "Status" and "Form Name".

Form Name:
Make edits to the form name.

Form Type:
Update the form type.

Notes:
Include additional notes about your form here.

Due Date:
If the form needs to be completed by a certain time, enter the date here.

Tags:
Add a tag to your form for organization.

***Start here:**
Click here to edit details about your form.

FORMS:SENDING FORMS (PART 1)

Send Form(s):
Select recipient(s) for your form; you will receive a copy once the form has been completed.

Send Form To:
Select whom you want to send the form to; please note you will only receive the form once it's completed.

Email Subject:
Give your email a title.

Email Message:
Enter notes / instructions here.

Form History:
View and search for the status of sent forms here. Once the provider fills and signs the form, you will receive a completed copy in your inbox.

***Start here:**
Once a form's status has changed to available, click on the envelope.

Actions Icon Key:

- Navigate to the provider's completed form.
- Download the form.
- Archive the form.

Status:
Track the status of your sent forms here. Filters: Sent, Delivered, Completed, Voided, and Declined.

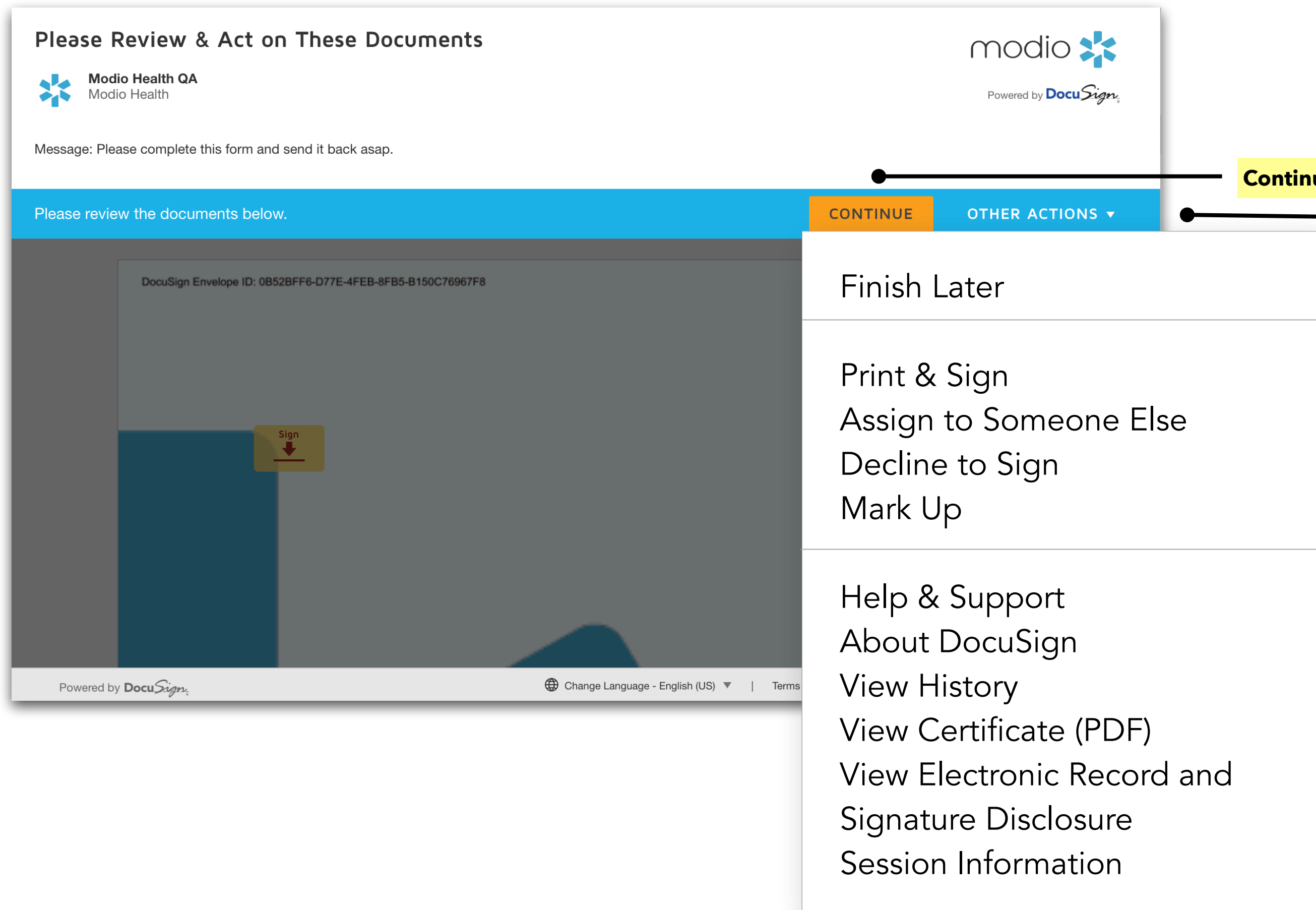
FORMS:SENDING FORMS (PART 2)

Provider	Status	Last Sent	Sender	Actions
Marten, Lily - MD	Completed	11/13/2017 14:28 PM	Yasi Givechi	[Icons]

Send:
After you hit send, the form will be sent via DocuSign (see to the right) and the provider(s) will be able to review and sign it.

FORMS: DOCUSIGN QUICK GUIDE

When you receive a DocuSign form, you don't have to sign it right away. If you can't finish the document right now, you can choose to finish later. Alternatively, if the document was sent to you by mistake, is incorrect, or you're not the right signer, you can either decline to sign or assign the document to someone else.



Continue: will take you to the form signature page.

Other Actions: View alternative options to signing the form right away.

- **Finish Later:** This option allows you to exit the signing process and save any information you have entered. You can return to finish signing the document later by clicking the link in the original email notification.

- **Print & Sign:** This option allows you to print and sign the document on paper.

- **Assign to Someone Else:** This option can be used to reassign the signing responsibility to another person. You will be asked to provide the new signer's name, email address, and a reason for the change. The sender will receive a notification of the change including the new signer's info and the reason for the change. The new signer you've identified will be prompted to sign the document.

- **Decline to Sign:** This will void the form. This option lets you decline to sign the document. You might be asked to provide a message for the sender of the document indicating why you have declined to sign. In cases where there are other signers, those who have already completed signing receive an email stating that you have declined to sign. Other signers who have not completed signing will not be able to access the documents.

- **Mark Up:** Add notes to the form by clicking here.

FORMS: ADOPTING A SIGNATURE

Select the sign field to

Adopt Your Signature

Confirm your name, initials, and signature.
* Required

Full Name*Name required Initials*Initials required

SELECT STYLE DRAW **UPLOAD**

PREVIEW

UPLOAD YOUR SIGNATURE

For best results use an image that is 400 x 145 pixels

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

Powered by DocuSign

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2019 DocuSign Inc. | V2R

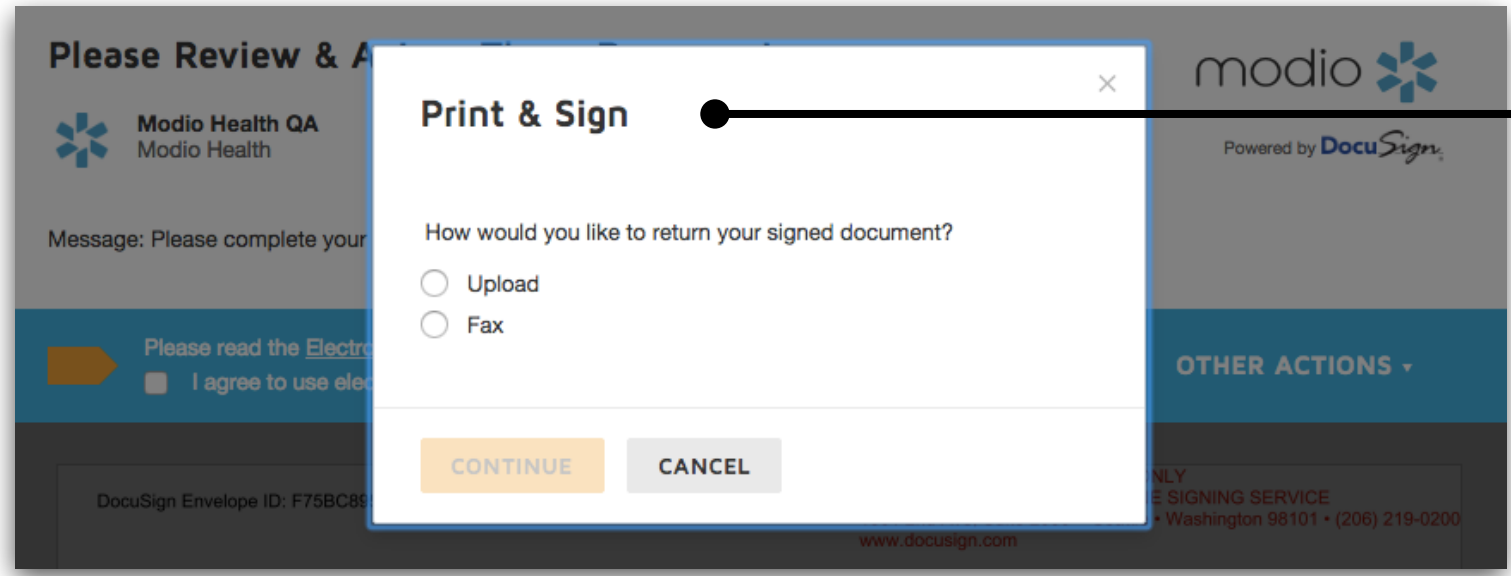
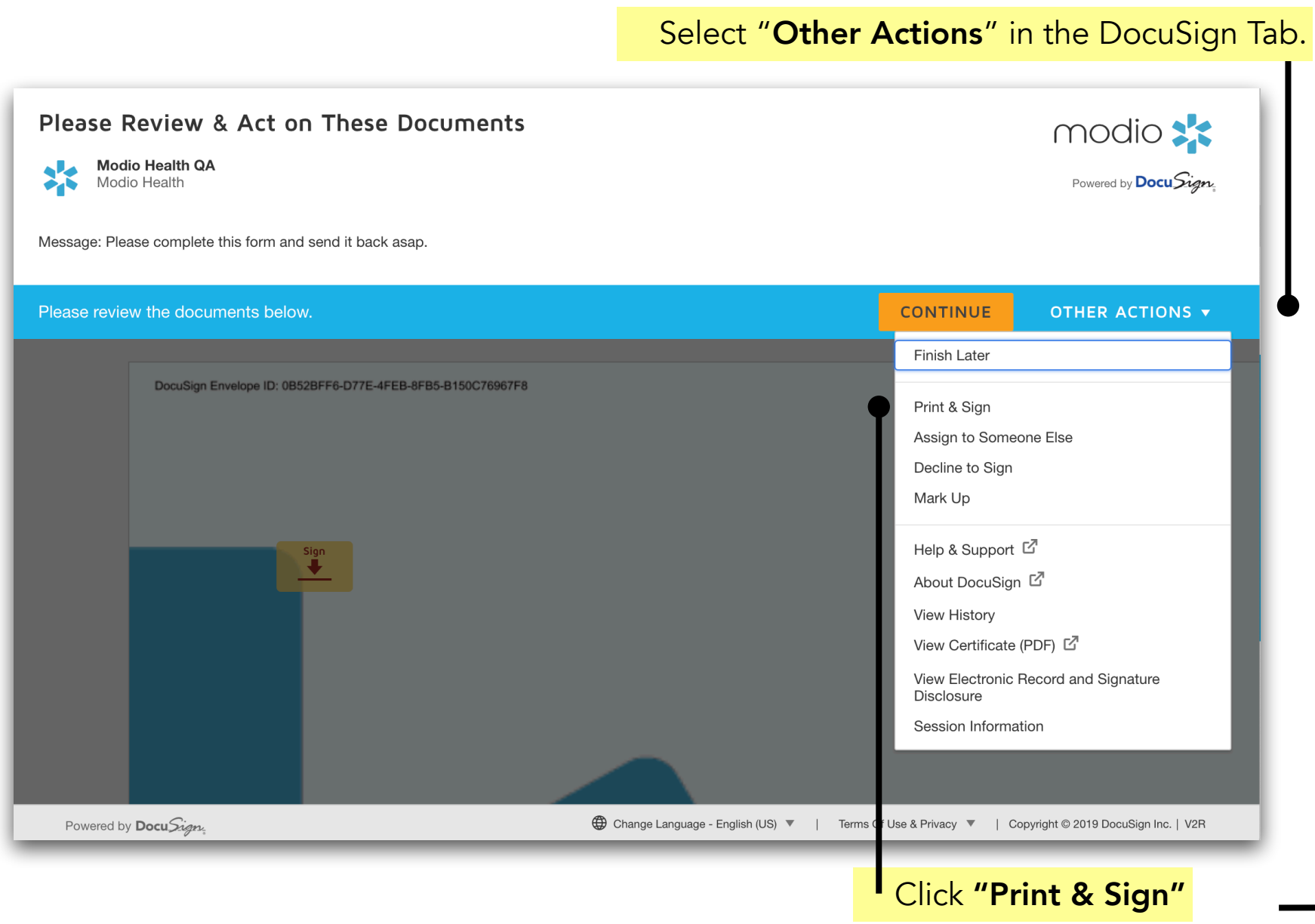
The first time you select a **sign** or **initial** field, you are asked to adopt a signature and initials. Verify that the name and initials are correct. To change the name or initials, enter the changes in the **Full Name** and **Initials** fields.

- **SELECT STYLE:** To select from a list of predefined signature styles, click **SELECT STYLE**. If you don't see any signature styles that appeal to you, you can create or upload a signature.
- **DRAW:** Use this field to create your own signature. Use a mouse to draw your signature (or your finger if you're on a touchscreen). If you make a mistake, click **Clear** to reset the field.
- **UPLOAD:** To upload a signature instead, select the **UPLOAD** tab. Click **UPLOAD YOUR SIGNATURE** and navigate to the image file on your device. When finished, confirm your signature and initials are correct, then click **ADOPT AND SIGN**.

Note: After clicking **ADOPT AND SIGN**, your signature is set, and you won't be able to change it for this document.

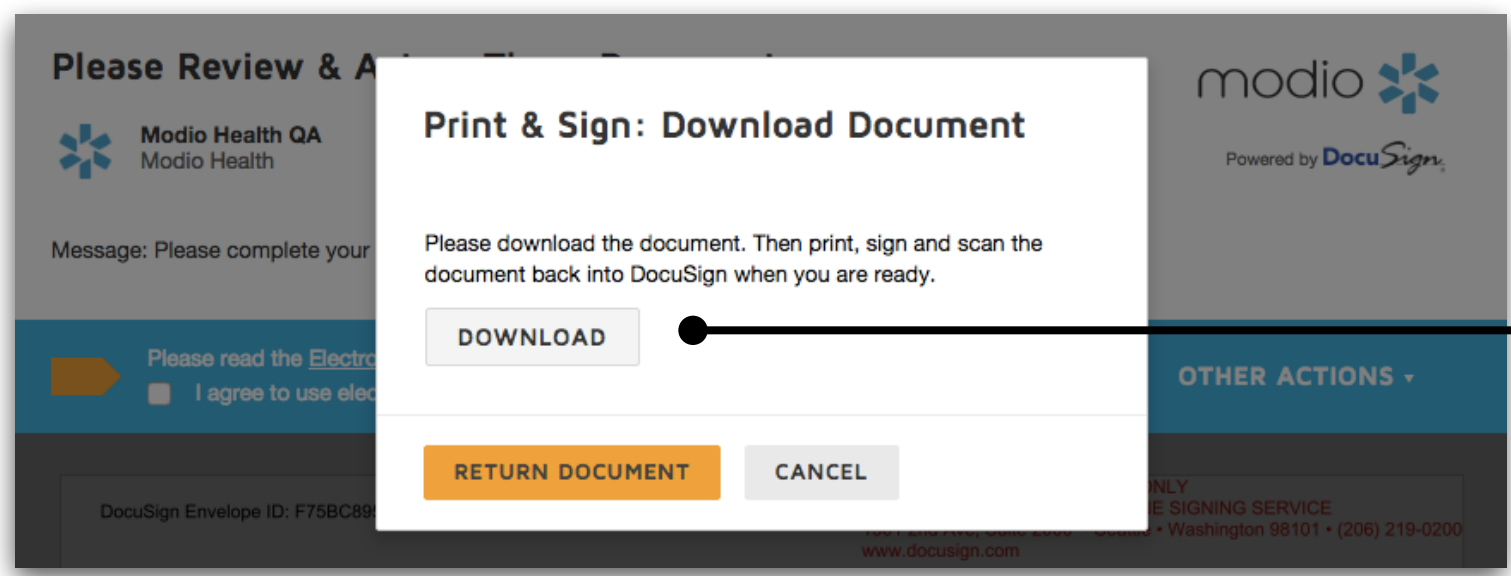
FORMS: MAKING FORM COPIES

Getting a Form Copy - If you prefer to print and hand sign the pre-filled form, click **“Review Document”** from your inbox. (Only applicable if the provider/office manager has access to OneView™.)

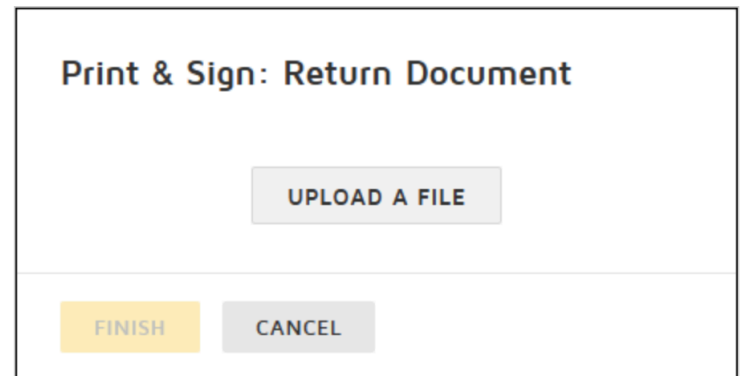


Choose between the return options **Upload** or **Fax**.

- **Upload:** you download the documents, print them, complete them with pen on paper, scan them, then upload the scanned, signed documents in order to return them.
- **Fax:** you download the documents, print them, complete them with pen on paper, and return them to the sender by following faxing instructions you'll be provided.

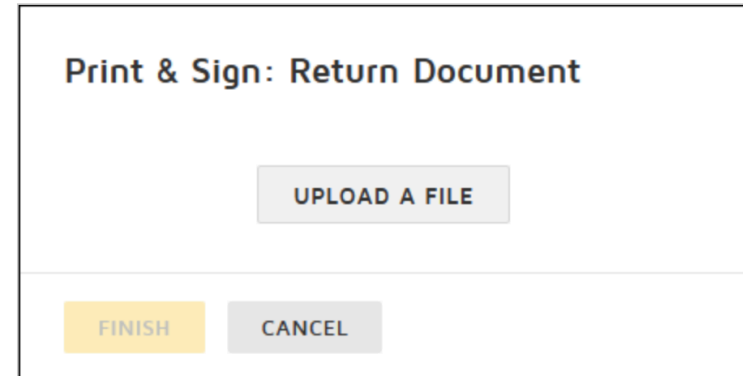


Click **Download**. You will now have a copy of the pre-filled form on your desktop to print and send to your providers. **NOTE: If you download the document and print, the status within OneView will not change to completed. This must be changed to “Completed” Manually.**



Returning Document:

1. Save the documents to your computer, by clicking **DOWNLOAD**.
2. Using your normal printing method, print the documents you saved to your computer. Fill out and sign the printed pages as needed. Create an electronic file version of the documents (for example, scan the documents and save them as a file on your computer). In the Print & Sign: Download Document dialog box, click **RETURN DOCUMENT**.
3. Click **UPLOAD A FILE**. Then select the electronic file from its stored location on your computer.
4. The file is uploaded and the file name and number of pages are shown in the dialog box. If you selected the incorrect file, select the file name to remove the file and then upload the correct file.

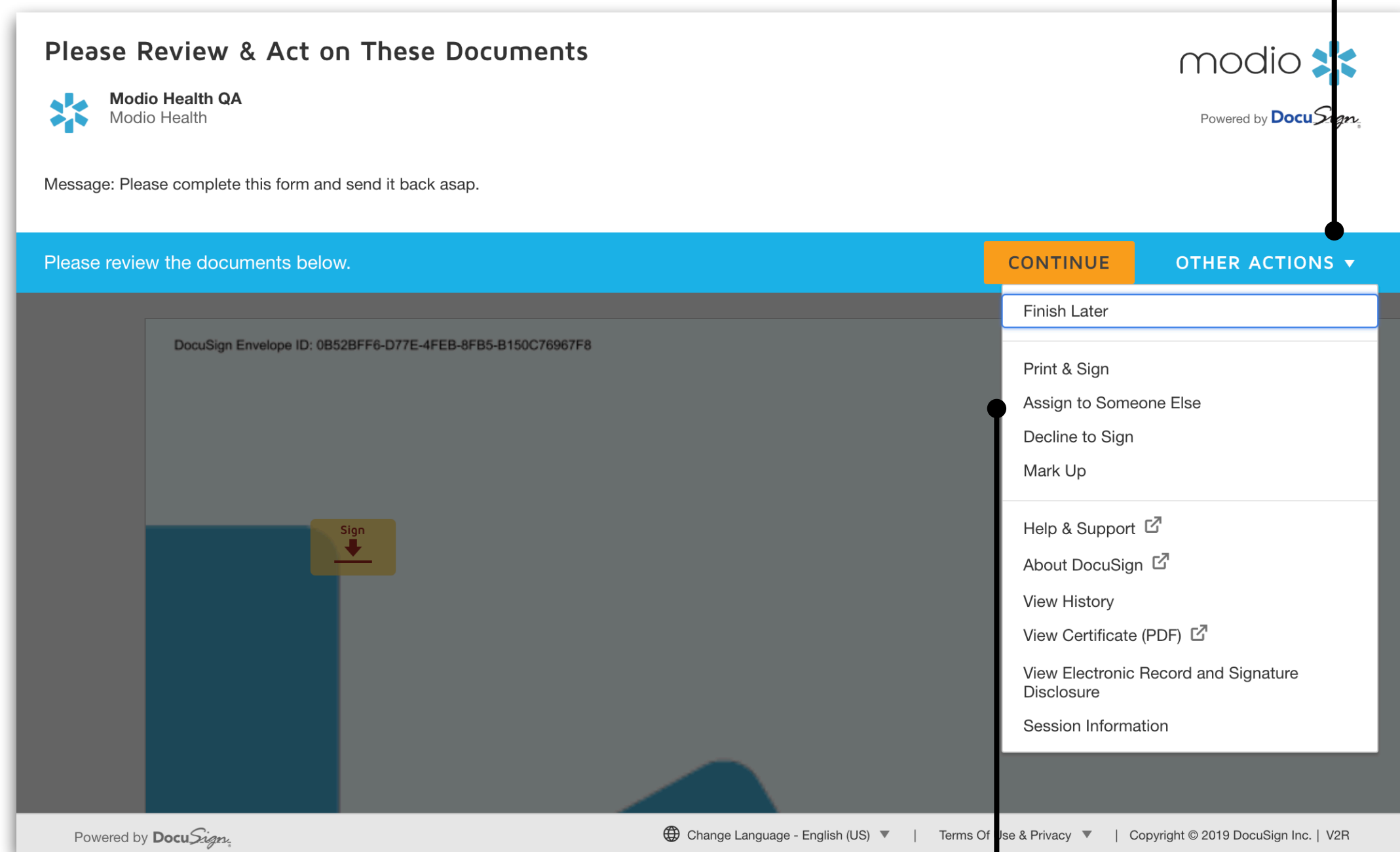


FAX: If you chose to fax your documents as the return method, the DocuSign fax cover page must be the first page that is sent. The fax cover page has information that links your documents to the envelope and your documents might be lost if the cover sheet is not the first page.

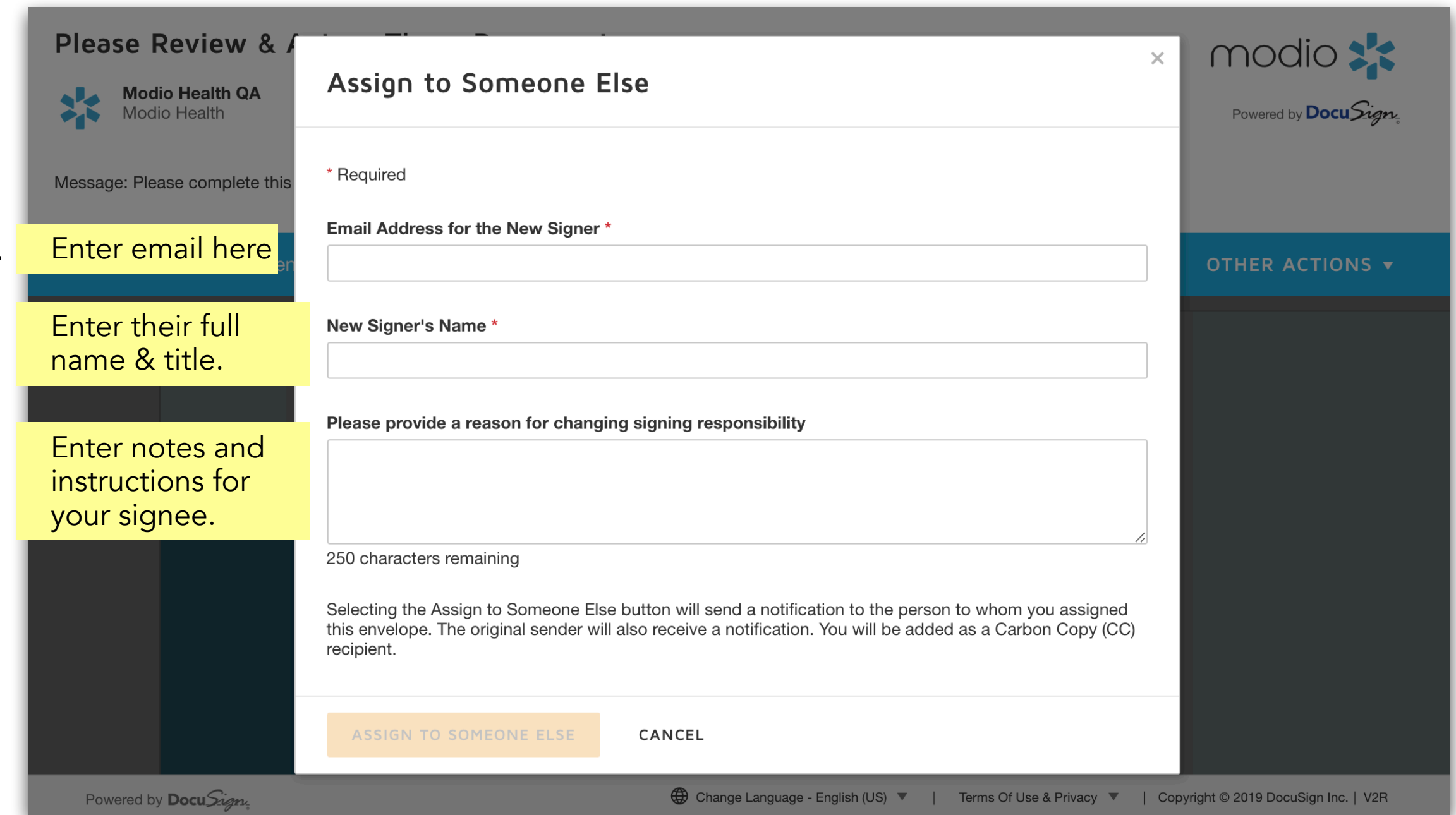
FORMS: ASSIGN TO SOMEONE ELSE

If you assign a form to someone else, they will receive a notification email to complete the form. Note: if the document is too large, the form will be saved to your provider's profile in the Documents section.

Select "Other Actions" in the DocuSign Tab.



Click "Assign to Someone Else"



Enter email here

Enter their full name & title.


Enter notes and instructions for your signee.

Once the form has been signed, you will be notified and the status will change to complete in OneView™.

FORMS: QA FORM MAPPING

All mapped fields correspond to a specific location within the OneView™ platform. It is crucial to ensure that the information related to the provider, practice, facility, etc is already stored in OneView™.

For any adjustments, inquiries, or customizations needed, please email updates@modiohealth.com to get a copy of the QA Form.

OneView™ modio 

- All mapped fields correspond to a specific location within the platform, so please ensure that the pertinent Provider and/or Practice/Facility information is currently housed in OneView.
 - Provider specific information will be mapped to the provider's profile
 - Practice/Facility specific information is housed within our database and can be found by running the Facilities report located in the Alerts dropdown menu
- Please utilize the below QA sheet to notate any mapping inquiries, adjustments, or customizations that may be needed
- Completed QA sheets and/or requests for an in-depth review with our OneView team can be submitted at updates@modiohealth.com.

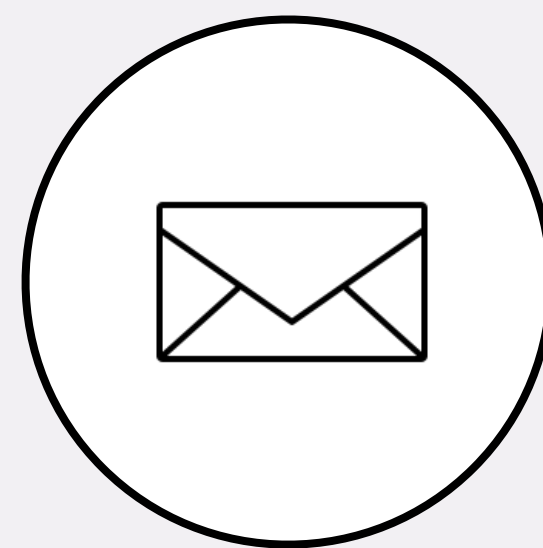
FORM MAPPING - QA SHEET	
Reviewer Information	
Organization Name:	
Contact Name:	
Contact Email:	

Form/Packet Name	Location/Nature of Change

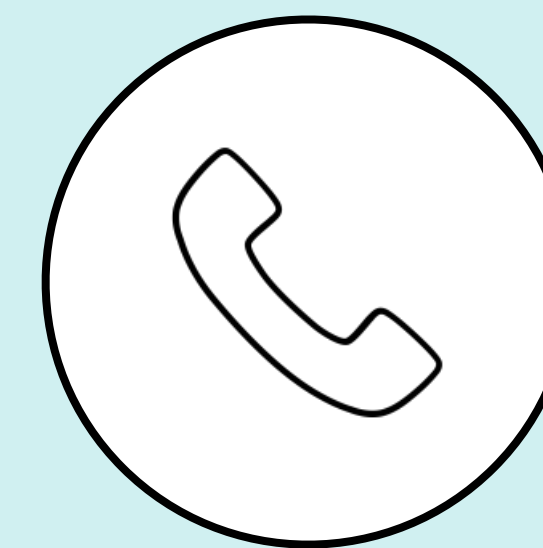
For additional questions or further training,
 contact the Modio Team:



Online:
 Live Chat Support



Email:
updates@modiohealth.com



Phone:
 844.696.6346