



TIP GUIDE : USING FORMS

Find this guide and additional tip guides under the “**Support**” section.

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

For help on submitting new forms to be added to your team, please see the tip guide “**Requesting New Forms**” in the Support section.

modio

Welcome Yasi GivechiSupportModio UNew FeaturesSettingsSign out

TeamFormsTrackingLoginsTasksNotes

Modio Health Master Practice (DEMO) (San Francisco, CA)

All

ID	Status	Templates	Count	Form Name	Form Type ...	Tag	Last Update...	Actions
...	Available		...	Search by name...			...	Search n
45728	Available	Composite	3	*DEMO*: New Composite Packet	Modio Health		02/04/2022	
27972	Available	Single	0	*DEMO*: Peer Reference Form (07.2020)	Reference L...		02/24/2021	
27971	Available	Single	0	*DEMO*: State of Georgia - Employee's Withholding Allowance Certificate (...)	Tax Docum...	GA	02/24/2021	
7112	Available	Single	1	Accountable Health Care IPA - Allied Health Professional Application (06.97)	Payor Appli...	Requires Fa...	01/20/2020	
22753	Available	Single	0	Alabama - Physician Assistant Application for Registration Agreement	License App...	Allied Licen...	12/02/2020	
22754	Available	Single	0	Alabama - Physician Assistant Reinstatement Application	License App...	Allied Licen...	12/02/2020	
22333	Available	Single	0	Alabama Board of Medical Examiners - Medical School Certification (Appe...	State Applic...	Alabama	12/06/2021	
13103	Available	Single	0	Alabama Department of Revenue - Employee's Witholding Tax Exemption ...	State Applic...		03/31/2020	
8937	Available	Single	0	AlohaCare - Provider Credentialing Application & Disclosure Information F...	Payor Appli...		08/26/2019	
14198	Available	Single	0	Ambetter-Allwell — MHS Practitioner Enrollment Form (0819.CC.P.FO 08.19)	Payor Appli...	ink signature	06/22/2021	
13183	Available	Single	0	Argus - FL - Full Application GP & SP - Rev 8.2018	Payor Appli...	Kate	03/09/2020	
6093	Available	Single	1	BCBS of AL - Uniform Provider Application	Payor Appli...	Alabama	08/01/2019	

1 / 1

200 items per page

1 - 80 of 80 items

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FORMS:DASHBOARD

Templates:
Forms can be filtered by:

- All
- Singles
- Composites
- No Composites

Count:
Indicates the number of files within this form/ Composite.

Form Name:
Enter a part of the name or the full name to filter to your desired form.

Form Type:
Forms can be filtered by a particular category.

Tag:
You can add custom tags to your forms and sort based on tag.

Form Notes:
You can search Form Notes by using the box below "Actions" .

Status:
Forms can be filtered by status:

- New
- In Process
- Available
- Rejected
- Archived

Note: The default filter for forms is the "Available" status.

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Support

Modio U

New Features

Settings

Sign out

Team

Forms

Tracking

Logins

Tasks

Notes

Modio Health Master Practice (DEMO) (San Francisco, CA)

All

ID

Status

Templates

Count

Form Name

Form Type

Tag

Last Update...

Actions

...

Available

...

Search by name...

...

Search n

27967

Available

Single

0

DEMO: HNFS Tricare West - Provider Information Sheet (HF0717x063 12.19)

Payor Applic...

West

03/24/2021

27972

Available

Single

0

DEMO: Peer Reference Form (07.2020)

Reference Le...

02/24/2021

27971

Available

Single

0

DEMO: State of Georgia - Employee's Withholding Allowance Certificate (For...

Tax Docume...

GA

02/24/2021

27970

Available

Single

0

DEMO: Vantage Health Plan - Arkansas Application For Physician Enrollment...

Payor Applic...

AR

02/24/2021

27969

Available

Composite

0

DEMO: AzAHP - Credentialing Alliance Practitioner Data Form (Rev. 01.2020 ...

Payor Applic...

AZ

02/24/2021

7112

Available

Single

1

Accountable Health Care IPA - Allied Health Professional Application (06.97)

Payor Applic...

Requires Fax...

01/20/2020

22753

Available

Single

0

Alabama - Physician Assistant Application for Registration Agreement

License Appl...

Allied Licens...

12/02/2020

22754

Available

Single

0

Alabama - Physician Assistant Reinstatement Application

License Appl...

Allied Licens...

12/02/2020

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Template Definitions:
Singles: An individual form
Composites: A compilation of single forms which can be sent together in one send.

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

Send Form:

Click here to send your forms to anyone in your team.

Edit:

Click here to edit details about your form.

Download:

Download the original file used to create the electronic form. Please note and updates or changes made to the form will not be reflected.

Composite Icon:

This icon appears next to single forms that are part of a composite(s). Hover over the icon to see which composite(s) it is included in.

FORMS:EDITING FORM DETAILS

Form Name:
Make edits to the form name.

Form Type:
Update the form type.

Tags:
Add a tag to your form for organization.

Notes:
Include additional notes about your form here.



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

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Modio Health QA (S

All

IDStatusTem

Available

33324	Available
12931	Available
10860	Available
18639	Available
17200	Available
18244	Available
28515	Available

11

Edit Oregon Practitioner Credentialing Application (5.1.12)

last updated: 05/19/2021

Form Name (33324)

Oregon Practitioner Credentialing Application (5.1.12)

Form Type

State Application

Due Date

mm/dd/yyyy

Status

Available

Tag

Templates

Single

File name

Oregon Practitioner Credentialing Application (5.1.12).pdf

Package Count

0

Override?

Version #

Version Date

mm/dd/yyyy

Notes

CancelSave

2021

2020

2019

2020

2020

2020


2021

1 of 58 items

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FORMS:SENDING FORMS

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

Prefill form for:
Select the provider(s) whose information you'd like to be pre-filled.

- Send Form To:**
Select who you want to initially receive the form.
- **Myself:** Send to yourself to make changes prior to re-assigning
 - **Provider:** Send directly to provider
 - **Coordinator:** Send to another coordinator on your team
 - **Contact:** Send to a contact not on your team (contacts must be added by Modio team)
 - **Reference*:** Send directly to one of provider's active peer references. *This is only available if Form Type is a Reference Letter.*

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.

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All

ID

Status

...

Available

33045

Available

5114

Available

6103

Available

15207

Available

28083

Available

8243

Available

8853

Available

7987

Available

5994

Available

24294

Available

12456

Available

12057

Available

1

/ 1

Send Form "New Field Mappings Test"

Prefill form data for provider(s), then choose a recipient for the form.

Prefill form for: *

Select provider(s) from your team...

Send form to: ☒ Myself ☐ Provider ☐ Coordinator ☐ Contact

Only you will receive a copy of each provider form.

Email Subject

Specify a subject for the email...

Email Message

Provider	Status	Last Sent	Sender	Actions
...	
Marten, Lily - MD	Sent		Yasi Givechi	
givechi, yasamin - MD	Completed	02/03/2021 12:16 PM	OneView*Admin A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 12:02 PM	OneView*Admin A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 11:57 AM	OneView*Admin A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 11:49 AM	OneView*Admin A.J. Bul...	

Cancel

Send

Email Subject: Give your email a title.

Email Message: Enter notes/instructions here.

Actions Icon Key:

Navigate to the provider's completed form.

Download the form.

Download a certificate of completion from DocuSign.

Resend the envelope to the last receipt.

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

Status Types:

- Sent:** Indicates the form was sent to the provider and is in their email inbox.
- Delivered:** Indicates the provider has received and opened the form, but has not completed it.
- Completed:** Indicates the provider has completed the form. (DocuSign also sends the coordinator a signed copy of the document.)
- Voided:** Indicates the provider has voided the form. The void status is reflected only when a DocuSign envelope has fully expired (120 days). Please note a coordinator and provider cannot manually mark/generate a form envelope status of voided.
- Declined:** Indicates the provider has declined to sign the form.

FORMS:SENDING FORMS WITH ATTACHMENTS

Attachments:
You can attach files from the provider's Documents section, Browse to attach a file from your computer, or select a form a provider previously completed.

Pro Tip: This can be used to attach documentation that a recipient doesn't need to act on (i.e., copies of licensure, bylaws, etc.).

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All

IDStatus

33045Available

5114Available

6103Available

15207Available

28083Available

8243Available

8853Available

7987Available

6094Available

24294Available

12456Available

12057Available

Send Form "New Field Mappings Test"

Prefill form data for provider(s), then choose a recipient for the form.

Prefill form for: *

Lily Marten (ygivechi@my.smccd.edu) x

DocumentsBrowseCompleted Forms

Select...

Order	Form/Document Name	Type	Filesize
1	New Field Mappings Test	Single Form	

Send form to: ☒ Myself ☐ Provider ☐ Coordinator ☐ Contact
Only you will receive a copy of each provider form.

Email Subject

Specify a subject for the email...

Email Message

Provider	Status	Last Sent	Sender	Actions
Marten, Lily - MD	Sent	02/15/2022 11:47 AM	Yasi Givechi	
givechi, yasamin - MD	Completed	02/03/2021 12:16 PM	OneView®Admin A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 12:02 PM	OneView®Admin A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 11:57 AM	OneView®Admin A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 11:49 AM	OneView®Admin A.J. Bul...	

Including Attachments:
In order to send a file with the form, click the "Include Attachments" checkbox. (This can only be used if you are pre-filling for a single provider.)

FORMS:SENDING FORM PROCESS

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All

ID	Status
33045	Available
5114	Available
6103	Available
15207	Available
28083	Available
8243	Available
8853	Available
7987	Available
6094	Available
24294	Available
12456	Available
12057	Available

Send Form "New Field Mappings Test"

Prefill form data for provider(s), then choose a recipient for the form.

Prefill form for: *

Lily Marten (ygivechi@my.smccd.edu) x

Include Attachments?

Attachments

DocumentsBrowseCompleted Forms

Select...

Order	Form/Document Name	Type	Filesize
1	New Field Mappings Test	Single Form	

Send form to: ☒ Myself ☐ Provider ☐ Coordinator ☐ Contact

Only you will receive a copy of each provider form.

Email Subject

Specify a subject for the email...

Email Message

Provider	Status	Last Sent	Sender	Actions
Marten, Lily - MD	Sent	02/15/2022 11:47 AM	Yasi Givechi	<div><div></div><div></div><div></div></div>
givechi, yasamin - MD	Completed	02/03/2021 12:16 PM	OneView*Admin A.J. Bul...	<div><div></div><div></div><div></div></div>
givechi, yasamin - MD	Completed	02/03/2021 12:02 PM	OneView*Admin A.J. Bul...	<div><div></div><div></div><div></div></div>
givechi, yasamin - MD	Completed	02/03/2021 11:57 AM	OneView*Admin A.J. Bul...	<div><div></div><div></div><div></div></div>
givechi, yasamin - MD	Completed	02/03/2021 11:49 AM	OneView*Admin A.J. Bul...	<div><div></div><div></div><div></div></div>

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.

Commonly Asked Question: Do DocuSign envelope notification emails expire?

This is a standard DocuSign setting designed for security purposes and it occurs after 5 clicks or 48 hours of inactivity. If a link expires, it does not require a full resending of the form, for when you/the providers attempt to open an expired form for the first time, DocuSign auto sends a new email notification and presents a page advising that the link has expired and a new notification has been sent. A provider will get a reminder to complete their DocuSign form after 2 days. If they still do not complete the form, they will get additional reminders each day thereafter.

Learn more here: <https://support.docusign.com/articles/Do-envelope-notification-emails-expire>

Modio Health QA via DocuSign

New Medicaid Form

From: Coordinator@modiohealth.com

Date: Thursday, September 15, 2019



Modio Health QA sent you a document to review and sign.

REVIEW DOCUMENT

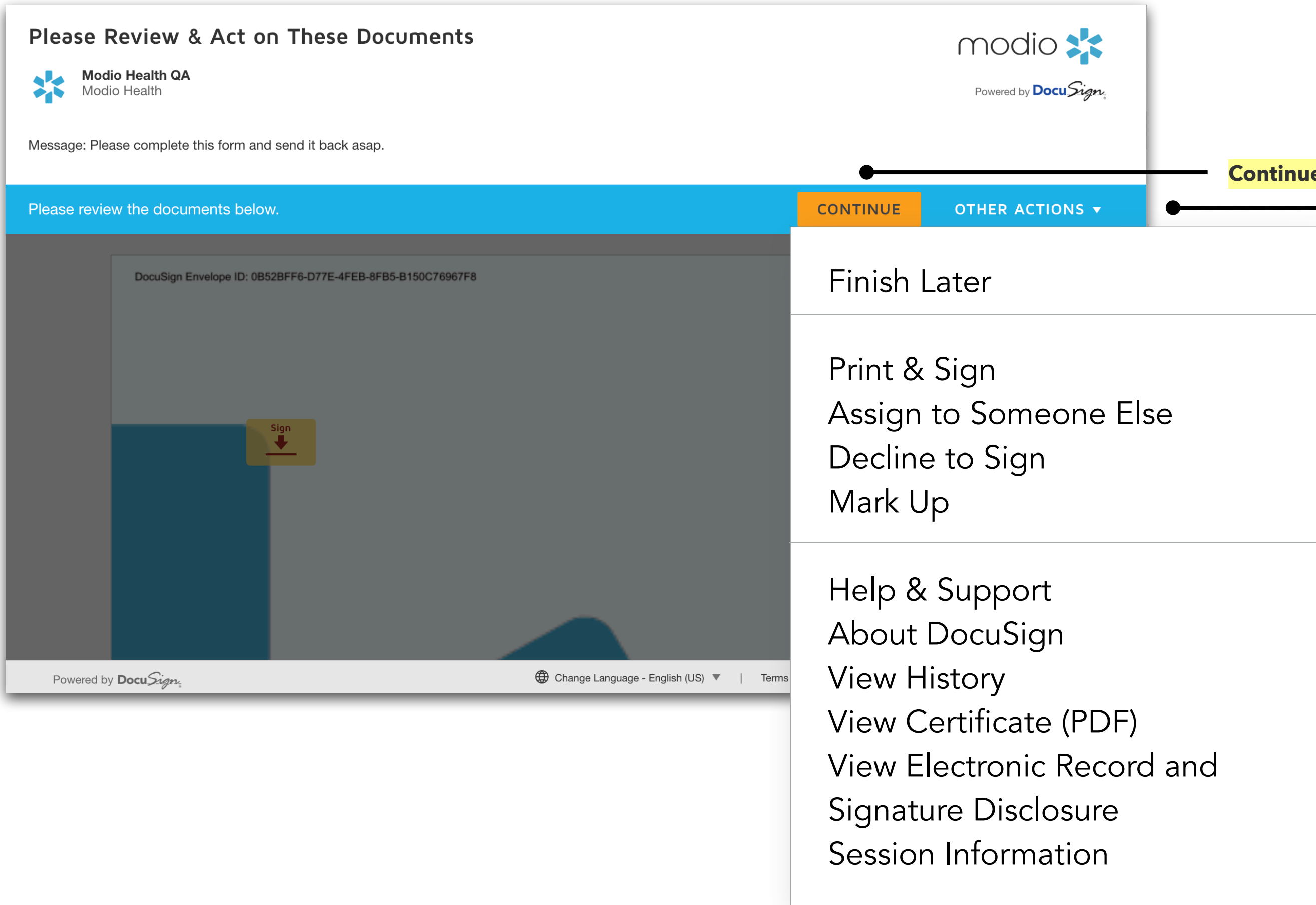
Modio Health QA
docusign@modiohealth.com

Message: Please complete this form and send it back asap.

Powered by DocuSign

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.
- **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.

FORMS: ADOPTING A SIGNATURE

Select the sign field to

DocuSign

NEXT PAGE

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

Other Actions

OneView Provider Verifications General 92018 3.pdf

Pages: 12

OneView PROVIDER VERIFICATION

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.

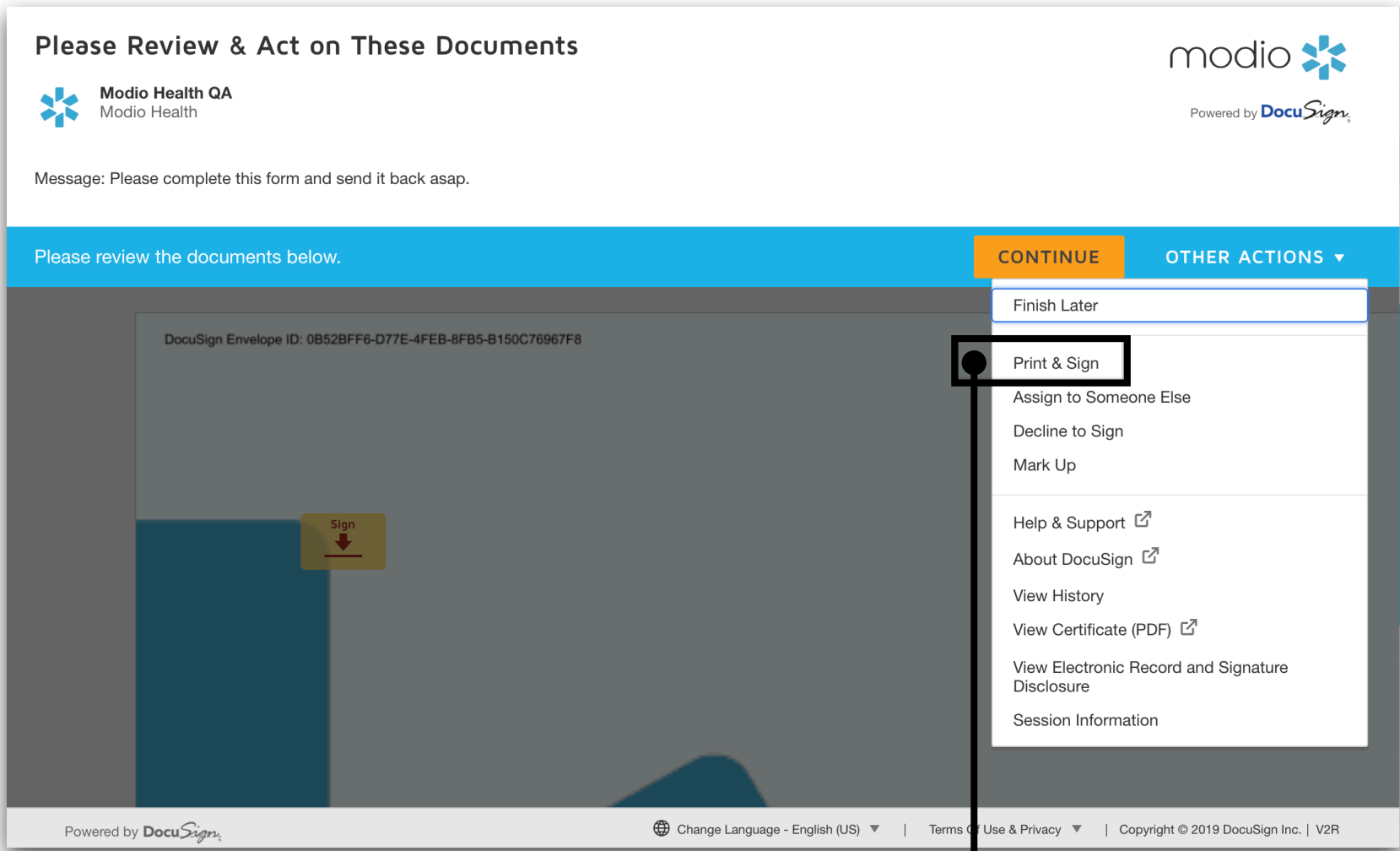
- **SELECT STYLE:** To select from a list of predefined signature styles, click **SELECT STYLE**. If you don't see any signature styles that appeal to you, you can create or upload a signature.
- **DRAW:** Use this field to create your own signature. Use a mouse to draw your signature (or your finger 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.

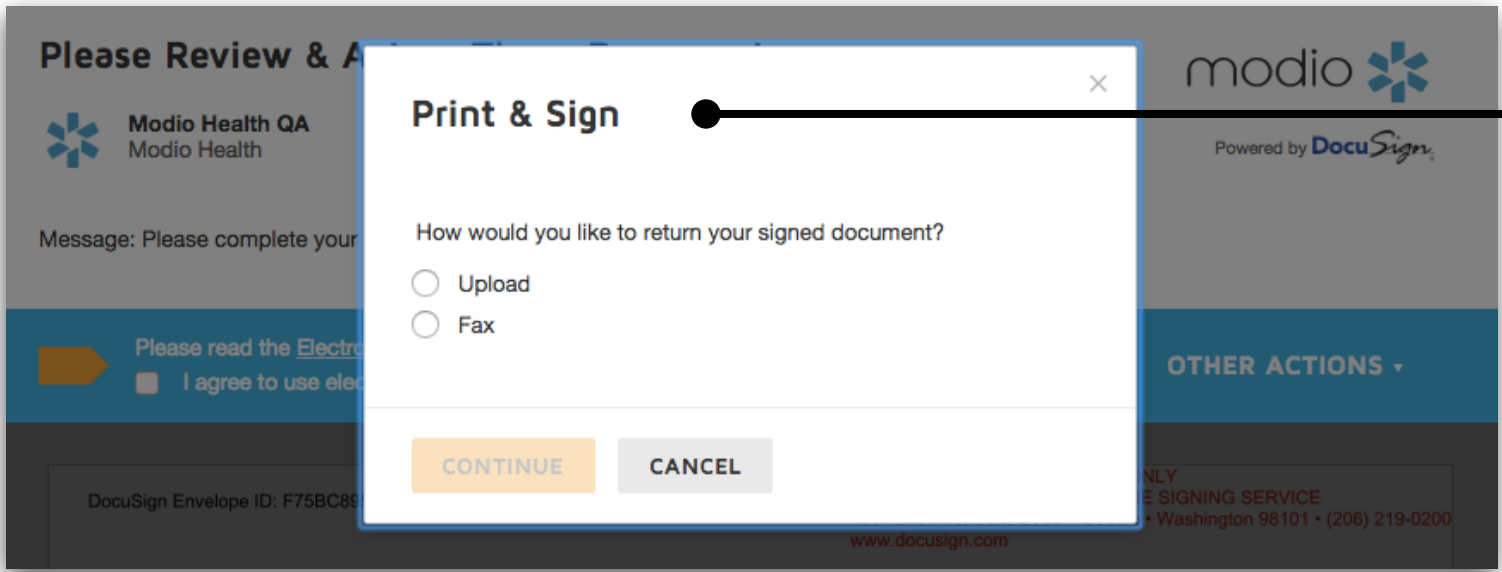
FORMS:OBTAINING A WET SIGNATURE

Once you have performed a review of the document, made any necessary changes, and determined that your document needs an ink/wet signature (not e-signature), you will need to use the "Print and Sign" Function.

Select "Other Actions" in the DocuSign Tab.

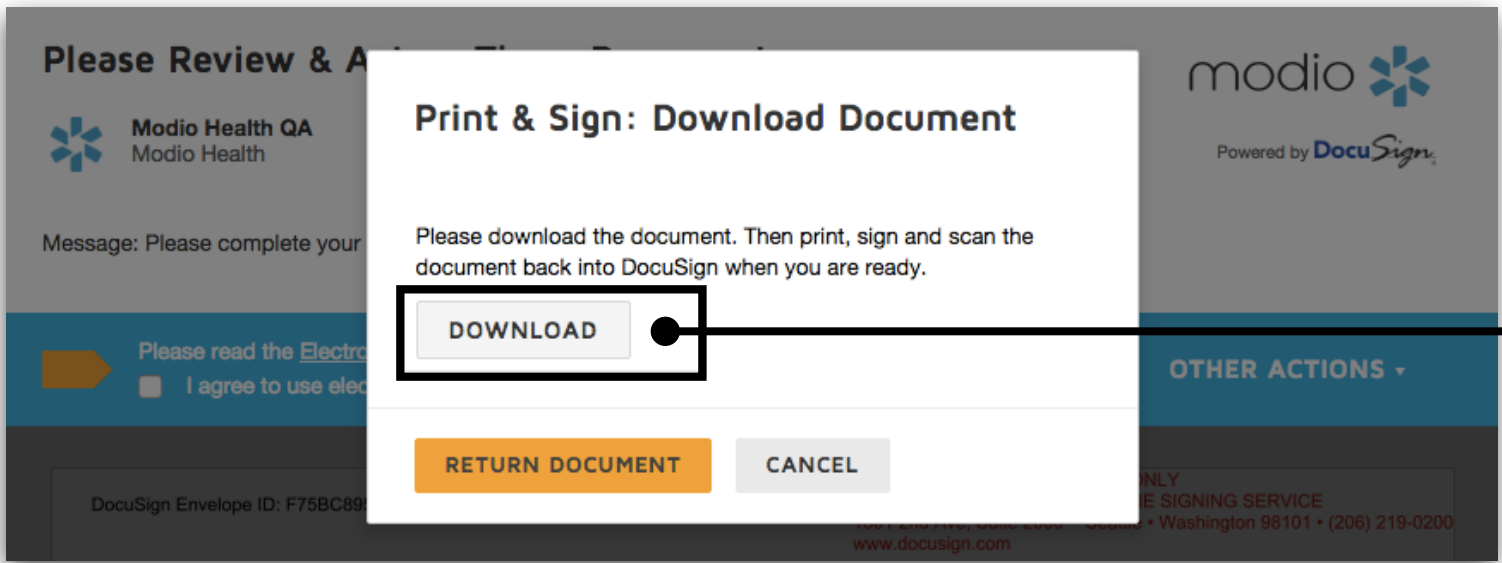


Click "Print & Sign"

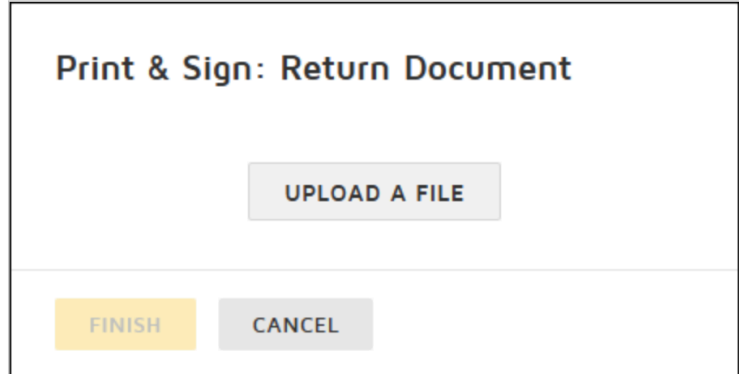
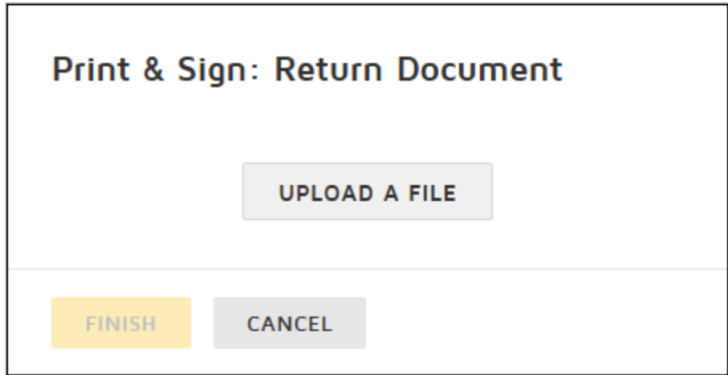


Choose between the return options **Upload** or **Fax**.

- **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 the faxing instructions 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 don't choose to fax or upload the finished form, the Send status within OneView will not show as completed.



Returning Document:

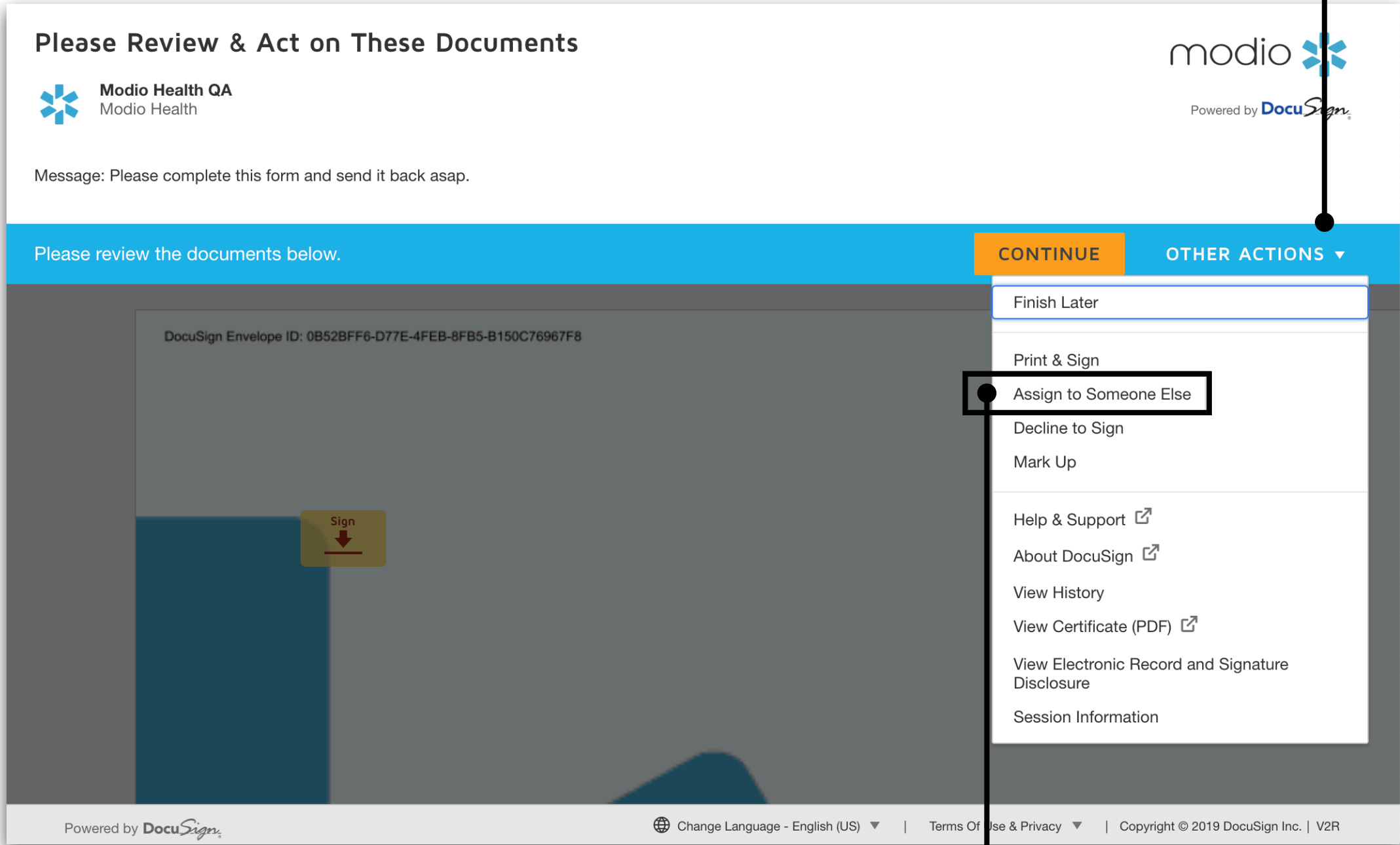
1. Save the documents to your computer, by clicking **DOWNLOAD**.
2. Using your normal printing method, print the documents you saved to your computer. Fill out and sign the printed pages as needed. Create an electronic file version of the documents (for example, scan the documents and save them as a 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

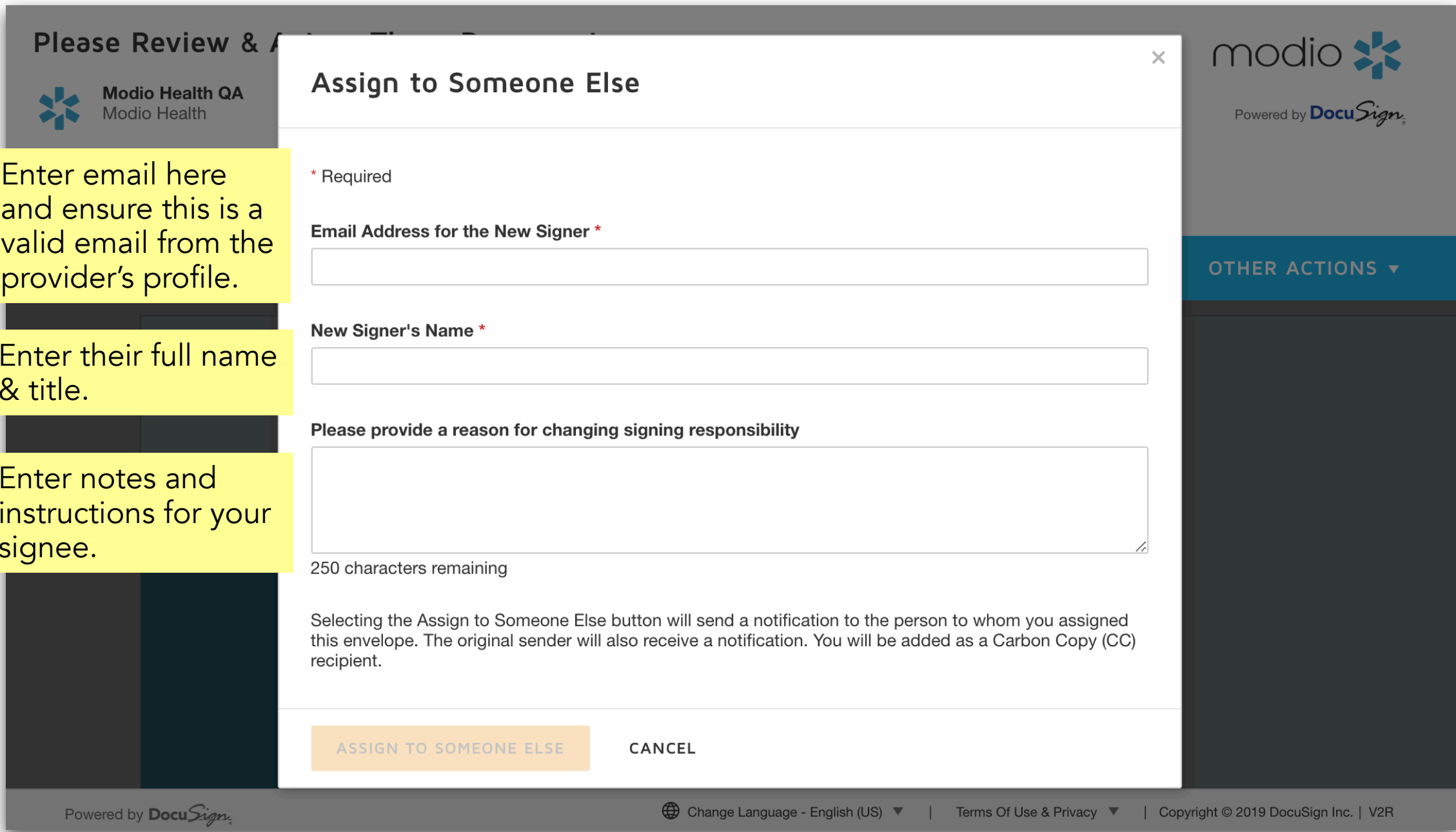
If you assign a form to someone else, they will receive a notification email to complete the form. The email that they receive will appear identical to the original email you received from DocuSign.

Select **"Other Actions"** in the DocuSign Tab.



Click **"Assign to Someone Else"**

Pro Tip: Our team highly recommends sending all forms to yourself first so that you can review and make any necessary changes, then re-assigning to the signer for completion.



Enter email here and ensure this is a valid email from the provider's profile.

Enter their full name & title.

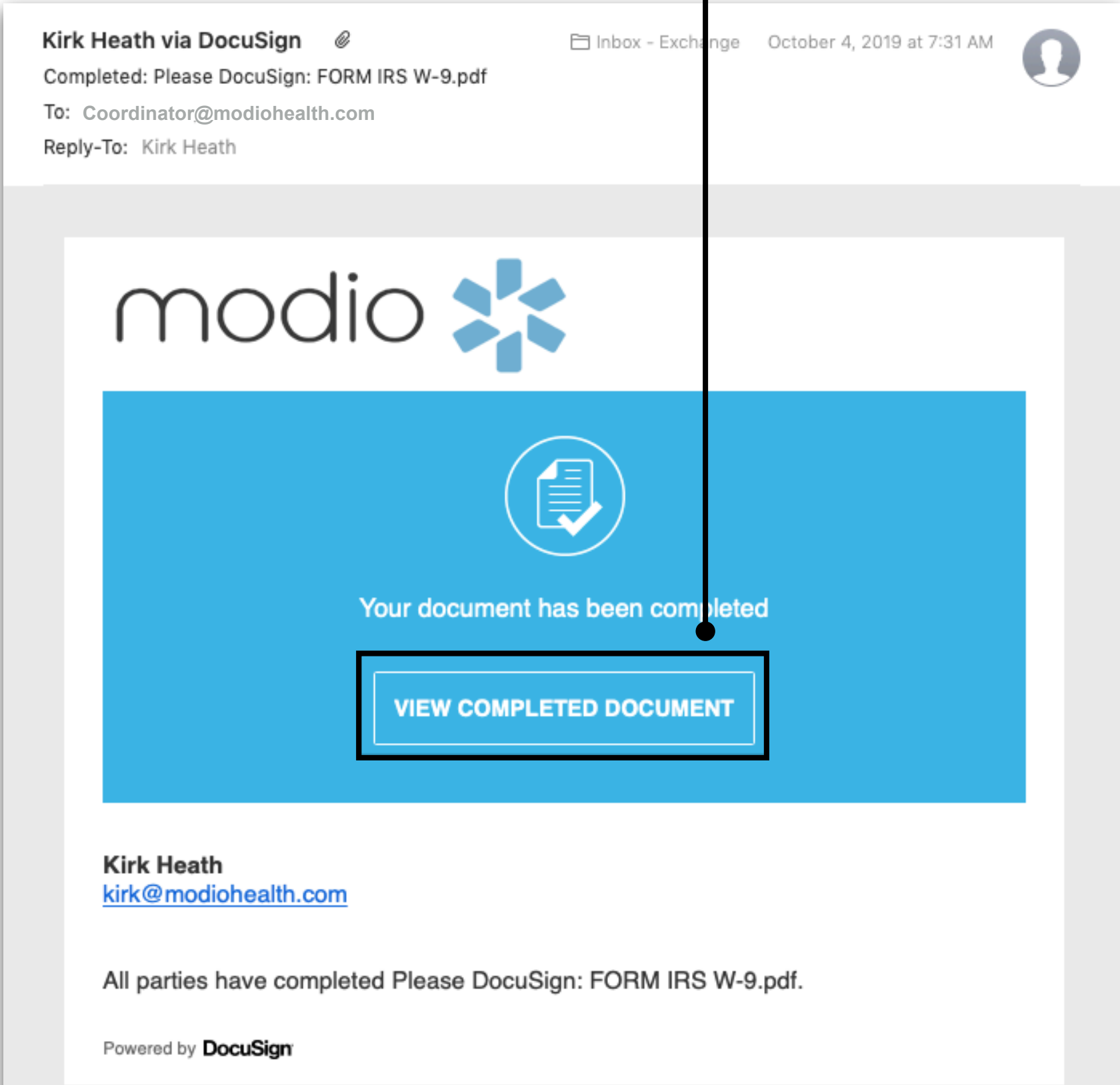
Enter notes and instructions for your signee.

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

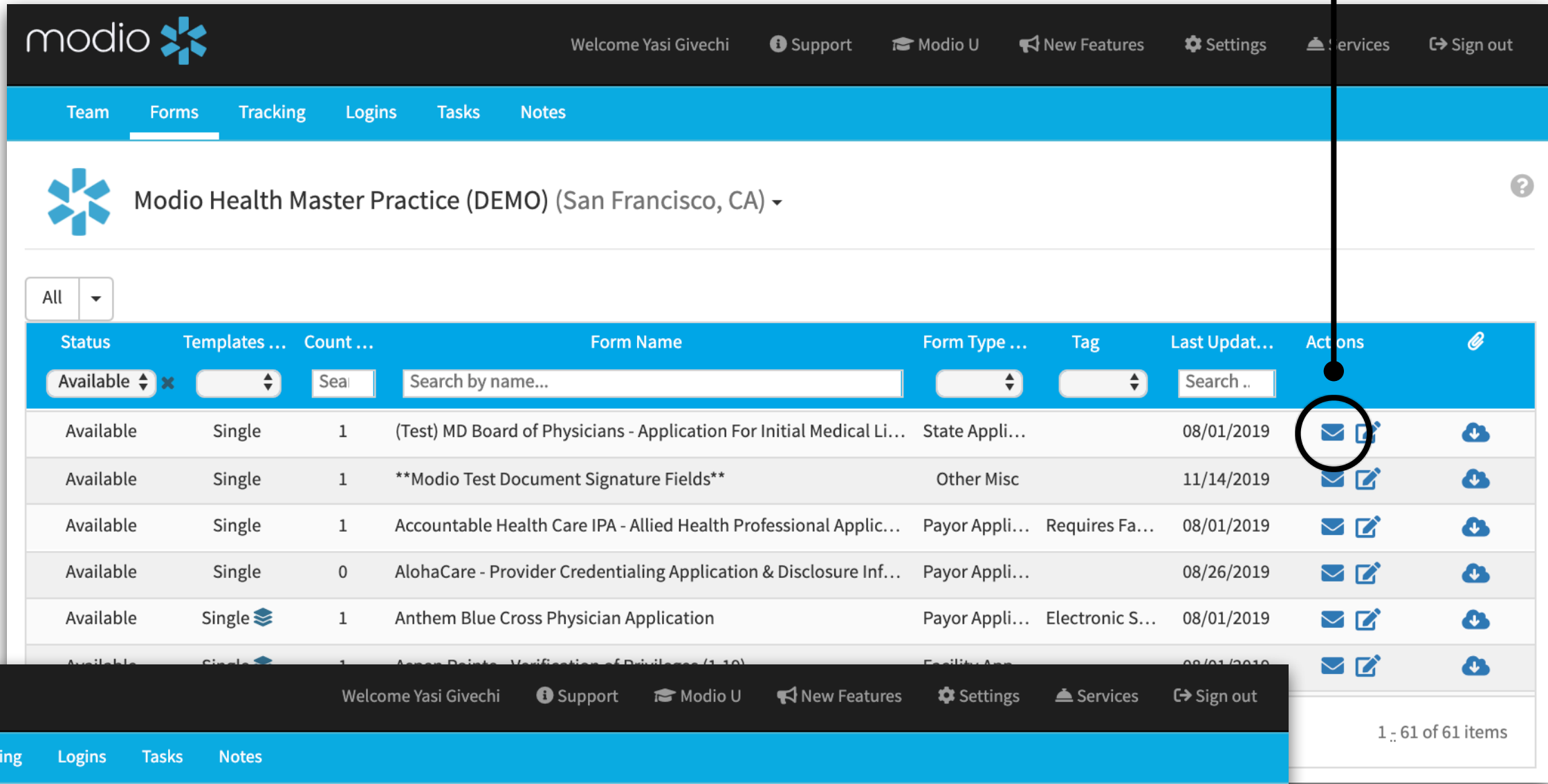
FORMS:FINDING COMPLETED APPLICATIONS

Once your applications are completed, there are several locations where they will be stored. 1. You can find them in your email 2. They will be available to view within the Send History for that form 3. They will be stored in your provider's Documents section.

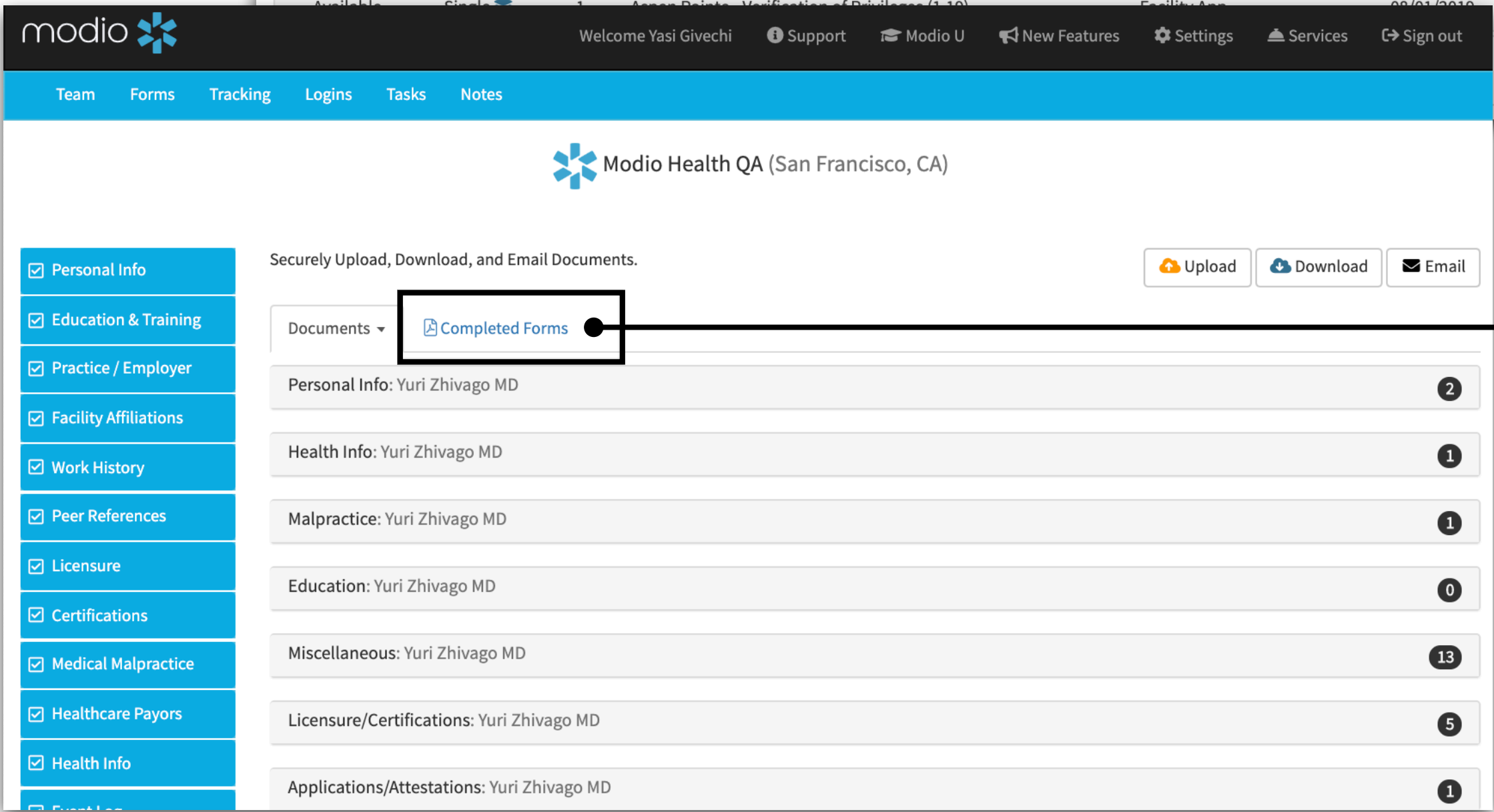
1 Your completed application will be delivered in an email from DocuSign. Follow the link titled **"View Completed Document"** or **download the attachment(s)**.



2 Click the envelope icon to view the send history. Refer to slide #5 for more details where you will see the status of the application as **Completed**.



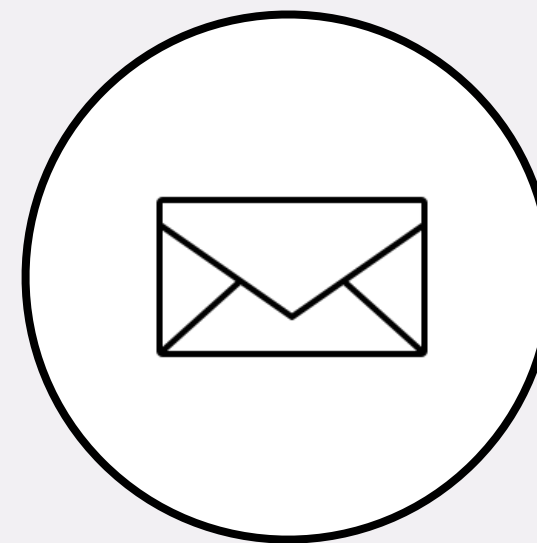
3 Navigate to the **Documents** section within your provider's profile. From here you can access completed applications by clicking the **"Completed Forms"** link.



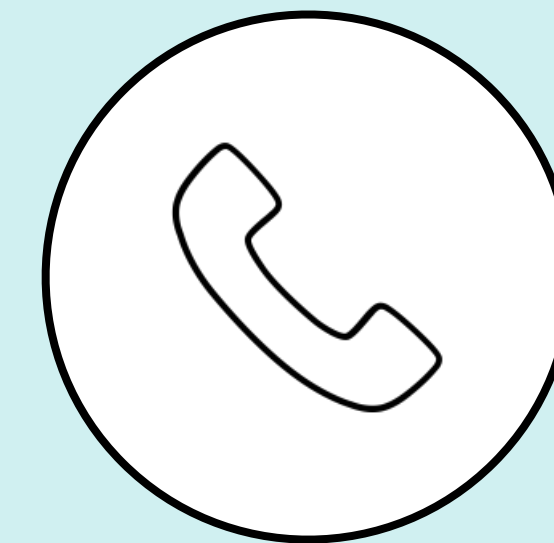
For additional questions or further training,
contact the Modio Team:



Online:
Live Chat Support



Email:
updates@modiohealth.com



Phone:
844.696.6346