



# Modio OneView<sup>®</sup> User Guide

## FORMS: FREQUENTLY ASKED QUESTIONS

### SUBMITTING A NEW FORM TO BE ADDED TO ONEVIEW<sup>®</sup>

- **How do I submit a new form to be mapped and loaded for our team?**

See the "Requesting New Forms" Tip Guide

### SENDING FORMS THROUGH ONEVIEW<sup>®</sup>

- **What is a "Single" form?**

An individual form template that is available in OneView.

- **What is a "Composite"?**

A collection of single forms that can be sent together with one click and are combined into one envelope for the provider.

- **How are Composites created?**

Simply send an email to [support@modiohealth.com](mailto:support@modiohealth.com) with a list of the single forms you would like included and what you would like the Composite named. If the order of forms is important, please include that information as well.

- **Can I send multiple forms to a provider in one email?**

Yes. You can utilize the Composite functionality. You can filter for Composites under the Templates column in your Forms Tab/Dashboard to see which composites already exist. (See previous 2 questions and page 3 on the "Using Forms" Tip Guide.)

- **Can I send attachments with my forms?**

Yes! You can utilize the "Include Attachments?" feature in the Form Send screen. (See page 6 in the "Using Forms" Tip Guide.)

- **What if I need an ink signature?**

By default, the form will be set up for e-signature. However, if an ink/wet signature is required, this can be achieved by utilizing the "Print and Sign" feature in DocuSign (See page 10 in the "Using Forms" Tip Guide.)



## SENDING FORMS THROUGH ONEVIEW®

### - **What if a form needs to be signed by multiple individuals?**

Unfortunately, this functionality is incompatible with our custom DocuSign API (which allows composites and pre-filling). Additional signatures will need to be completed outside DocuSign/OneView®.

### - **How do I get rid of the "In Progress" watermark?**

The "In Progress" watermark will disappear once the envelope is e-signed/submitted OR if the "Print and Sign" feature is used. (See page 10 in the "Using Forms" Tip Guide.)

## DATA THAT POPULATES ONTO FORMS

### - **Can I edit a mapped form once it has been pre-populated and sent through DocuSign?**

Yes. Most users send the form to themselves via email first to QA, edit and add any additional info that wasn't in the OneView® provider profile. You can edit anything that was pre-populated from OneView® before you reassign the form to the provider to complete and sign.

### - **Can I make certain questions/fields required?**

Yes. Our team can apply this setting to specific fields within a template. Please use caution when determining what fields should be required as this will be required on ALL sends of the form. (e.g. If medical school is made required, and the form is sent to a Nurse, then the provider would be required to put something in this field even though it doesn't apply to them.)

### - **What are alerts in the different profile sections in OneView®? What implications do they have for Forms?**

Throughout multiple sections of the OneView® provider profile, you will see a bell icon which indicates if an item has an alert on it. You can disable the alert by clicking on the bell. Disabled alerts show with a slash through them. Disabling the Alert (bell icon) has 2 major implications:

- 1) it will prevent the record from showing up on compliance reports; you will not be alerted it is expiring/expired
- 2) records with disabled alerts will NOT populate onto Forms. If you disable the alert (bell) that item will not prefill onto forms



## DOCUSIGN FUNCTIONALITY

- **I need proof that this form was signed via DocuSign - how can I obtain this?**

The "Certificate of Completion" can be downloaded for completed forms by clicking the "certificate" button in the send history section. You will see the icon to the right under the Actions column once it's available.



## SENDING FORMS THROUGH ONEVIEW®

- **Will I be notified when the provider completes the Form I sent?**

Yes. When the provider signs and completes the form via DocuSign, the coordinator who sent the form will receive an email notification. The completed form will also be saved to the provider's profile under Completed Forms, which you can access through the Documents section of the provider profile in OneView®.

- **Is there a report with what forms have been sent and what the status is of those forms?**

Yes. From the Team screen in OneView®, click on the arrow next to Alerts in the center of the screen. Click on the Forms report. This will export this data (and more) into Excel which you can then sort and filter. You can also see the status of the forms that have been sent by going to the Forms section and click on the envelope icon next to the form in question. Rather than choosing a provider to prefill the form for and sending the form, look below on the modal at the send history to see provider, status, sent date and the coordinator who sent the form.

## COMMON TERMS/DEFINITIONS

**Custom Mapping:** Coding (linking) the fields within a form to pull data from specific fields in a provider's OneView profile.

**Form(s):** An electronic template that has been custom mapped. It can be pre-filled for any provider living on your team.

**Envelope:** The DocuSign envelope that is generated when a form is pre-filled for a specific provider. This is unique to the provider.

