



OneView

TIP GUIDE : TASKS

TASKS

The Tasks section is where you can assign your team to-do items (like uploading a document or watching a training video) and track their progress.

The screenshot shows the Modio Tasks interface for 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. The interface includes a navigation bar with 'Team', 'Tasks', 'Forms', 'Logins', and 'Services'. Below the navigation bar, there are tabs for 'All', 'Demo 1', 'Facility Application', and 'New Provider'. A table lists tasks with columns for Id, Group, Task Name, Created By, Assigned To, Task Status, Attachment, and Actions. The table contains 11 rows of tasks. At the bottom, there is a pagination control showing '1' of 11 items and '50 items per page'. A 'Live Help' button is located in the bottom right corner.

Id	Group	Task Name	Created By	Assigned To	Task Status	Attachment	Actions
1823	Medicare Payor Enr...	notify provider enrolled	Kirk Heath	Kirk Heath	Open		+ [edit] [delete]
1862	Medicare Payor Enr...	notify provider enrolled	Connor Hubbard	Kirk Heath	Open		+ [edit] [delete]
1806	Medicare Payor Enr...	notify provider enrolled	Connor Hubbard	Kirk Heath	Open		+ [edit] [delete]
1812	Medicare Payor Enr...	notify provider enrolled	Connor Hubbard	Kirk Heath	Open		+ [edit] [delete]
1856	Medicare Payor Enr...	notify provider enrolled	Connor Hubbard	Kirk Heath	Open		+ [edit] [delete]
1871	Onboarding	Facility Application	John Barry	Gary Goldman	Open		+ [edit] [delete]
1873	Onboarding	ABC Hospital Credentialing Application	John Barry	Gary Goldman	Open		+ [edit] [delete]
1837	Onboarding	Facility Application	John Bou	Gary Goldman	Open		+ [edit] [delete]
1839	Onboarding	ABC Hospital Credentialing Application	John Bou	Gary Goldman	Open		+ [edit] [delete]
1849	Onboarding	Facility Application	Kirk Heath	William Fithian	Open		+ [edit] [delete]
1851	Onboarding	ABC Hospital Credentialing Application	Kirk Heath	William Fithian	Open		+ [edit] [delete]

6 **Tabs:**
Organize your tasks with custom tags.

1 **Add Task(s):**
Click here to add a new task, or pick an existing one from the library.

2 **Library:**
View your library of group tasks here (refer to page 4 for more details).

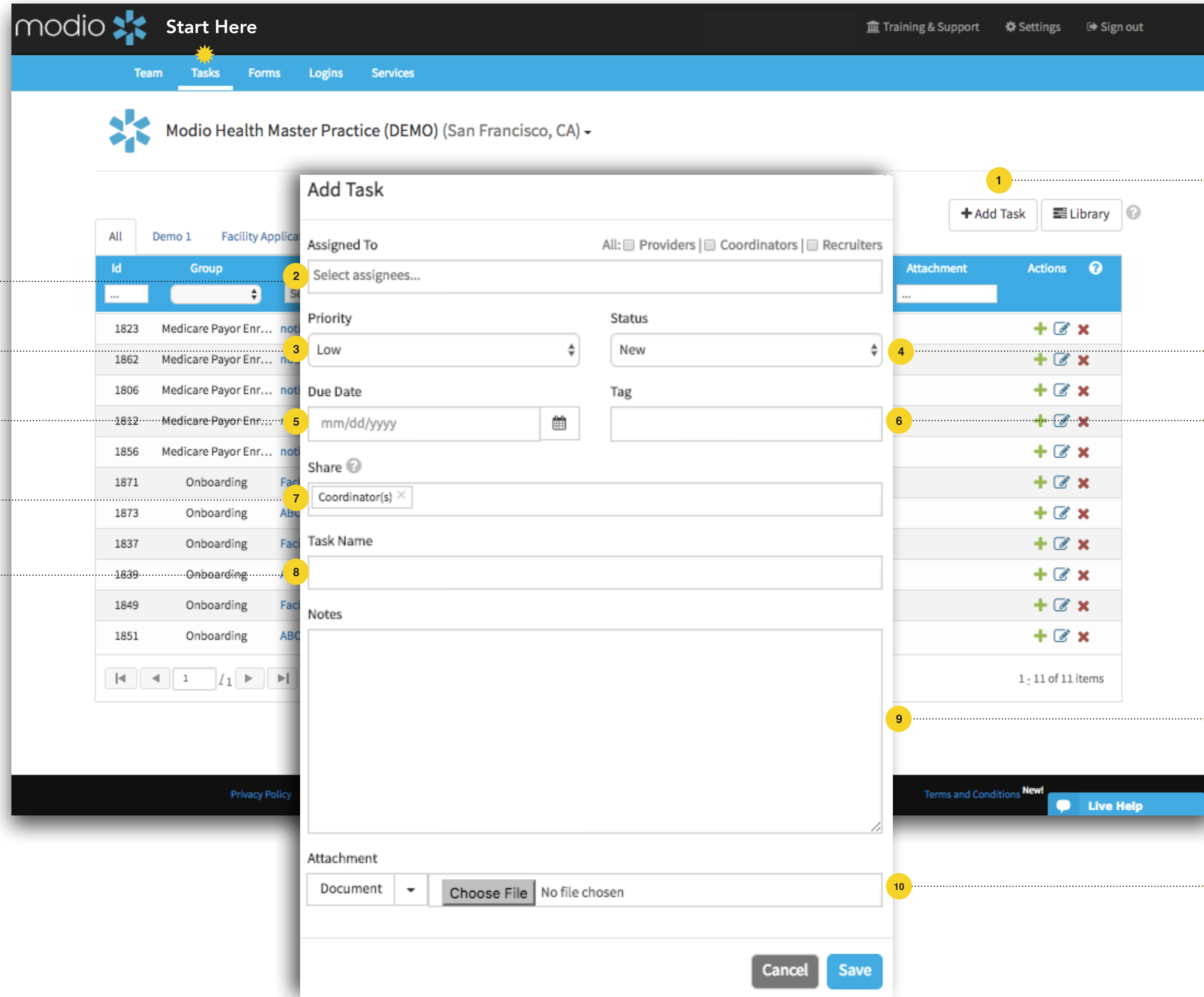
3 **Assign:**
Assign an existing task to additional providers or coordinators.

4 **Edit:**
Make edits to an existing task.

5 **Archive:**
Finally, click here to complete and archive a task.

TASKS: ADDING TASKS

Creating an Individual Task.



The screenshot shows the 'Add Task' form in the Modio application. The form is overlaid on a background of a task list. The form fields and their corresponding callout numbers are:

- 1:** '+ Add Task' button
- 2:** 'Assigned To' dropdown menu
- 3:** 'Priority' dropdown menu (set to 'Low')
- 4:** 'Status' dropdown menu (set to 'New')
- 5:** 'Due Date' field (placeholder: 'mm/dd/yyyy')
- 6:** 'Tag' input field
- 7:** 'Share' dropdown menu (set to 'Coordinator(s)')
- 8:** 'Task Name' input field
- 9:** 'Notes' text area
- 10:** 'Attachment' section with 'Document' dropdown and 'Choose File' button

1 Add:
Click the Add button to create a new task or select from the library.

4 Status:
Choose an initial status for the task.

6 Tag:
Organize tasks by project or type by giving each task a tag.

9 Notes:
Add a short description of the task here.

10 Attachment:
If desired, attach a file or include a link here. When the assignee clicks on the file or link, the task will automatically be marked complete.

2 Assigned To:
Select the provider or coordinator (or both) to whom you're assigning the task.

3 Priority:
Set the priority of the task by choosing low, medium, or high from the drop-down.

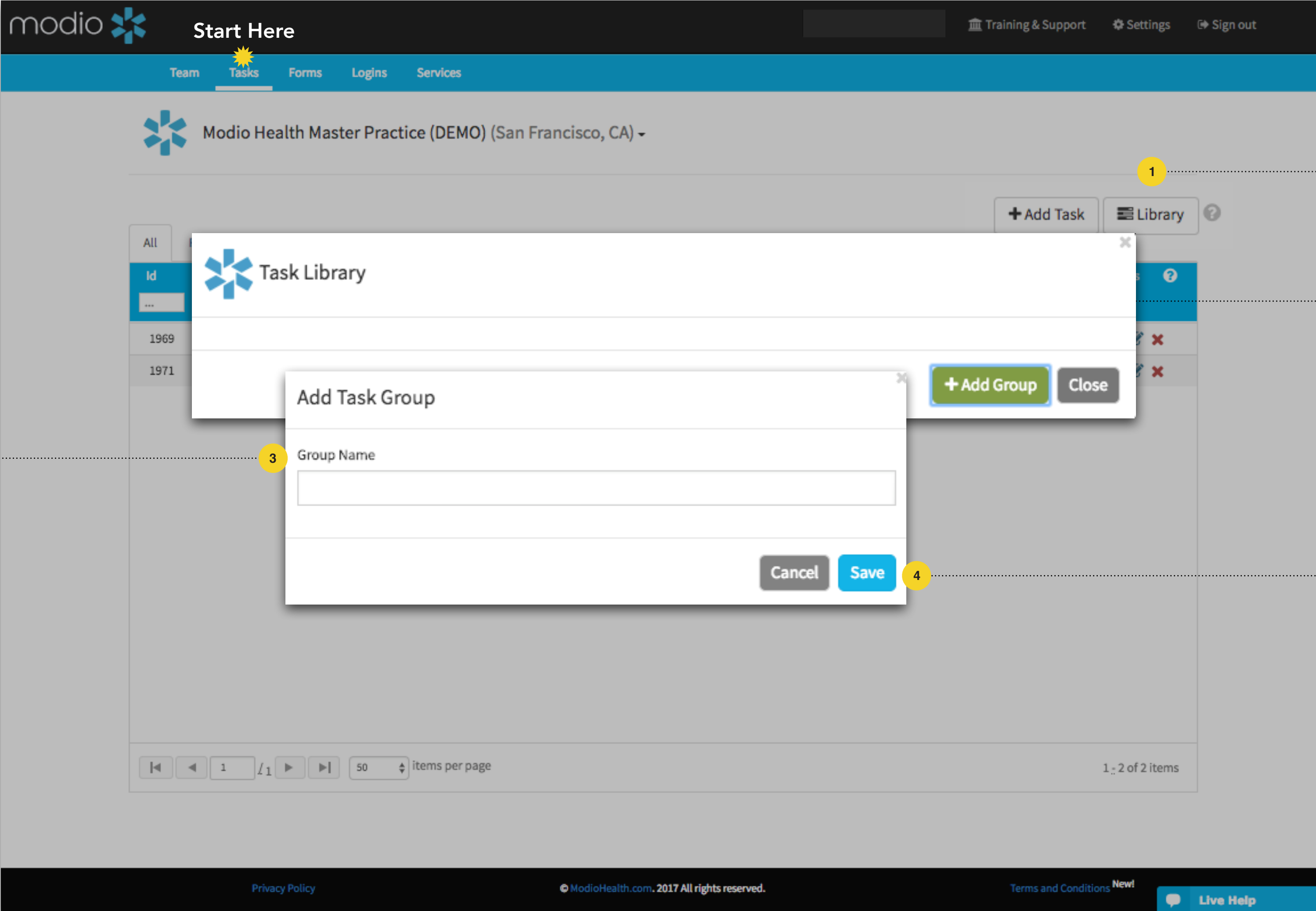
5 Due Date:
Set a due date for your provider(s) or coordinator(s) to complete the task.

7 Share:
Select whom you want to share this task with (coordinators or recruiters).

8 Task Name:
Name your task.

TASKS LIBRARY: CREATING GROUP TASKS

Creating Group Tasks.



The screenshot shows the Modio Health Master Practice (DEMO) interface. The top navigation bar includes 'Start Here', 'Team', 'Tasks', 'Forms', 'Logins', and 'Services'. The main content area displays the 'Task Library' section. A modal window titled 'Task Library' is open, showing an 'Add Task Group' form. The form has a 'Group Name' input field and 'Cancel' and 'Save' buttons. A '+ Add Group' button is also visible. The background shows a table with columns for 'Id' and 'Group Name'.

3 **Group Name:**
Give your group task a name.

1 **Library:**
Click here to add a new group task (a task with multiple steps).

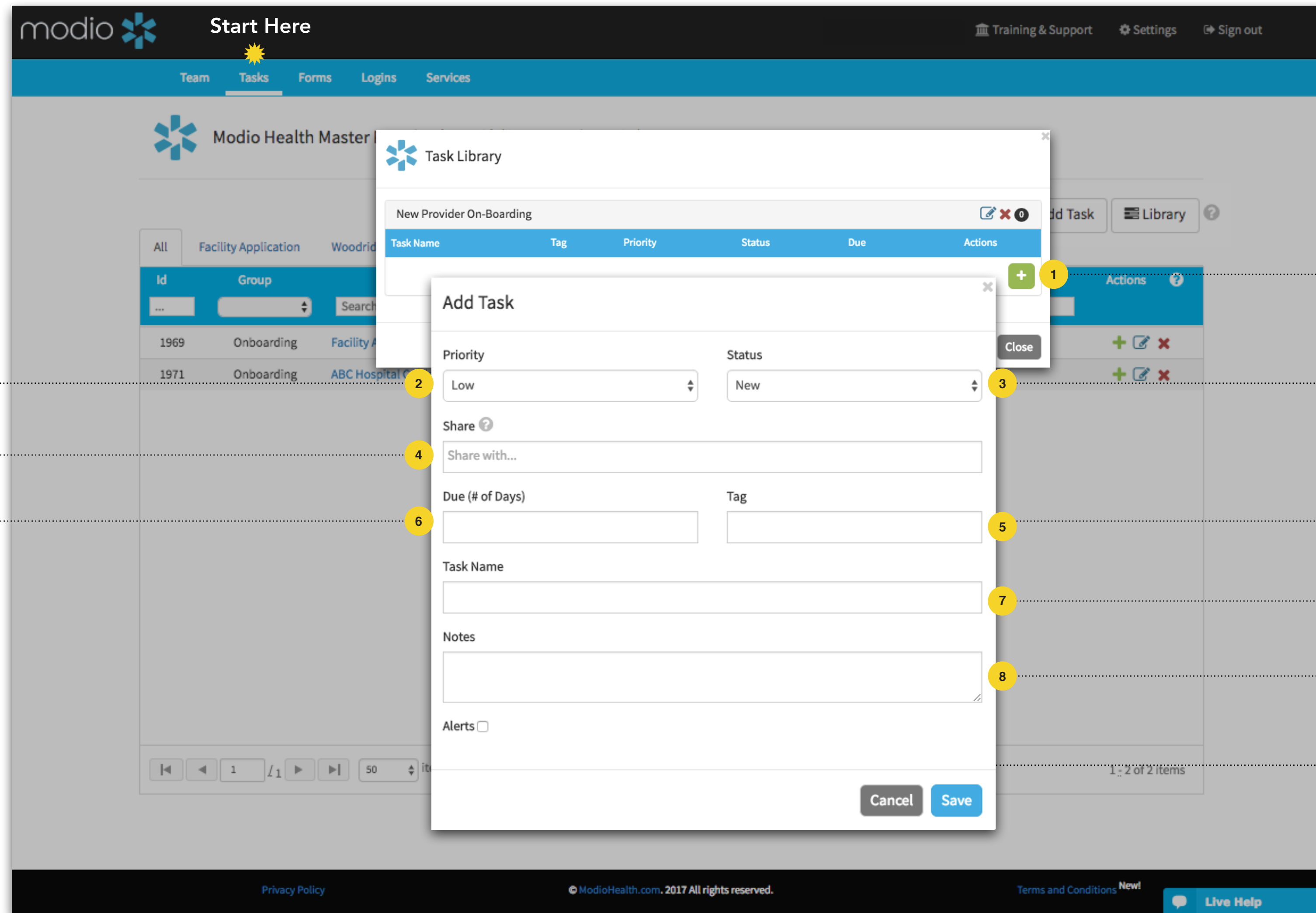
2 **Add Group:**
Click here to create the group.

4 **Save:**
Give your group task a name, then click save.

Go on to the next slide to add each step to your group task.

TASKS LIBRARY: CREATING GROUP TASKS

Creating Group Tasks - Part II.



2 Priority:
Set the priority level of the task.

4 Share:
Select the people with whom you want to share the task.

6 Due (# of Days):
Choose how many days the assignee has to complete the task from the assignment date.
For example, if you pick 2 days here, then assign the group task on Jan 2, this task will be due on Jan 4. Each task can have a different due date.
When you assign the group task, just leave the main due date blank, and each task will automatically be filled with a date based on the number of days picked here.

1 Add Steps:
Click here to add tasks to the group.

3 Status:
Set an initial status for the task.

5 Tag:
When you make a tag for your task(s), it will create a tab with that tag name across the top for easy filtering.

7 Task Name:
Give your task a name.

8 Notes:
Enter instructions or any required links for the task here.

9 Alerts:
Check this box to get color-coded alerts when the due date approaches.

TASKS: TRACKING

Tracking the status of your Tasks.

The screenshot displays the Modio Health Master Practice (DEMO) interface for tracking tasks. The main view shows a list of tasks with columns for Id, Group, Task Name, Created By, Assigned To, Task Status, Attachment, and Actions. A task titled "Ensure Receipt of Application" is selected, and its details are shown in a modal window. The modal window includes fields for Assigned To (Jane Doe), Priority (Low), Status (New), Due Date (06/22/2017), and Last Updated (06/21/2017). An "Edit Task" modal window is also shown, allowing the user to change the Status to "In Progress".

1 Select Task:
Click on the task name to view details about the task

2 Status:
When the assignee opens the new task, it will change to "In Progress." If you added an attachment or a link, the task will mark as "Completed" when the assignee clicks on it.

3 Edit Task:
Click here to view a task or make edits.

4 Status:
You or the assignee can edit the status of the task here.

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