



Tip Guide: Document Management

Table of Contents:

Page #1 -Title Page

Page #2 -Table of Contents

Page # 3 - #5 - Documents V1

Page #6 - #9 - Documents V2 - Single Provider View

Page #10 - Documents V2 - All Provider View

Page #11 - Naming Convention Guide

Page #12 - Frequently Asked Questions

Page #13 - Support & Contact Information

modio

Welcome Yas GivechiSupportModio UNew FeaturesSign out

TeamFormsTrackingLoginsTasksNotesReports

Yuri Zhivago MDDocuments

Securely Upload, Download, and Email Documents.

DocumentsCompleted Forms

UploadDownloadEmail

Personal Info

Education & Training

Practice / Employer

Facility Affiliations

Work History

Peer References

Licensure

Certifications

Medical Malpractice

Healthcare Payors

Health Info










Event Log

CME

Documents

Summary




Personal Info3

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Color Photo	Powell Alisha - Color Photo.jpg	02/14/2018	General		Active	  
Color Photo	Udall Dana - Color Photo.jpg	02/14/2018	General		Active	  
Curriculum Vitae (CV)	Analytics Results 1.8-1.14.18.xlsx	02/20/2018	General		Active	  

Health Info0

Malpractice0

Education1

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Exam Scores	profile-sharing-example-v2.png	02/16/2024	General		Active	  

Miscellaneous

Chat

Drag and Drop:
To upload a single document, simply drag and drop it into this box.

Batch Document Uploading:
Upload one or more files directly into the provider's profile.

Upload Documents :
Upload one or more files directly into your provider's file.

Download Zip :
Download a zip file of all documents.

Share in Email :
Share these documents with any coordinator or recruiter on your team. See next slide for details.

Action Item Key:

Alert: Enable or disable alert notifications in the V2 Documents grid

Edit: Change Permissions, Expiration date, Document Type and add notes.

Archive: Archive any documents. Archived documents can be accessed by adjusting the filter in the Status column.

KEY: Access Permissions - Document Visibility Definitions		
All Teams	General	The provider to whom the document belongs, and any coordinators who belong to the same team(s) as the provider
	Coordinator Only	Any coordinators who belong to the same team(s) as the provider
Team Name	General	The provider to whom the document belongs, and any coordinators who belong to the listed team
	Coordinator Only	Any coordinators who belong to the listed team

3

2

Recipients: Select the coordinator or recruiter with whom to share documents.

3

Documents: Choose just the files you want to share or Select All to email the entire list.

4

Email Subject: Give your email a title.

5

Email Message: Enter notes and instructions for your team.

1

Click the Email Button to start

Click here Send.

Tip Guide: Document Management

Upload a supporting Document to a specific data entry v1. Attach documents to specific credentialing records in these sections: Education & Training, Peer References, Licensure, Certifications, Medical Malpractice, & Healthcare Payors.

Team

Forms

Tracking

Logins

Tasks

Notes

Reports

Personal Info

Education & Training

Practice / Employer

Facility Affiliations

Work History

Peer References

Licensure

Certifications

Medical Malpractice

Healthcare Payors

Health Info

Event Log

CME

Documents

Summary

State Licenses

License State	License #
VA - Virginia	0101232393
CA - California	A74488 (MD)
CO - Colorado	123456 (RN)
DC - District of Columbia	MD037745
IN - Indiana	123459 (D-N)
MD - Maryland	D0085596 (P)

DEA Licenses

License State	License #
DC - District of Columbia	FA4228474
VA - Virginia	BA7683584

State Controlled Substance Licenses

License State	License #
---------------	-----------

Edit DEA License for Jennifer Abele MD

last updated: 07/25/2024

License State

DC - District of Columbia

License #

FA4228474

Issue Date

mm/dd/yyyy

Expiration Date

06/30/2025

License Status

Active

Primary Source Link

https://apps.deaiversion.usdoj.gov/webforms2/spring/validationLogin

Notes

General

Team

Prepend Leah Sanborn | OneView® Trainer

Documents

First Name

Jennifer

Last Name

Abele

1

2

3

Files

Drop documents here or Click here to browse

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

File Name	Type	Date	Permission	Expiration	Actions
-----------	------	------	------------	------------	---------

Ok

1

























2

3

Expiration Date

Last Updated

Actions









12/31/2020	06/26/2024	   
	05/29/2024	   
12/31/2024	05/08/2024	   
	05/22/2024	   
09/30/2024	05/08/2024	   
	07/24/2024	   

Add + Find

Expiration Date

Last Updated

Actions





06/30/2025	07/25/2024	   
06/30/2020	01/18/2024	   

Add + Find

Expiration Date

Last Updated

Actions

		   
--	--	---

Add +

- 1 Select the Section in the row and Data Point you would like to add a supporting document
- 2 Select the Edit icon in the Document field to open the "Attach Document" option.
- 3 Upload the supporting document here in the "Click/ Drag& Drop" box. It will appear in the Documents section as well. To remove or edit the file, you'll need to access it from the section it was uploaded from.

modio

New FeaturesModio USupportYas Givochl

TeamFormsTrackingLoginsTasksNotesReports































Modio Health QA (San Francisco, CA)Add Provider +

All ProvidersSearch a Provider Name or NPI...Sections

Provider InfoLicensureActions & ExclusionsCertificationsEducation & TrainingWork ExperienceMalpractice InsuranceDocumentsVerification

Documents35 Expiring746 Expired2944 Total

AllNo Tags123andriiandrii_beykdecember_tag_okExpiredikNataliia new_marchokOKIok_2024ok_doc_marchok_mayok_may_newqa_docs_grid

	Provider Name	Title	Primary Specialty	Document Type	File Name	Permission	Exp. N/A	Exp. I	Actions
<input type="checkbox"/>	> Marajas, Marie Katrina	PA	Pediatrics	Correspondence	Modio Health CV PEDS Katri...	General	Yes	N/A	    
<input type="checkbox"/>	> Marajas, Marie Katrina	PA	Pediatrics	Curriculum Vitae (CV)	MKM Updated CV (1).docx	General	No		    
<input type="checkbox"/>	> Marajas, Marie Katrina	PA	Pediatrics	Modio Health	Marajas Marie Katrina - Mo...	Coordinator Only	Yes	N/A	    
<input type="checkbox"/>	> Marajas, Marie Katrina	PA	Pediatrics	NPI Verification	NPI 1962780676 12-21-2023....	General	No		    
<input type="checkbox"/>	> Marajas, Marie Katrina	PA	Pediatrics	Other Misc	OIG Verification OIG Demc...	General	No	07/3	    
<input type="checkbox"/>	> Marajas, Marie Katrina	PA	Pediatrics	State License	Kirk Heath MD Initial Cred V...	General	No		    

Sent Forms0 Expiring1 Expired27 Total

AllNo Tagsandriiok_june

Privacy Policy© 2024 Modio Health All rights reservedTerms and ConditionsSupport

- 1

Click on the "Documents" tab to access all documents on your Team.
- 2

Click the New Icon and upload 1 document at a time by selecting the green plus icon. The grid will open and guide you through filling in required fields.
- 3

Quickly Email Providers or Coordinators on your team to notify them of expiring or expiring Documents.

4

KEY: Access Permissions - Document Visibility Definitions		
All Teams	General	The provider to whom the document belongs, and any coordinators who belong to the same team(s) as the provider
	Coordinator Only	Any coordinators who belong to the same team(s) as the provider
Team Name	General	The provider to whom the document belongs, and any coordinators who belong to the listed team
	Coordinator Only	Any coordinators who belong to the listed team

1 Enable the filter icon. If the row of filters is hidden, click on the filter button to view.

2 Use any of the columns to filter the items in your download.

3 Select the ellipses for additional filter options.
** Try filtering by enabled alerts to narrow what you see in the documents section.

4 Download just the filtered documents or all documents in the profile. Note: you can only view these options when you have filtered for a single provider.

modio

New Features

Modio U

Support

Yasi Givechi

Team

Forms

Tracking

Logins

Tasks

Notes

Reports

Modio Health QA

(San Francisco, CA)

Lily Marten, FAC

NPI 5345345345

Family Medicine

Lily Marten

Sections (2)

Documents

0 Expiring

9 Expired

56 Total

	Document Type	File Name	Permission	Exp. N/A	Exp. Date	Expires Within	
<input type="checkbox"/>	> FSMB Verification	eee (1) (1) (1) (1).jpeg	General	Yes	N/A		
<input type="checkbox"/>	> Other Misc	Screenshot 2023-03-30 at 11.22.32.png	General	Yes	N/A		
<input type="checkbox"/>	> State License	pngwing.com (1).png	General	No			
<input type="checkbox"/>	> OIG Verification	OIG Marten Lily 05-12-2023 1.pdf	General	No			
<input type="checkbox"/>	> State License Verification	Nathan Neil AK MEDSI234 05-16-2023.pdf	General	No	12/31/1990	Expired	
<input type="checkbox"/>	> State License Verification	Nathan Neil AK MEDSI234 06-01-2023.pdf	General	No	12/31/1990	Expired	
<input type="checkbox"/>	> Other Misc	0-02-05-564a4f8f0ab588ca4722cc2flc...	General	No			
<input type="checkbox"/>	> State License Verification	Nathan Neil AK MEDSI234 07-10-2023.pdf	General	No	12/31/1990	Expired	
<input type="checkbox"/>	> State License Verification	Nathan Neil AK MEDSI234 08-02-2023.pdf	General	No	12/31/1990	Expired	
<input type="checkbox"/>	> Application Receipt	psychology receipt.png	Coordinator Only (Team)	No			
<input type="checkbox"/>	> State License Verification	Nathan Neil AK MEDSI234 09-20-2023.pdf	General	No	12/31/1990	Expired	
<input type="checkbox"/>	> Other Misc	Screenshot 2023-03-30 at 11.22.32.png	General	Yes	N/A		

Sent Forms

No Records found for Lily Marten, FAC

Export to Excel

Export to CSV

Export to PDF

Download All (Filtered)

Download All

Reset Grid Settings

- 1

Use single provider view to select the email icon next to the alerts.
- 2

Select Documents option to send a zip file of documents to any coordinators on your Team.
- 3

Add yourself or any coordinators to the "Send Email To" list.
- 4

Use the Active & Enabled Alerts options in the "Filters Applied" section or manually add or remove documents from the "Select File(s) to Email" section.
- 5

Optional - Include a custom message before selecting "Send".
- 6

Select "Send" Optional - Add a note or a Tag to document your Send

modio

Team Forms Tracking Logins Tasks Notes Reports

Kirk Heath, MD - NPI 1184838286

General Surgery

Documents

	Document Type	File Name
<input type="checkbox"/>		
<input type="checkbox"/>	Board Certification Verification	ABMS Heath Kirk 11-20-2023.pdf
<input type="checkbox"/>	Board Certification	Board Sanction.pdf
<input type="checkbox"/>	Other Misc	civic.jpg
<input type="checkbox"/>	Board Sanction	DEA Sanction.pdf
<input type="checkbox"/>	Peer Review	Dr Heath - Peer Review Dr. Clifford
<input type="checkbox"/>	Diploma	Dr Heath Kirk ChiefRes Diploma.p
<input type="checkbox"/>	Other Misc	file (22).png
<input type="checkbox"/>	FSMB Verification	Heath FSMB.key
<input type="checkbox"/>	Diploma	Heath Kirk GenSurg Residency Dip
<input type="checkbox"/>	Certificate of Insurance (COI)	Heath Modio VA COI CRMC exp. 0
<input type="checkbox"/>	Certificate of Insurance (COI)	Heath Modio VA COI CRMC exp. 0
<input type="checkbox"/>	NPDB Verification	Heath NPDB.key
<input type="checkbox"/>	Facility Applications	Heath Riverside Application SIGN
<input type="checkbox"/>	Color Photo	KHEATH PHOTO.jpg
<input type="checkbox"/>	Background Check	Kirk Heath - Background Check 2016.pdf
<input type="checkbox"/>	Other Misc	Kirk Heath MD CV 03-07-2024.docx

Email Documents for Kirk Heath

Select content to email

☐ Alerts ☒ Documents

Filters applied All Records Enabled Alerts

Send Email to:

Leah Sanborn | OneView® Trainer (leah.sanborn@modiohealth.com)

Select File(s) to Email

All Filtered Documents

KHEATH PHOTO.jpg

Dr Heath - Peer Review Dr. Clifford.docx

Kirk Heath - Background Check 2016.pdf

Heath Kirk GenSurg Residency Diploma.pdf

Dr Heath Kirk ChiefRes Diploma.pdf

Heath Riverside Application SIGNED.pdf

Heath Modio VA COI CRMC exp. 03.02.20.pdf

Heath Modio VA COI CRMC exp. 03.02.20.pdf

Board Sanction.pdf

Heath FSMB.key

Heath NPDB.key

DEA Sanction.pdf

Kirk Heath MD State Licenses Summary 08-01-2023.pdf

ABMS Heath Kirk 11-20-2023.pdf

Kirk Heath MD CV 03-07-2024.docx

Kirk Heath MD CV 03-07-2024.docx

Kirk Heath MD CV 03-07-2024.docx

Screenshot 2024-07-29 at 11.41.53.png

Screenshot 2024-08-08 at 10.36.46AM.png

NPI 1184838286 10-23-2024.pdf

civic.jpg

file (22).png

Kirk Heath MD Recred Cred Verif 02-12-2025.pdf

OIG Heath Kirk 02-20-2025 l.pdf

SAM Heath Kirk 02-20-2025 l.pdf

Email Subject

| • Modio University • | Document Notification

Email Message

Cancel Send

New Features Modio U Support Leah Sanborn | OneView® Trainer

Add Provider +

Sections (1)

1

0 Expiring 2 Expired 25 Total

Last Updated Actions

11/20/2023	<div><div></div><div></div><div></div><div></div><div></div></div>
08/07/2024	<div><div></div><div></div><div></div><div></div><div></div></div>
01/07/2025	<div><div></div><div></div><div></div><div></div><div></div></div>
03/02/2023	<div><div></div><div></div><div></div><div></div><div></div></div>
11/02/2021	<div><div></div><div></div><div></div><div></div><div></div></div>
10/31/2023	<div><div></div><div></div><div></div><div></div><div></div></div>
01/07/2025	<div><div></div><div></div><div></div><div></div><div></div></div>
03/01/2023	<div><div></div><div></div><div></div><div></div><div></div></div>
11/02/2021	<div><div></div><div></div><div></div><div></div><div></div></div>
12/10/2021	<div><div></div><div></div><div></div><div></div><div></div></div>
12/15/2021	<div><div></div><div></div><div></div><div></div><div></div></div>
03/01/2023	<div><div></div><div></div><div></div><div></div><div></div></div>
11/02/2021	<div><div></div><div></div><div></div><div></div><div></div></div>
11/02/2021	<div><div></div><div></div><div></div><div></div><div></div></div>
07/25/2024	<div><div></div><div></div><div></div><div></div><div></div></div>
05/16/2024	<div><div></div><div></div><div></div><div></div><div></div></div>

8

1 Navigate to V2 Single Provider view by entering a profile name here.

2 Drag and drop document(s) or select “Click here to browse” to upload your document(s) of choice.

3 “Click Here to Browse” allows you to upload multiple documents at once. Multi-select documents from the device you are working from.

Use the recommended naming convention to activate an automation that selects Doc Type and Exp Date. Review and manually adjust the Document Type and Expiration before selecting “Upload”

4 The Orange alert icon appears when a document fits in more than one category. Manually adjust the document type as needed.

**** Pro Tip:** Visit the Documents Types & Permissions Guide for a detailed list of naming conventions and designated groupings.

The screenshot displays the Modio V2 Documents Upload interface for Jennifer Abele MD. The interface includes a search bar (1) with the provider's name, a drop zone for documents (2) with the text "Drop documents here or Click here to browse", and a "File Uploads for Jennifer Abele MD" modal (3). The modal lists three files: "SAM Verification SAM Jennifer Abele 08-02-2026", "CME Jennifer Abele Dipoloma EXP 01012025", and "Other Misc Jennifer Abele ABMS EXP 01012025". The third file has an orange alert icon (4) next to its type "Board Certification". A tooltip explains that the type was suggested based on keywords in the file name but multiple matches were found, suggesting "CME/CEU - CME" or "Education - Diploma".

File name	96KB	Type	Expiration	N/A?	Permission
SAM Verification SAM Jennifer Abele 08-02-2026	.pdf	SAM Verification	08/02/2026	<input type="checkbox"/>	General
CME Jennifer Abele Dipoloma EXP 01012025	.pdf	CME	01/01/2025	<input type="checkbox"/>	General
Other Misc Jennifer Abele ABMS EXP 01012025	.pdf	Board Certification	01/01/2025	<input type="checkbox"/>	General

File Uploads for Jennifer Abele MD

File name: Other Misc Jennifer Abele ABMS EXP 01012025, 386KB, Type: Board Certification, Expiration: 01/01/2025, Permission: General

Alert: A document type has been suggested based on keywords in your file name, but multiple matches were found. Please review the below suggested types and update if needed.

- CME/CEU - CME
- Education - Diploma

1 Navigate the V2 platform to a grid that needs supporting document(s) uploaded.

2 From the V2 grid, locate the data point you wish to upload supporting documents and select the “Tags, Notes, Docs” icon from the Actions column. The side drawer will open, select the “Documents” tab from the side drawer.

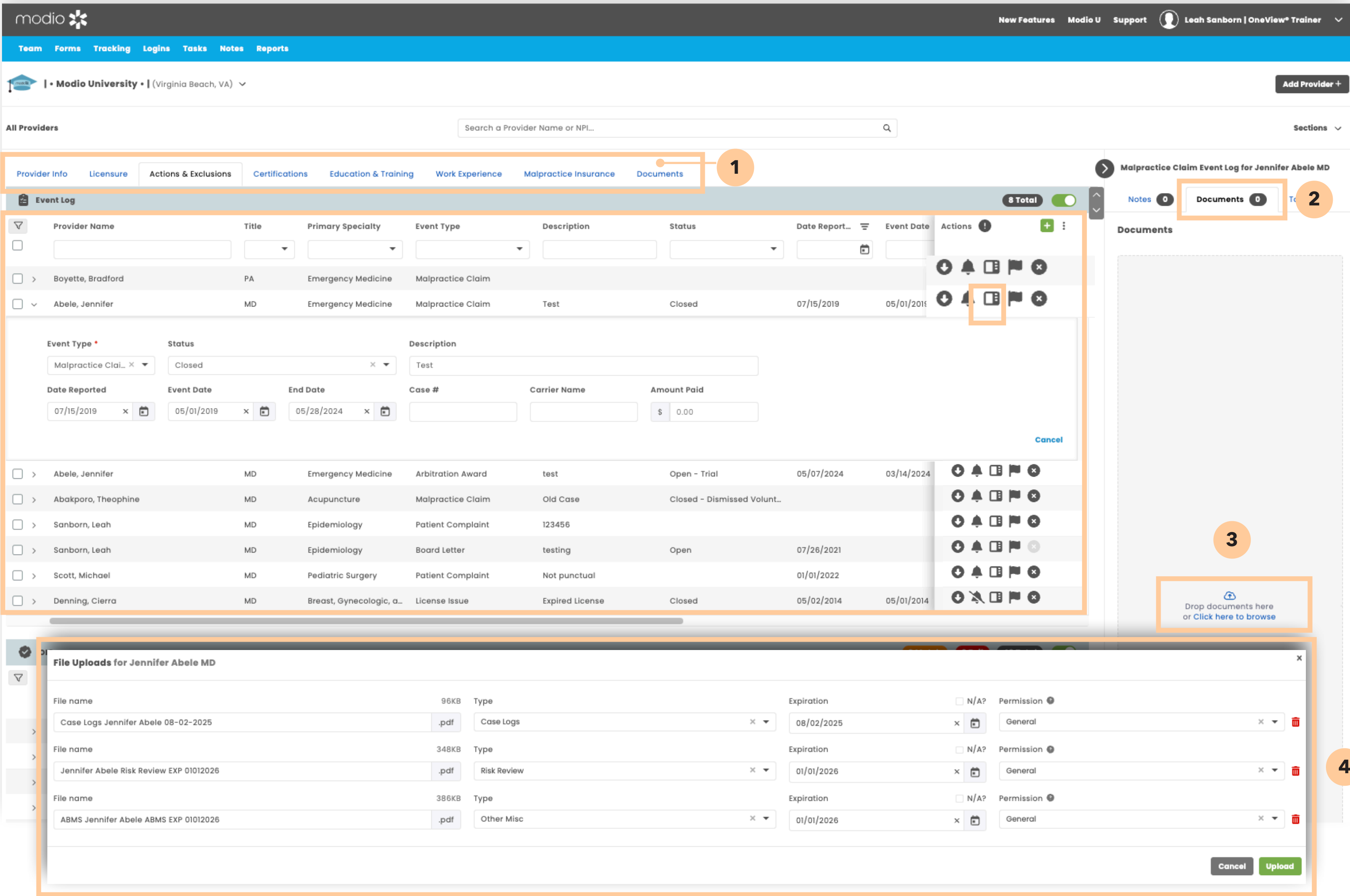
3 Drag & Drop or select “Click Here to Browse” to add documents to the selected data point from the V2 grid.

4 “Click Here to Browse” will allow you to upload multiple documents at the same time. Multi-select documents from the device you are working from.

Use the recommended naming convention to activate an automation that selects Doc Type and Exp Date. Review and manually adjust the Document Type and Expiration before selecting “Upload”.

Note: Each V2 grid hosts a unique set of document types. Other Misc Type may indicate that your document could be better fit for a different grid, or that the naming convention was not detected.

**** Pro Tip: Visit the Documents Types & Permissions Guide for a detailed list of naming conventions and designated groupings.**



The screenshot displays the Modio V2 platform interface. At the top, there's a navigation bar with options like Team, Forms, Tracking, Logins, Tasks, Notes, and Reports. Below this, a search bar is present. The main area shows a grid of providers, with a side drawer open on the right. The side drawer has tabs for Notes, Documents, and Tags. The 'Documents' tab is selected. A modal window titled 'File Uploads for Jennifer Abele MD' is open, showing a table with columns for File name, Type, Expiration, and Permission. The table contains three rows of document information. The 'Documents' tab in the side drawer is highlighted with a red box and a red circle with the number 2. The 'Click Here to Browse' button in the modal is highlighted with a red box and a red circle with the number 3. The 'Upload' button in the modal is highlighted with a red box and a red circle with the number 4.

File name	Type	Expiration	Permission
Case Logs Jennifer Abele 08-02-2025	Case Logs	08/02/2025	General
Jennifer Abele Risk Review EXP 01012026	Risk Review	01/01/2026	General
ABMS Jennifer Abele ABMS EXP 01012026	Other Misc	01/01/2026	General

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 AND cert; 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. (get payor list)	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 AND [reg OR licens OR cert]	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, corec, cpr, nrp	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

Frequently Asked Questions

Q: Can Providers upload documents into their profile?

Yes, providers can upload documents to their own profile if they have access to their own profile from the Onboarding Feature.

Q: Is there a limit on how many documents I can add to the provider's profile?

No, there is not a limit by number of documents or by size of documents.

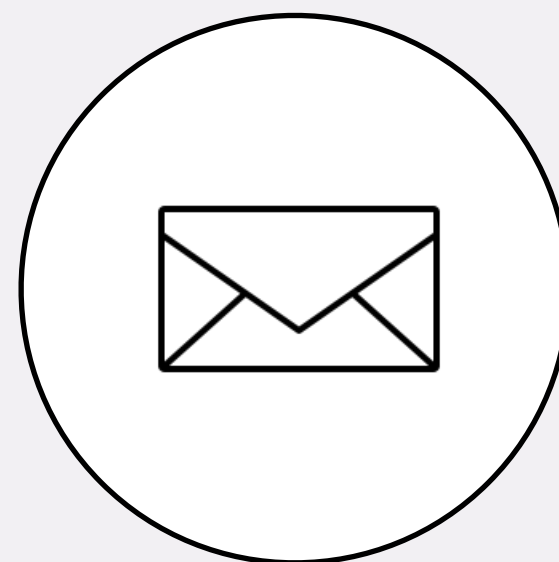
Q: Will I be notified when a document is expired?

If you would like to see when the documents are soon to expire or expired, you can click on the Documents tab in V2 or the Documents section in the providers profile in V1 to view the expiration date.

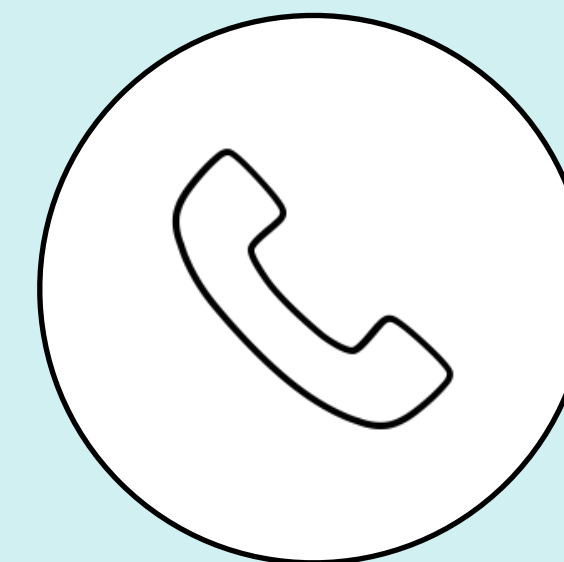
For additional questions or further training,
contact the Modio Team:



Online:
Live Chat Support



Email:
Support@modiohealth.com



Phone:
844.696.6346