OneView®

Tip Guide: Requesting New Forms

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

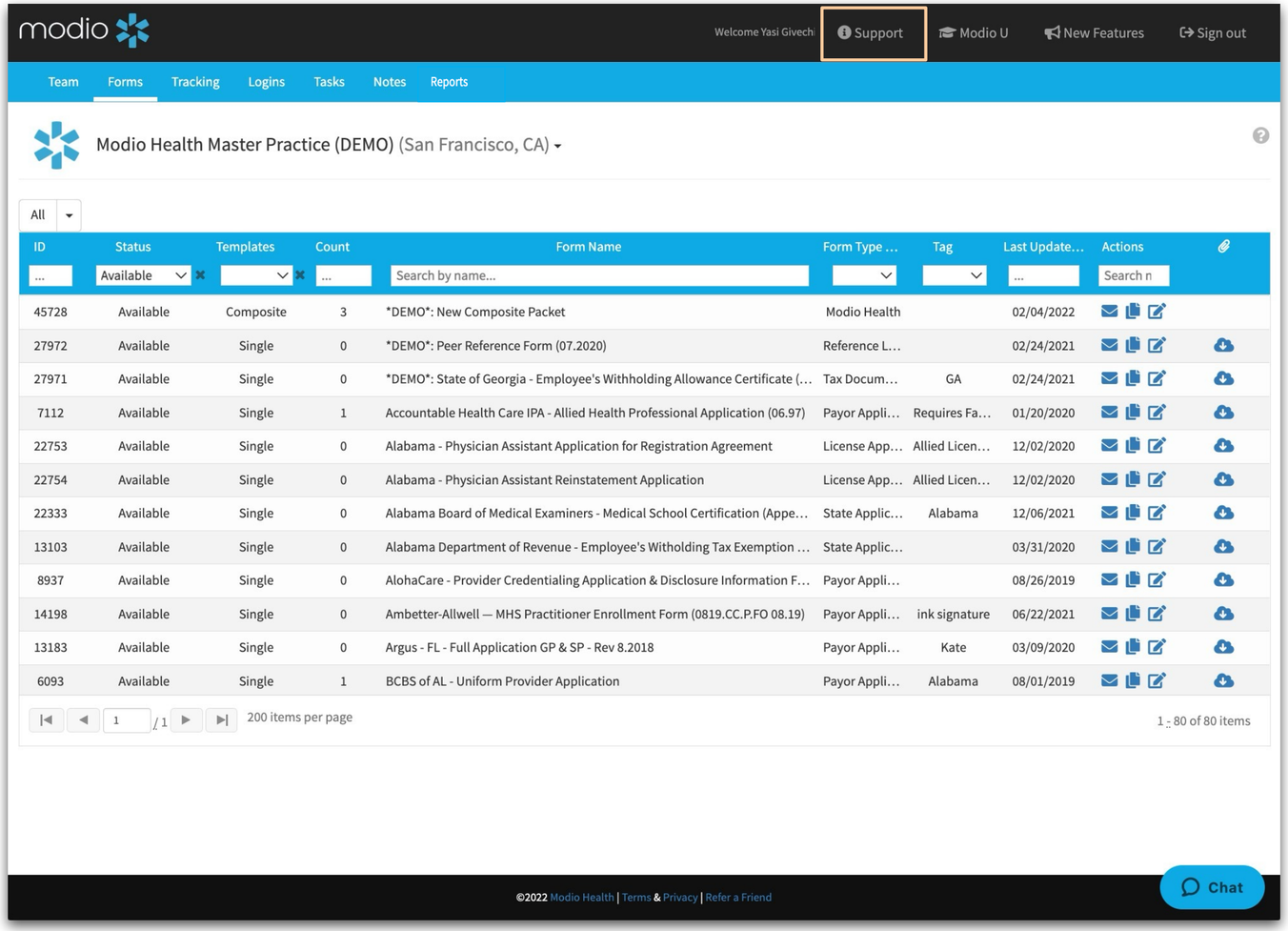
Form Requests

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 within 3-7 business days), the form will be listed as "**Available**" on the Forms dashboard. Once your Form is in "**Available**" status, use the Envelope Icon to pre-fill and send to coordinators or providers on your Team.

To request a custom form, send your files to Support@modiohealth.com.

What to include in your Request:

- What team should the form be added to?
- Is this form replacing an existing form?
- Does it need to be added to a composite?
- Are there any special instructions?



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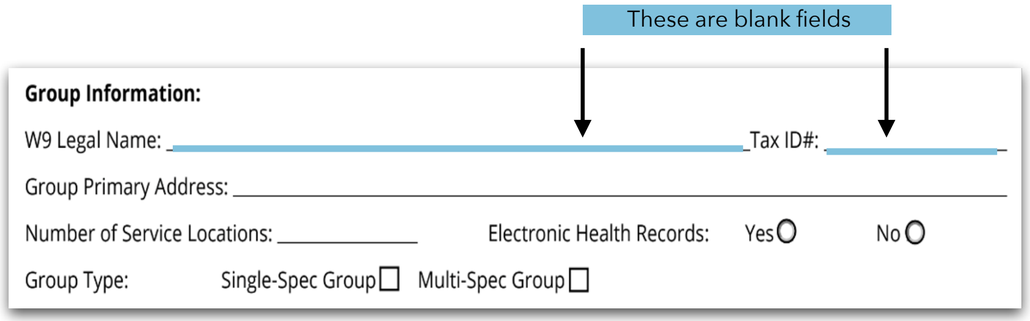
SUBMITTING DO'S

Following these tips will help the Forms team complete your request in a quicker timeframe.

- PDF or word document are acceptable.

- Blank fields where information should populate.

  Example of a form with blank fields:



- High quality scan or source PDF/word document are acceptable.

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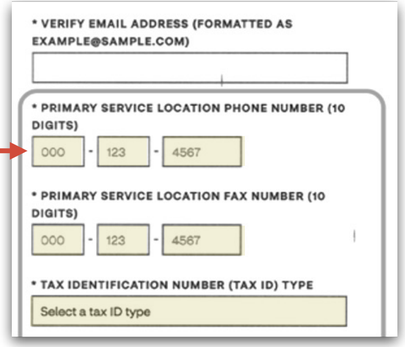
SUBMITTING DON'TS

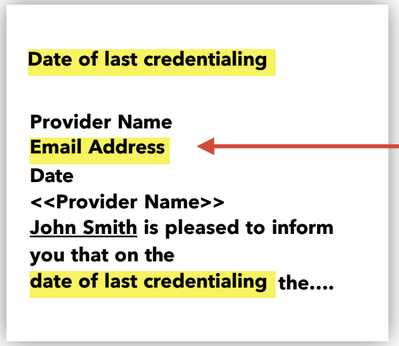
Following these tips will help the Forms team complete your request in a quicker timeframe.

No Excel Based Roster (but we do recommend a custom report)

No Reference Text/Mail Merge Labels

Form should not have placeholder text in boxed fields (see highlighted area).



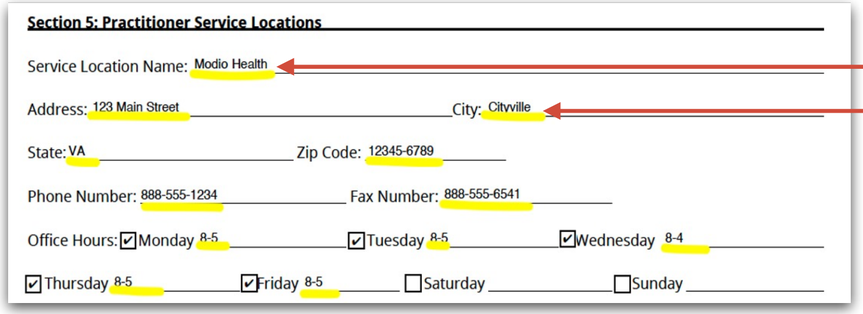


Form should not have mail merge labels (see highlighted area).

Remove Provider Specific Information

No provider info should be pre-filled on the form (see provider name highlighted).

Remove Practice Specific Information



No pre-populated text in form fields (see highlighted content).

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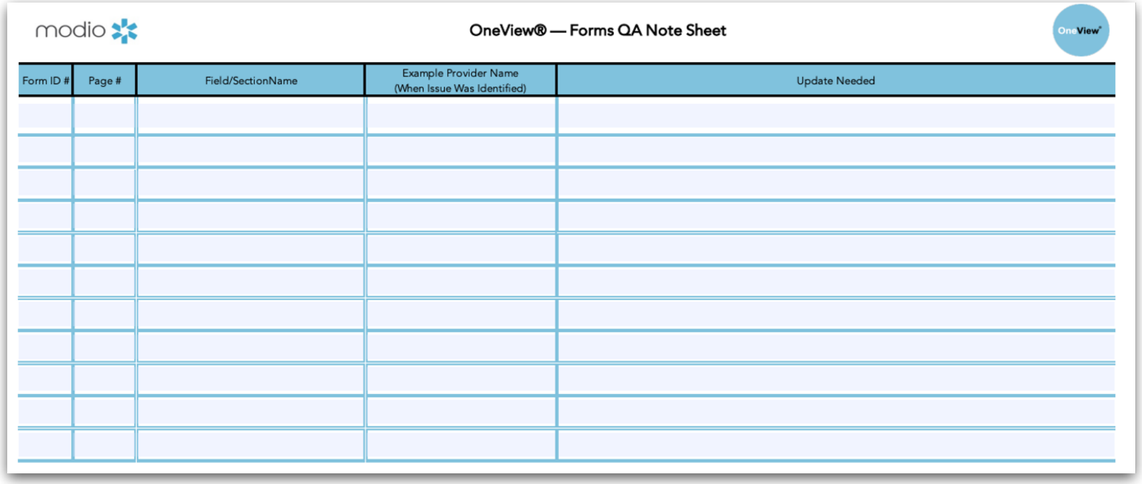
What's Next? After you have been notified that your form(s) are available and ready for use, we strongly suggest you audit the form to confirm it is meeting all of your needs.

How to Perform a Quality Audit (QA):

1. **Locate the recently added form and select a provider with a robust or complete profile.** (You will see the one time "Preparing form to Send" message and spinner the first time you open a form.)
2. **Send the form to yourself and open the DocuSign envelope.**
3. **Review each section on the form and notate any issues on the "Forms QA Note Sheet" (Found on the support page)**
   - Be as specific as possible about which field on the form you are referencing and where the information should pull from within OneView.
   - Include Form ID, Page number, and Profile used to QA the form Pre-fill.
   - Include screenshots or marked up PDFs as needed to help clarify.
   - Remember that pre-filled information is tied directly to data within the provider profile. If information is not entered in the profile, it will not populate.
4. **Send the "Forms QA Note Sheet" to Support@modiohealth.com**
5. **Forms team will notify you once the changes are made.**
6. **Once you finish your Form Send QA, "Finish" the form through DocuSign.** (This will stop any reminder emails being sent out 48 hours after the initial form send.)

Find this Forms QA Note Sheet under the "**Support**" section.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OneView® — Forms QA Note Sheet

Form ID #	Page #	Field/SectionName	Example Provider Name (When Issue Was Identified)	Update Needed

Requesting a composite

If you have multiple single forms that will need to be sent at one time, you can request for them to be packaged into a Composite.

Follow These Steps:

- Send request to Support@modiohealth.com with the following details:
  - Desired Composite Name
  - List of Forms to be included in composite (Form ID is ideal)
  - Form order (if needed)

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

Online:
Live Chat Support

Email:
support@modiohealth.com

Phone:
844.696.6346