

# OneView® Tip Guide: Tags

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#### Adding Tags in OneView V1

From the Team Tab, open the edit icon under the Teams Actions column.

### 1. To add an **existing** Tag, select one or multiple Tags from the dropdown list.

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## 2. To create a **new** Tag(s), To create new tags, type your desired word(s) and press the **tab** key after each desired tag. Lastly, click **save**.



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#### Using Tags in OneView V1

Use your Tags to filter and sort your organizations roster. Tags are also displayed in some of our Standard Reports. The Provider's report, one of your most utilized reports, includes Tags – run the report and use the Tag column to filter.

Use the Teams dashboard to filter by Tags. The Tags column, located in the center of the page, hold a dropdown to select the Tag filter you wish to apply.

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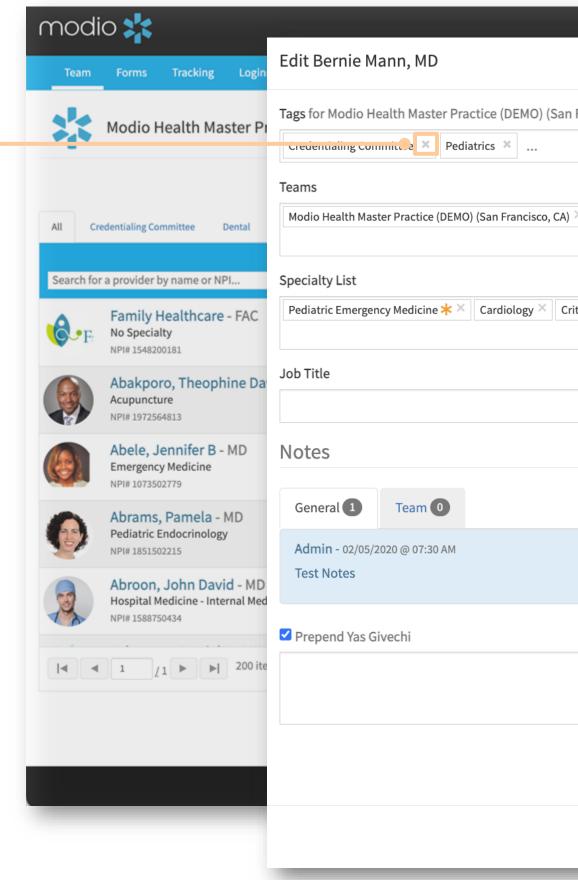
#### Removing Tags in OneView V1

To remove a Tag, select the profile's edit icon (pen and paper icon).

Now, click the grey X to the right of Tag name and this will remove the desired Tag.

The Tag(s) have been removed from your provider's profile.

Lastly, click Save.





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#### Adding Tags for new Providers in OneView V1 & V2

There is an option to add Tag(s) during the "Add Provider" workflow.

To add a new Tag(s), you can create a new Tag or choose from an existing Tag(s) (following the same steps as page 3).

Click Save.

Tags added during the "Add Provider" workflow will appear in the Team page of v1 and the Provider Info tab of the Provider Info grid in v2.

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ports sorting and filtering. Select other columns in V2, the "Tags"

ne side panel's dropdown ers in the Provider Info Grid.

#### Adding Tags to other Grid Sections of V2

**Provide Info Grid** – All Tags here will mirror the Tags on the Team page of v1. Adding or removing a Tag here will also Add or Remove a Tag on the Team page.

All other V2 Grids - Tags are autonomous and allows adding Grid specific Tags. This allows for maximum customization of the platform.

If you prefer to have Tags match in all or some Grids - Reach out to support@modiohealth.com and let them know which grids you would like them to apply to. Our Data team can help set this up for you.

To access Tags in other grids, open the side panel and select the Tags tab. From there, create new Tags or choose from existing Tags. Each Grid hosts a Tags column allowing you to multiselect Tags to filter as needed.

#### **Removing Tags in OneView V2**

To remove a Tag in V2, open the side panel within the relevant grid, access the Tags tab, and click the desired Tag.

This action is similar to V1's Tag removal process (using the gray 'x'), but in V2, changes are saved automatically.

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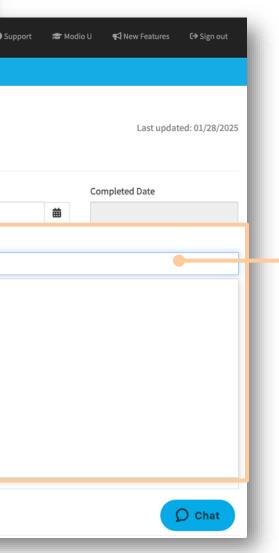


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#### Adding Tags to Tracking items

First select the pen and paper icon from the Tracking dashboard.



Add multiple Tags to tracking items as you find helpful. You can create new Tags or use your existing Tags.

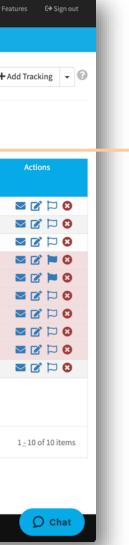
**Important:** Tags in Tracking are not connected to individual providers or profiles. They are at a Tracking Record level. Tracking reports will report on Tracking Tags only, not Provider or Grid level Tags.

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#### Adding Tags to Tracking items

To filter your dashboard using Tags, select the desired Tag.



If you have accumulated more than 10 Tags, a dropdown menu will appear in the left corner to help you navigate them. This functionality is consistent across all V1 dashboards, including Teams, Forms, and Tracking.

For assistance with permanently removing outdated or unused Tags from Tracking, please contact support@modiohealth.com. Our team can provide guidance and help with the removal process.

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#### **Removing Tags to Tracking items**

Remove a Tag from any tracking item that isn't in a completed status.

Navigate back into the Tracking item you want to remove the Tag from by clicking on the editor box in the dashboard for that tracking item.

Next, click the X on the next to the Tag you want to remove. You can also add a new Tag or Tags at this time as well.

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

