



OneView[®]

Tip Guide: Tasks

Tip Guide: Tasks - Use the Tasks feature to assign your team one-off to-do items (like making a phone call or watching a training video).

Start Here

Add Tasks : Click here to add a new task or pick an existing one from the library.

Tasks : Organize your tasks with custom tags.

Library : Click here to add a new task, or pick an existing one from the library.

The screenshot shows the Modio Tasks interface. At the top, the 'Tasks' menu item is highlighted with a 'Start Here' callout. Below the navigation bar, there are buttons for '+ Add Task' and 'Library', with a callout 'Add Tasks' pointing to the '+ Add Task' button and another callout 'Library' pointing to the 'Library' button. The main area displays a table of tasks with columns for Id, Group, Task Name, Created By, Assigned To, Related To, Task Status, Date Created, and Actions. The 'Actions' column contains icons for adding, editing, and archiving tasks. A callout 'Actions' points to these icons. At the bottom, there is a pagination control showing '1 / 1' and '200 items per page', and a 'Chat' button.

Id	Group	Task Name	Created By	Assigned To	Related To	Task Status	Date Created	Actions
83002	Florida Blue (thru Ne...	5. Important Update - Provider Relations Process	OneView® Trainer Le...	Lee Danessa		Open	05/06/2025	+ [edit] [archive]
83001	Florida Blue (thru Ne...	1. *Mandatory	OneView® Trainer Le...	Lee Danessa		Open	05/06/2025	+ [edit] [archive]
83000	Florida Blue (thru Ne...	2. How to add a provider to an Existing Group Agreement	OneView® Trainer Le...	Lee Danessa		Open	05/06/2025	+ [edit] [archive]
82999	Florida Blue (thru Ne...	4. Facility WITHOUT an Outpatient License	OneView® Trainer Le...	Lee Danessa		Open	05/06/2025	+ [edit] [archive]
82998	Florida Blue (thru Ne...	3. Facility WITH Outpt License	OneView® Trainer Le...	Lee Danessa		Open	05/06/2025	+ [edit] [archive]
82997	Florida Blue (thru Ne...	Central Reps.Contact Info	OneView® Trainer Le...	Lee Danessa		Open	05/06/2025	+ [edit] [archive]
82996	Florida Blue (thru Ne...	Clinical Network Manager Contact Info	OneView® Trainer Le...	Lee Danessa		Open	05/06/2025	+ [edit] [archive]
82995	Florida Blue (thru Ne...	Supervisor Contact Info	OneView® Trainer Le...	Lee Danessa		Open	05/06/2025	+ [edit] [archive]
82994	Lexis Nexus Quarterly ...	CIGNA Roster Verification via Lexus Nexus	OneView® Trainer Le...	Denning Cierra		Open	05/06/2025	+ [edit] [archive]
82993	Lexis Nexus Quarterly ...	BCBS Roster Verification via Lexus Nexus	OneView® Trainer Le...	Denning Cierra		Open	05/06/2025	+ [edit] [archive]
82992	Lexis Nexus Quarterly ...	VA Premier Payor Rosters Verification via Lexus Nexus	OneView® Trainer Le...	Denning Cierra		Open	05/06/2025	+ [edit] [archive]
82991	Lexis Nexus Quarterly ...	Optima Payor Rosters Verification via Lexus Nexus	OneView® Trainer Le...	Denning Cierra		Open	05/06/2025	+ [edit] [archive]
82990	• Modio University •	Document Notification	OneView® Trainer Le...	Holmes Brandon		Open	05/06/2025	+ [edit] [archive]
43651	Lexis Nexus Quarterly ...	CIGNA Roster Verification via Lexus Nexus	OneView® Trainer Le...			Open	10/24/2023	+ [edit] [archive]

Actions

- + Assign**: Assign an existing task to additional providers or coordinators.
- [edit]** **Edit**: Make edits to an existing task.
- [archive]** **Archive**: Click here to complete and archive a task.

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

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

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

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

Task Name: Name your Tasks

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

The screenshot shows the Modio 'Add Task' dialog box. The background shows a task list with columns for Id, Group, Date Created, and Actions. A 'Start Here' callout points to the '+ Add Task' button. The dialog box has the following fields:

- Task Library:** Select a task group (dropdown)
- Assigned To:** Select assignees... (dropdown) All: Providers | Coordinators
- Priority:** Low (dropdown)
- Status:** New (dropdown)
- Due Date:** mm/dd/yyyy (text input with calendar icon)
- Tag:** (text input)
- Share:** Coordinator(s) (text input)
- Task Name:** (text input)
- Notes:** (text area)
- Attachment:** Document (dropdown) Choose File No file chosen

At the bottom of the dialog box are 'Cancel' and 'Save' buttons. A 'Chat' button is visible in the bottom right corner of the background interface.

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

Status: Choose an initial Status for the task.

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

Notes: Add a short description of the task here.

Start Here

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

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.

Id	Group	Date Created
83002	Florida Blue (thru Ne... 5. Important Update	05/06/2025
83001	Florida Blue (thru Ne... 1. *Mandatory	05/06/2025
83000	Florida Blue (thru Ne... 2. How to add a provi	05/06/2025
82999	Florida Blue (thru Ne... 4. Facility WITHOUT a	05/06/2025
82998	Florida Blue (thru Ne... 3. Facility WITH Outp	05/06/2025
82997	Florida Blue (thru Ne... Central Reps.Contact	05/06/2025
82996	Florida Blue (thru Ne... Clinical Network Manager Contact Info	05/06/2025
82995	Florida Blue (thru Ne... Supervisor Contact Info	05/06/2025
82994	Lexis Nexus Quarterly ... CIGNA Roster Verification via Lexus Nexus	05/06/2025
82993	Lexis Nexus Quarterly ... BCBS Roster Verification via Lexus Nexus	05/06/2025
82992	Lexis Nexus Quarterly ... VA Premier Payor Rosters Verification via Lexus Nexus	05/06/2025
82991	Lexis Nexus Quarterly ... Optima Payor Rosters Verification via Lexus Nexus	05/06/2025
82990	• Modio University • Document Notification	05/06/2025

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

2. Priority :
Set the priority level of the task.

4. Share :
Select the people with whom you need to share a 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.

6. 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
Select the people with whom you need to share a task.

1. Select Task:

From the Tasks Tab, click on the task name to view details about the task.

The screenshot displays the Modio Tasks interface. On the left, a task list is shown with columns for Id, Group, and task name. The task '2. How to add a provider to an Existing Group Agreement' is highlighted. In the center, a task details view is open, showing notes, attachments, and a table of task details. The table has columns for Priority, Status, Assigned To, Related To, Due Date, Date Created, and Last Updated. The task details show a priority of 'Normal', status of 'New', assigned to 'Lee Danessa', and a due date of '05/20/2025'. An 'Edit Task' modal is open in the foreground, allowing for updates to the task's assigned to, priority, status, due date, and related to fields. The modal also includes a notes field, an attachment section, and a checkbox for 'Notify by e-mail'.

2. Edit Task:

Click here to view a task or make edits.

3. 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.

4. Attachment:

Attached a document here.

5. Email:

Check this box to send a 1-time email.

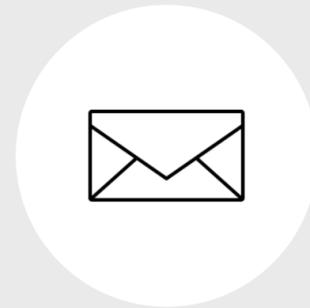
6. Save

Click Save to save an edits or changes.

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



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