OneView®

Tip Guide : Using Forms

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

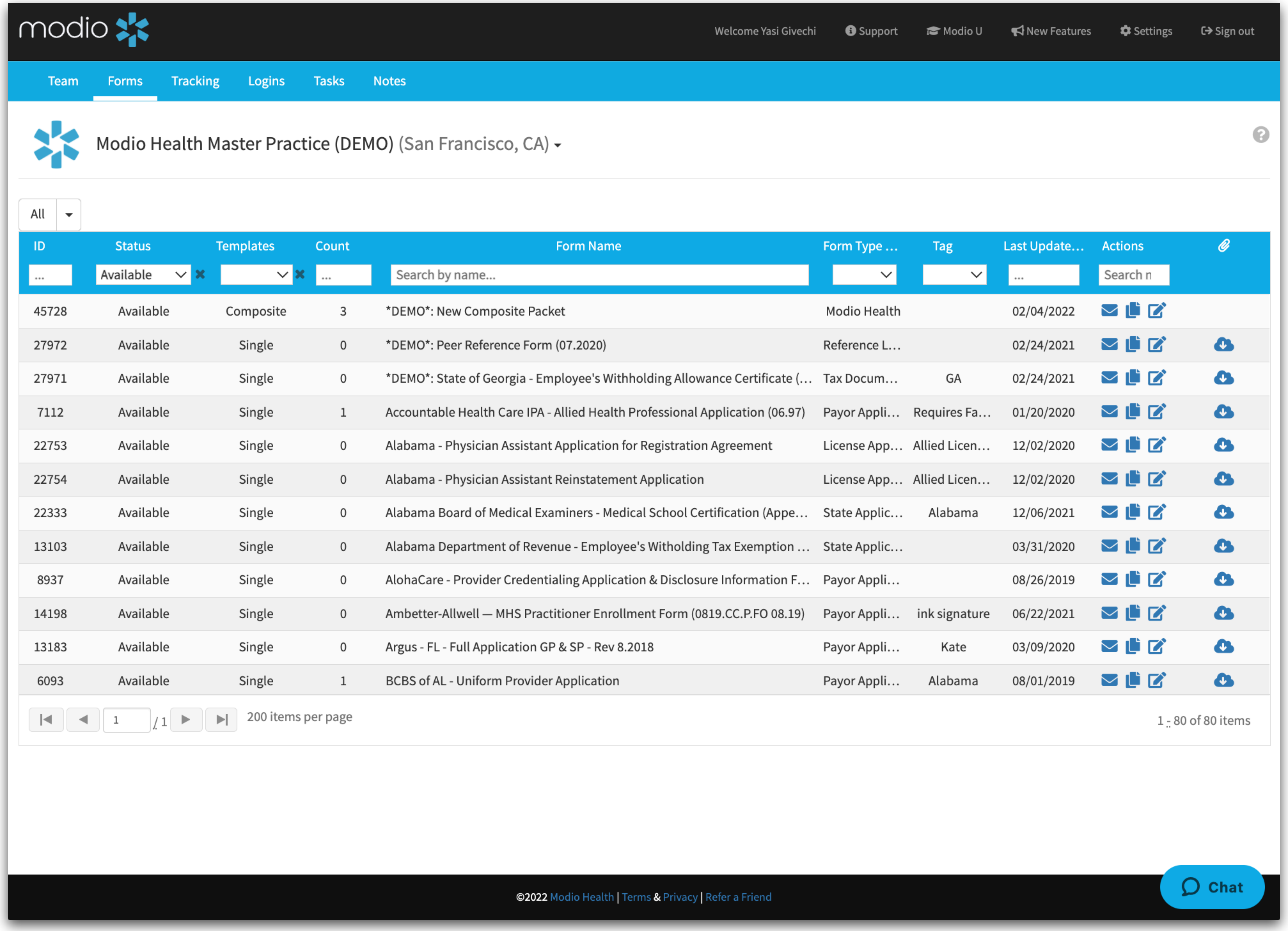
INTRODUCTION:

FORMS

The Forms tab gives you access to our digital forms center, where you can create and store forms like facility applications, payor contracts, and more. When your form is added to OneView™, you can send it to other people on your team for them to fill out and electronically sign. Forms can automatically be pre-filled with details from your providers' profiles to save time.

FORM REQUESTS

For help on submitting new forms to be added to your team, please see the tip guide “**Requesting New Forms**” in the Support section.



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FORMS:DASHBOARD

Templates:
Forms can be filtered by:
- All
- Singles
- Composites
- No Composites

Count:
Indicates the number of files within this form/ Composite.

Form Name:
Enter a part of the name or the full name to filter to your desired form.

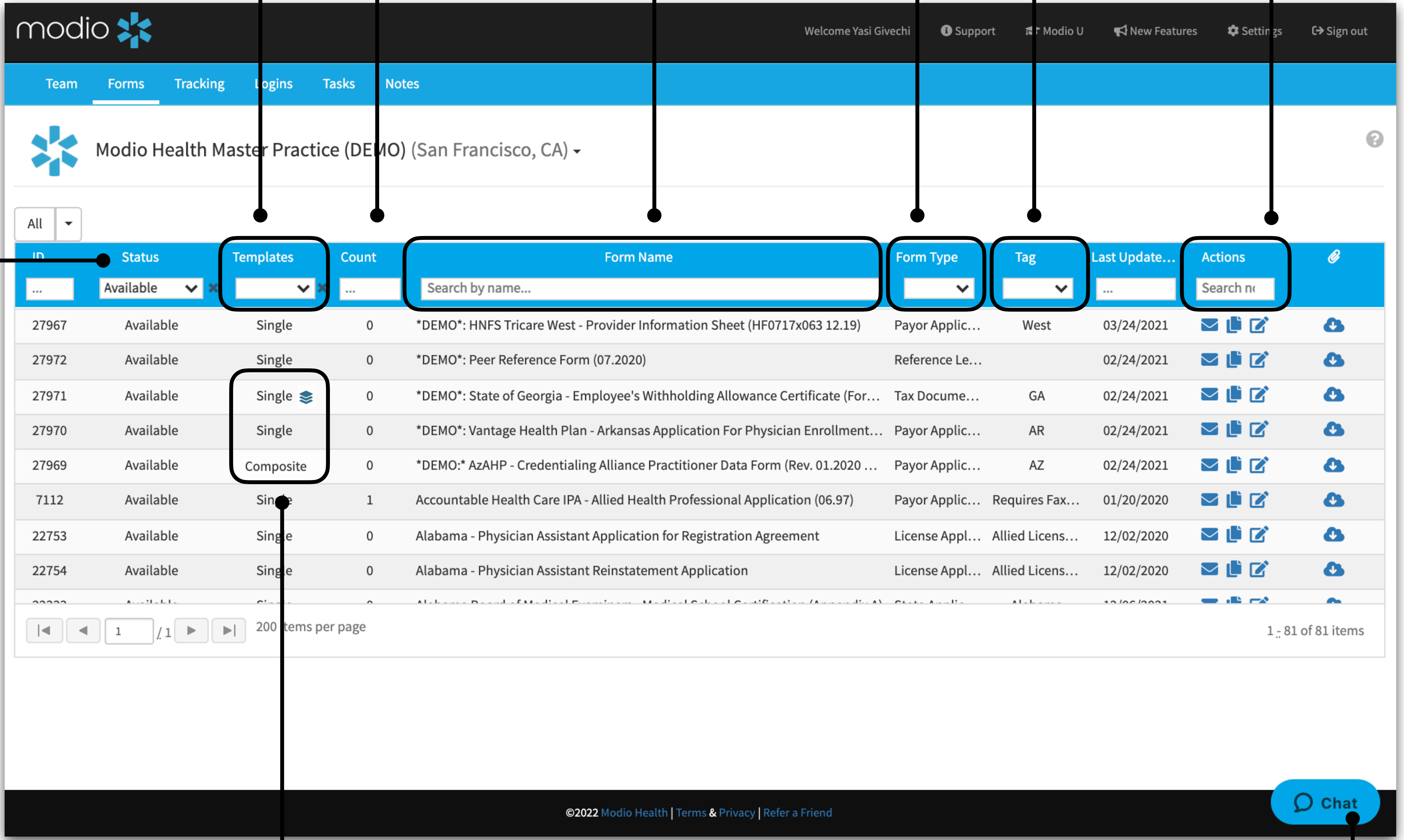
Form Type:
Forms can be filtered by a particular category.

Tag:
You can add custom tags to your forms and sort based on tag.

Form Notes:
You can search Form Notes by using the box below "Actions" .

Status:
Forms can be filtered by status:
- New
- In Process
- Available
- Rejected
- Archived

Note: The default filter for forms is the "Available" status.



Actions Icon Key:

Send Form:
Click here to send your forms to anyone in your team.

Edit:
Click here to edit details about your form.

Download:
Download the original file used to create the electronic form. Please note and updates or changes made to the form will not be reflected.

Composite Icon:
This icon appears next to single forms that are part of a composite(s). Hover over the icon to see which composite(s) it is included in.

<u>Template Definitions</u>:
Singles: An individual form
Composites: A compilation of single forms which can be sent together in one send.

Live Help:
Stuck? We are here to help. Click here to chat with our support team.

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FORMS: EDITING FORM DETAILS

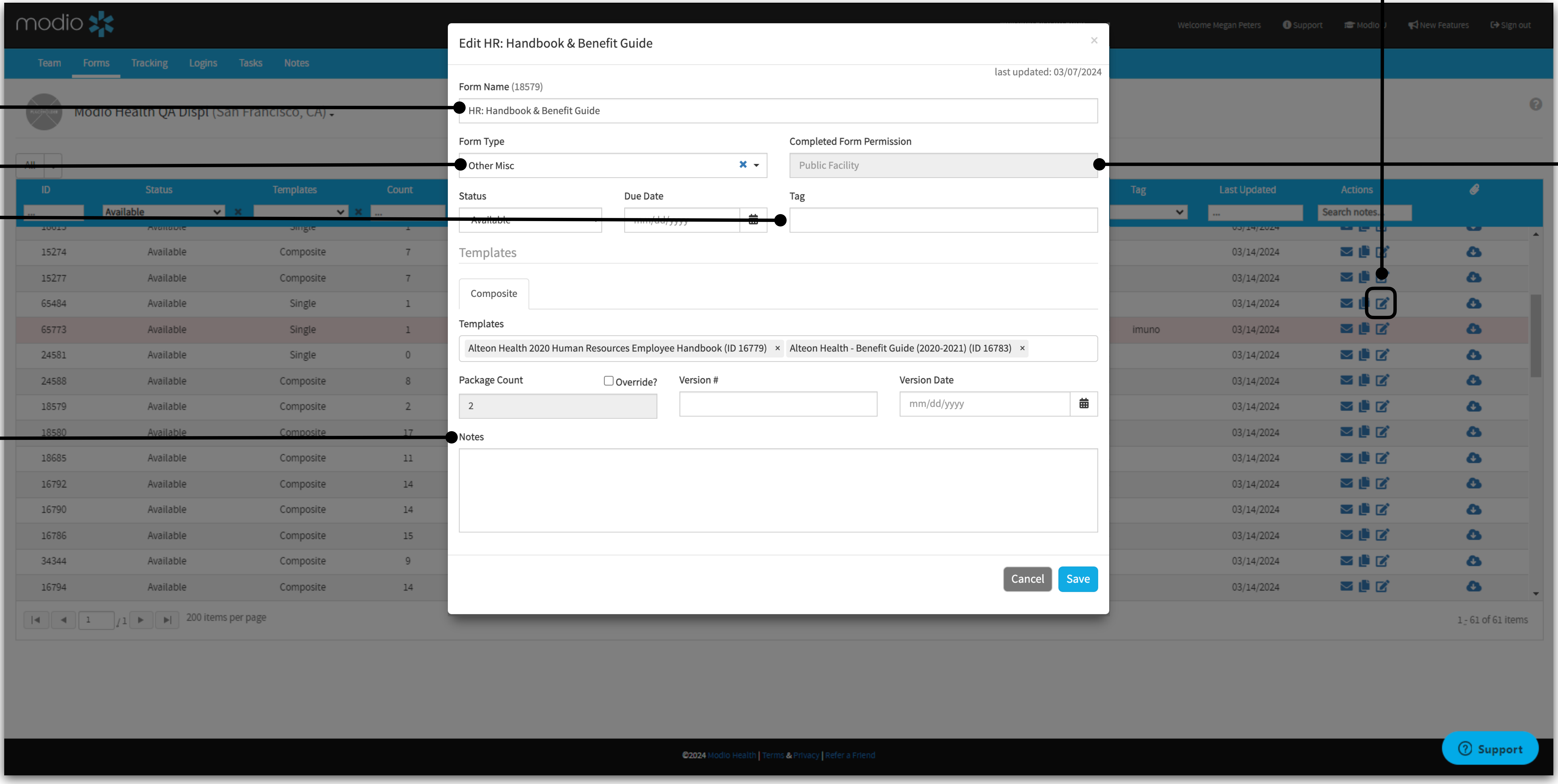
***Start here:**
Click here to edit details about your form.

Form Name:
Make edits to the form name.

Form Type:
Update the form type.

Tags:
Add a tag to your form for organization.

Notes:
Include additional notes about your form here.



Completed Form Permission: Indicates and can change visibility for all completed forms using the template.

Public: Indicates that the completed form is visible to the provider and all coordinators with access to the Team(s).

Coordinator: Indicates that the completed form is visible to all coordinators on the Team(s) but hidden from the provider.

Public Facility: Indicates that the completed form is visible to the provider, and all coordinators on only the Team it was sent from.

Coordinator Facility: Indicates that the completed form is hidden from the provider and visible to all coordinators on only the Team it was sent from.

Changing the **Form Type** will display the matching **Completed Form Permission**.

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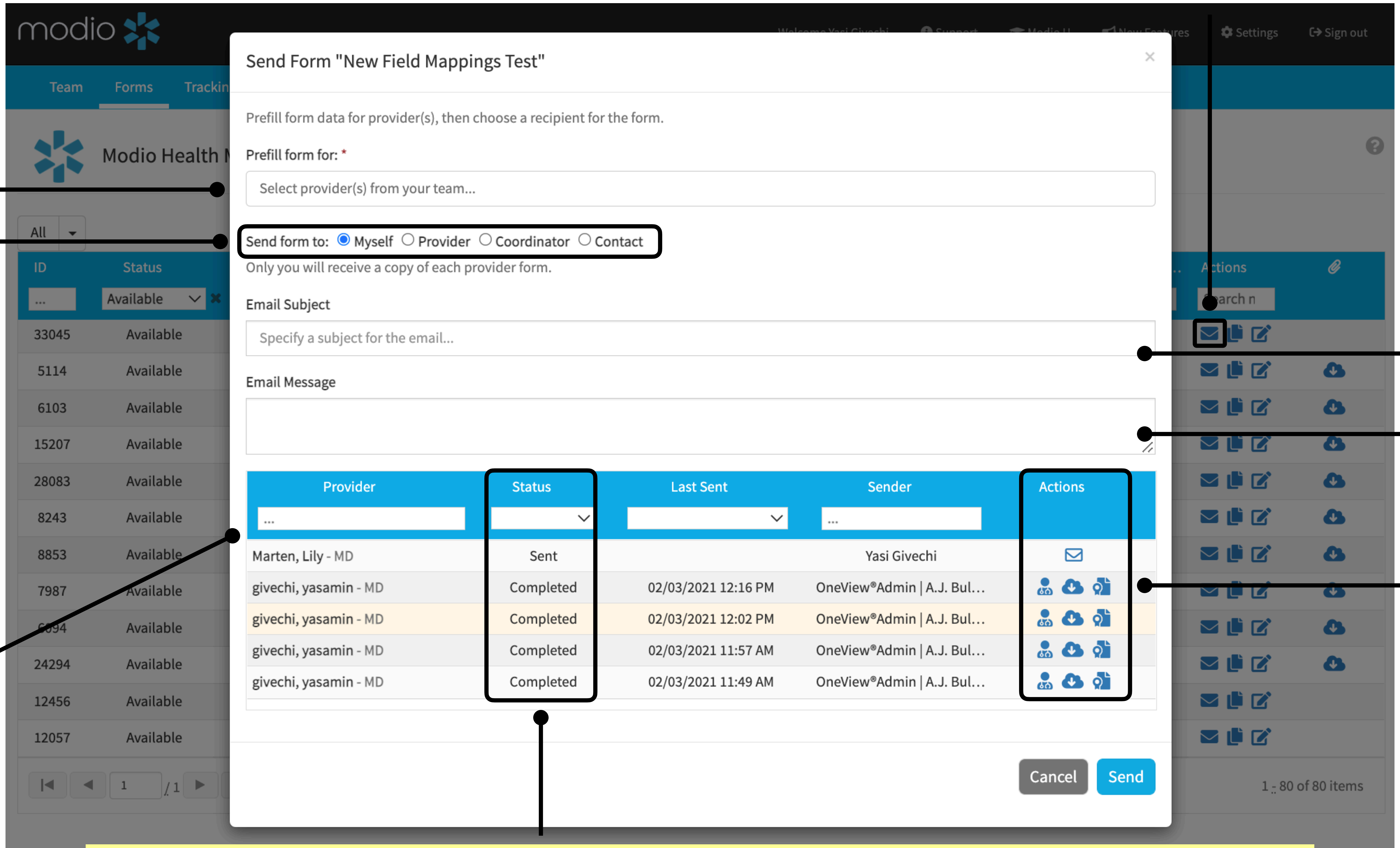
FORMS: SENDING FORMS

***Start here:**
Once a form's status has changed to available, click on the envelope.



Prefill form for:
Select the provider(s) whose information you'd like to be pre-filled.

Send Form To:
Select who you want to initially receive the form.

- **Myself:** Send to yourself to make changes prior to re-assigning
- **Provider:** Send directly to provider
- **Coordinator:** Send to another coordinator on your team
- **Contact:** Send to a contact not on your team (contacts must be added by Modio team)
- **Reference*:** Send directly to one of provider's active peer references. *This is only available if Form Type is a Reference Letter.*

Form History:
View and search for the status of sent forms here. Once the provider fills and signs the form, you will receive a completed copy in your inbox.

Email Subject:
Give your email a title.

Email Message:
Enter notes/instructions here.

Actions Icon Key:

- Navigate to the provider's completed form.
- Download the form.
- Download a certificate of completion from DocuSign.
- Resend the envelope to the last receipt.

Status: Track the status of your sent forms here. The filters include: Sent, Delivered, Completed, Voided, and Declined.

Status Types:

- **Sent:** Indicates the form was sent to the provider and is in their email inbox.
- **Delivered:** Indicates the provider has received and opened the form, but has not completed it.
- **Completed:** Indicates the provider has completed the form. (Docusign also sends the coordinator a signed copy of the document.)
- **Voided:** Indicates the provider has voided the form. The void status is reflected only when a DocuSign envelope has fully expired (120 days). Please note a coordinator and provider cannot manually mark/generate a form envelope status of voided.
- **Declined:** Indicates the provider has declined to sign the form.

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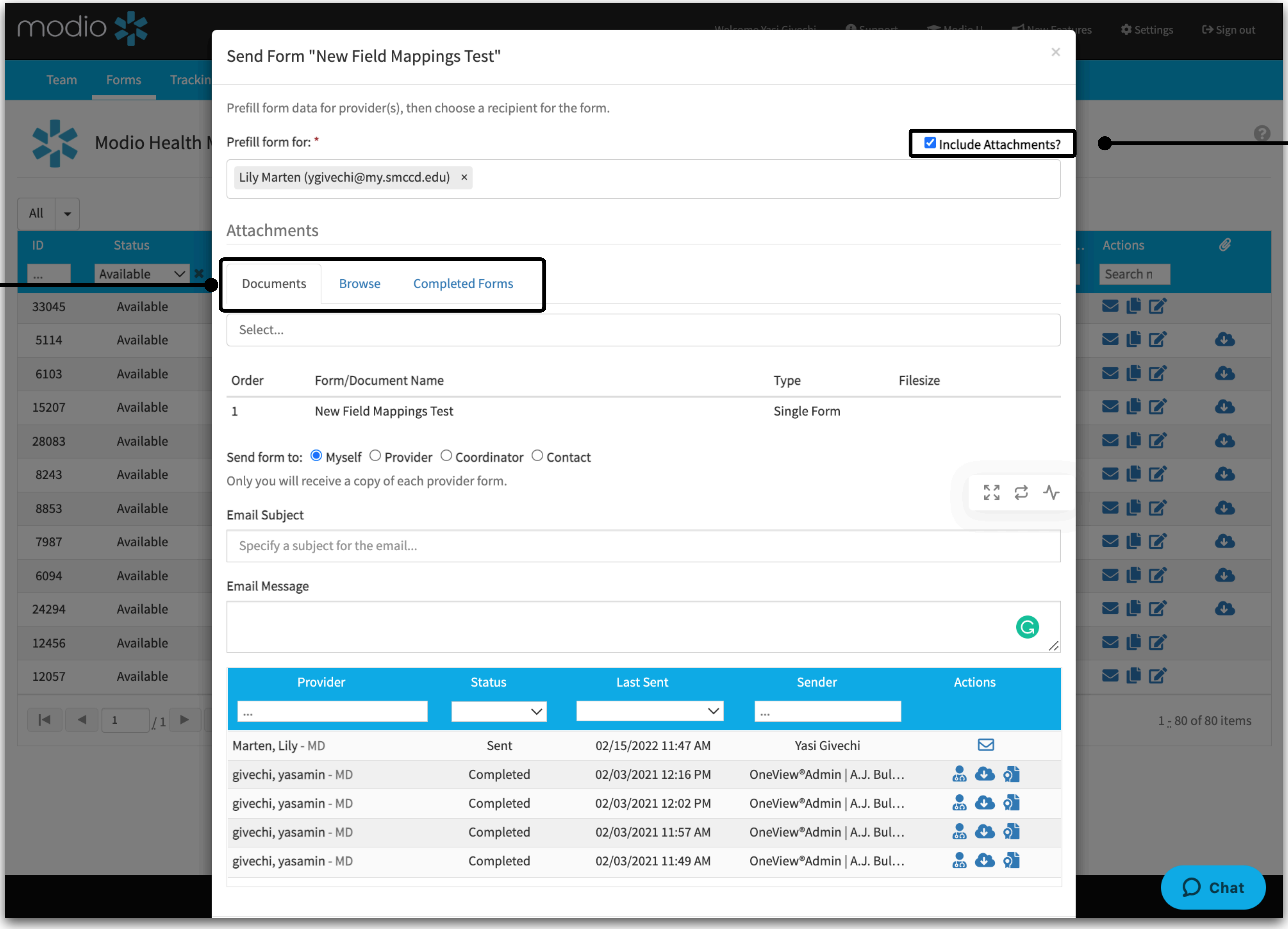
FORMS:SENDING FORMS WITH ATTACHMENTS

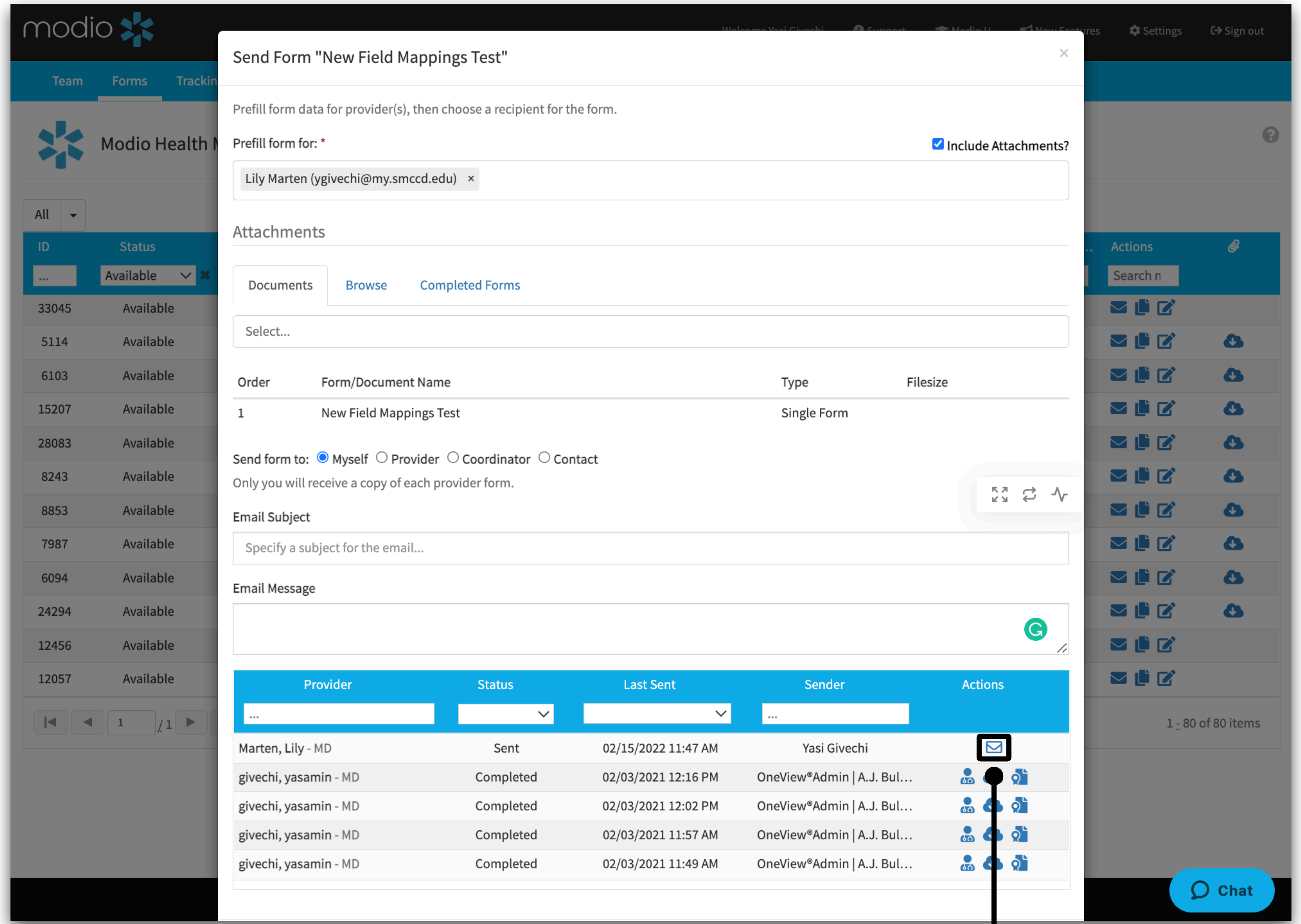
Attachments:
You can attach files from the provider's Documents section, Browse to attach a file from your computer, or select a form a provider previously completed.

Pro Tip: This can be used to attach documentation that a recipient doesn't need to act on (i.e., copies of licensure, bylaws, etc.).



Including Attachments:
In order to send a file with the form, click the "Include Attachments" checkbox. (This can only be used if you are pre-filling for a single provider.)

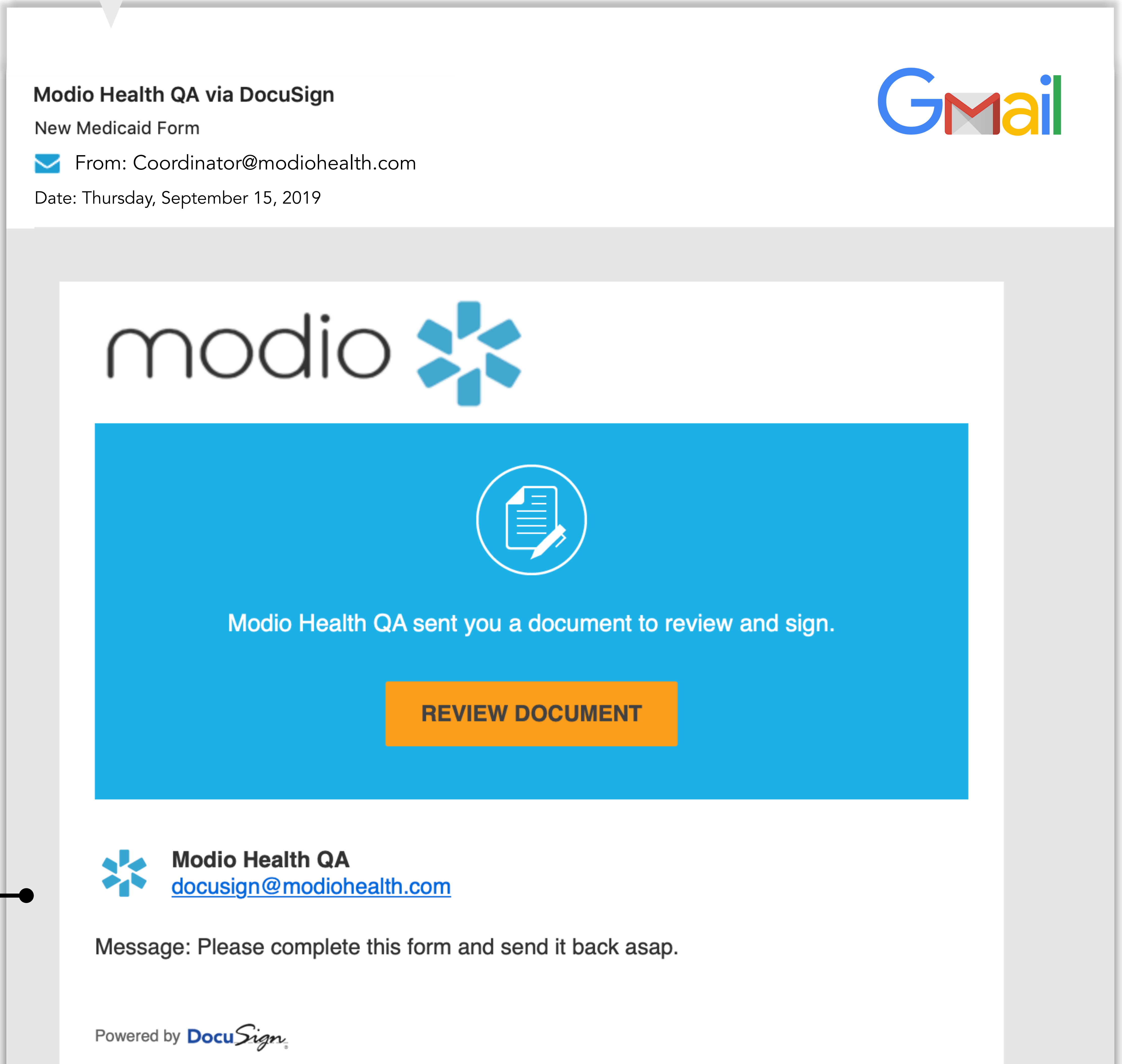
FORMS: SENDING FORM PROCESS



Commonly Asked Question: Do DocuSign envelope notification emails expire?

This is a standard DocuSign setting designed for security purposes and it occurs after 5 clicks or 48 hours of inactivity. If a link expires, it does not require a full resending of the form, for when you/the providers attempt to open an expired form for the first time, DocuSign auto sends a new email notification and presents a page advising that the link has expired and a new notification has been sent. A provider will get a reminder to complete their DocuSign form after 2 days. If they still do not complete the form, they will get additional reminders each day thereafter.

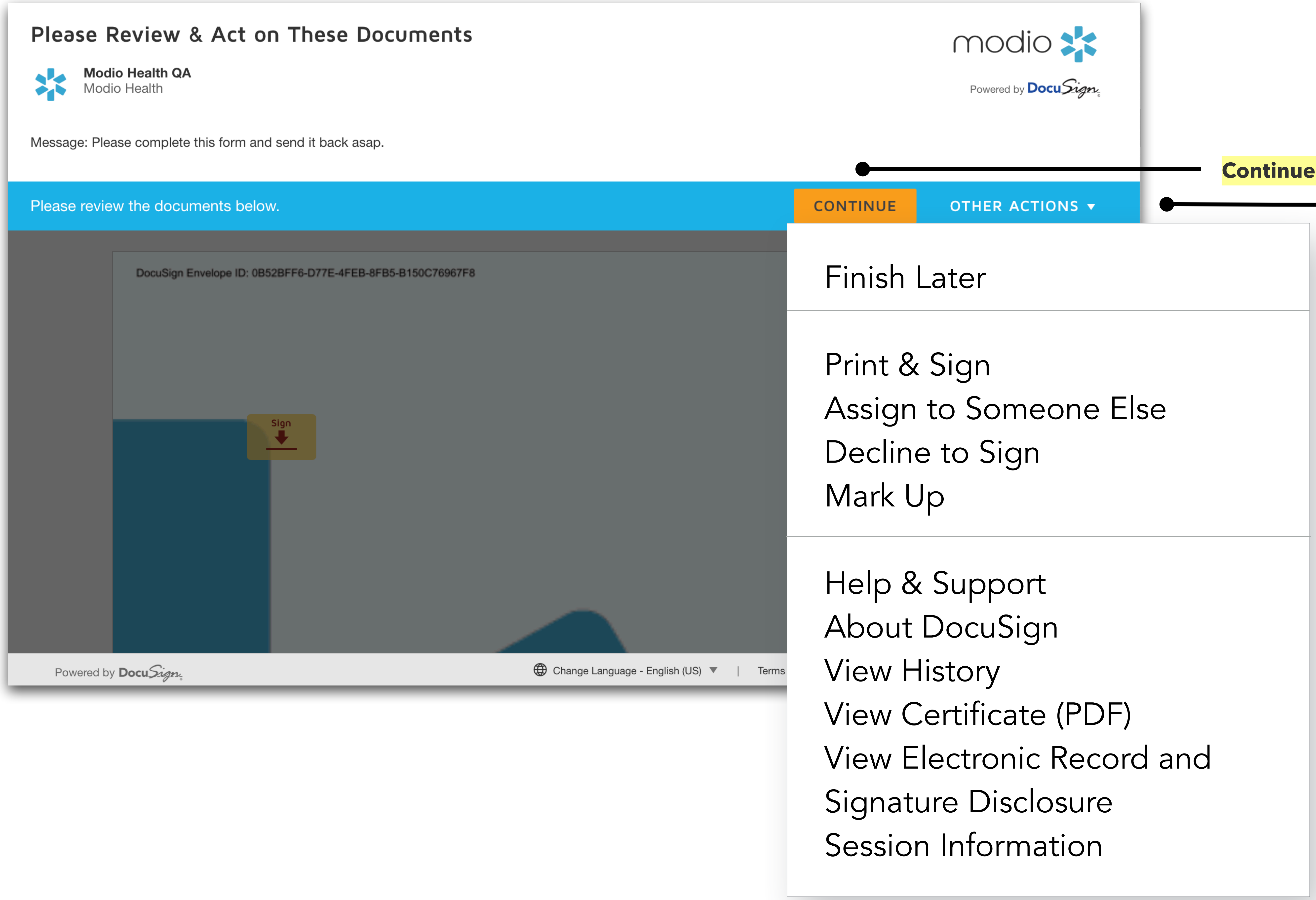
Learn more here: https://support.docusign.com/articles/Do-envelope-notification-emails-expire



Send:
After you hit send, the form will be sent via DocuSign (see to the right) and the provider(s) will be able to review and sign it.

FORMS: DOCUSIGN QUICK GUIDE

When you receive a DocuSign form, you don't have to sign it right away. If you can't finish the document right now, you can choose to finish later. Alternatively, if the document was sent to you by mistake, is incorrect, or you're not the right signer, you can either decline to sign or assign the document to someone else.



Continue: Will take you to the form signature page.

Other Actions: View alternative options to signing the form right away.

- **Finish Later:** This option allows you to exit the signing process and save any information you have entered. You can return to finish signing the document later by clicking the link in the original email.
- **Print & Sign:** This option allows you to print and sign the document on paper.
- **Assign to Someone Else:** This option can be used to reassign the signing responsibility to another person. You will be asked to provide the new signer's name, email address, and a reason for the change. The sender will receive a notification of the change including the new signer's info and the reason for the change. The new signer you've identified will be prompted to sign the document.
- **Decline to Sign:** This will void the form. This option lets you decline to sign the document. You might be asked to provide a message for the sender of the document indicating why you have declined to sign. In cases where there are other signers, those who have already completed signing receive an email stating that you have declined to sign. Other signers who have not completed signing will not be able to access the documents.

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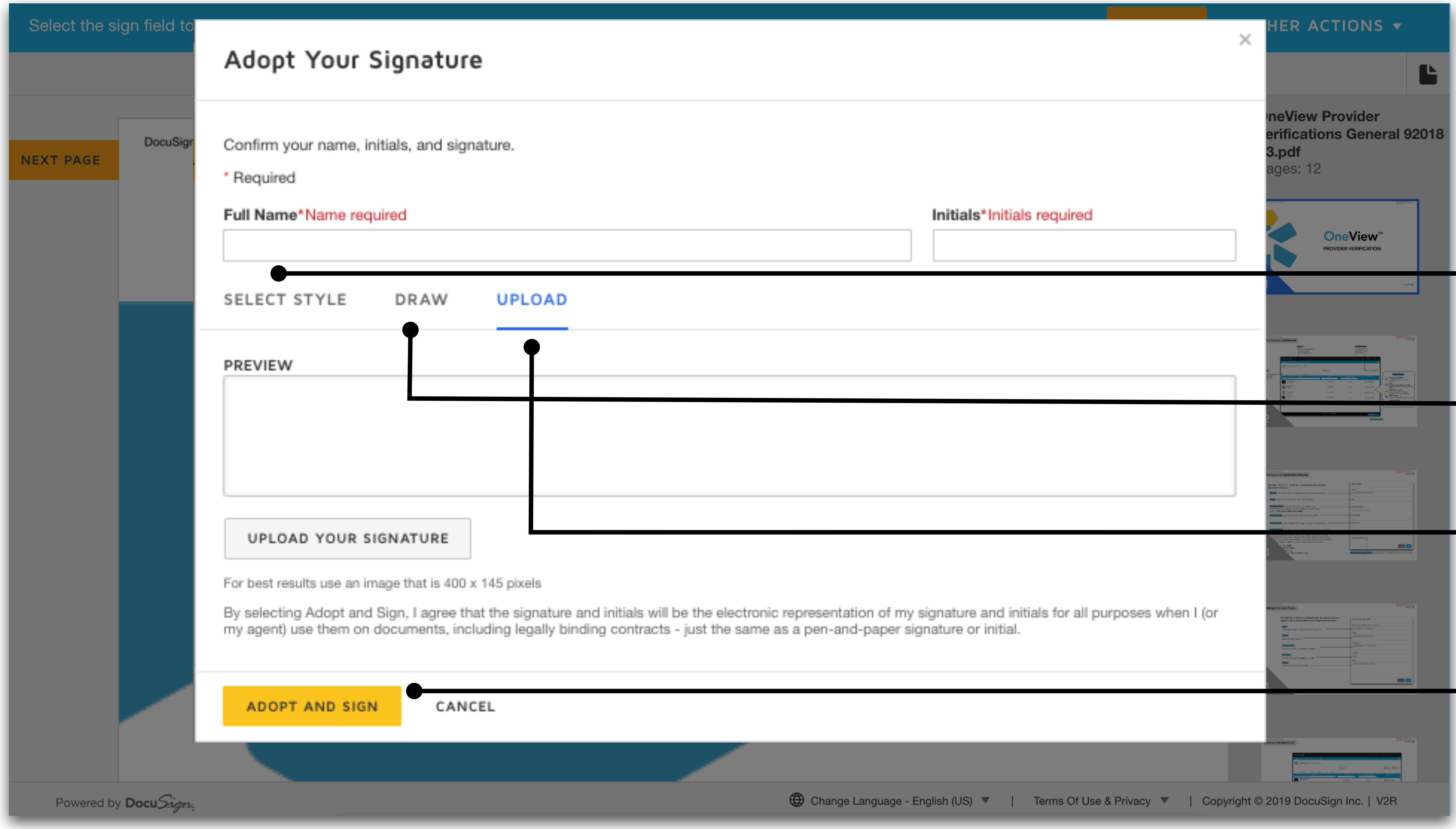
FORMS: ADOPTING A SIGNATURE



The first time you select a **sign** or **initial** field, you are asked to adopt a signature and initials. Verify that the name and initials are correct. To change the name or initials, enter the changes in the **Full Name** and **Initials** fields.

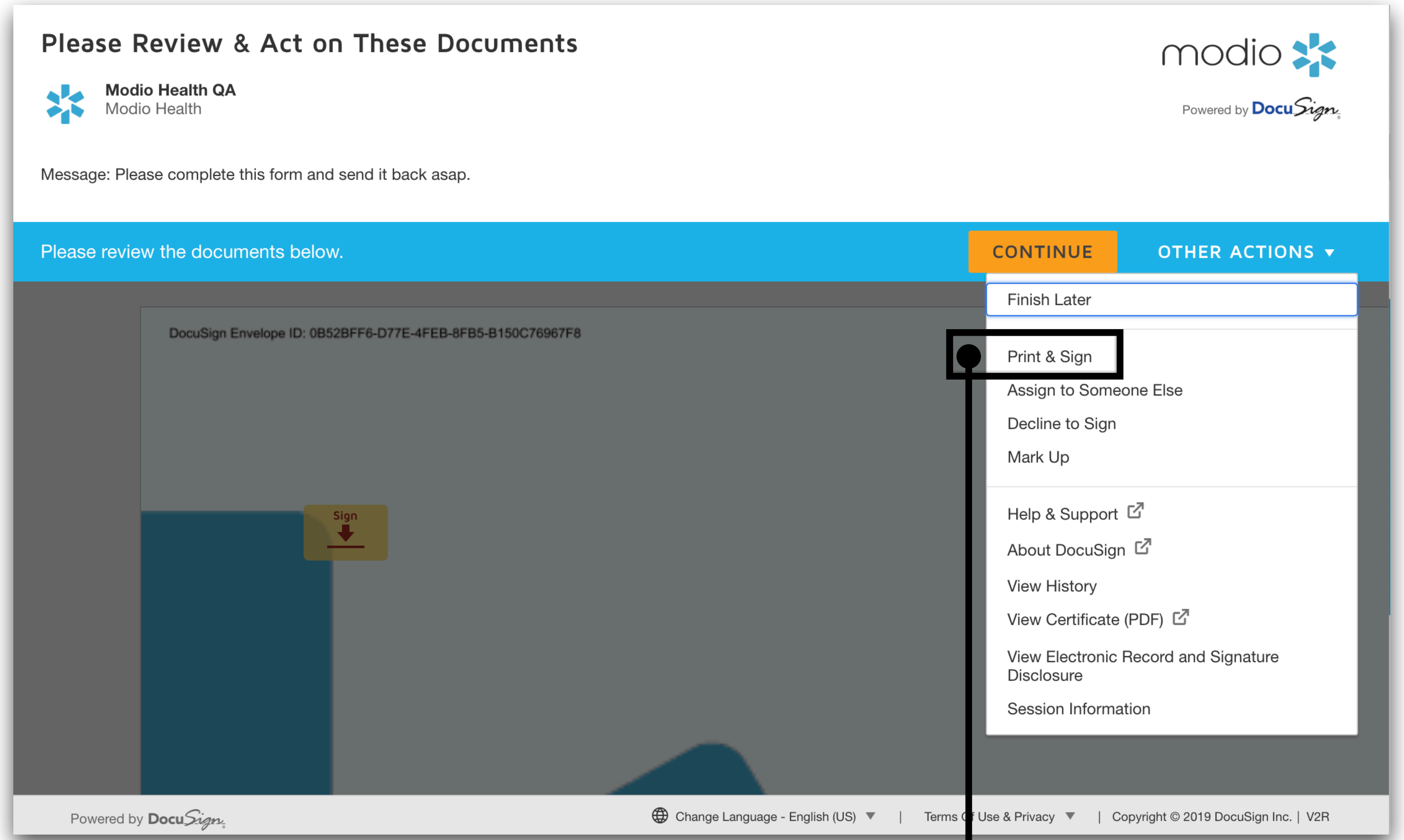
- **SELECT STYLE**: To select from a list of predefined signature styles, click **SELECT STYLE.** If you don't see any signature styles that appeal to you, you can create or upload a signature.
- **DRAW:** Use this field to create your own signature. Use a mouse to draw your signature (or your finger if you're on a touchscreen). If you make a mistake, click **Clear** to reset the field.
- **UPLOAD:** To upload a signature instead, select the **UPLOAD** tab. Click **UPLOAD YOUR SIGNATURE** and navigate to the image file on your device. When finished, confirm your signature and initials are correct, then click **ADOPT AND SIGN**.

Note: After clicking **ADOPT AND SIGN,** your signature is set, and you won't be able to change it for this document.

FORMS:OBTAINING A WET SIGNATURE

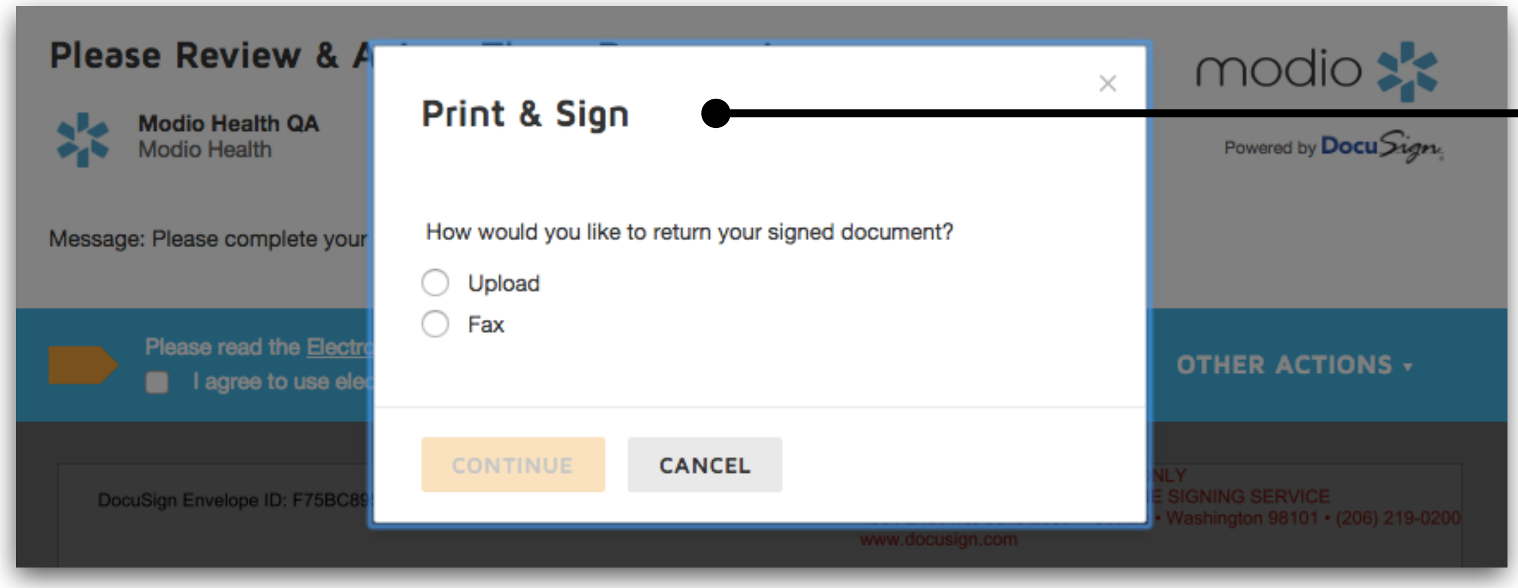
Once you have performed a review of the document, made any necessary changes, and determined that your document needs an ink/wet signature (not e-signature), you will need to use the "Print and Sign" Function.

Select "**Other Actions**" in the DocuSign Tab.



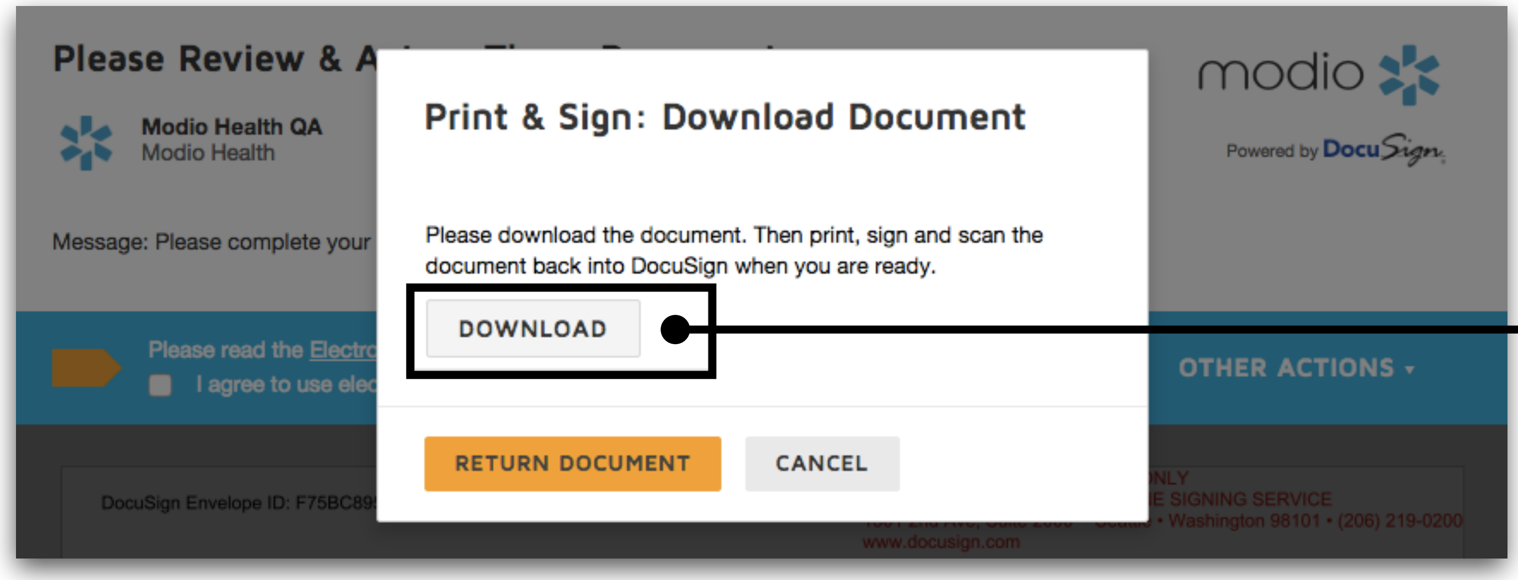
Click **"Print & Sign"**

Helpful Tip: DocuSign sends out reminder emails after 48 hours of the form being sent but not completed, and then every 24 hours after until the form is completed. Selecting **Print & Sign** will start the timer for reminder emails. Reminder emails will stop once the Return Document process has been completed, marking the forms as "complete"

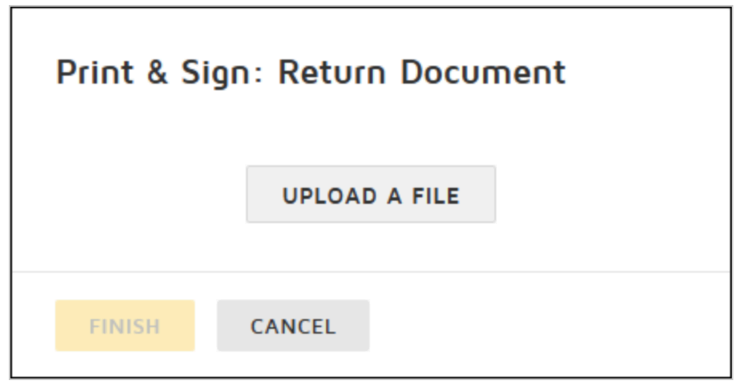


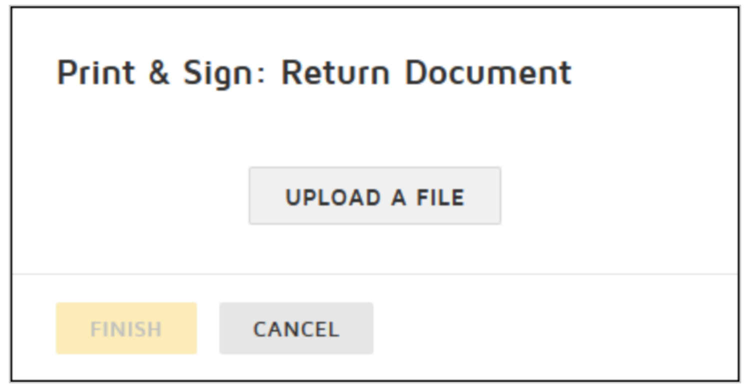
Choose between the return options **Upload** or **Fax.**

- **Upload:** You download the documents, print them, complete them with pen on paper, scan them, then upload the scanned, signed documents in order to return them.
- **Fax:** You download the documents, print them, complete them with pen on paper, and return them to the sender by following the faxing instructions provided.



Click **Download.** You will now have a copy of the pre-filled form on your desktop to print and send to your providers. **NOTE**: If you download the document and don't choose to fax or upload the finished form, the Send status within OneView will not show as completed.





Returning Document:

1. Save the documents to your computer, by clicking **DOWNLOAD**.
2. Using your normal printing method, print the documents you saved to your computer. Fill out and sign the printed pages as needed.
   Create an electronic file version of the documents (for example, scan the documents and save them as a file on your computer).
   In the Print & Sign: Download Document dialog box, click **RETURN DOCUMENT**.
3. Click **UPLOAD A FILE.** Then select the electronic file from its stored location on your computer.
4. The file is uploaded and the file name and number of pages are shown in the dialog box. If you selected the incorrect file, select the file name to remove the file and then upload the correct file.

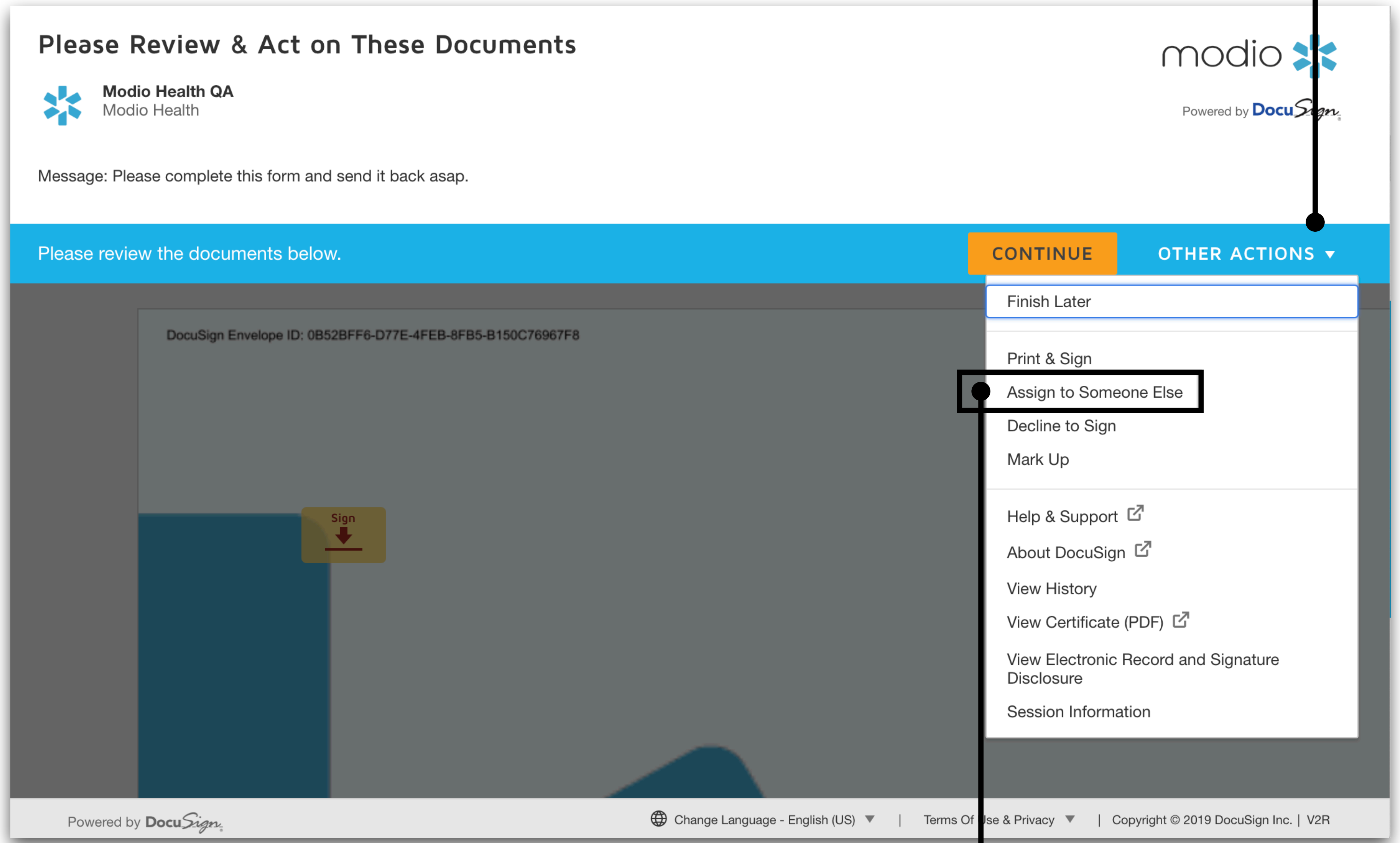
FAX: If you chose to fax your documents as the return method, the DocuSign fax cover page must be the first page that is sent. The fax cover page has information that links your documents to the envelope and your documents might be lost if the cover sheet is not the first page.

FORMS: ASSIGN TO SOMEONE ELSE

If you assign a form to someone else, they will receive a notification email to complete the form. The email that they receive will appear identical to the original email you received from DocuSign.

Pro Tip: Our team highly recommends sending all forms to yourself first so that you can review and make any necessary changes, then re-assigning to the signer for completion.

Select **"Other Actions"** in the DocuSign Tab.

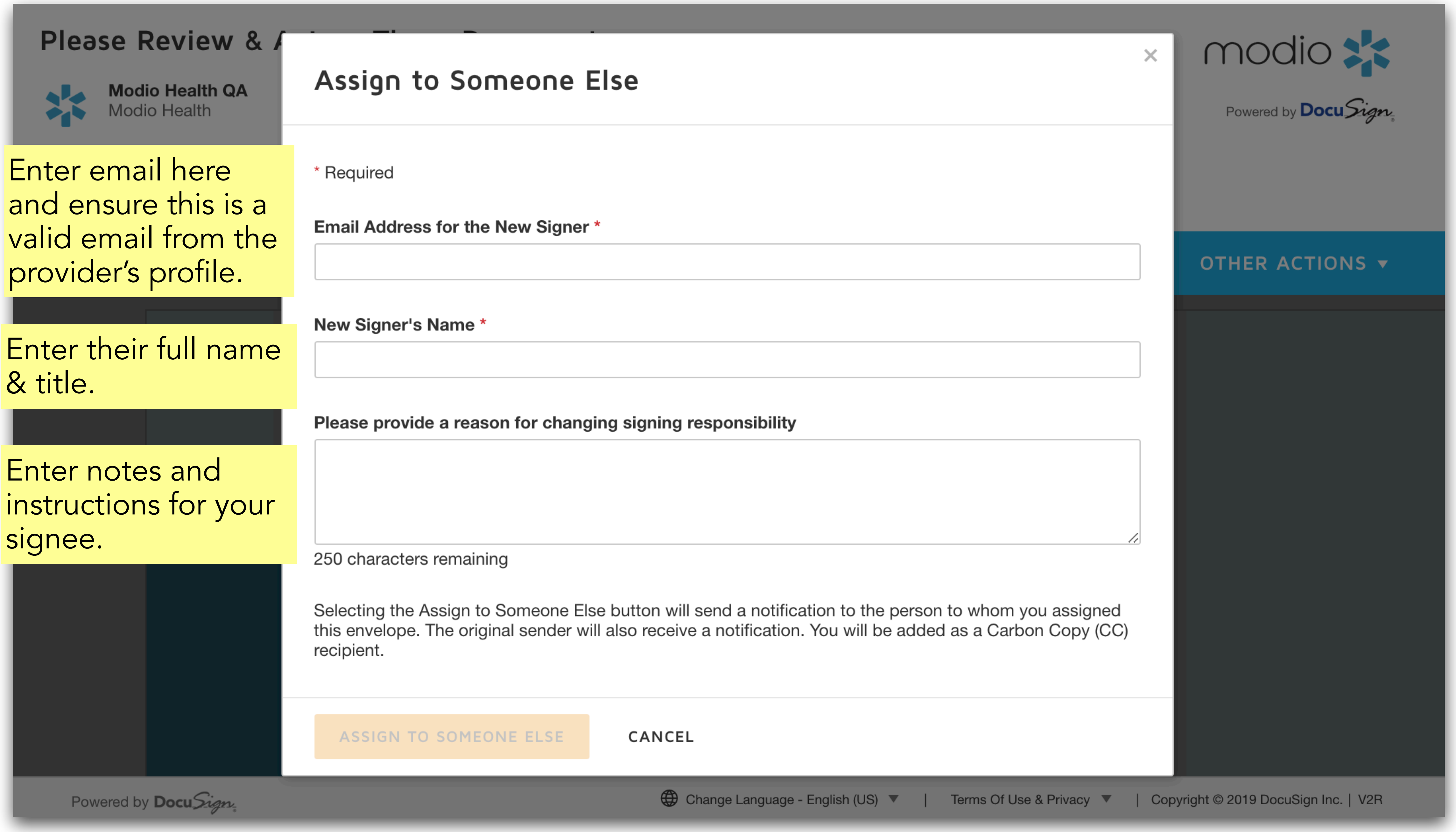


Click **"Assign to Someone Else"**

Enter email here and ensure this is a valid email from the provider's profile.

Enter their full name & title.

Enter notes and instructions for your signee.



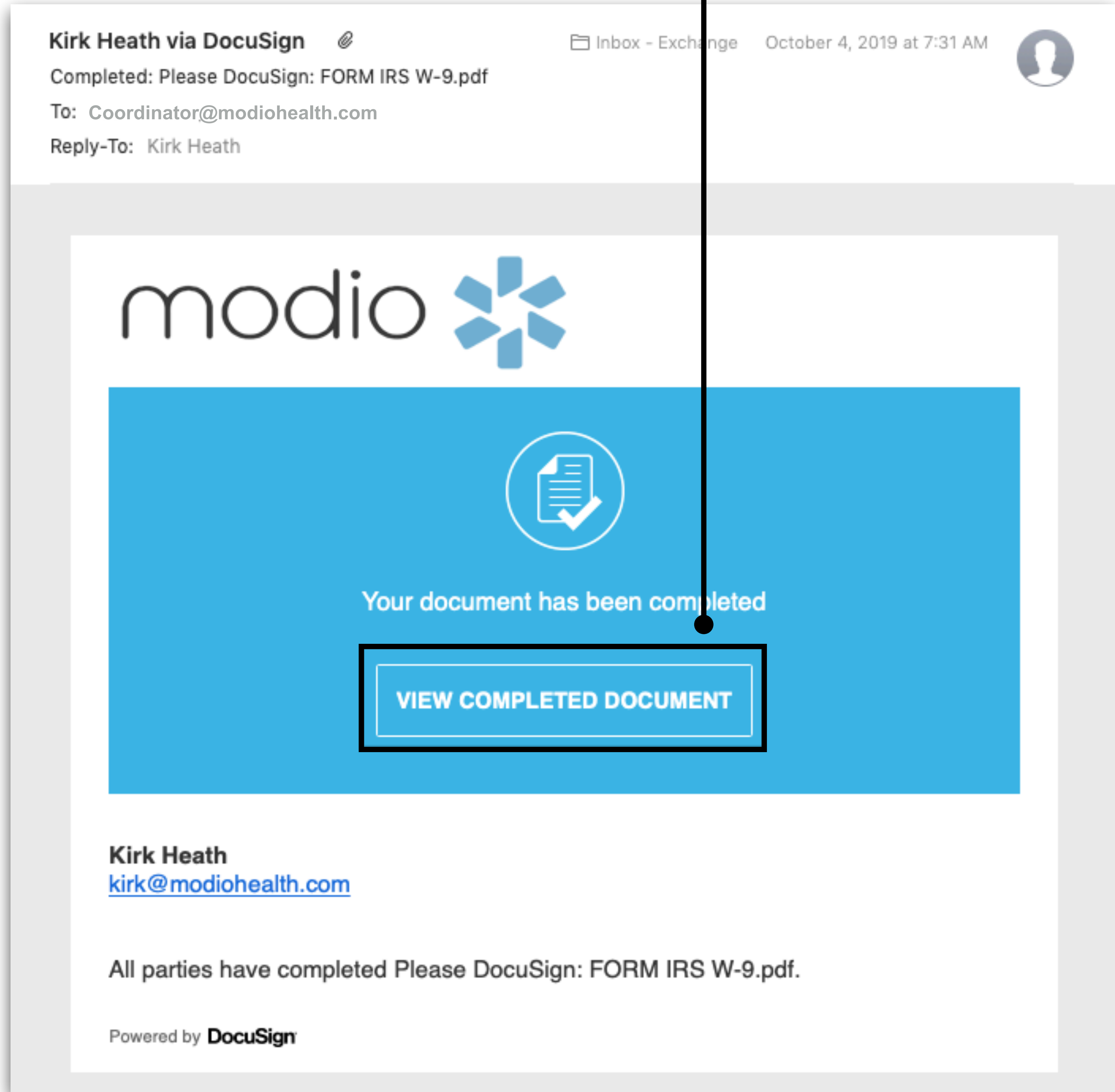
Note: Once the form has been signed, you will be notified and the status will change to Complete in OneView™.

FORMS: FINDING COMPLETED APPLICATIONS

Once your applications are completed, there are several locations where they will be stored. 1. You can find them in your email 2. They will be available to view within the Send History for that form 3. They will be stored in your provider's Documents section.

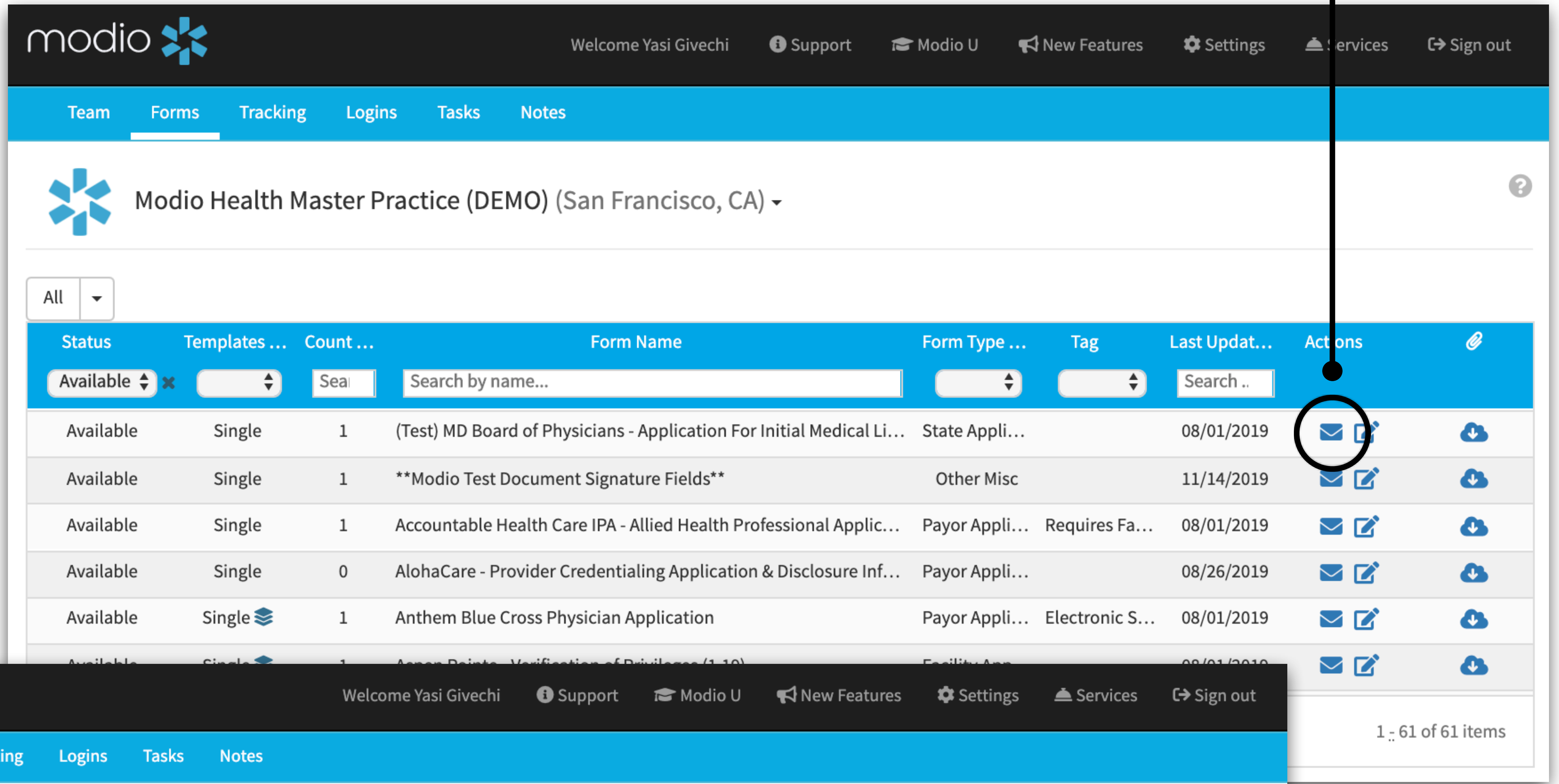
1

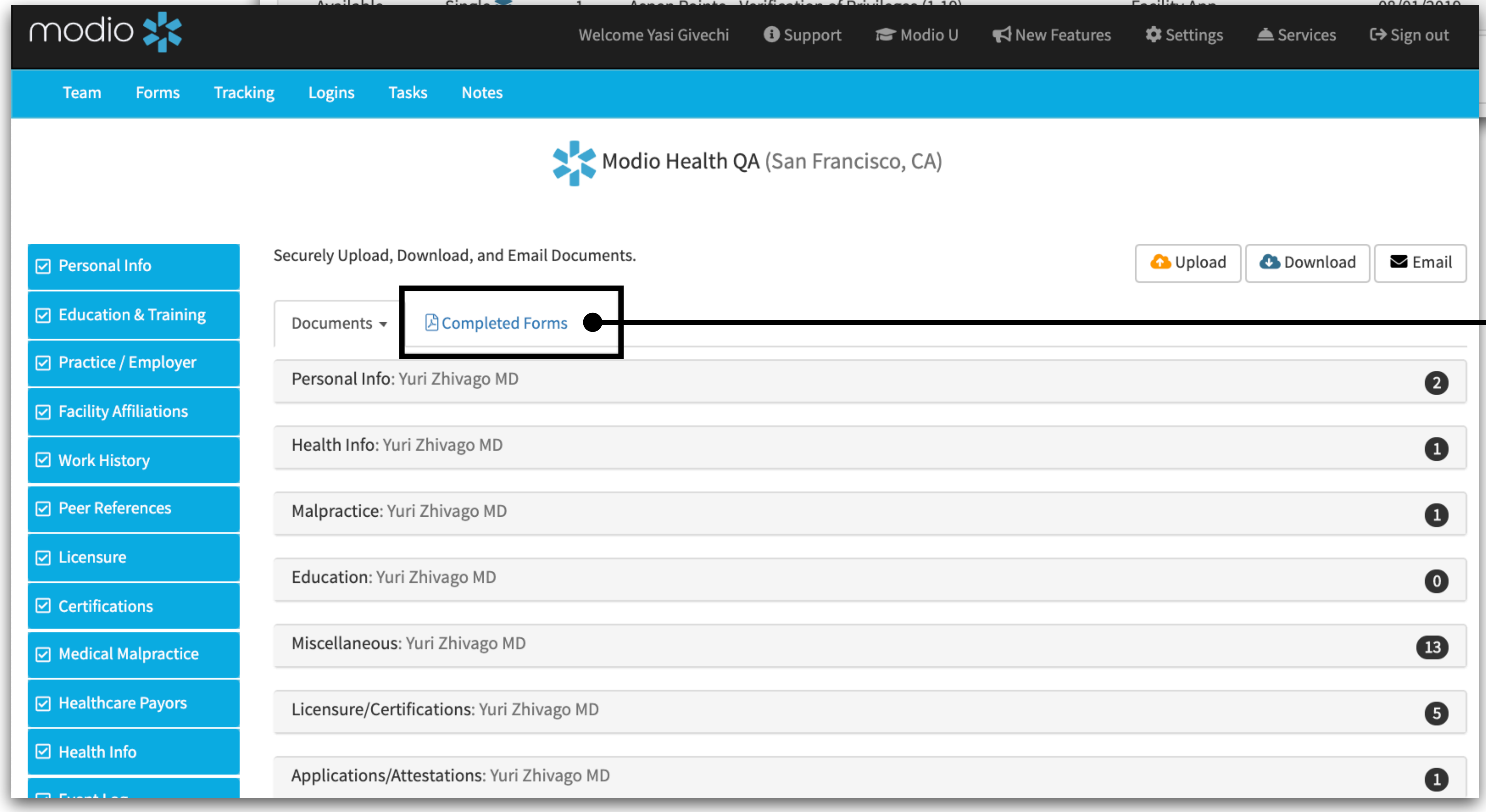
Your completed application will be delivered in an email from DocuSign. Follow the link titled **"View Completed Document"** or **download the attachment(s).**



2

Click the envelope icon to view the send history. Refer to slide #5 for more details where you will see the status of the application as **Completed.**





3

Navigate to the **Documents** section within your provider's profile. From here you can access completed applications by clicking the **"Completed Forms"** link.

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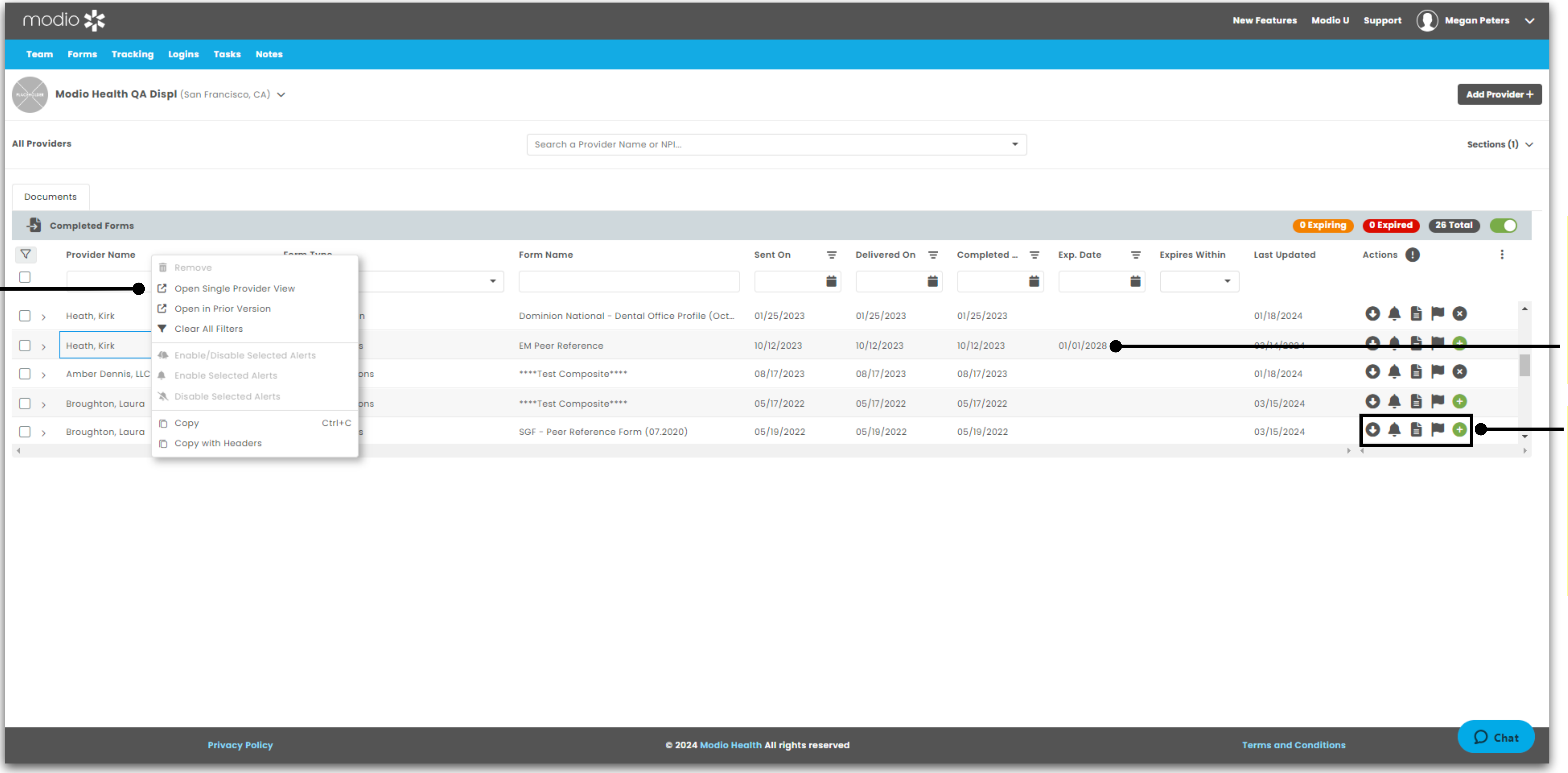
FORMS:FINDING COMPLETED APPLICATIONS

If your team is using OneView V2 in your workflow, you can also find Completed Forms in its own grid.

All Provider View:
Easily identify all forms completed within your team by opening the Completed Forms grid in All Providers View.

Single Provider View:
Use the right-click menu to navigate to single provider view.



Inline Editing:
With inline editing, you can quickly add a new expiration date for the form. Simply double-click into the Exp. Date field to add new information.

Actions Row:
Use the download icon to download a completed form.
You can also:

- disable alerts
- flag records
- inactivate a record

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

Online:
Live Chat Support

Email:
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