

OneView - Document Type & Permissions Guide

Grouping	Document Type	Default Permissions
Admin	Correspondence	admin
	Correspondence Form	general
	Employment Contract	general
	Employment Contract Addendum	general
	Employment Termination Notice	general
	HR Document	general
	Modio Health	admin
	Non-Disclosure Agreement	general
	Offer Letter	general_team
	Protocol	general
	Term Letter	general_team
	Test Form	general
Grouping	Document Type	Default Permissions
Applications/Attestations	Admit Letter	general
	Application Receipt	coordinator_team
	Application Status	coordinator_team
	Application Withdrawal	general
	Approval Letter	coordinator_team
	Attestation Explanation	coordinator only
	Authorization Release	coordinator only
	Board Approval Letter	coordinator only
	CAQH Authorization	coordinator_team
	CAQH Profile	coordinator_team
	Clinical Competency Checklist	coordinator only
	Clinical Standing Orders	coordinator only
	Committee Signature Page	general_team
	Credentialing and Privileging Checklist	general
	Credentialing Packet	general
	Delineation of Privileges (DOP)	general_team
	Demographic Update Form	general
	Denial Letter	coordinator_team
	EDI Enrollment	general
	EFT Enrollment	general
	ERA Enrollment	general
	Facility Applications	coordinator_team
	Facility Attestations	coordinator_team
	Facility Contract Addendum	coordinator only
	Facility Contracts	coordinator_team
	Facility Dues	coordinator only
	FQHC Letter	coordinator only
	HIPAA Attestation	general_team
	Hospital Admitting Privileges	coordinator only
	HRSA Grant Award Letter	coordinator only
	Infection Control Attestation	general_team
	Insurance Approval Letter	coordinator only
	Insurance Attestation	general
	Internal Application	coordinator only
	Leave of Absence	general
	Letter of Intent	coordinator only
License Application	general	
Link Letter	coordinator only	
Medicaid Revalidation	coordinator only	
Medicare Revalidation	coordinator only	
Opioid Attestation	coordinator only	
Orientation Attestation	general_team	

	Payor Application	coordinator_team
	Payor Contract Amendment	general
	Payor Contracts	coordinator_team
	Payor Correspondence	coordinator_team
	Payor Directory	coordinator only
	Payor Fee Schedules	general
	Payor Notification	coordinator only
	Payor Roster	general
	Payor Summary List	general_team
	Reappointment Application	coordinator_team
	Recredentialing Letter	general
	Resignation Letter	general
	State Application	general_team
	Telehealth Attestation	general
	Training Attestation	general
Grouping	Document Type	Default Permissions
CME/CEU	CME	Team(s): general
	CME	Team(s): general
Grouping	Document Type	Default Permissions
Education	ADEX	general
	ASWB Exam	general
	COMLEX-USA	general
	COMVEX	general
	Corporate Training	general
	Diploma	general
	ECFMG Certificate	general
	Exam Scores	general
	FLEX	general
	FPGEC	general
	FPGEE	general
	FSBPT	general
	GED Document	general
	LMCC	general
	MFT National Examination	general
	NBCOT	general
	NBDE	general
	NBDHE	general
	NBME	general
	NBOME	general
	NBPME	general
	NCE	general
	NCLEX	general
	NCMHCE	general
	NEBO	general
	Observational Rotation Form	general
	PRAXIS	general
	Residency, Internship, Fellowship Certificates	general
	SPEX	general
	State Exam	general
	Transcripts	general
	USMLE	general
Grouping	Document Type	Default Permissions
	Annual Health Assessment	general
	Bacillus Calmette-Guerin (BCG)	general
	Chest X-ray	general
	Color Blindness Test	general
	COVID-19 Antibody Test	general

Health Info	COVID-19 Test	general
	Covid-19 Vaccine	coordinator only
	COVID-19 Vaccine Exemption	general
	Drug Test	general
	Fitness for Duty Form	general
	Health Status Statement	general
	Hepatitis A	general
	Hepatitis A Titer	general
	Hepatitis B	general
	Hepatitis B Declination Form	coordinator only
	Hepatitis B Titer	general
	Hepatitis C Titer	general
	HPV	general
	Immunization Information	general
	Impaired Practitioner Program	general
	Influenza	general
	MMR (Measles, Mumps, and Rubella)	general
	MMR Titer	general
	Physical Exam	general
	Pneumococcal	general
	Polio	general
	PPD Test Results	general
	QuantiFERON-TB Gold (QFT)	general
	Respiratory Fit Test	general
	RSV Vaccine	general
	Shingles Vaccine	general
	T-SPOT.TB (T-Spot)	general
	TB Questionnaire	general
	TD Vaccine	general
	Tdap (Tetanus, Diphtheria, Pertussis)	general
	TDAP Titer	general
Vaccine Declination/Waiver	coordinator only	
Varicella	general	
Varicella Titer	general	
Yellow Fever Vaccine	coordinator only	

Grouping	Document Type	Default Permissions
Licensure/Certifications	Agreement	general
	Board Certification	general
	Board Letter	general
	Board Sanction	general
	Central Venous Catheter Skills Validation	general
	Certification Verification	general
	CLIA	general
	Collaborative Agreement	general
	Collaborative Relationship	general
	Compliance Learning	general
	DEA	general
	Direct Patient Care Exam	general
	Direct Patient Care Skills Validation	general
	Disciplinary Action	general
	Emergency Preparedness Learning	general
	Facility Accreditation Certificate	general
	Glucometer Skill Validation	general
	Hepatitis B Virus Learning	general
	IMLC Letter of Qualification	general
	Infection Control Certificate	general
	License Issue	general
	Mock Code/Oral Airways Skill Validation	general

	MQSA	general
	National Water Curriculum/Annual Water Certification	general
	Operational Complaint	general
	OSHA Learning	general
	Other Certs (ATLS, BLS, PALS etc)	general
	Patient Care Technician Certification	general
	Patient Complaint	general
	Professional Certification	general
	Registration Certificate	general
	Registration Verification	general
	SAMHSA Opioid Treatment Program Certification	general
	Scope of Practice	coordinator only
	State Controlled Substance	general
	State License	general
	Supervision Training Certificate	general
	Temporary Letter to Practice	general
	Water Room Skill Validation	general
	Yellow Fever Certificate	general
Grouping	Document Type	Default Permissions
Malpractice	Administrative Issue	general
	BOP/General Liability Insurance Policy	general
	Certificate of Insurance (COI - Corporation)	general
	Certificate of Insurance (COI - Provider)	general
	Certificate of Insurance (COI)	general
	Claims History	general_team
	Court Order	general
	Criminal Case	general
	Malpractice Authorization and Release	general
	Malpractice Case Response	general_team
	Malpractice Court Documen	general
	Malpractice Insurance Application	general_team
	Malpractice Insurance Cancellation	general
	Malpractice Reimbursement	general
	Malpractice Run Loss Report	coordinator only
	NPDB Self-Query	coordinator only
	Payor Grievances	general
	WI Only 15-Year Run Loss Report	coordinator only
Workers Comp Insurance Policy	general	
Grouping	Document Type	Default Permissions
	Annual Clinical Policy Acknowledgement	general
	Assignment Documents	general
	Audit	coordinator only
	Bank Letter / Voided Check	coordinator_team
	Board Members	general
	Business License	general
	Business License Application	general
	Case Logs	general_team
	Certificate of Completion	general
	CMS Identity & Access Management System Connection Request (Surrogacy Invitation)	coordinator only
	Conflict of Interest Disclosure	general
	Disclosure of Ownership	general
	Fax Confirmation Page	general
	Fictitious Name Permit	general

Miscellaneous	Form I-9	coordinator only
	Incorporation	coordinator_team
	Insurance Inspection	coordinator only
	Intake Form	general
	Internal Transfer	general
	IRS Form 147C	coordinator_team
	IRS Form CP-575	coordinator_team
	IRS Form W-4	coordinator only
	IRS Form W-9	coordinator_team
	IRS SS-4 Letter	coordinator only
	Job Description	general
	Lease Agreement	general
	Letter of Critical Need	coordinator only
	Medical Association Dues	general
	Medicare Opt Out Affidavit	coordinator only
	Military Service Records	general
	New Hire Acknowledgement	general
	New Hire Learning	general
	Other Misc	general
	Power of Attorney	general
	Prescriptive Medication Guidelines	general
	Professional Disclosure Statement	general
	Professional Practice Committee (PPC) Packet	general
	Professional Reference Questionnaire	coordinator only
	Protocols	coordinator only
	Provider generalation	coordinator only
	Provider Rights	general
	Reference Materials	coordinator only
	Risk Disclosures	coordinator_team
	Risk Documentation	coordinator_team
	Risk Narrative	coordinator_team
	Risk Review	coordinator_team
	Staff Handbook	general
	Statement of Information	general
Supervision Professional Disclosure Statement	general	
Suspension Letter	general	
Tax Documents	general_team	
Tracking Screenshot	general	

Grouping	Document Type	Default Permissions
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	Account Management Form	coordinator only
	Auto Insurance	general
	Auto Registration	general
	Background Check	general
	Background Check Authorization	coordinator only
	Biography	coordinator only
	Birth Certificate	general
	Citizenship	general
	Clearance	coordinator only
	Color Photo	general
	Contact Information	coordinator only
	Curriculum Vitae (CV)	general
	DD214	general
	DD215	general
	Digital Signature	general
	Divorce Certificate	general
	Driver License Copy	general

Personal Info	HR Profile	coordinator only
	Level 2 Background Check	coordinator only
	Level 2 Compliance Affidavit	coordinator only
	Marriage License	coordinator only
	Motor Vehicle Report	coordinator only
	Name Change Certificate	general
	NPI Authorization	coordinator only
	OSHA	coordinator only
	Passport Copy	general
	Permanent Residency Card	general
	Previous Addresses	general
	Provider Profile	general
	Release of Information	coordinator only
	Search Engine Result	coordinator only
	Sex Offender Search	coordinator only
	Signature Authorization	coordinator only
	Skills Checklist	coordinator only
	Social Security Card	general
	Social Security Master Death File (SSMDF) Results	general
	Work Permit	general
Work Visa	general	
Grouping	Document Type	Default Permissions
Professional/Clinical Evaluations	Annual Clinical Skill Evaluation	general
	Employee Evaluation	coordinator only
	Knowledge Assessment	general
	Mentor Review	coordinator only
	Onboarding Review	coordinator only
	OPPE/FPPE	coordinator only
	Peer Review	coordinator only
	Professional Evaluation	coordinator only
	Reference Letters	general_team
Grouping	Document Type	Default Permissions
Profile Summaries	All License Types Summary	coordinator only
	DEA Licenses Summary	
	Education Training Summary	
	Facility Affiliations Summary	
	Medical Malpractice Summary	
	Practice/Employer Summary	
	Provider Profile Summary	general
	State Controlled Substance Licenses Summary	
	State Licenses Summary	
	Work History Summary	
Grouping	Document Type	Default Permissions
	805 Report	coordinator only
	AMA Profile	coordinator_team
	AOIA Verification	coordinator_team
	Board Certification Verification	general_team
	CMS Preclusion List	coordinator only
	Credentialing Verification	coordinator_team
	DATA Waiver Approval Letter	general
	DEA Verification	general
	ECFMG Verification	general
	Education Verification	coordinator_team
	Employment Verification	coordinator_team
	Facility Affiliation Verification	coordinator_team
FCVS Profile	general	

Verifications	FPGEC Verification	general
	FSMB Verification	coordinator_team
	ID Verification	general_team
	Medi-Cal Verification	coordinator only
	Medicare Opt Out Verification	coordinator only
	NPDB Verification	coordinator_team
	NPI Verification	general_team
	OIG Verification	general
	OMIG Verification	coordinator only
	SAM Verification	general
	State Controlled Substance Verification	general
	State Exclusions	coordinator_team
	State License Verification	general_team
	State Medicaid Exclusion	coordinator only
	Training Verification	coordinator_team
USPS Verification	general	

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