



OneView

TIP GUIDE : DOCUMENTS

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Upload Documents :
Upload one or more files directly into your provider's file.

Download Zip :
Download a zip file of all documents.

Share in Email :
Share these documents with any coordinator or recruiter on your team. See next slide for details.

Drag and Drop:
To upload a single document, simply drag and drop it into this box.

Batch Document Uploading:
Upload one or more files directly into the provider's profile.

Action Item Key:

Alert: Enable or disable alert notifications in the V2 Documents grid

Edit: Change Permissions, Expiration date, Document Type and add notes.

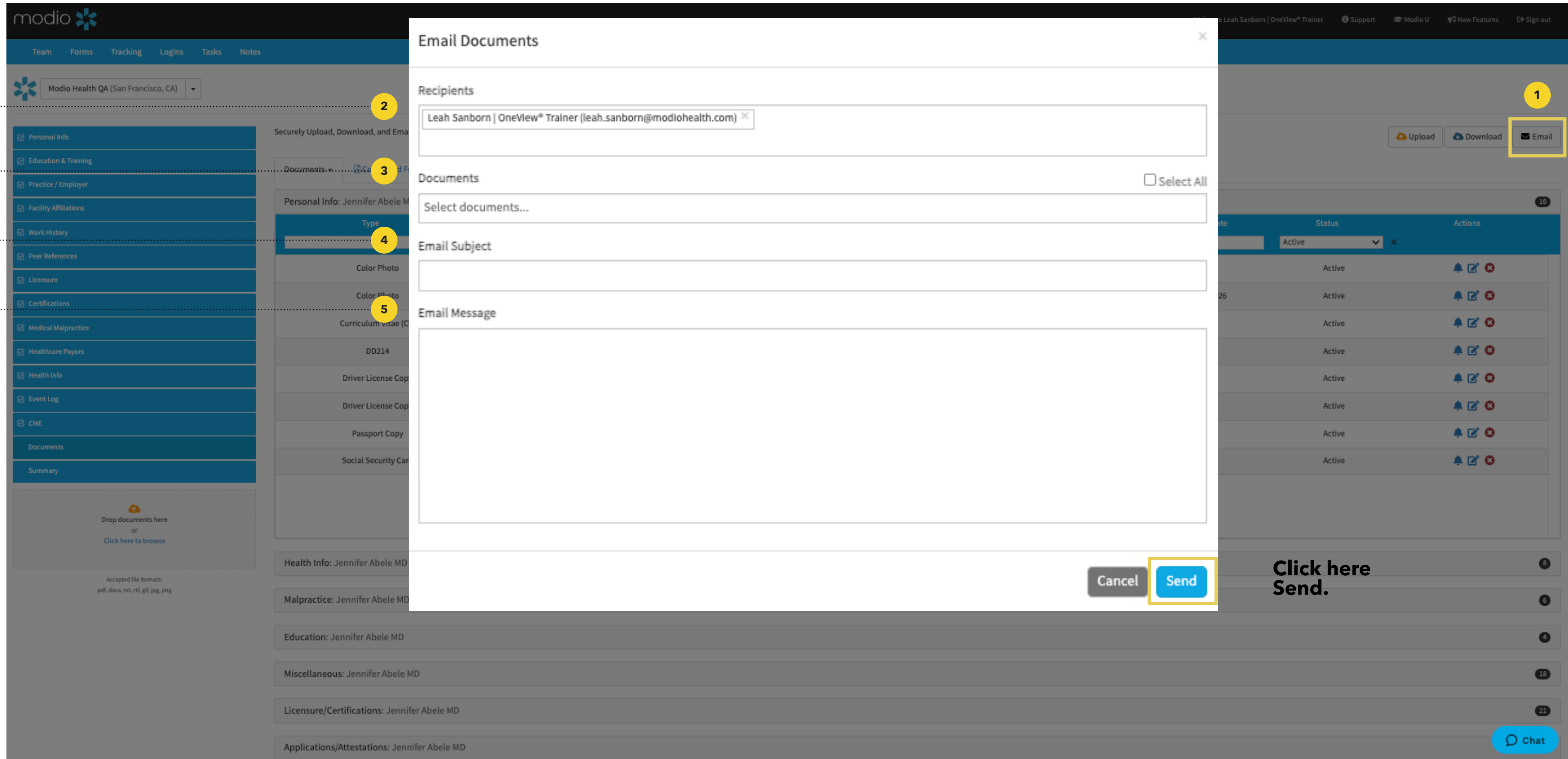
Archive: Archive any documents. Archived documents can be accessed by adjusting the filter in the Status column.

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

Tip Guide: Document Management

Email Feature: Share documents with yourself or anyone in your organization.

- 2 Recipients:**
Select the coordinator or recruiter with whom to share documents.
- 3 Documents:**
Choose just the files you want to share or Select All to email the entire list.
- 4 Email Subject:**
Give your email a title.
- 5 Email Message:**
Enter notes and instructions for your team.



The screenshot displays the 'Email Documents' modal in the Modio application. The modal is overlaid on a user profile page for Jennifer Abele MD. The modal contains the following sections:

- Recipients:** A text input field containing 'Leah Sanborn | OneView® Trainer (leah_sanborn@modiohealth.com)'. A yellow circle '2' is next to this field.
- Documents:** A section with a 'Select All' checkbox and a 'Select documents...' input field. A yellow circle '3' is next to this section.
- Email Subject:** An empty text input field. A yellow circle '4' is next to this field.
- Email Message:** A large text area for entering a message. A yellow circle '5' is next to this field.

At the bottom of the modal, there are 'Cancel' and 'Send' buttons. The 'Send' button is highlighted with a yellow box and a yellow circle '1' next to it. A text label 'Click here Send.' points to this button. In the background, the user profile page has an 'Email' button highlighted with a yellow box and a yellow circle '1' next to it, with a text label 'Click the Email Button to start' pointing to it.

Click the **Email Button** to start

Click here **Send.**

Tip Guide: Document Management

Upload a supporting Document to a specific data entry v1. Attach documents to specific credentialing records in these sections: Education & Training, Peer References, Licensure, Certifications, Medical Malpractice, & Healthcare Payors.

The screenshot displays the Modio interface for editing a DEA license. The main form is titled "Edit DEA License for Jennifer Abele MD" and includes the following fields:

- License State: DC - District of Columbia
- License #: FA4228474
- Issue Date: mm/dd/yyyy
- Expiration Date: 06/30/2025
- License Status: Active
- Primary Source Link: <https://apps.deadiversion.usdoj.gov/webforms2/spring/validationLogin>
- Notes: Prepend Leah Sanborn | OneView® Trainer

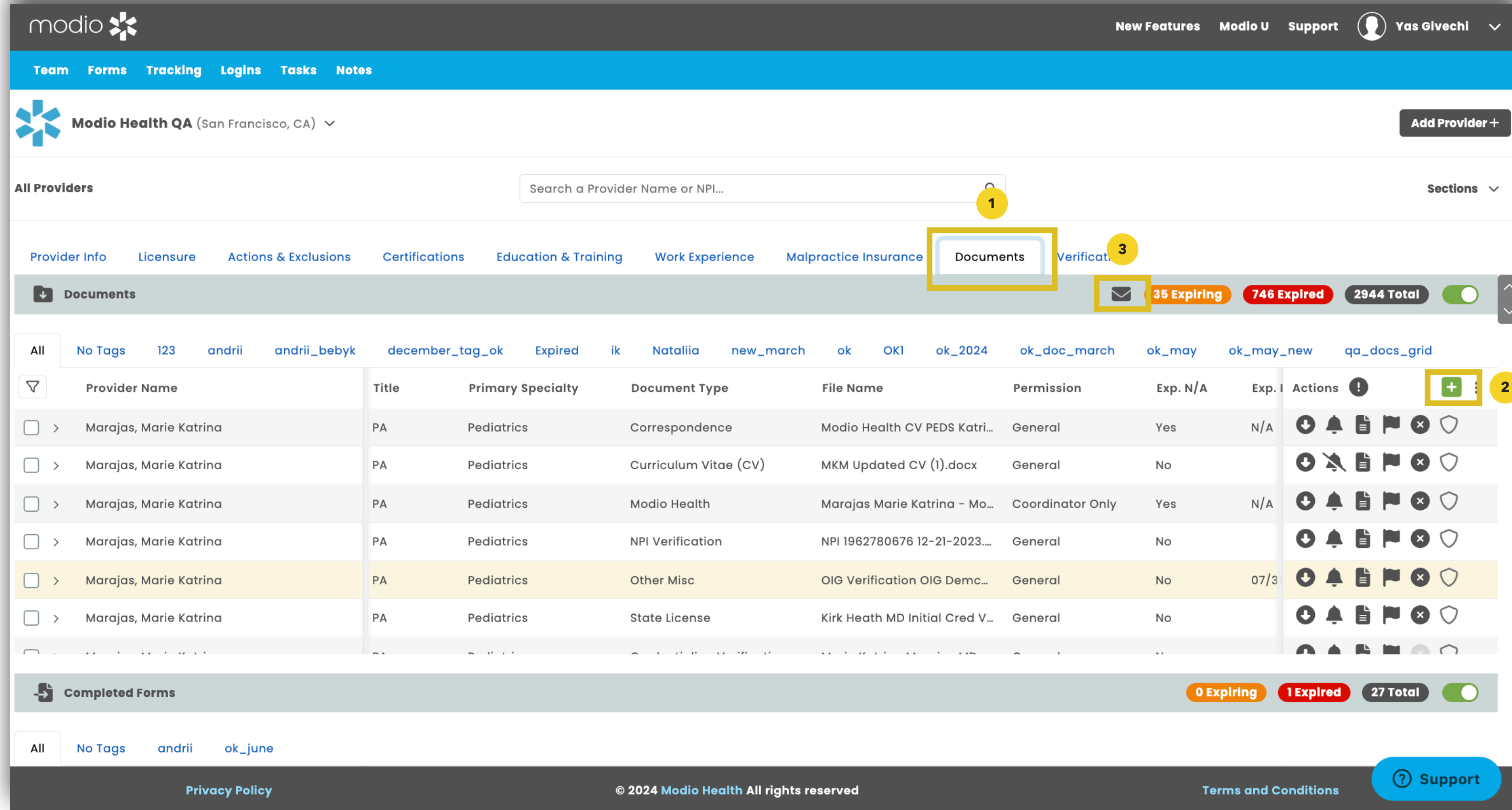
The "Documents" section is highlighted with a yellow circle and the number 2. A yellow circle with the number 1 highlights the "Edit" icon in the "Documents" section. A yellow circle with the number 3 highlights the "Ok" button in the "Files" dialog.

The "Files" dialog shows a file upload area with the text "Drop documents here or Click here to browse" and "Accepted file formats: pdf, docx, txt, rtf, gif, jpg, png". Below the upload area is a table with the following columns: File Name, Type, Date, Permission, Expiration, and Actions.

1 Select the Section in the row and Data Point you would like to add a supporting document

2 Select the Edit icon in the Document field to open the "Attach Document" option.

3 **Click / Drag & Drop:** Upload the supporting document here. It will appear in the Documents section as well. To remove or edit the file, you'll need to access it from the section it was uploaded from.



- 1 **Documents:**
Click on the "Documents" tab to access all documents on your Team.
- 2 **Click the New Icon:**
Upload 1 document at a time by selecting the green plus icon. The grid will open and guide you through filling in required fields.
- 3 **Email Feature:**
Quickly Email Providers or Coordinators on your team to notify them of expiring or expiring Documents.

4 **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
	Coordinat or 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
	Coordinat or Only	Any coordinators who belong to the listed team

You can use our built-in detection system to get category and date details from the name of the file. For example, you can name a file like this on your computer: 'John Doe CV EXP 01022018'. When you upload that file to our platform, it will automatically fill in the category and expiration date (Curriculum Vitae expiring on 01/02/2018). Following these guidelines will help organize your files and optimize Modio for you.

Below is a formatting guide for naming your files:

1 FirstName LastName DocumentType EXP MMDDYYYY. (MMDDYY is also acceptable.)

2 You can separate each word with a space, or any punctuation in this list:

- period (.)
- underscore (_)
- hyphen (-)
- plus (+)

Use the guide to the right to help you name your files appropriately. Following these guides will help organize both your computer files and your Modio files.

Document Type	Possible Names	Example (First Name Last Name Document Name EXP MMDDYYYY)
Curriculum Vitae (CV)	cv, resume, vitae	Jane Doe CV EXP 01022018
Color Photo	photo, image	Jane Doe Photo EXP 01022018
PPD Test Results	ppd	Jane Doe PPD EXP 01022018
Certificate of Insurance (COI)	coi, insurance	Jane Doe COI EXP 01022018
ECFMG Certificate	ecfmg	Jane Doe ECFMG EXP 01022018
MD Diploma	diploma, school	Jane Doe Diploma EXP 01022018
Residency, Internship, Fellowship Certificates	residen, resident, residency, intern, fellow	Jane Doe Residency EXP 01022018
Social Security Card	ssn, social	Jane Doe SSN EXP 01022018
Immunization Information	immun, flu	Jane Doe Immun EXP 01022018
Case Logs	case, logs	Jane Doe Case EXP 01022018
Board Certification Certificate(s)	board, abms	Jane Doe ABMS EXP 01022018
NPDB Self-Query	npdb	Jane Doe NPDB EXP 01022018
Facility Applications	app	Jane Doe App EXP 01022018
Facility Attestations	attest	Jane Doe Attestation EXP 01022018
Payor Contracts	payor, medicare, medicaid, aetna, etc. (get payor list)	Jane Doe Payor EXP 01022018
Driver License Copy	dl, driver	Jane Doe DL EXP 01022018
Passport Copy	passport	Jane Doe Passport EXP 01022018
DD214	dd214	Jane Doe dd214 EXP 01022018
State Controlled Substance Document	csl	Jane Doe CSL EXP 01022018
DEA	dea	Jane Doe DEA EXP 01022018
State Medical License	license	Jane Doe License EXP 01022018
Other Certs (ATLS, BLS, PALS etc)	atls, acls, arls, bls, pals, nals, nccpa, also, corec, cpr, nrp	Jane Doe ATLS EXP 01022018
Exam Scores	score, usmle	Jane Doe Score EXP 01022018
Malpractice Case Response	malpractice, mal practice	Jane Doe Malpractice EXP 01022018
Tax Documents	tax, w9, w-9	Jane Doe Tax EXP 01022018
Delineation of Privileges (DOP)	dop, privilege	Jane Doe DOP EXP 01022018
Reference Letters	peer, refer	Jane Doe Peer EXP 01022018
Modio Health	admin	Jane Doe Admin EXP 01022018
Background Check	bgc, background	Jane Doe Background EXP 01022018
CME	cme	Jane Doe CME EXP 01022018
AMA Profile	ama profile	Jane Doe AMA Profile EXP 01022018
Facility Contracts	contract	Jane Doe Contract EXP 01022018
Transcripts	transcripts	Jane Doe Transcripts EXP 01022018
Other	"unknown"	Jane Doe Unknown EXP 01022018

Frequently Asked Questions

Q: Can Providers upload documents into their profile?

Yes, providers can upload documents to their own profile if they have access to their own profile from the Onboarding Feature.

Q: Is there a limit on how many documents I can add to the provider's profile?

No, there is not a limit by number of documents or by size of documents.

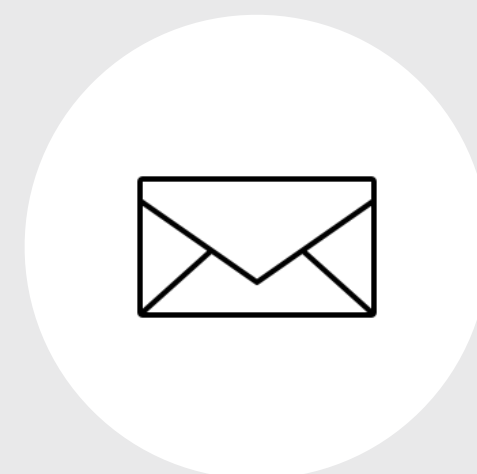
Q: Will I be notified when a document is expired?

If you would like to see when the documents are soon to expire or expired, you can click on the Documents tab in V2 or the Documents section in the providers profile in V1 to view the expiration date.

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346