



OneView[®]

Tip Guide: Document Management

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The screenshot shows the Modio web application interface for a provider's profile. The top navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The main header displays 'Yuri Zhivago MD' and 'Documents'. Below this, there are buttons for 'Upload', 'Download', and 'Email'. The main content area is divided into sections: 'Personal Info', 'Health Info', 'Malpractice', 'Education', and 'Miscellaneous'. Each section contains a table of documents with columns for Type, File Name, Date, Permission, Expiration Date, Status, and Actions. A sidebar on the left lists various profile sections, with 'Documents' highlighted. A 'Drop documents here' box is located at the bottom left of the main content area.

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.

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.

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 |

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.

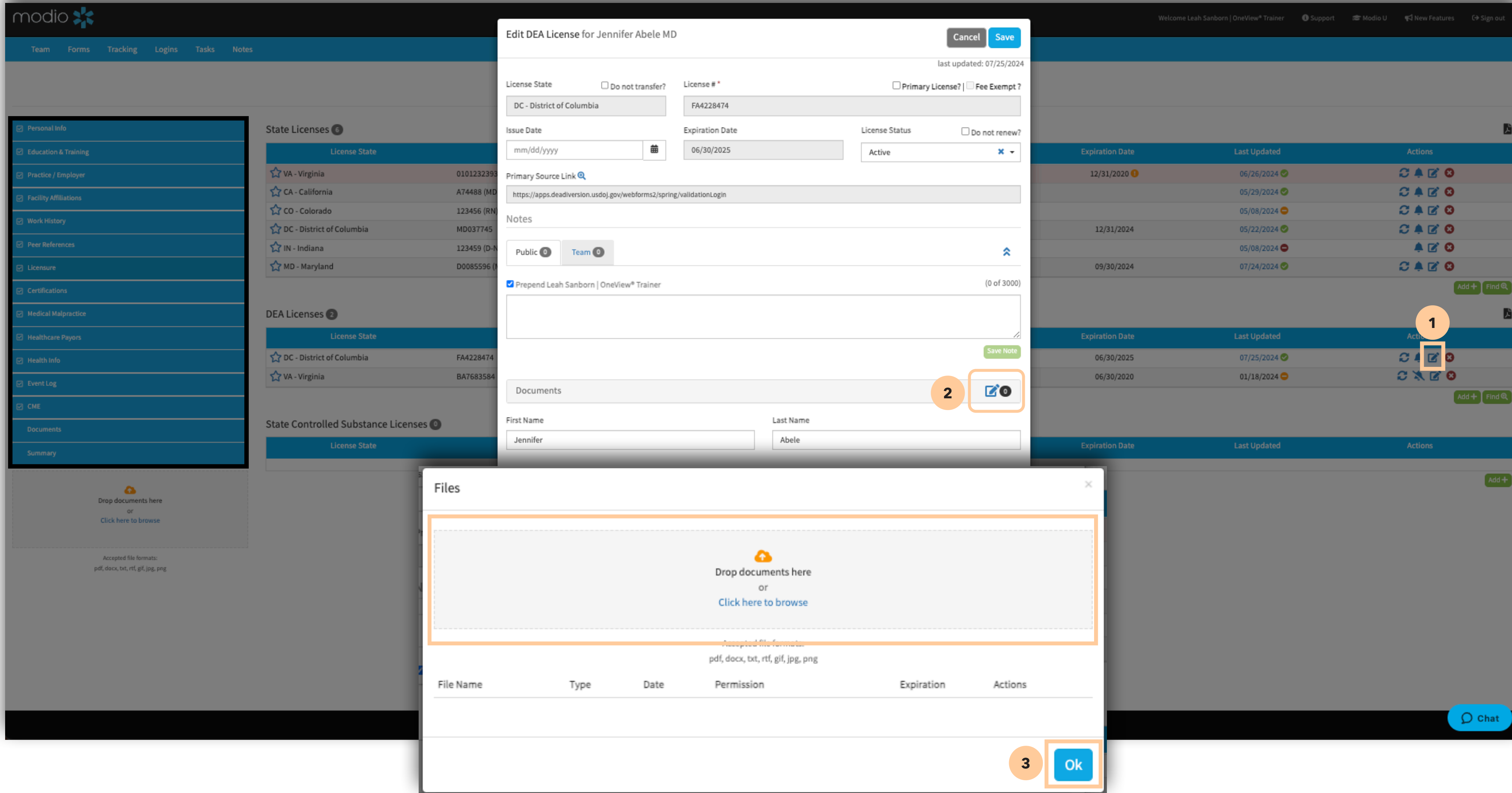
5 **Email Message:** Enter notes and instructions for your team.

1 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 illustrates the process of attaching a document to a specific data entry. The background shows the user profile page for Jennifer Abele MD, with a 'Documents' section. A modal window titled 'Edit DEA License for Jennifer Abele MD' is open, showing the 'Documents' field with an 'Attach Document' icon (circled with a '2'). A 'Files' dialog box is open in the foreground, showing a 'Drop documents here' area (circled with a '3') and an 'Ok' button (circled with a '3'). A table of licenses is visible in the background, with an 'Edit' icon in the 'Actions' column circled with a '1'.

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 Upload the supporting document here in the "Click/ Drag& Drop" box. 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 Click on the "Documents" tab to access all documents on your Team.

2 Click the New Icon and 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 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 |
| | 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 |

1

Enable the filter icon. If the row of filters is hidden, click on the filter button to view.

2

Use any of the columns to filter the items in your download.

The screenshot shows the Modio Health QA interface for a provider named Lily Marten, FAC. The main content area displays a table of documents. The table has columns for Document Type, File Name, Permission, Exp. N/A, Exp. Date, and Expires Within. A dropdown menu is open over the 'Expires Within' column, showing various filtering and alerting options. The 'Download All (Filtered)' option is highlighted in the menu. The interface also includes a navigation bar with options like Team, Forms, Tracking, Logins, Tasks, and Notes. The top right corner shows the user's name, Yasir Givechi, and a profile icon. The bottom of the page contains a footer with links for Privacy Policy, Terms and Conditions, and a Chat button.

| Document Type | File Name | Permission | Exp. N/A | Exp. Date | Expires Within |
|----------------------------|--|-------------------------|----------|------------|----------------|
| FSMB Verification | eee (1) (1) (1) (1).jpeg | General | Yes | N/A | |
| Other Misc | Screenshot 2023-03-30 at 11.22.32.png | General | Yes | N/A | |
| State License | pngwing.com (1).png | General | No | | |
| OIG Verification | OIG Marten Lily 05-12-2023 1.pdf | General | No | | |
| State License Verification | Nathan Neil AK MEDS1234 05-16-2023.pdf | General | No | 12/31/1990 | Expired |
| State License Verification | Nathan Neil AK MEDS1234 06-01-2023.pdf | General | No | 12/31/1990 | Expired |
| Other Misc | 0-02-05-564a4f8f0ab588ca4722cc2flc... | General | No | | |
| State License Verification | Nathan Neil AK MEDS1234 07-10-2023.pdf | General | No | 12/31/1990 | Expired |
| State License Verification | Nathan Neil AK MEDS1234 08-02-2023.pdf | General | No | 12/31/1990 | Expired |
| Application Receipt | psychology receipt.png | Coordinator Only (Team) | No | | |
| State License Verification | Nathan Neil AK MEDS1234 09-20-2023.pdf | General | No | 12/31/1990 | Expired |

3

Select the ellipses for additional filter options.
** Try filtering by enabled alerts to narrow what you see in the documents section.

4

Download just the filtered documents or all documents in the profile. Note: you can only view these options when you have filtered for a single provider.

- 1 Use single provider view to select the email icon next to the alerts.
- 2 Select Documents option to send a zip file of documents to any coordinators on your Team.
- 3 Add yourself or any coordinators to the "Send Email To" list.
- 4 Use the Active & Enabled Alerts options in the "Filters Applied" section or manually add or remove documents from the "Select File(s) to Email" section.
- 5 Optional - Include a custom message before selecting "Send".
- 6 Select "Send" Optional - Add a note or a Tag to document your Send

The screenshot displays the 'Email Documents for Kirk Heath' dialog box. The background shows the provider's document list with columns for Document Type, File Name, and Actions. The dialog box contains the following sections:

- Select content to email:** Radio buttons for Alerts and Documents (selected).
- Filters applied:** All Records and Enabled Alerts.
- Send Email to:** A dropdown menu showing 'Leah Sanborn | OneView® Trainer (leah.sanborn@modiohealth.com)'.
- Select File(s) to Email:** A list of selected files including 'KHEATH PHOTO.jpg', 'Dr Heath - Peer Review Dr. Clifford.docx', 'Kirk Heath - Background Check 2016.pdf', etc.
- Email Subject:** A text field containing '| • Modio University • | Document Notification'.
- Email Message:** A large text area for a custom message.
- Buttons:** Cancel and Send buttons at the bottom right.

1 Navigate to V2 Single Provider view by entering a profile name here.

2 Drag and drop document(s) or select "Click here to browse" to upload your document(s) of choice.

3 "Click Here to Browse" allows you to upload multiple documents at once. Multi-select documents from the device you are working from.

Use the recommended naming convention to activate an automation that selects Doc Type and Exp Date. Review and manually adjust the Document Type and Expiration before selecting "Upload"

4 The Orange alert icon appears when a document fits in more than one category. Manually adjust the document type as needed.

**** Pro Tip:** Visit the Documents Types & Permissions Guide for a detailed list of naming conventions and designated groupings.

1 Navigate the V2 platform to a grid that needs supporting document(s) uploaded.

2 From the V2 grid, locate the data point you wish to upload supporting documents and select the "Tags, Notes, Docs" icon from the Actions column. The side drawer will open, select the "Documents" tab from the side drawer.

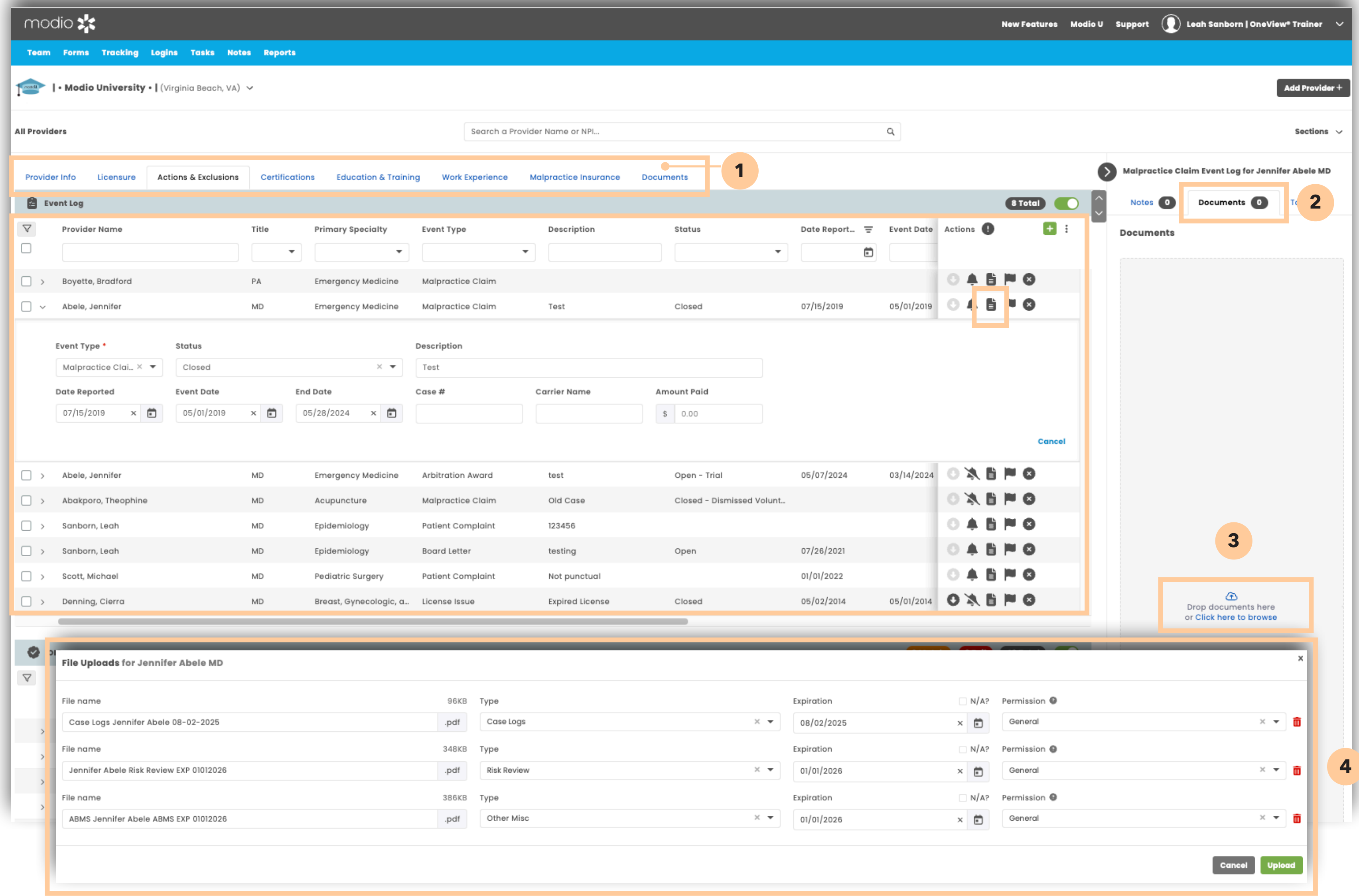
3 Drag & Drop or select "Click Here to Browse" to add documents to the selected data point from the V2 grid.

4 "Click Here to Browse" will allow you to upload multiple documents at the same time. Multi-select documents from the device you are working from.

Use the recommended naming convention to activate an automation that selects Doc Type and Exp Date. Review and manually adjust the Document Type and Expiration before selecting "Upload".

Note: Each V2 grid hosts a unique set of document types. Other Misc Type may indicate that your document could be better fit for a different grid, or that the naming convention was not detected.

**** Pro Tip: Visit the Documents Types & Permissions Guide for a detailed list of naming conventions and designated groupings.**



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 AND cert; 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 AND [reg OR licens OR cert] | 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.

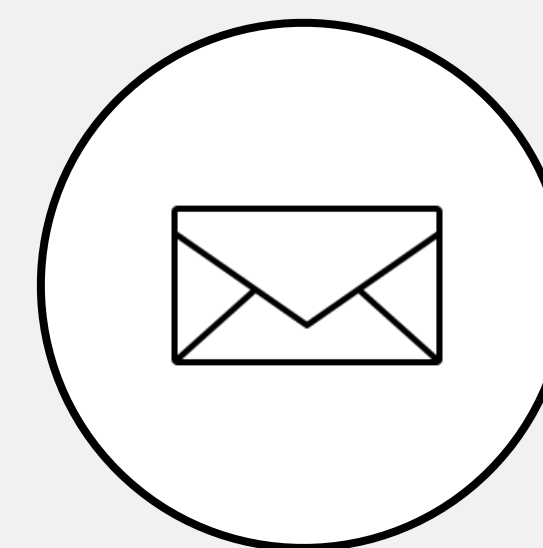
Q: Will I be notified when a document is expired?

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:
updates@modiohealth.com