



OneView[®]

TIP GUIDE: NOTES

Introduction:

Use the notes feature to free text additional information into your provider profiles. With 2 levels of permissions and a dashboard available, you can easily find and view the notes you need.

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There are two types of notes available to add to your provide profiles: Team and General. Team notes are visible to all full access coordinators on your team. General notes are available to all full access and read only coordinators. Providers can view General notes in their own profile if they have access to their profile through the Onboarding invite.

Team Notes:

Team Notes:

- Visible to full access coordinators only.
- Only full access coordinators can add Team Notes.

General Notes:

Notes:

- Visible to Read-Only Coordinators.
- Read-Only Coordinators can add a General Note.
- Visible to Full access coordinators.
- Visible to Providers who have access to their own profile through the Onboarding feature.



Use cases for notes:

- Free Text any additional documentation.
- Communicate with your team by using the notes feature.
- Add status updates.
- Provide additional clarification as needed.

OneView Tip Guide: Notes Feature - Notes: V1

Use the notes dashboard to filter, find and edit the notes you need all in one place.

Credentialing Sections:

All these sections have an option to add free text notes.

General Note & Team Note:

Select the note type you would like to add by clicking on the corresponding tab.

Add & View Notes:

The Team and General note tables will each show a number. The number displayed indicates the number of existing notes in the tab. The most recent note will always be at the top of the list and the oldest notes will be the lowest down on the list.

Free Text your note here.

Select "Save Note" to add to profile.

OneView Tip Guide: Notes Feature - Dashboard

Use the notes dashboard to filter, find and edit the notes you need all in one place. Full access coordinators will have access to this notes feature. The notes dashboard will not be available to Read Only and Provider access.

Status:

Use the Status column to access any Archived notes. This is the only place that holds archived notes and have access to restore them. Notes deleted from a profile will fall into the Archived status in the Notes Dashboard.

Start Here

All columns in this notes dashboard work as filters. You can apply one or more filters at a time to quickly locate the note or notes you are looking for.

The screenshot shows the Modio Notes Dashboard interface. At the top, there is a navigation bar with the Modio logo and user information. Below the navigation bar, there is a breadcrumb trail: "Team Forms Tracking Logins Tasks **Notes** Reports". The main content area displays a table of notes with the following columns: Provider Name, Note Type, Description, Date Created, Last Updated, Status, Permission, and Actions. The table contains 15 rows of notes. The first row is highlighted. The Status column has a dropdown menu set to "Active". The Actions column contains edit and archive icons. At the bottom of the table, there is a pagination control showing "1 / 2" and "200 items per page".

Provider Name	Note Type	Description	Date Created	Last Updated	Status	Permission	Actions
Group/Organization Name - FAC	Healthcare Payors	Leah Sanborn OneView® Trainer - notes hi more notes notes notes more not...	09/07/2022	08/26/2024	Active	Team	
Group/Organization Name - FAC	Healthcare Payors	Leah Sanborn OneView® Trainer - another notes	09/07/2022	09/07/2022	Active	Team	
Group/Organization Name - FAC	Healthcare Payors	Leah Sanborn OneView® Trainer - hgdfhgh dgygdjgdsdgjhsa UDate	09/07/2022	02/26/2024	Active	Team	
Group/Organization Name - FAC	Healthcare Payors	Brandon Holmes - Demo Test Demo testing Test Test	12/09/2020	03/12/2024	Active	General	
Group/Organization Name - FAC	Healthcare Payors	Brandon Holmes OneView® Trainer - Test	01/24/2024	01/24/2024	Active	General	
Group/Organization Name - FAC	Healthcare Payors	Brandon Holmes OneView® Trainer - Test	12/12/2023	12/12/2023	Active	General	
StarshipEnterprise - FAC	Licensure	Brandon Holmes OneView® Trainer - Test	02/02/2024	02/02/2024	Active	General	
Sunrise Medical Lab - FAC	Affiliations	Danessa McShane OneView® Trainer - test	07/22/2024	07/22/2024	Active	General	
Sunrise Medical Lab - FAC	Healthcare Payors	Leah Sanborn OneView® Trainer - notes! Demo	03/17/2023	08/17/2023	Active	General	
Sunrise Medical Lab - FAC	Healthcare Payors	notes!	03/17/2023	03/17/2023	Active	Team	
Sunrise Medical Lab - FAC	Healthcare Payors	Leah Sanborn OneView® Trainer - notes	03/17/2023	03/17/2023	Active	Team	
Sunrise Medical Lab - FAC	Healthcare Payors	notes	03/17/2023	03/17/2023	Active	Team	
Sunrise Medical Lab - FAC	Healthcare Payors	Leah Sanborn OneView® Trainer - notes	03/17/2023	03/17/2023	Active	Team	
Sunrise Medical Lab - FAC	Provider	Leah Sanborn OneView® Trainer - notes!!	08/22/2023	08/22/2023	Active	General	

Edit Note:

Select the edit icon to make edits to any of the existing notes. Select the red "x" to archive any existing notes.

This dashboard is a complete list of all notes that have been added to the different sections of your provider profiles. It includes notes from both V1 and the relevant section notes in V2.

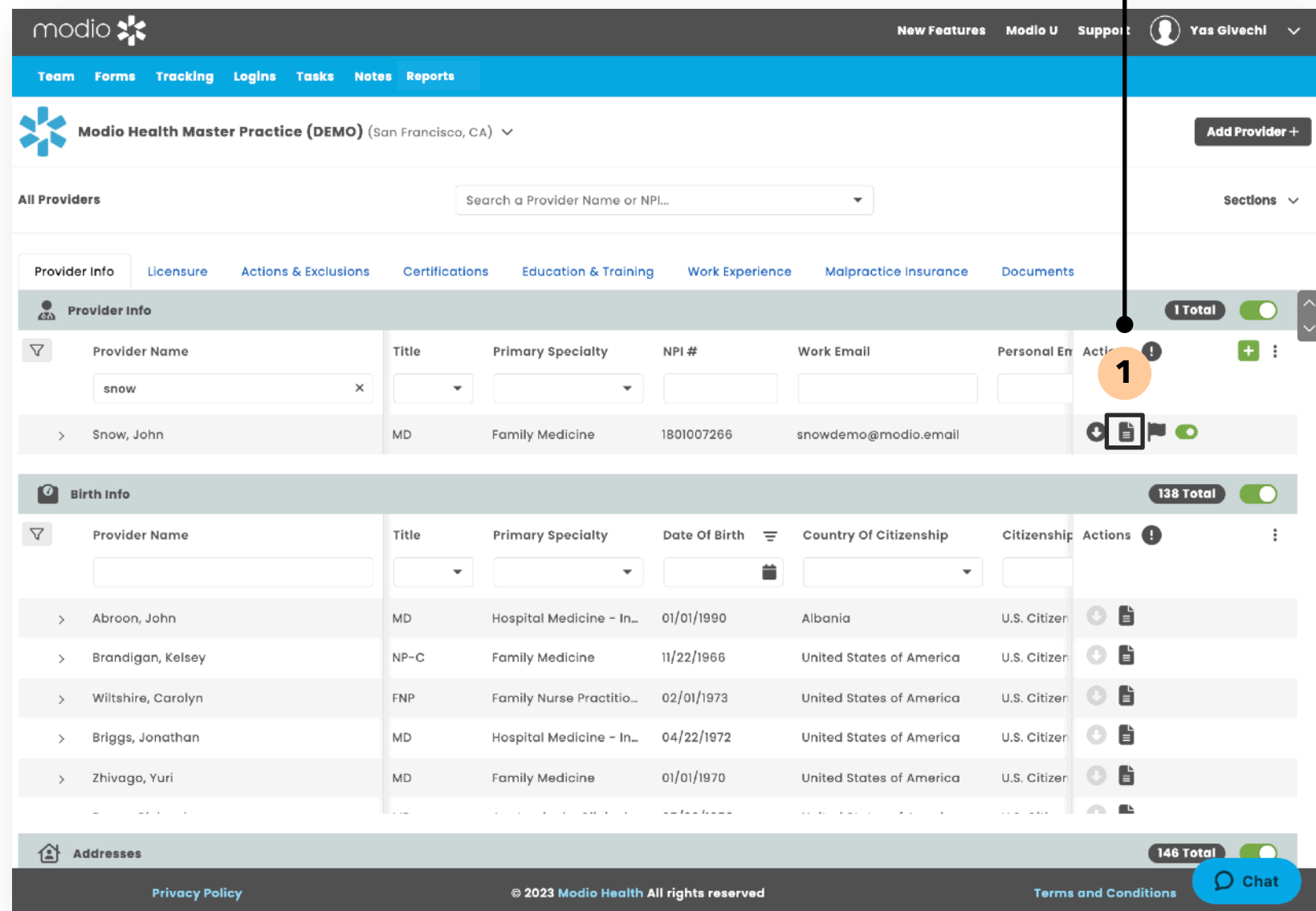
OneView Tip Guide: Notes Feature - Notes: V2

All grids available in v2 have the option to add both Team and General notes. The notes in v2 are in the "Side Drawer" through the actions column.

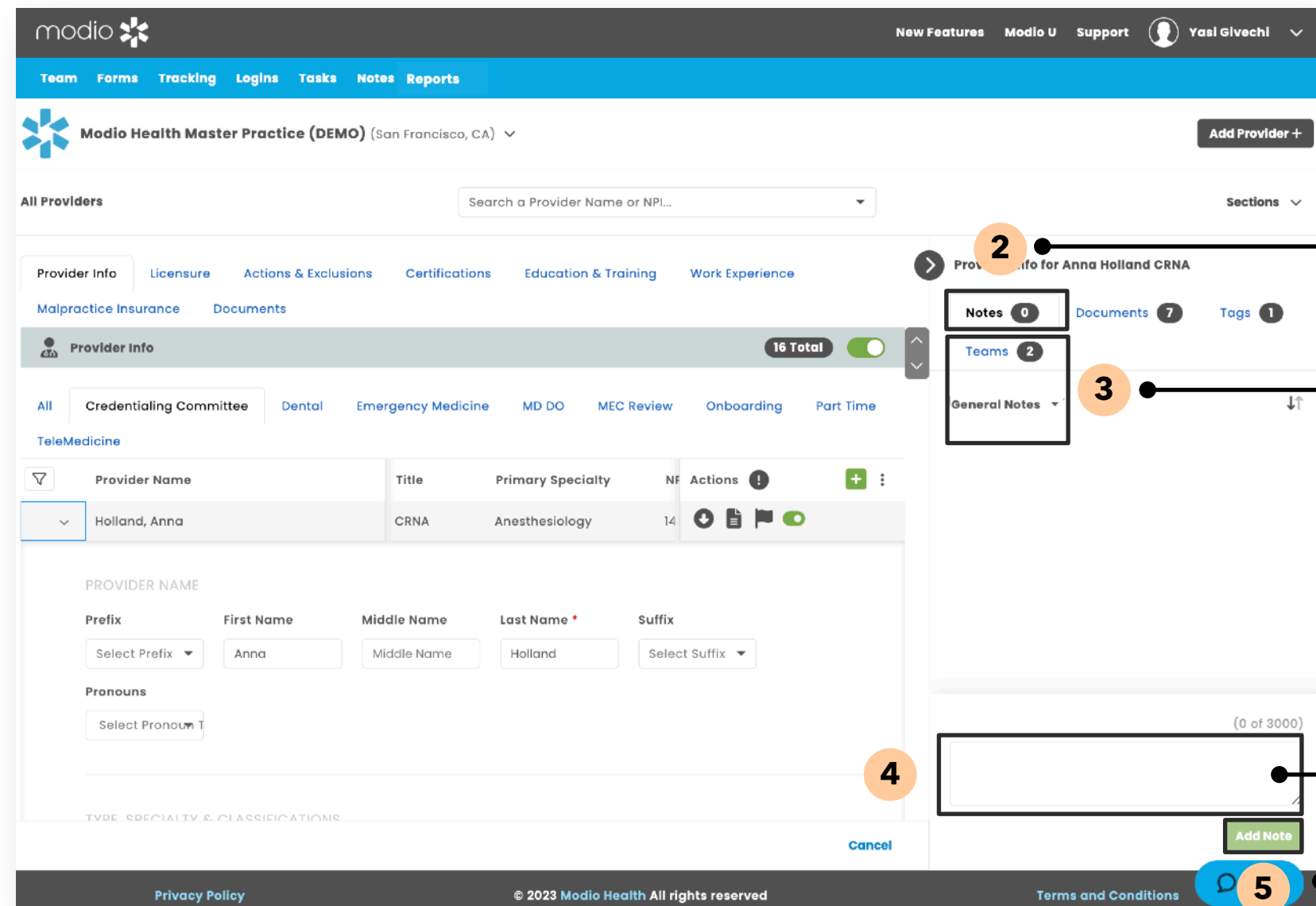
Accessing Notes:

Each individual grid in V2 has a notes section where you can access the General and Team Notes.

To start, click the document icon to open the "Side Drawer"



Side Drawer will appear here.



Select the **notes tab** in the side drawer.

Toggle to select **Team** or **General**.

Type your note in the **text box**.

Select "**Add Note**" to save.

***Note:** Once you click the documents icon, the Side drawer with the Notes feature will remain remain open until you log out. When you log back into OneView V2; you must repeat the same process by click the Documents icon.

Frequently Asked Questions

Q: Can a provider see General Notes?

Yes! If the provider has access to their own profile and the General notes are added to a section they have access to, they will be able to see any notes entered as General.

Q: Are there character limits when adding notes?

Yes, notes section have a limit of 3,000 characters per notes. The exception in the CME section where the character limit is 11,000. There is no limit on the number of notes added. If you have a note larger than the character limit, is it OK to add an additional note to accommodate.

Q: If I add notes in v1 will they be visible in v2?

Yes, all general and team notes that are added in v1 will be visible in v2. All notes added to provider profiles will also be available in the Notes dashboard.

Q: Does the notes dashboard report on notes added to my tracking tab?

No, it does not. The notes dashboard only reports on profile notes. Tracking has its own report dedicated just to the notes added to tracking steps.

Q: Will I be notified if someone adds a new note?

This feature is not available at this time

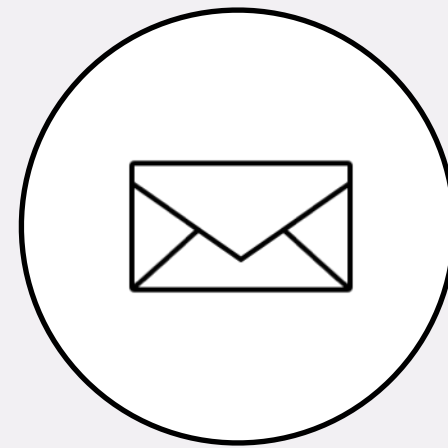
Q: Can I add new notes from the Notes tab?

No, new notes can be added through the edit button on the team page or within a specific section in the provider profile. You can edit existing notes from the notes tab.

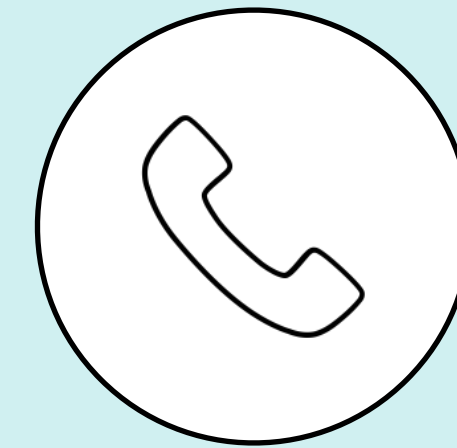
For additional questions or further training,
contact the Modio Team via:



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