



**OneView**<sup>®</sup>

TIP GUIDE : USING FORMS

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

## INTRODUCTION:

# FORMS

The Forms feature gives you access to your organizations forms and applications that have been individually mapped by our OneView® Forms Team. Here you can store forms like facility applications, payor contracts, DOPs, HR Documents 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 and data housed in your providers' profiles to save time, ensure accuracy, and more.

# 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.

The screenshot shows the Modio Health Master Practice (DEMO) interface for San Francisco, CA. The top navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The main content area displays a table of forms with columns for ID, Status, Templates, Count, Form Name, Form Type, Tag, Last Update, and Actions. The table lists various forms such as 'New Composite Packet', 'Peer Reference Form', and 'State of Georgia - Employee's Withholding Allowance Certificate'. A yellow callout box points to the 'Support' link in the top right corner of the interface.

ID	Status	Templates	Count	Form Name	Form Type	Tag	Last Update	Actions
45728	Available	Composite	3	*DEMO*: New Composite Packet	Modio Health		02/04/2022	[Icons]
27972	Available	Single	0	*DEMO*: Peer Reference Form (07.2020)	Reference L...		02/24/2021	[Icons]
27971	Available	Single	0	*DEMO*: State of Georgia - Employee's Withholding Allowance Certificate (...)	Tax Docum...	GA	02/24/2021	[Icons]
7112	Available	Single	1	Accountable Health Care IPA - Allied Health Professional Application (06.97)	Payor Appli...	Requires Fa...	01/20/2020	[Icons]
22753	Available	Single	0	Alabama - Physician Assistant Application for Registration Agreement	License App...	Allied Licen...	12/02/2020	[Icons]
22754	Available	Single	0	Alabama - Physician Assistant Reinstatement Application	License App...	Allied Licen...	12/02/2020	[Icons]
22333	Available	Single	0	Alabama Board of Medical Examiners - Medical School Certification (Appe...	State Applic...	Alabama	12/06/2021	[Icons]
13103	Available	Single	0	Alabama Department of Revenue - Employee's Withholding Tax Exemption ...	State Applic...		03/31/2020	[Icons]
8937	Available	Single	0	AlohaCare - Provider Credentialing Application & Disclosure Information F...	Payor Appli...		08/26/2019	[Icons]
14198	Available	Single	0	Ambetter-Allwell — MHS Practitioner Enrollment Form (0819.CC.P.FO 08.19)	Payor Appli...	ink signature	06/22/2021	[Icons]
13183	Available	Single	0	Argus - FL - Full Application GP & SP - Rev 8.2018	Payor Appli...	Kate	03/09/2020	[Icons]
6093	Available	Single	1	BCBS of AL - Uniform Provider Application	Payor Appli...	Alabama	08/01/2019	[Icons]

Page 1 of 1, 200 items per page, 1 of 80 items

# 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
- Not In Use
- Archived

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

The screenshot shows the Modio Forms Dashboard for 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. The top navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The main content area features a table of forms with columns for ID, Status, Templates, Count, Form Name, Form Type, Tag, Last Update, and Actions. A search bar is located in the 'Form Name' column. The 'Status' column is set to 'Available'. The 'Templates' column shows a dropdown menu with 'Single' and 'Composite' options. The 'Form Type' column has a dropdown menu. The 'Tag' column has a dropdown menu. The 'Actions' column contains icons for Send Form, Edit, Download, and Composite. A 'Chat' button is located in the bottom right corner.

**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.

**Template Definitions:**  
**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.

# 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.

The screenshot displays the Modio Forms management interface. A modal window titled "Edit HR: Handbook & Benefit Guide" is open, allowing for the editing of form details. The modal includes the following fields and options:

- Form Name (18579):** HR: Handbook & Benefit Guide
- Form Type:** Other Misc
- Completed Form Permission:** General (Team)
- Status:** Available
- Due Date:** mm/dd/yyyy
- Tag:** (empty field)
- Templates:** Composite
- Package Count:** 2
- Version #:** (empty field)
- Version Date:** mm/dd/yyyy
- Notes:** (empty text area)

In the background, a table lists various forms with columns for ID, Status, Templates, and Count. A table with 4 columns (ID, Status, Templates, Count) and 15 rows is visible. The first row has ID 18019, Status Available, Templates Single, and Count 1. The last row has ID 16794, Status Available, Templates Composite, and Count 14.

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

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

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

**General (Team):** Indicates that the completed form is visible to the provider, and all coordinators on only the Team it was sent from.

**Coordinator Only (Team):** 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**.

# 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)
- **Peer Reference\*:** Send directly to one of provider's active peer references. *This is only available if Form Type is a Peer 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.

# 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 in OneView®.

**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.).

Order	Form/Document Name	Type	Filesize
1	New Field Mappings Test	Single Form	

Provider	Status	Last Sent	Sender	Actions
Marten, Lily - MD	Sent	02/15/2022 11:47 AM	Yasi Givechi	
givechi, yasamin - MD	Completed	02/03/2021 12:16 PM	OneView®Admin   A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 12:02 PM	OneView®Admin   A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 11:57 AM	OneView®Admin   A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 11:49 AM	OneView®Admin   A.J. Bul...	

**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

Send Form "New Field Mappings Test"

Prefill form data for provider(s), then choose a recipient for the form.

Prefill form for: \*  Include Attachments?

Lily Marten (ygivechi@my.smccd.edu) x

Attachments

Documents Browse Completed Forms

Select...

Order	Form/Document Name	Type	Filesize
1	New Field Mappings Test	Single Form	

Send form to:  Myself  Provider  Coordinator  Contact  
Only you will receive a copy of each provider form.

Email Subject  
Specify a subject for the email...

Email Message

Provider	Status	Last Sent	Sender	Actions
Marten, Lily - MD	Sent	02/15/2022 11:47 AM	Yasi Givechi	
givechi, yasamin - MD	Completed	02/03/2021 12:16 PM	OneView*Admin   A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 12:02 PM	OneView*Admin   A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 11:57 AM	OneView*Admin   A.J. Bul...	
givechi, yasamin - MD	Completed	02/03/2021 11:49 AM	OneView*Admin   A.J. Bul...	

**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.

**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>

**Modio Health QA via DocuSign**

New Medicaid Form

From: [Coordinator@modiohealth.com](mailto:Coordinator@modiohealth.com)

Date: Thursday, September 15, 2019

Modio Health QA sent you a document to review and sign.

**REVIEW DOCUMENT**

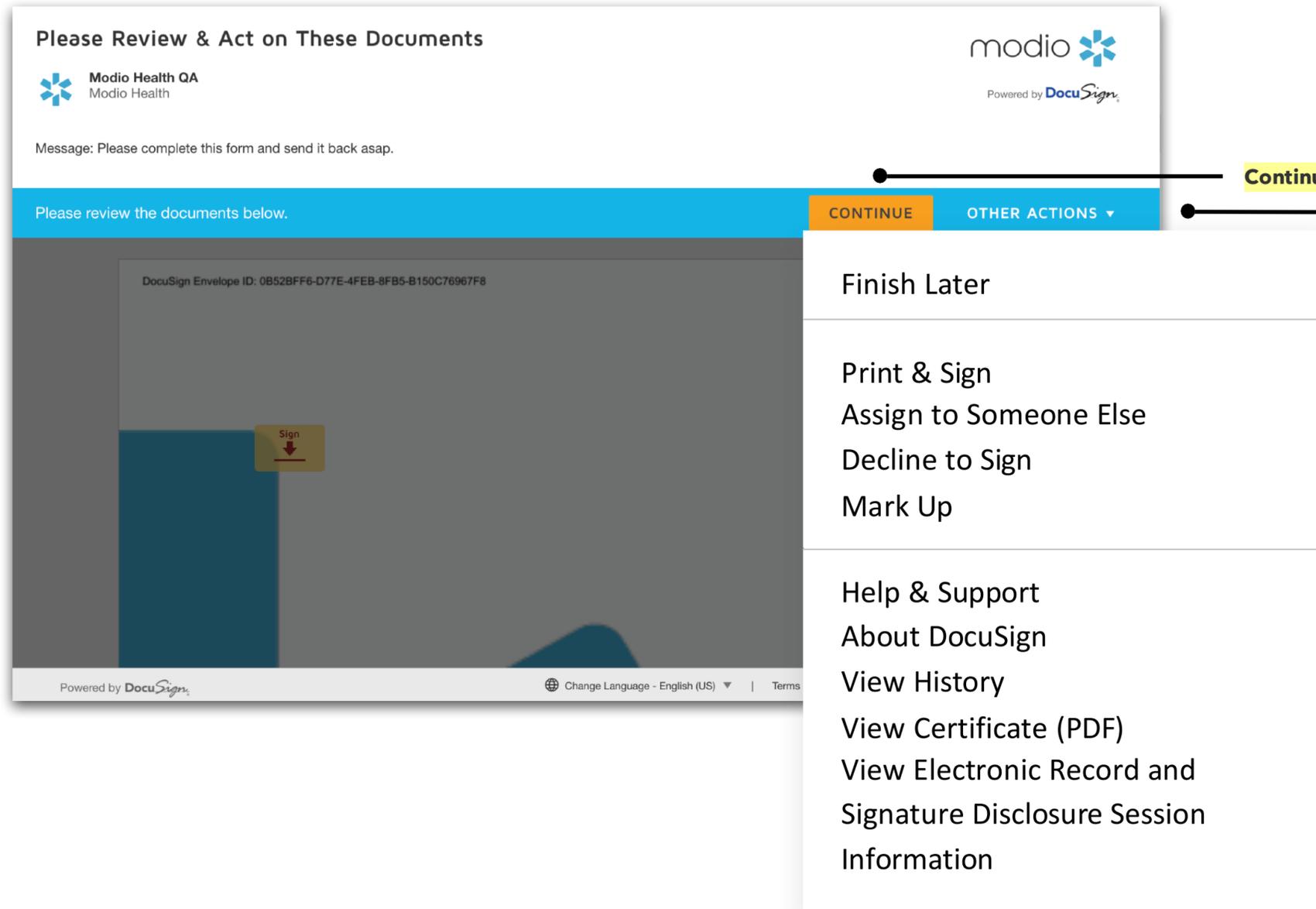
**Modio Health QA**  
[docusign@modiohealth.com](mailto:docusign@modiohealth.com)

Message: Please complete this form and send it back asap.

Powered by DocuSign

# 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.

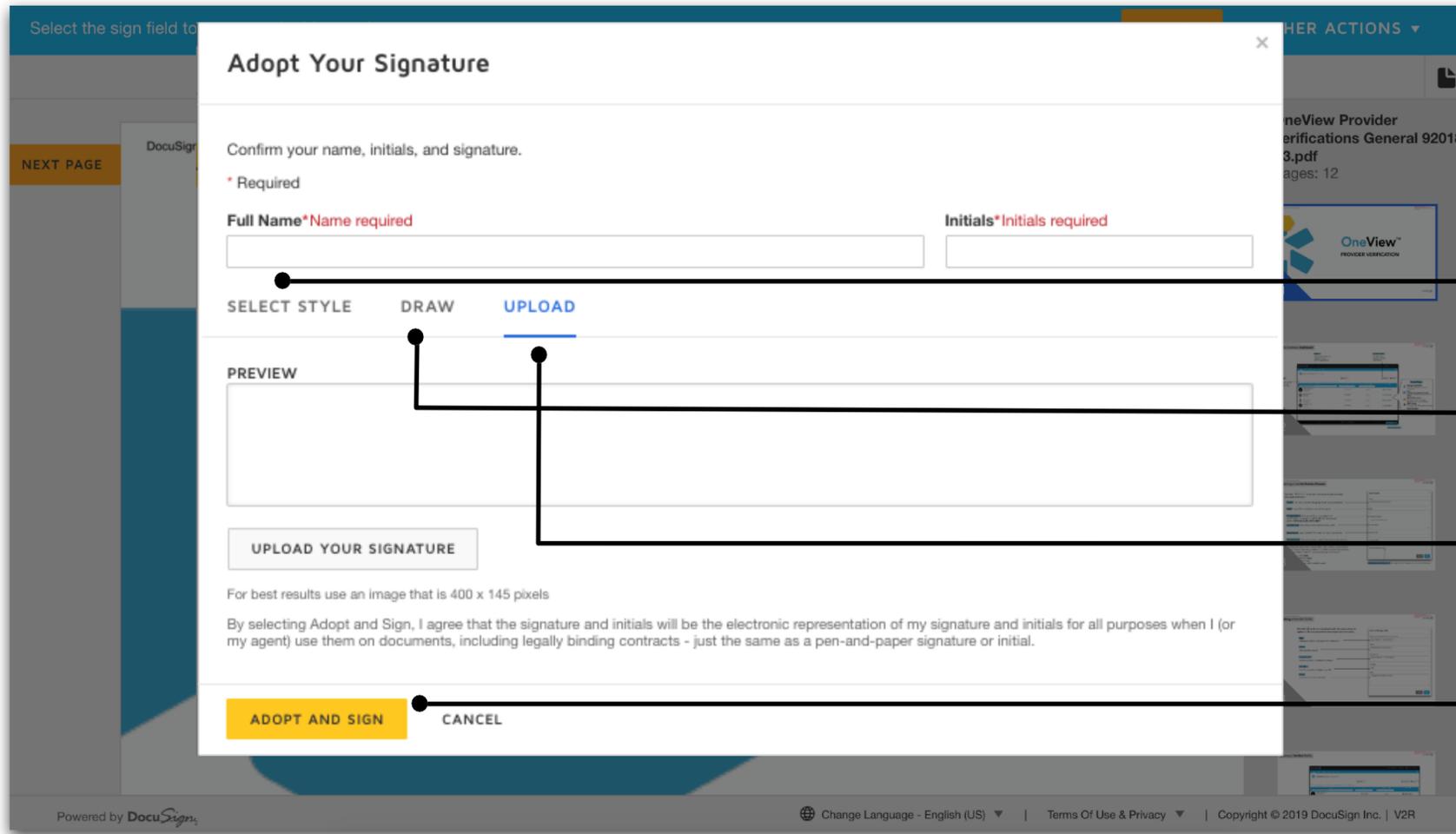


**Continue:** Will take you to the form signature page.

**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.

# FORMS: ADOPTING A SIGNATURE



Select the sign field to

## Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Full Name\*Name required Initials\*Initials required

SELECT STYLE DRAW UPLOAD

PREVIEW

UPLOAD YOUR SIGNATURE

For best results use an image that is 400 x 145 pixels

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

Powered by DocuSign

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2019 DocuSign Inc. | V2R

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.

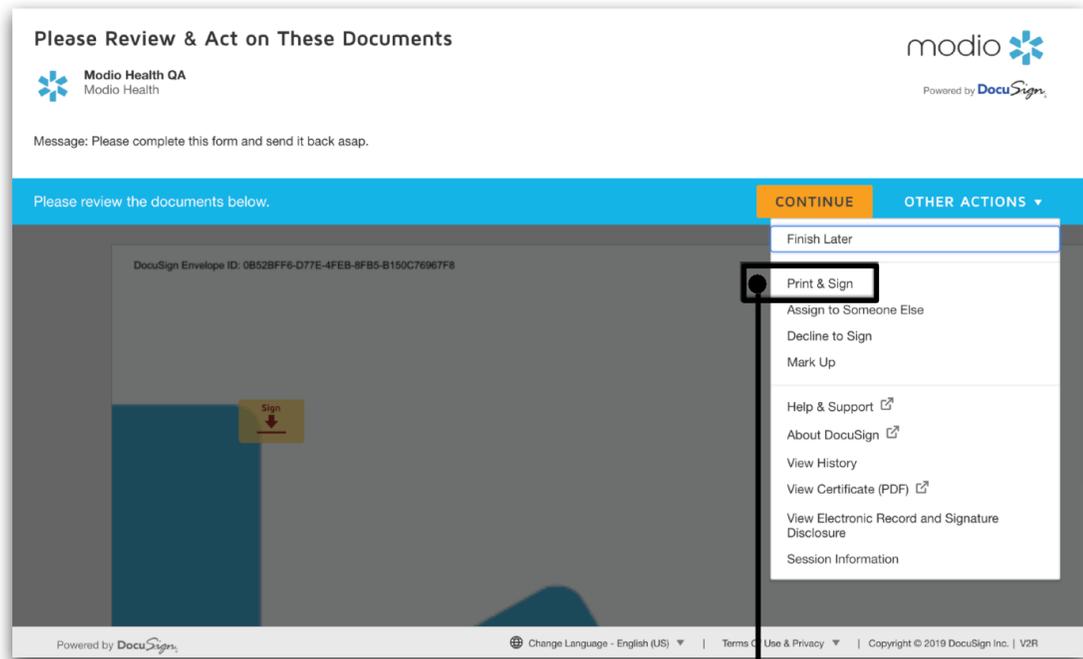
- **SELECT STYLE:** To select from a list of predefined signature styles, click **SELECT STYLE**. If you don't see any signature styles that appeal to you, you can create or upload a signature.
- **DRAW:** Use this field to create your own signature. Use a mouse to draw your signature (or your finger 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.

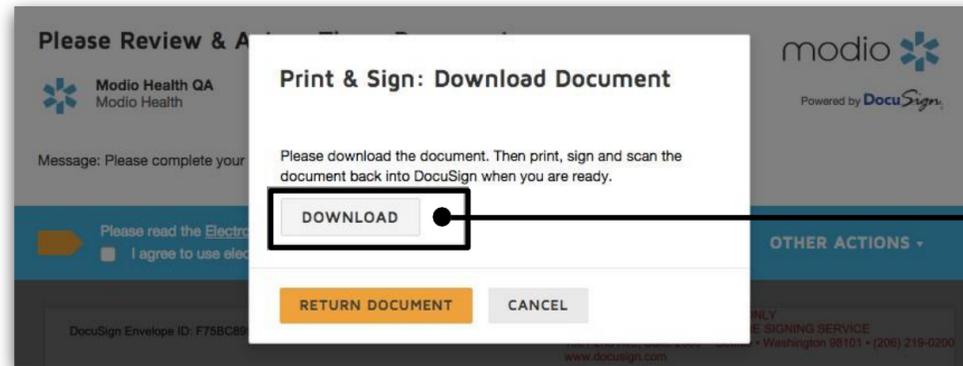


Click “Print & Sign”

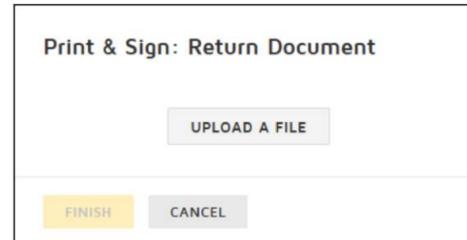


Choose between the return options **Upload** or **Fax**.

- **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.



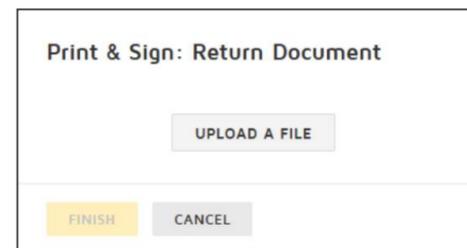
Click **Download**. You will now have a copy of the pre-filled form on your desktop to print and send to your providers. **NOTE:** If you download the document and don't choose to fax or upload the finished form, the Send status within OneView will not show as completed.



### 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.

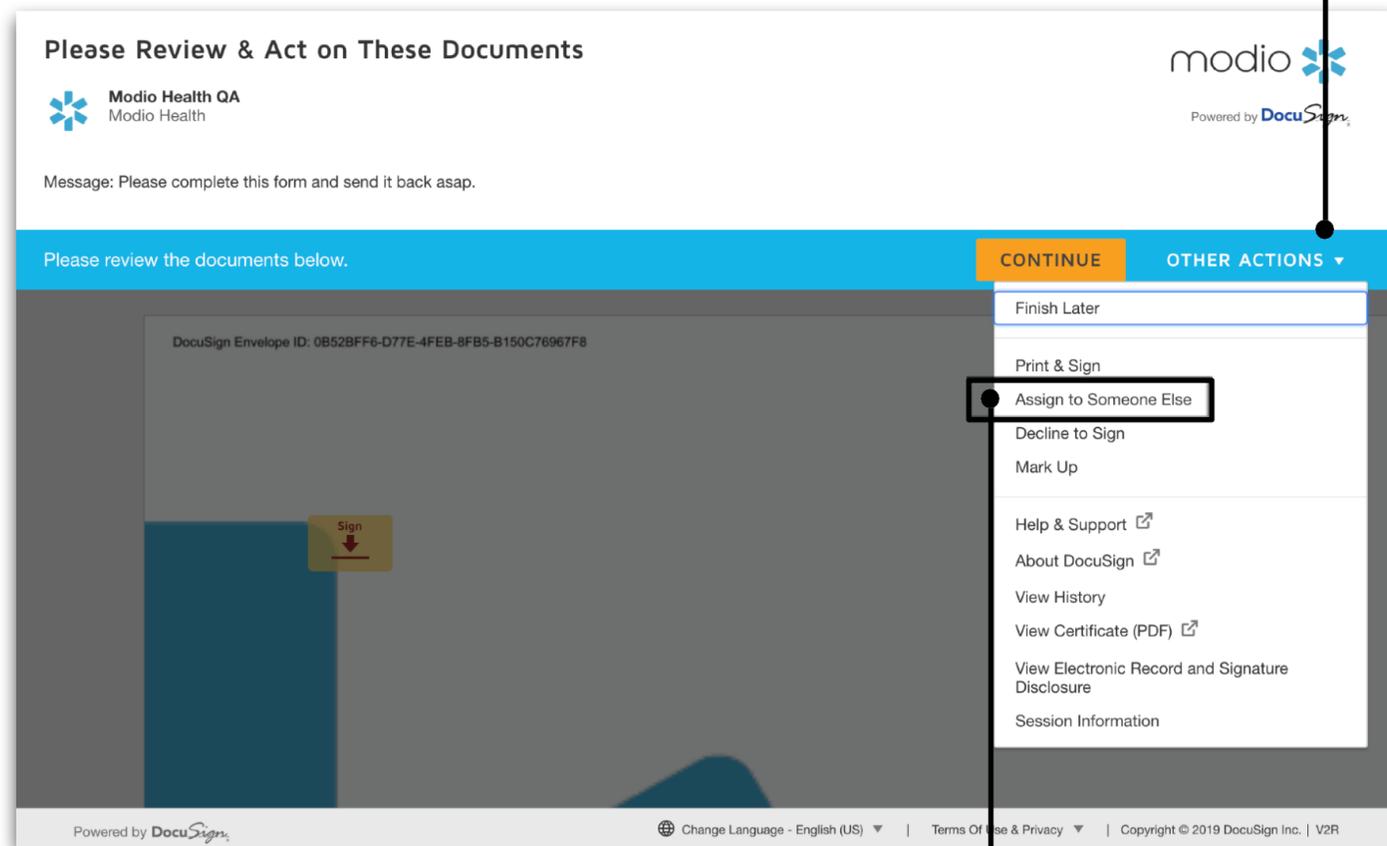


# FORMS : ASSIGN TO SOMEONE ELSE

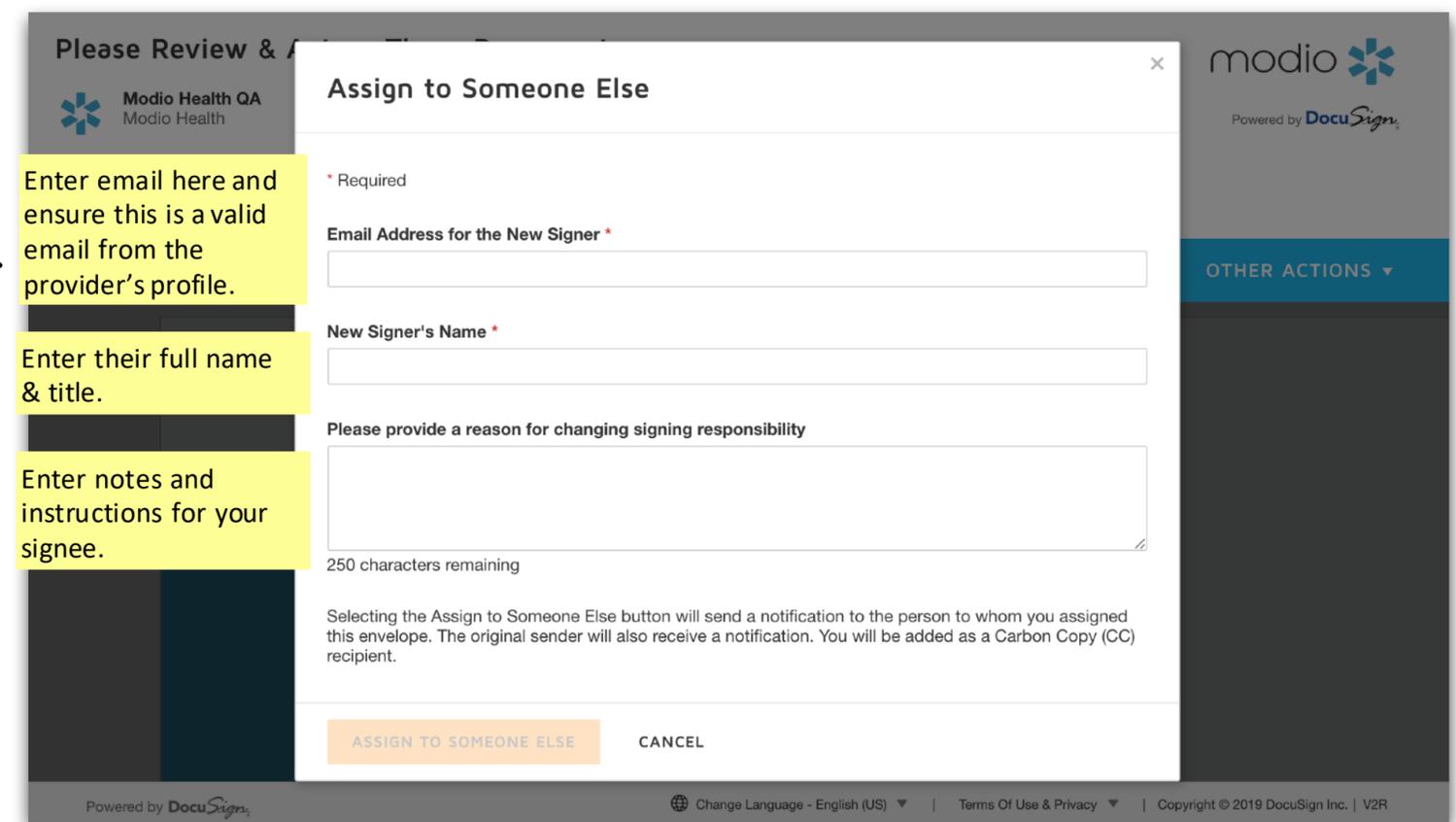
If you assign a form to someone else, they will receive a notification email to complete the form. The email that they receive will appear identical to the original email you received from DocuSign.

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

**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.



Click **"Assign to Someone Else"**

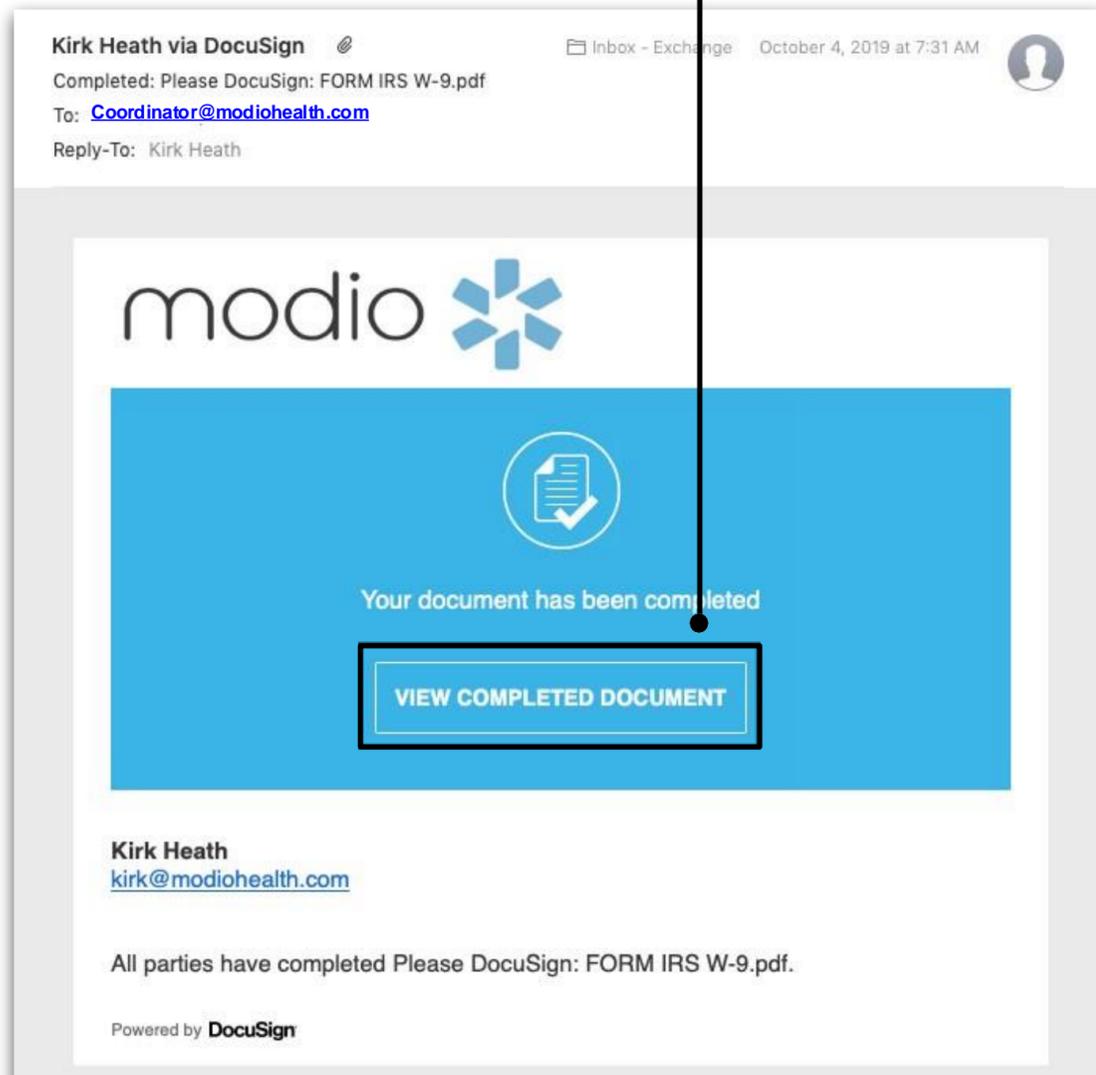


**Note:** Once the form has been signed, you will be notified and the status will change to Complete in OneView™.

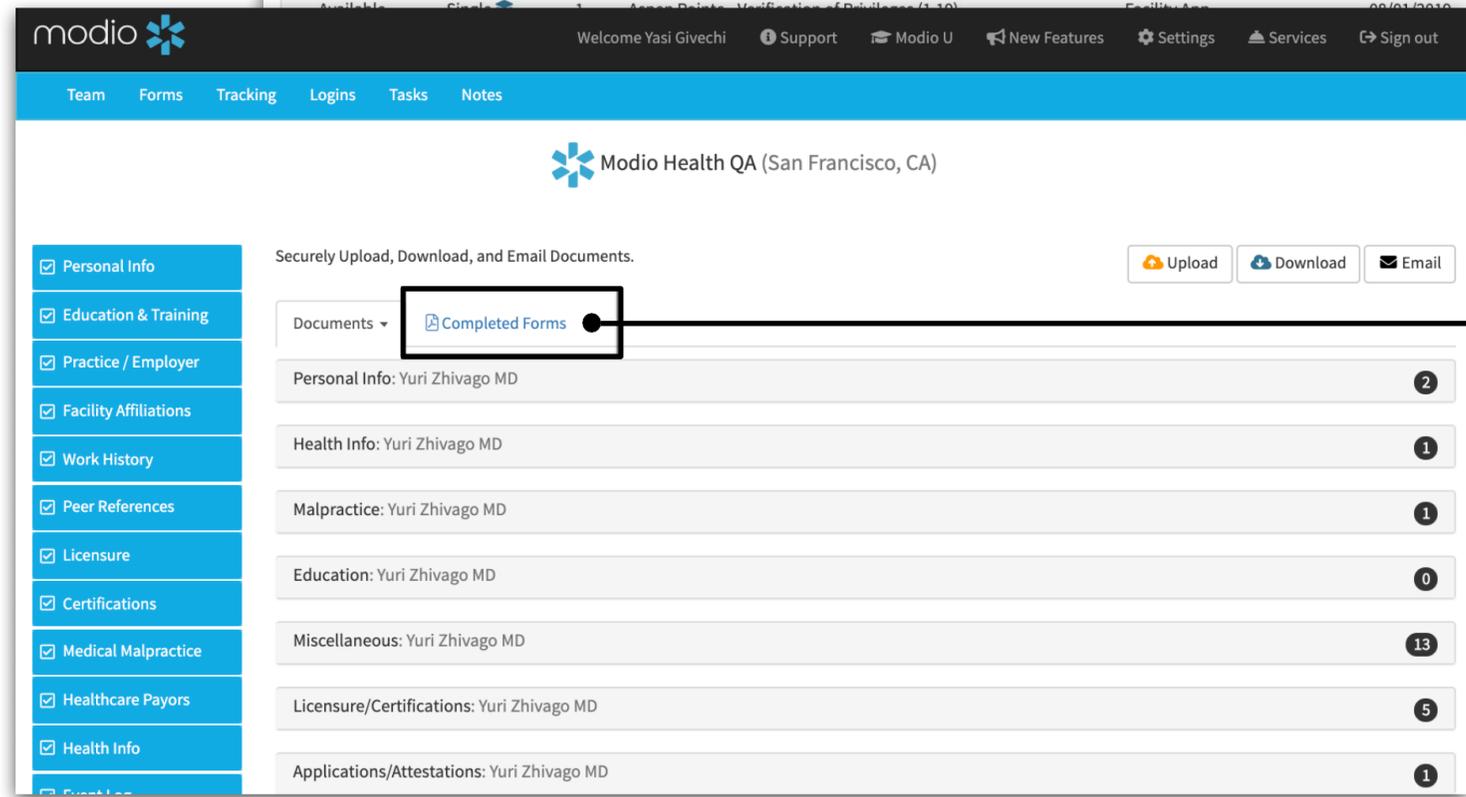
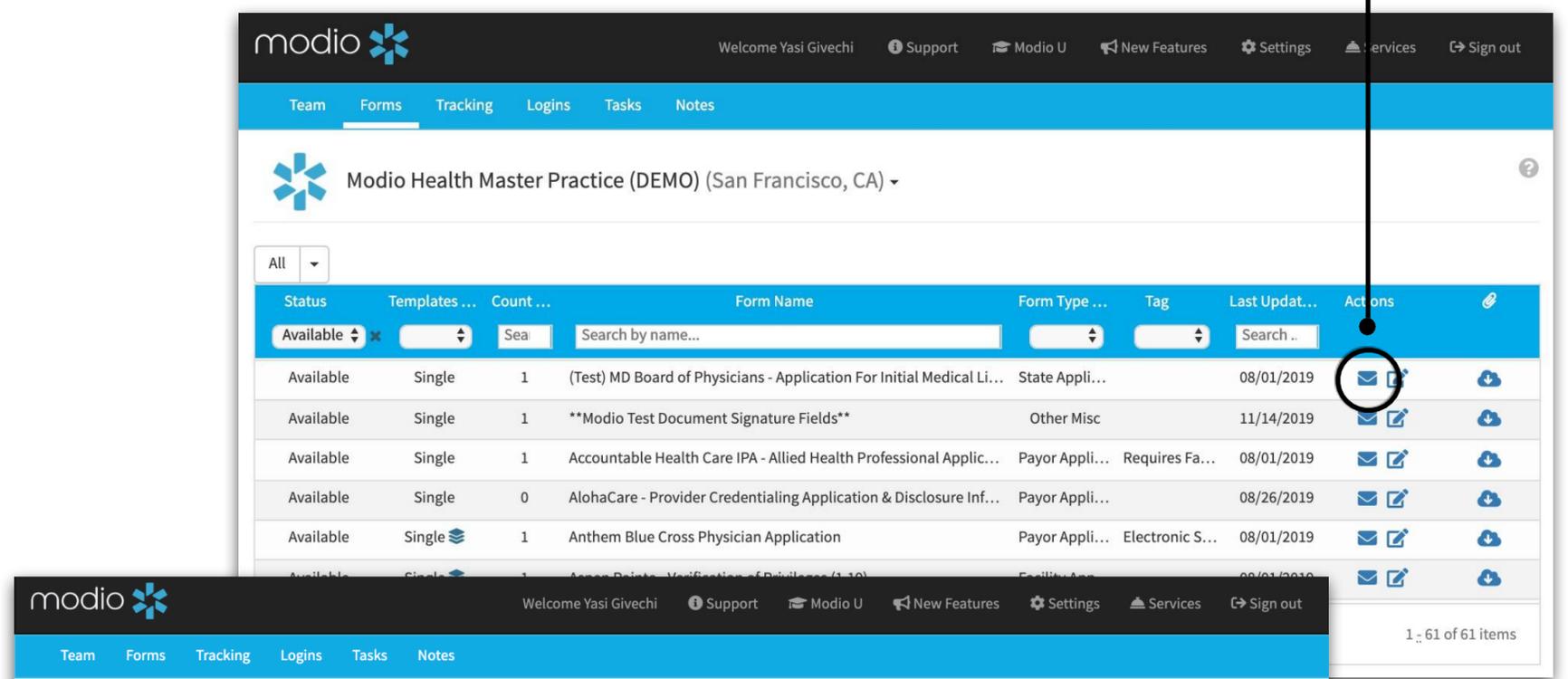
# FORMS : FINDING COMPLETED APPLICATIONS

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.

# 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.

Provider Name	Form Name	Sent On	Delivered On	Completed	Exp. Date	Expires Within	Last Updated	Actions
Heath, Kirk	Dominion National - Dental Office Profile (Oct...	01/25/2023	01/25/2023	01/25/2023			01/18/2024	[Icons]
Heath, Kirk	EM Peer Reference	10/12/2023	10/12/2023	10/12/2023	01/01/2028		03/15/2024	[Icons]
Amber Dennis, LLC	****Test Composite****	08/17/2023	08/17/2023	08/17/2023			01/18/2024	[Icons]
Broughton, Laura	****Test Composite****	05/17/2022	05/17/2022	05/17/2022			03/15/2024	[Icons]
Broughton, Laura	SGF - Peer Reference Form (07.2020)	05/19/2022	05/19/2022	05/19/2022			03/15/2024	[Icons]

**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 [bell icon]
- flag records [flag icon]
- inactivate a record [plus icon]

# FORMS : FINDING COMPLETED APPLICATIONS

If your team is using OneView V2 and has a multi-team set up it might be beneficial to enable the “Sent From” column. This column will display the name of the Team the form was originally sent from.

- Sent From Column:**
1. Clients who have multiple teams and are managing forms from multiple teams will use this column to view the team it was sent from.
  2. Filter, sort and view and report on the Team the form was sent from.

The screenshot shows the Modio OneView V2 interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, the user is logged in as 'Megan Peters'. The main content area is titled 'All Providers' and shows a search bar and a 'Sections' dropdown. The 'Completed Forms' section is active, displaying a table with columns: Provider Name, Title, Primary Specialty, Form Type, Form Name, Sent From, Sent On, Delivered On, Completed On, Exp. Date, Expires Within, and Last Updated. The 'Sent From' column is highlighted with a black box. A dropdown menu is open on the right, showing a list of columns with checkboxes. The 'Sent From' checkbox is checked and highlighted with a black box.

Provider Name	Title	Primary Specialty	Form Type	Form Name	Sent From	Sent On	Delivered On	Completed On	Exp. Date	Expires Within	Last Updated
Abele, Jennifer	MD	Allergy and Immunolo...	Background Check	Background Authorization Form (Certi...	• Modio University •	9/1/2022	9/1/2022	9/1/2022	03/18/2024	Expired	03/29/2024
Heath, Kirk	MD	General Surgery	Facility Applications	GA Uniform Practitioner Credentialing...	• Modio University •	9/23/2021	9/23/2021	9/23/2021			01/18/2024
Heath, Kirk	MD	General Surgery	Other Misc	Modio - Verification Checklist	• Modio University •	12/15/2021	12/15/2021	12/15/2021			01/18/2024
Abakporo, Theophine	MD	Acupuncture	Other Misc	Compliance Documents Acknowledg...	• Modio University •	6/15/2022	6/15/2022	6/15/2022	06/23/2023	Expired	01/18/2024
Abele, Jennifer	MD	Allergy and Immunolo...	Other Misc	EXAMPLE - Verification Checklist	• Modio University •	1/24/2023	1/24/2023	1/24/2023			01/18/2024

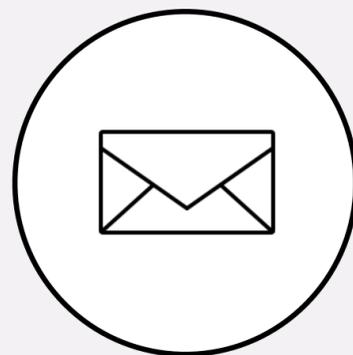
- Accessing the “Send From” Column:**
1. Select the 3 dots icon
  2. Select the column icon to view a dropdown list of the existing columns.
  3. Check the box next to the Sent From option
  4. The “Sent From” column will appear.

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

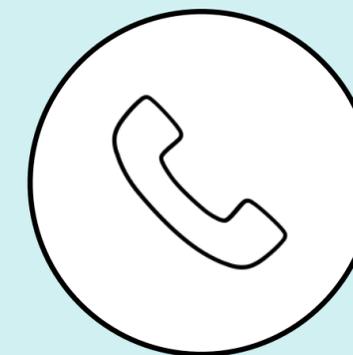
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**Online:**  
Live Chat Support



**Email:**  
[updates@modiohealth.com](mailto:updates@modiohealth.com)



**Phone:**  
844.696.6346