



OneView[®]

TIP GUIDE: LOGINS

Use the Logins feature to store and Usernames and Passwords for any accounts you manage for your providers or your team. This feature will help your team stay organized by keeping all logins in the same place.

Use the Logins tab to store usernames & passwords for any accounts that you manage for your providers and your team. Logins is a Team level feature and is available to all full access coordinators on your team. Providers can only see logins that they own (including logins you create for the provider).

Logins: Use to this tab to start adding Logins and view any existing entries.

Category: Each Site is associated with a Category. Quickly filter by category here.

Add Login: Manually add login credentials by clicking "Add Login."

Dashboard: Each column on the blue toolbar works as a filter. Use the dropdown arrows to apply different filters. Use more than one filter at a time to quickly locate the Logins you are looking for.

Account Owner: Type in the providers or coordinators name to filter and find that users credentials. The name listed in this column should be whomever the Username and Password belongs to

The screenshot shows the Modio Logins dashboard. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below this is a header for 'Modio Health QA (San Francisco, CA)' with an '+ Add Login' button. The main area is a table with columns: Account Owner, Role, State, Status, Category, Site Name, and Actions. The table contains several rows of login data. At the bottom, there are pagination controls showing '1 / 1' and '200 items per page', and a 'Chat' button.

Icon Key:

- Viewing Logins:** To view an existing login, click the Edit icon in the Actions column.
- Direct Link:** Click here to be directed to the stored Logins website.
- Archiving Logins:** Archive a login by clicking here. Archived logins can be retrieved by changing the Status filter to empty and clicking on the blue + icon in the Actions column.
- Flagging:** Click on this icon to "flag" a login when it requires attention. Done updating a flagged login? Just click on the icon again to remove the marker.

Important: Logins is a Team level feature and all accounts that are stored here will be accessible by all full access coordinators on your Team.

Securely store provider or coordinator login information for any site such as CAQH, PECOS, and more.

Add Login:
Start Here by clicking "Add Login."

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Account Owner:
Choose an Account Owner from the drop-down list. The login credentials (username/password) should match the owner you are adding.

3

Site Name:
Type within the free text field to search for the site you wish to add. This will pull a list of potential matches for you to select from. If you picked a website, the URL (address) will be auto-filled in the Site URL and Registration URL fields

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Username & Password:
Enter in the appropriate Username and Password. These fields will be encrypted once you click Save.

7

Notes:
Add Notes as needed, then click Save. This section will be encrypted once you click save.

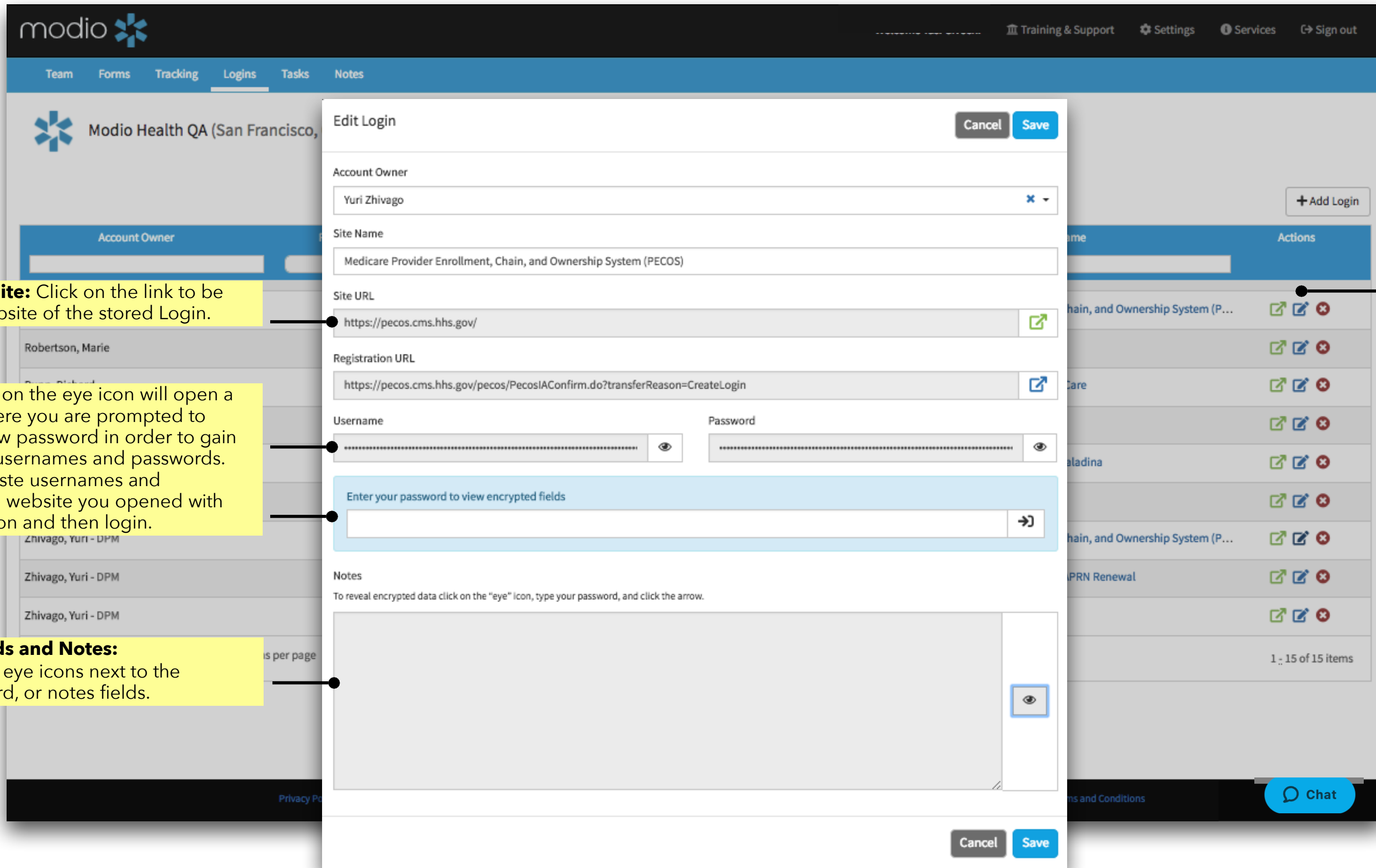
Efficiency Tip: Update your Onboarding Invitation to include Logins. As your provider fills them out, they will appear in this section.

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Site Name & Registration URL:
If you picked a website, the URL (address) will be auto-filled in the Site URL and Registration URL fields. If you picked a custom website, enter the URL for the site here. (Examples are "<http://yourwebsitename.com>" and "<http://yourwebsitename.com/signup>".)

*If the website can't be found within our dropdown, please enter the URL for the site in the "Site URL and Registration URL" fields. Please then send this information to support@modiohealth.com

View and manage existing Logins for your providers and your team.



The screenshot displays the 'Edit Login' modal in the Modio OneView application. The modal is centered over a list of saved logins. The modal fields include: Account Owner (Yuri Zhivago), Site Name (Medicare Provider Enrollment, Chain, and Ownership System (PECOS)), Site URL (https://pecos.cms.hhs.gov/), Registration URL (https://pecos.cms.hhs.gov/pecos/PecosIAConfirm.do?transferReason=CreateLogin), Username (masked with dots), Password (masked with dots), and a 'Notes' section with a text area. A password prompt 'Enter your password to view encrypted fields' is also present. The background shows a table of logins with columns for Name and Actions. The Actions column contains icons for Edit (pencil), View (eye), and Delete (X). A 'Chat' button is visible at the bottom right of the interface.

2

Visiting a Saved Site: Click on the link to be directed to the website of the stored Login.

3

Eye Icon: Clicking on the eye icon will open a password field where you are prompted to enter your OneView password in order to gain access to a saved usernames and passwords. Next, Copy and paste usernames and passwords into the website you opened with the green arrow icon and then login.

4

Viewing Passwords and Notes: Click on any of the eye icons next to the username, password, or notes fields.

1

Editing Logins:
To view an existing login, click the Edit icon in the Actions column.

FAQ

Q- Can I run a report or download all stored information from the Logins tab?

There is a Logins report available by request. Since the Logins report contains sensitive data, clients do not have access to run it themselves. If you would like a copy of the report, please email Support@ModioHealth.com and our team will be happy to assist.

Q- What if I need to change the Username or Password of a Login that I have already added?

1. Start by clicking the "Edit" button for the Login entry you wish to modify.
2. A new modal will appear in the center of your screen, displaying the encrypted username and password.
3. Click the "eye" icon to decrypt these credentials. You'll be prompted to enter your OV password; kindly provide it.
4. Select the "Enter" button located to the right of the password field.
5. Now, you can make any necessary changes to the fields.
6. After making changes, remember to save the updated credentials, as the system won't automatically save this modification.

NOTE: Each time a user decrypts a Login, Modio stores that information for auditing/compliance and tracking purposes.

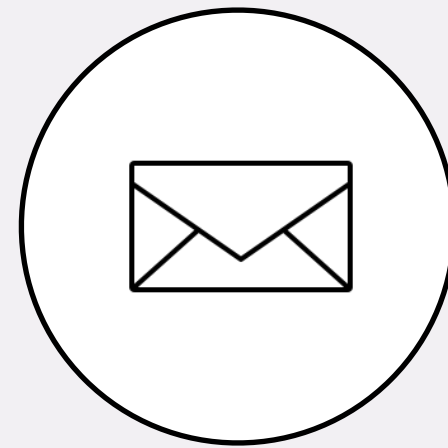
Efficiency Tips:

1. Update your Onboarding invite to request Login Details directly from your provider. When the provider enters their usernames and password from the Onboarding invite, the data will automatically be added to the Logins dashboard.
2. Store your teams shared passwords in the logins tab. If you currently use a shared spreadsheet, enter those login details here. If your team has an FAC profile, you can use that as the Account Owner.
3. Use the notes section in Logins to add additional information for your team to view.

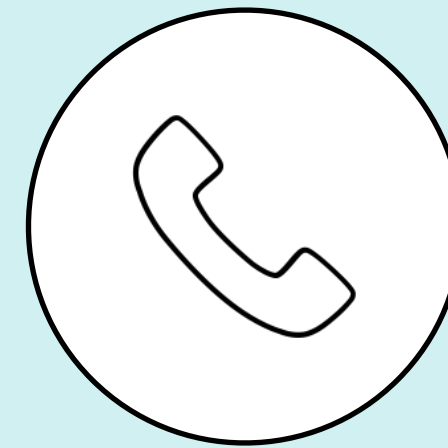
For additional questions or further training,
contact the Modio Team via:



Online:
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