

OneView™

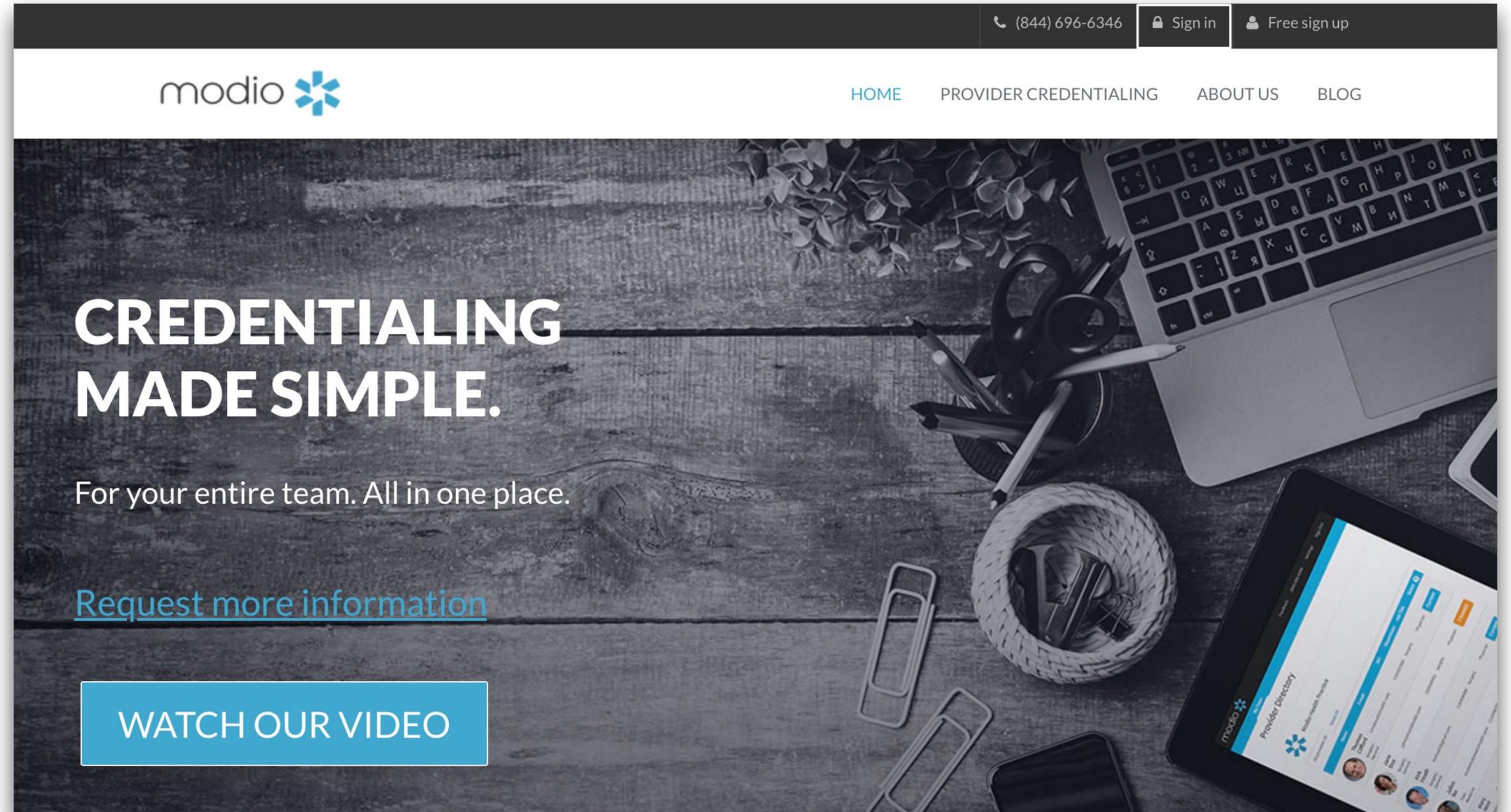
COORDINATOR  
QUICK TIP GUIDE

# OneView™

Credential management for your entire team. All in one place.

## Getting Started

1. Visit our website at: [www.modiohealth.com](http://www.modiohealth.com).
2. On the top right hand corner, click "**Sign in**".
3. Enter in your Username & Password. **These will be provided to you by your account representative.**



# OneView™

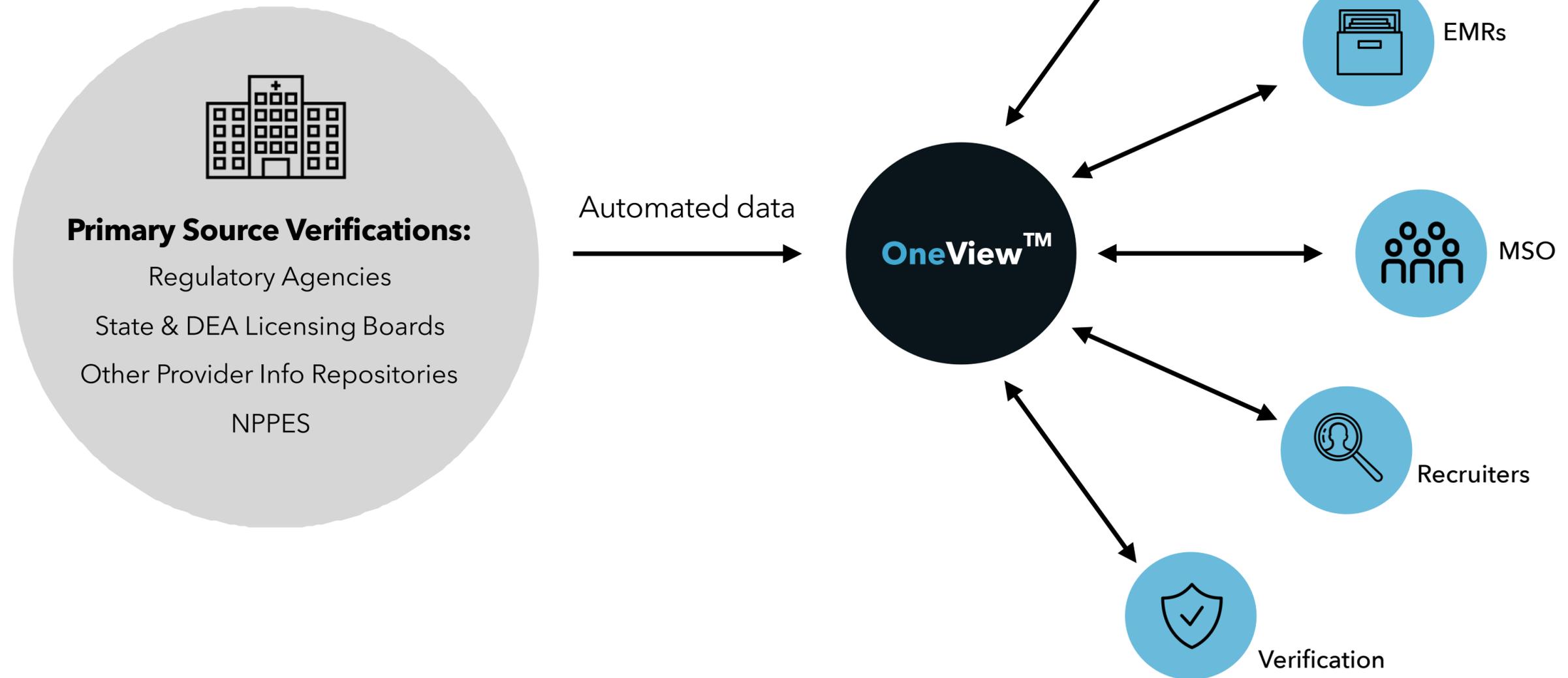
Credential management for your entire team. All in one place.

Information exchange in healthcare is confusing, repetitive, and painful. OneView offers a centralized record for provider data, including NPI, state licensure, DEA registration, and important documents, plus the ability to update all of this information and receive alerts about it.

The record can be accessed across organizations to limit the amount of information transferred between parties. Our goal is to minimize and eventually eliminate the need to send redundant information that can simply be kept in one place and accessed by all parties.

(All provider data is kept in a secure environment and is not accessible to the general public. Organizational information is also kept private.)

## The Unified Provider Record



# THE TEAM DASHBOARD

# Team Dashboard

When you log in, you'll see your Team(s) in the Provider Dashboard.

**Alerts:**  
View a Compliance Report for selected team and download other reports.

**Compliance Issues:**  
View individual provider issues here.

**Add Provider:**  
Instantly add providers to your team(s).

**Message:**  
Invite provider(s) to register and complete their profile.

**Teams:**  
Manage multiple teams under different tabs

**Profile Cards:**  
To view a provider's profile, hover over the providers initials and click "profile".

The screenshot shows the Modio Team Dashboard for 'Modio Health QA (San Francisco, CA)'. The top navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below this, there are tabs for 'All', 'Contract Employees', 'Critical Care', 'Internal Medicine', 'New', and 'Pain Medicine'. A search bar is present for 'Search provider name, specialty, or NPI...'. The main content area is a table with columns for 'Provider', 'Tags', 'Compliance', and 'Actions'. The table lists five providers: Mann, Bernie - MD (Internal Medicine, 2 alerts), Smith, Judd T - MD (Acupuncture, 1 alert), Marten, Lily - MD (Family Medicine, 3 alerts), Zhivago, Yuri - DPM (Internal Medicine, No alerts), and No, Julius Dit - OD (Cardiology, 8 alerts). Each provider row has a set of icons for actions like messaging, adding providers, editing, uploading documents, and tracking CME. A 'Live Help' button is located in the bottom right corner.

**Icon Key:**

- Manage Credentials:** Securely manage a provider's credentials.
- Edit:** Edit providers Tag(s), Team(s), Specialty List, Job Title and Notes.
- Upload Documents:** Securely upload & manage documents from your desktop.
- CME tracking:** Track provider CME goals and credits.
- Active/Inactive:** Make a provider active or inactive (does not delete them). View inactive providers under the "Issues" tab.
- Incomplete Profile:** Indicates provider has started their profile.
- Accepted Profile:** Indicates provider has completed their profile.
- New Invitation:** Indicates a new provider. Click to invite.
- Completed Profile:** Indicates provider has completed their onboarding.

Live chat support

# ONBOARDING PROVIDERS

# Adding Providers

 **Add Provider:**  
Start here to add a new provider

**Teams:**  
Select the team you need to add your new provider to.

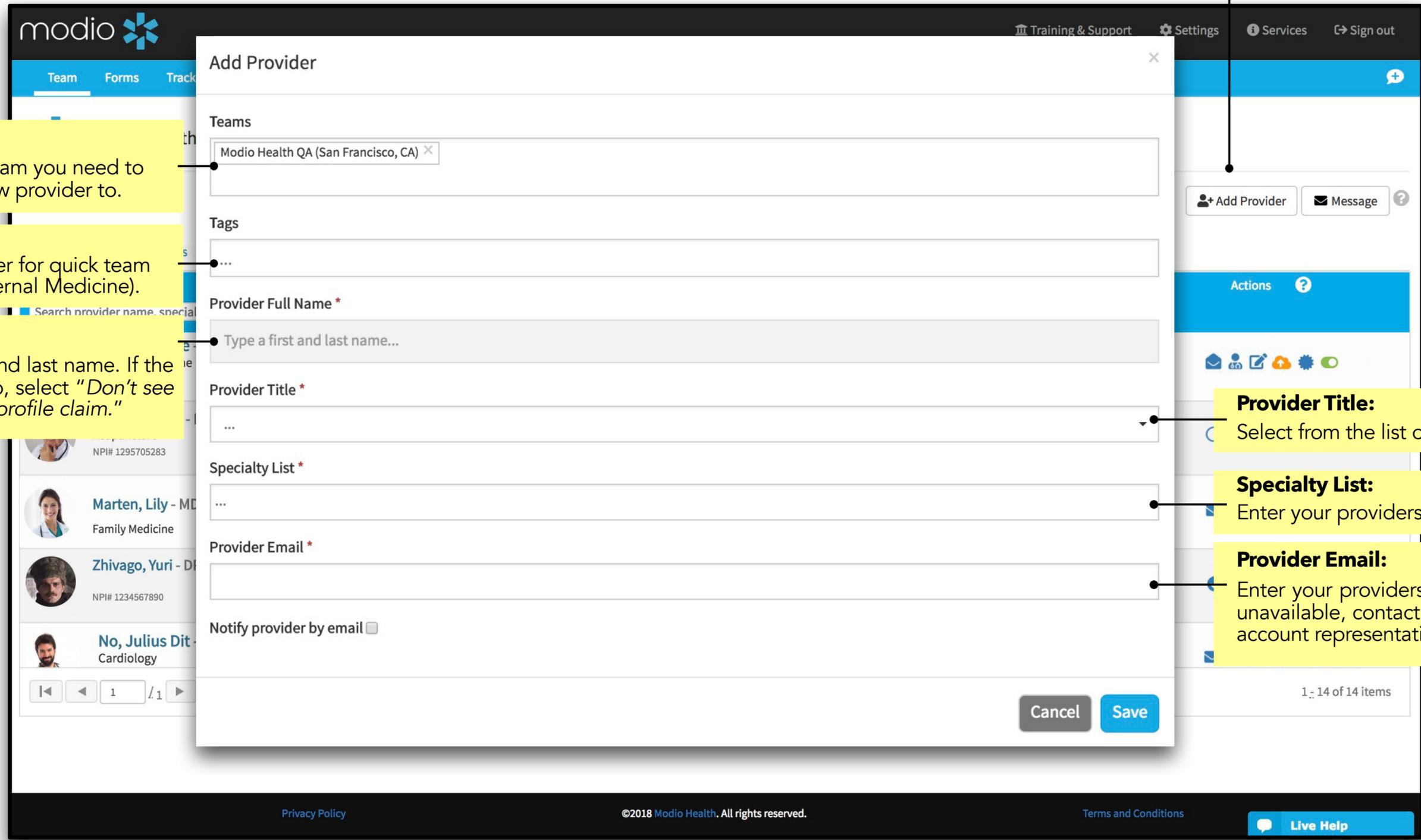
**Tag(s):**  
Tag your new provider for quick team identification (ie. Internal Medicine).

**Provider Full Name:**  
Enter your providers full name and last name. If the providers name doesn't show up, select "Don't see profile listed? Click here to skip profile claim."

**Provider Title:**  
Select from the list of professional titles.

**Specialty List:**  
Enter your providers specialty.

**Provider Email:**  
Enter your providers email. If its unavailable, contact your Modio account representative.



The screenshot shows the 'Add Provider' form in the Modio interface. The form is overlaid on a background showing a list of existing providers. The form fields include:

- Teams:** A dropdown menu with 'Modio Health QA (San Francisco, CA)' selected.
- Tags:** An empty text input field.
- Provider Full Name \*:** A text input field with the placeholder 'Type a first and last name...'.
- Provider Title \*:** A dropdown menu with '...' selected.
- Specialty List \*:** A text input field with '...' as a placeholder.
- Provider Email \*:** A text input field.
- Notify provider by email:** A checkbox that is currently unchecked.

At the bottom of the form are 'Cancel' and 'Save' buttons. The background interface shows a list of providers with their names, titles, and NPI numbers, along with navigation controls and a 'Live Help' button.

# TEAM MANAGEMENT

# Team Management

Customize your team dashboard by organizing your providers by department, updating their speciality or by adding notes.

The screenshot displays the Modio Team Management interface. At the top, the user is logged in as 'Yas Givechi' and has access to various settings and services. The main navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The current team is 'Modio Health QA (San Francisco, CA)'. A list of providers is shown, including Mann, Bernie - MD, Smith, Judd T - MD, Marten, Lily - MD, Zhivago, Yuri - DPM, and No, Julius Dit - OD. An 'Edit Yuri Zhivago, DPM' modal window is open, showing fields for Tags (Internal Medicine, Pain Medicine), Teams (Modio Health QA), Specialty List (Addiction Medicine, Pain Medicine), Job Title (DPM), and Notes (Moving to new address in 3 weeks). The modal has 'Cancel' and 'Save' buttons at the bottom.

**Tag(s):** Manage the team(s) your provider belongs to (ie. Internal Medicine).

**Teams(s):** If your provider belongs to multiple teams, type the name here.

**Specialty List :** If your provider has multiple specialities, enter them here.

**Job Title :** Edit your provider's medical license (ie MD, DO, DDS).

**Notes:** Include any Note you need to reference back to for your provider here.

Click here  to update or edit a select provider's basic team information.

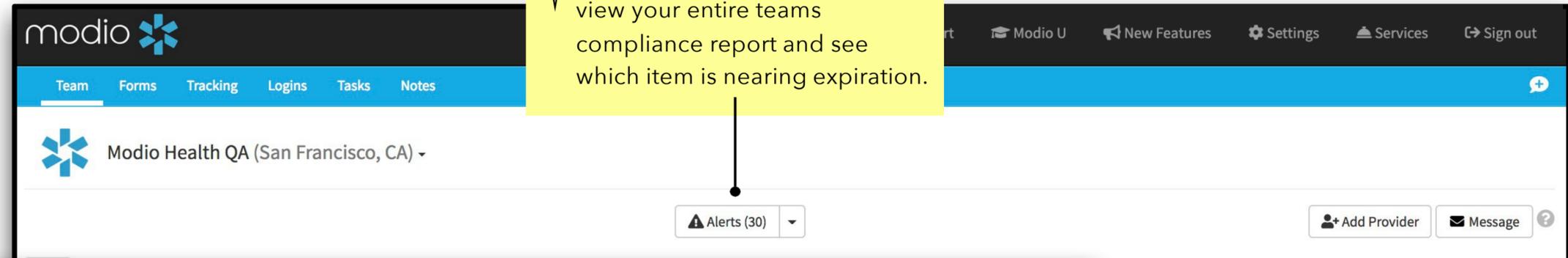
Click **Save** and you will see the new updates.

# TEAM ALERTS

# Compliance Alerts

View your entire team's compliance report and see expired or expiring items.

**Start Here:**  
view your entire teams compliance report and see which item is nearing expiration.



**State Licenses**

Provider Name	License	State	Status	Exp. Date	Expires In	Last Updated	Actions
Yuri Zhivago, DPM	123456789 (NP)	CA	Active	10/30/2018	a month	09/18/2018	[Refresh] [Share] [Edit] [Alert]
Yuri Zhivago, DPM	KST1321	KS	Active	07/09/2017	expired	05/04/2018	[Share] [Edit] [Alert]
Yuri Zhivago, DPM	TN-1342	TN	Active	07/27/2017	expired	05/04/2018	[Share] [Edit] [Alert]

- DEA Licenses (8 alerts)
- State Controlled Substance Licenses (0 alerts)
- ABMS Certifications (1 alert)
- OIG (0 alerts)
- CAQH (1 alert)
- Other Certifications (0 alerts)
- Documents (11 alerts)
- Malpractice Insurance (1 alert)

**Email Alerts:**  
Send email alerts to your providers or coordinators with impending expiration dates.

**Color coded indicators:**  
**Yellow:** There are 60 or fewer days until the license expires.  
**Red:** The license has expired.

# DOCUMENTS

# Documents

Upload, download, and share from the Documents tab in your providers' profiles.

## Upload Documents :

Upload one or more files directly into your providers file.

## Download Zip :

Download a zip file of all documents

## Share in Email :

Share any document directly with your provider or any coordinator in your team.

## Drag and Drop:

To upload a single document, simply drag and drop to the platform.

## Batch Document Uploading:

Upload multiple files by clicking here.

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 DPM: Documents'. Below this, there are three buttons: 'Upload Documents', 'Download Zip', and 'Share In Email'. The main content area is titled 'Securely upload and manage documents here.' and features a sidebar with various document categories, each with a checkmark and a count. The 'Documents' category is selected, showing a table with columns for Type, File Name, Date, Permission, Expiration Date, Status, and Actions. A single document is listed: 'Passport Copy' with file name 'YuriZhivagoPassport.jpeg', date '09/11/2018', permission 'Coordinator', expiration date '11/11/2018', and status 'Active'. Below the table, there is a list of document categories: Health Info (0), Malpractice (0), Education (0), Miscellaneous (10), Licensure/Certifications (2), Applications/Attestations (0), Admin (0), CME/CEU (1), and Verifications (0). At the bottom of the sidebar, there is a 'Drop documents here or Click here to browse' area with a list of accepted file formats: pdf, docx, txt, rtf, gif, jpg, png.

\*For a more detailed guide to Documents, please refer to the Documents Guide in the Training and Support Section.

# Documents

Upload, download, and share from the Documents tab in your providers' profiles.

## File Type:

Select the file Type(s) from the drop-down menu.

## Expiration:

Click the Expiration date(s). Expiring or expired documents will show up in the "Issues" list.

## File Name:

Name your file. Note, OneView auto-detects the type of documents you upload.

## Permissions:

**Public** - Visible only to your team(s)  
**Coordinator** - Visible only to Coordinator(s)

The screenshot displays the Modio web application interface. At the top, the navigation bar includes the Modio logo, user information (Welcome Yas Givechi), and various utility links (Support, Modio U, New Features, Settings, Services, Sign out). Below this is a secondary navigation bar with tabs for Team, Forms, Tracking, Logins, Tasks, and Notes. The main content area is titled "Yuri Zhivago DPM: Documents". A modal window titled "File Upload for Julius No MD" is open, showing a form with the following fields: "File name" (containing "SC State License Card exp 9/1/2017.pdf"), "File size" (1.37 MB), "Type" (a dropdown menu set to "State License"), "Expiration" (a date field set to "9/1/2017"), and "Permission" (a dropdown menu set to "Public"). "Cancel" and "Upload" buttons are at the bottom right of the modal. Below the modal, a sidebar on the left contains a list of document categories with checkboxes: Certifications, Medical Malpractice, Healthcare Payors, Health Info, Event Log, Documents, and Summary. The main area shows a list of these categories with their respective counts: Health Info (0), Malpractice (0), Education (0), Miscellaneous (10), Licensure/Certifications (2), Applications/Attestations (0), Admin (0), CME/CEU (1), and Verifications (0). A "Drop documents here" area is visible at the bottom left of the main content, with a note about accepted file formats: pdf, docx, txt, rtf, gif, jpg, png. The footer contains links for Privacy Policy, Terms and Conditions, and Live Help, along with a copyright notice for 2018 Modio Health.

\*For a more detailed guide to Documents, please refer to the Documents Guide in the Training and Support Section.

# Documents

If you want to avoid entering details like your file type and expiration date, you can use our *built-in detection system* to have those details grabbed right from your file's original name. 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).

**Below is a formatting guide for naming your files:**

1)) First Name Last Name Document Type 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
Other	"unknown"	Jane Doe Unknown EXP 01022018

\*For a more detailed guide to Documents, please refer to the Documents Guide in the Training and Support Section.



# LOGINS AND PASSWORDS

# Logins

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

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

**Account Owner:**  
Choose an Account Owner from the drop-down list. This is the person to whom the login details belong, and can be either a coordinator or provider on your team.

**Site Name:**  
Click on the blank space next to Site Name to enter the website name.

**Username & Password:**  
Enter in the appropriate Username and Password.

**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>".)

**Notes:**  
Add Notes as needed, then click Save.

The screenshot shows the 'Add Login' form in the Modio application. The form is overlaid on a background showing a list of team members. The form fields include: 'Account Owner' (a dropdown menu with 'Select coordinator or provider...' selected), 'Site Name' (a text input field), 'Site URL' (a text input field), 'Registration URL' (a text input field), 'Username (20 of 250)' (a text input field containing 'Yuri@modiohealth.com'), 'Password (10 of 250)' (a masked password input field), and 'Notes (0 of 2000)' (a large text area). There are 'Cancel' and 'Save' buttons at the top right and bottom right of the form. A 'G' icon is visible in the bottom right corner of the form area. The background shows a list of team members with names like Bergunio, Ginno; Givechi, Yasi; Lam, Naomi; Mann, Bernie - MD; Robertson, Marie; and Rupp, Richard. At the bottom of the page, there is a footer with 'Privacy Policy', '©2018 Modio Health. All rights reserved.', 'Terms and Conditions', and a 'Leave a Message' button.

# CREATING TASKS

# Tasks

Communicate with any provider or coordinator on your team by adding a task as a "to-do", a reminder when credentials or documents approach expiration, missing information, or a request for current supporting documentation.

The screenshot shows the 'Add Task' form in the Modio application. The form is titled 'Add Task' and is part of a larger interface for 'Modio Health QA (San Francisco, CA)'. The form includes the following fields and sections:

- Assigned To:** A dropdown menu with the text 'Select assignees...' and a filter for 'All: Coordinators | Providers'.
- Priority:** A dropdown menu with 'Low' selected.
- Due Date:** A date input field with a calendar icon and the format 'mm/dd/yyyy'.
- Status:** A dropdown menu with 'New' selected.
- Tag:** An empty text input field.
- Share:** A dropdown menu with 'Coordinator(s)' selected.
- Task Name:** A text input field.
- Notes:** A large text area for adding a short description of the task.
- Attachment:** A section with a 'Document' dropdown, a 'Choose File' button, and the text 'No file chosen'. There is also a checkbox for 'Auto-complete Status?' which is checked.

At the bottom of the form, there are 'Cancel' and 'Save' buttons. The 'Save' button is highlighted in blue.

**Add Task:**  
Start Here. Click the Add button to create a new task or select from the library.

**Library**  
Click the Library button top open the Task Library

**Assigned To:**  
Select the provider or coordinator (or both) to whom you're assigning the task.

**Priority:**  
Set the Priority of the task by choosing low, medium, or high from the dropdown.

**Due Date:**  
Set a Due Date for your provider(s) or Coordinator(s) to complete the task.

**Share:**  
Select whom you want to Share this task with (either Coordinators or Recruiters).

**Task Name:**  
Name your task.

**Attachment:**  
If needed, attach a document to the task here. When the document is opened or a link is clicked, the task will move to the "Complete" status.

**Status:**  
Choose an initial status for the task.

**Tag:**  
Organize tasks by project or type by giving each task a tag

**Notes:**  
Add a short description of the task here.

**Click Save.**

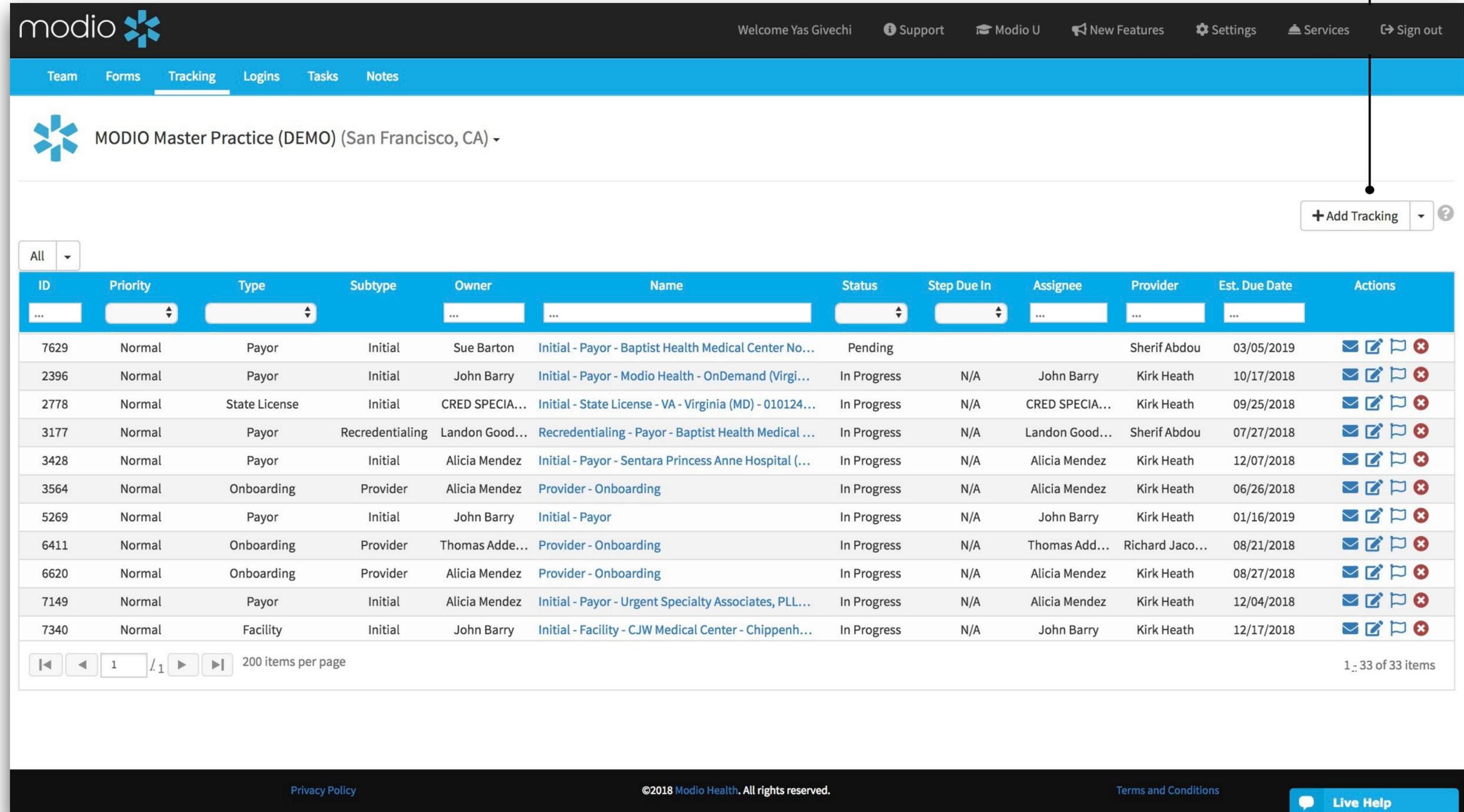
# TRACKING WORKFLOWS

# Tracking

The Tracking feature is an integrated workflow tool to track all the credentialing and payor enrollment applications in process. There is a library of workflow templates for you to choose from or we can build customized workflows for your organization.

Use Tracking to bring transparency to the progress being made on medical staff applications, license renewals, CAQH enrollment/attestation, payor applications and more. In addition, there are several real-time reports to replace the manual reports you are creating today as follow up tools, management reports or status on new provider payor participation.

 **Add Tracking:** Click here to add a new item to track on the list.



The screenshot displays the Modio Tracking interface for 'MODIO Master Practice (DEMO) (San Francisco, CA)'. The interface includes a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. A '+ Add Tracking' button is visible in the top right. Below the navigation is a table with the following columns: ID, Priority, Type, Subtype, Owner, Name, Status, Step Due In, Assignee, Provider, Est. Due Date, and Actions. The table contains 12 rows of tracking items. At the bottom, there is a pagination control showing '1' of 1 items and '200 items per page'. The footer includes 'Privacy Policy', '©2018 Modio Health. All rights reserved.', 'Terms and Conditions', and a 'Live Help' button.

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due In	Assignee	Provider	Est. Due Date	Actions
7629	Normal	Payor	Initial	Sue Barton	Initial - Payor - Baptist Health Medical Center No...	Pending			Sherif Abdou	03/05/2019	   
2396	Normal	Payor	Initial	John Barry	Initial - Payor - Modio Health - OnDemand (Virgi...	In Progress	N/A	John Barry	Kirk Heath	10/17/2018	   
2778	Normal	State License	Initial	CRED SPECIA...	Initial - State License - VA - Virginia (MD) - 010124...	In Progress	N/A	CRED SPECIA...	Kirk Heath	09/25/2018	   
3177	Normal	Payor	Recredentialing	Landon Good...	Recredentialing - Payor - Baptist Health Medical ...	In Progress	N/A	Landon Good...	Sherif Abdou	07/27/2018	   
3428	Normal	Payor	Initial	Alicia Mendez	Initial - Payor - Sentara Princess Anne Hospital (...	In Progress	N/A	Alicia Mendez	Kirk Heath	12/07/2018	   
3564	Normal	Onboarding	Provider	Alicia Mendez	Provider - Onboarding	In Progress	N/A	Alicia Mendez	Kirk Heath	06/26/2018	   
5269	Normal	Payor	Initial	John Barry	Initial - Payor	In Progress	N/A	John Barry	Kirk Heath	01/16/2019	   
6411	Normal	Onboarding	Provider	Thomas Adde...	Provider - Onboarding	In Progress	N/A	Thomas Add...	Richard Jaco...	08/21/2018	   
6620	Normal	Onboarding	Provider	Alicia Mendez	Provider - Onboarding	In Progress	N/A	Alicia Mendez	Kirk Heath	08/27/2018	   
7149	Normal	Payor	Initial	Alicia Mendez	Initial - Payor - Urgent Specialty Associates, PLL...	In Progress	N/A	Alicia Mendez	Kirk Heath	12/04/2018	   
7340	Normal	Facility	Initial	John Barry	Initial - Facility - CJW Medical Center - Chippenh...	In Progress	N/A	John Barry	Kirk Heath	12/17/2018	   

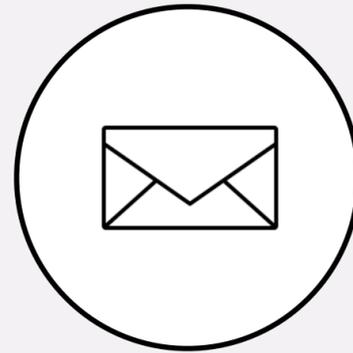
\*For a more detailed guide to Tracking, please refer to the Tracking Guide in the Training and Support Section.

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

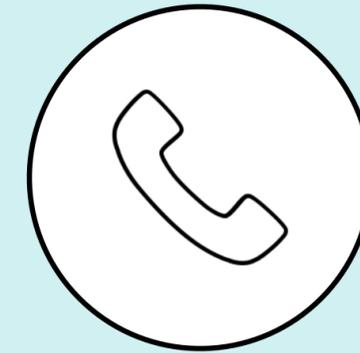
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**Online:**  
Live Chat Support



**Email:**  
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**Phone:**  
844.696.6346