modio University

Best Practices: **Tracking Management**

Purpose

- Tracking is a customizable **workflow management tool** that allows our coordinators to track credentialing and enrollment workflows/SOP's like payor enrollment, onboarding, facility privileging, licensing, and verifications.

- It is intended to provide a **centralized work queue** in OneView for all work being done, by all coordinators, on all providers and viewable by all full access coordinators.

- It often **replaces a manual process** used to record the due diligence/follow up processes and status reporting needs of the credentialing/enrollment team.

Best Practice Tips: OneView Tracking Management

- Fewer steps are **better**.
- Create **short step names** and **long descriptions**. This will make the template more meaningful with clear direction in the description.
- Pad out the tat on steps.
- Fewer **steps** and fewer **templates** are easier to maintain for clients from a documentation standpoint
- Keep step names and descriptions **generic.** Leave out specific staff member names (for example and use titles instead)

Tracking **Template**

Tracking template: a customizable workflow, often an organization's SOP created using an excel format to then be added to your OneView platform by the Modio team.

A Tracking Template should include:

- Type – subtype
- Step name
- Step description, starting with the
 symbol
- Estimated TAT on each step in business days

Functionality

Different section of the provider profile link to Tracking via quick start links that look like stars:

- Payor enrollment initial and re-credentialing links to the provider's Healthcare Payors section.
- State license initial and renewal links to the provider's Licensure section.
- Facility privileging initial and reappointment links to Facility Affiliation section.
- Onboarding link to the provider's personal info section.
- The “quick start star” is limited to 2 subtypes per 1 type.
  - For example:
    - Payor – **Initial** and Payor – **Re**credentialing or State License – **Initial** and State License – **Re**newal.
  - This “star” link will only work if there is at most an initial and a recredentialing template. If there are more than two templates for a given type, that link will be broken, and some functionality will be lost.

Tracking Reports

Tracking all teams (team page):

- Shows latest step for each tracking event
- High level snapshot of how many in each status (in progress, completed, etc)
- Pulls tracking across all teams that coordinator has access to

Open items (tracking page):

- Any in progress or new steps for each tracking event
- Pulls tracking for team that you're in

All items (tracking page):

- All steps, status, and latest note on each
- Pulls tracking for team that you're in

Payors with Tracking Notes (Tracking page):

- All Healthcare Payors with Tracking status and note if there is Tracking setup with quicklinks
- Pulls Tracking for Team that you're in

Affiliation and Payors with Tracking Notes (Tracking page):

- Verify similar to Payors with Tracking notes report but with some different columns (includes provider tag for example)
- Pulls Tracking for Team that you're in

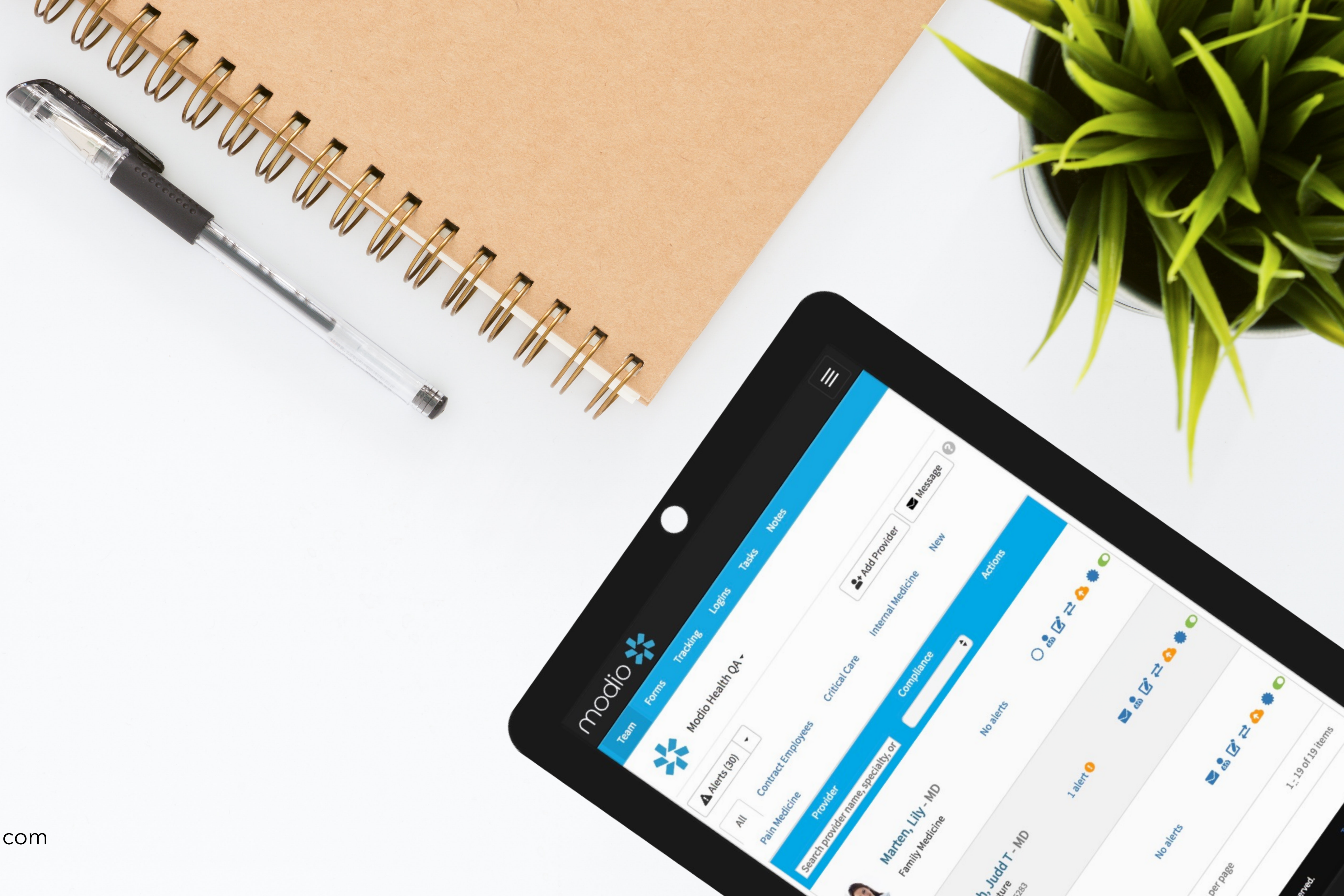
Notes (Tracking page):

- All notes from all steps on all Tracking events
- Pulls Tracking for Team that you're in

Tracking **Additions** and **Revisions**

Any changes you would like made to the tracking within your team must be submitted via the excel template

- Which team(s) will any revisions/additions be made on
- The current name of the tracking type and subtype
- Any changes you wish to be applied must be highlighted within the spreadsheet



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