



OneViewtm

Provider Onboarding

Onboarding

Dashboard

The screenshot shows the Modio Health QA dashboard for San Francisco, CA. The top navigation bar includes links for Team, Forms, Tracking, Logins, Tasks, and Notes. The main header displays the organization name and a search bar. Below this, there are filters for Alerts (30), Add Provider, and Message. The main content area is a table of providers with columns for Provider, Tags, Compliance, and Actions. The providers listed are 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). A callout box on the right explains the icon key for the Actions column.

Provider	Tags	Compliance	Actions
Mann, Bernie - MD Internal Medicine NPI# 1111111111	Internal Medicine	2 alerts	
Smith, Judd T - MD Acupuncture NPI# 1295705283	Contract Employees Critical Care	1 alert	
Marten, Lily - MD Family Medicine	Internal Medicine	3 alerts	
Zhivago, Yuri - DPM NPI# 1234567890	Internal Medicine	No alerts	
No, Julius Dit - OD Cardiology	Pain Medicine	8 alerts	

Icon Key:

- Incomplete Profile:** Indicates provider has started their profile.
- New Invitation:** Indicates a new provider. Click to invite.
- Accepted Profile:** Indicates a provider has accepted the invitation and created a profile.
- Completed Profile:** Indicates provider has completed their onboarding.

Onboarding

Adding your Provider(s)

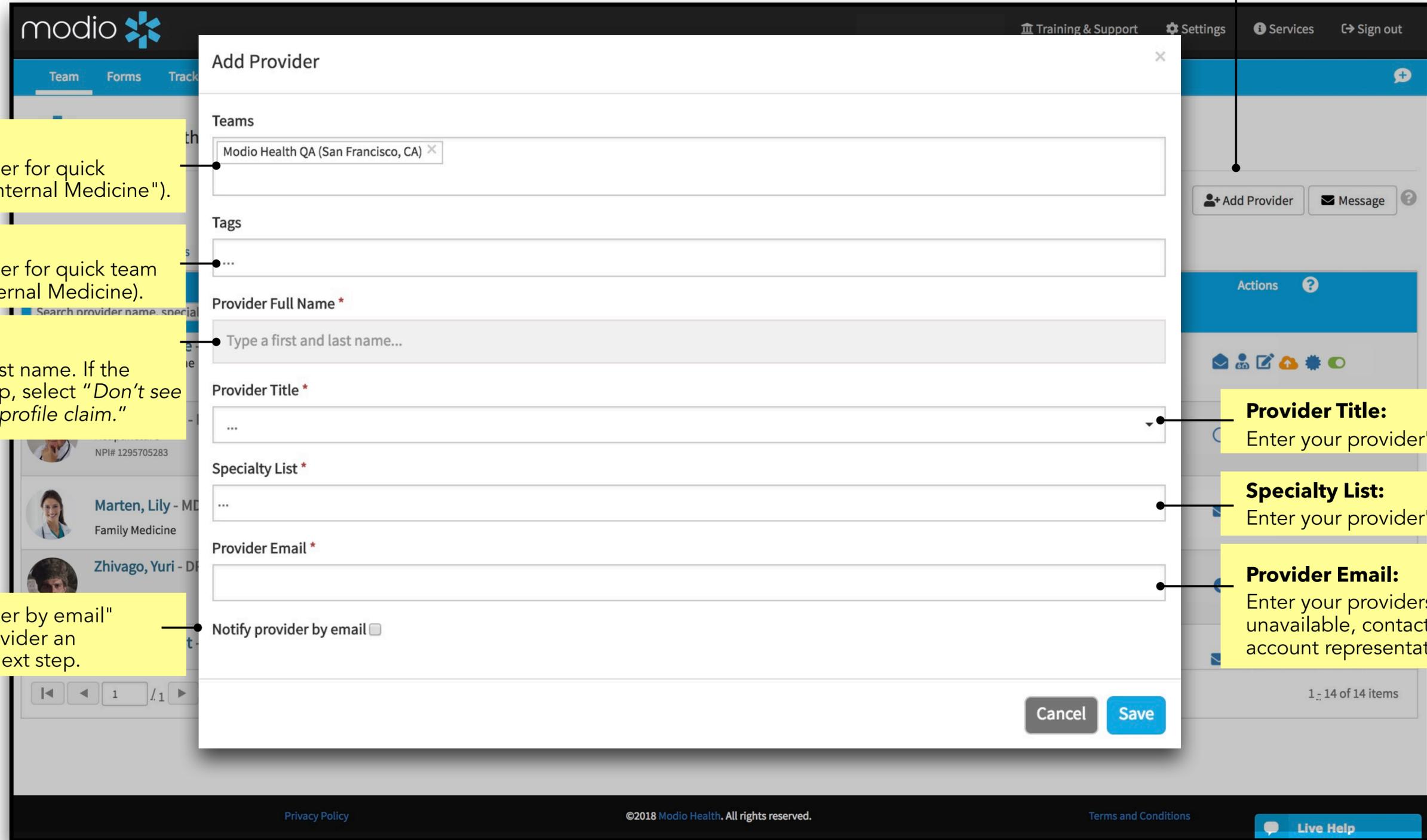
 **Add Provider:**
Start here to add a new provider yourself.

Teams:
Tag your new provider for quick identification (i.e. "Internal Medicine").

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

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

Do Not Click the "notify provider by email" checkbox. You can send the provider an invitation to their profile in the next step.



The screenshot shows the 'Add Provider' form in the Modio application. The form is overlaid on a blurred background of the application's main interface. The form fields and their corresponding callouts are:

- 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 dropdown menu with '...' selected.
- 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 navigation bar with 'Team', 'Forms', and 'Track' tabs, and a sidebar with 'Add Provider' and 'Message' buttons. The footer contains 'Privacy Policy', '©2018 Modio Health. All rights reserved.', 'Terms and Conditions', and 'Live Help'.

Provider Title:
Enter your provider's specialty.

Specialty List:
Enter your provider's email.

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

Onboarding

Inviting your Provider(s)

Tag(s):
Tag your new provider for quick identification (i.e. "Internal Medicine").

Email Providers:
Click here to send an email inviting the provider(s) to join your team.

Template & Attachment:
Customize your email and add any attachments (like a welcome packet). Contact your account manager to set up a custom invitation template.

Email Subject & Message:
Enter a desired subject and then add a message to your provider. This area can be customized as well. Contact your Modio Rep to learn more.

Message Provider:
Start here to invite a provider to register and join your team.

Invite to Modio Health (San Francisco, CA)

Email Providers:

Separate provider email addresses using commas, spaces or the enter/return key

Template & Attachment Set as default template?

Invite Provider No file chosen

Email Subject

Email Message

New Invitations (2) Select All

Work Email	Provider Name	Actions
...	...	<input type="button" value="+"/>
thomas.Lee@modio.email	Thomas Lee	<input type="button" value="+"/>
Galileo.NY@modio.email	Galileo NY	<input type="button" value="+"/>

Default Templates:
Click here to save your email subject and message as a default template. If you need to make changes to a template, click on the pen and paper icon.

New Invitations:
Click here to add more providers to the invitation list.

Modio Health provider list sidebar showing profiles for Marten, Lily - Family Medicine, Zhivago, Yuri - NPI# 1234567890, and No, Julius Dit - Cardiology.

Modio Health mobile app interface showing navigation options like Services and Sign out, and a list of providers with icons for adding providers and sending messages.

Onboarding

Next Steps - Overview

1. The provider will receive your message in their email.

2. The provider should click the link in your message, then claim their profile to start the onboarding process.

3. The provider is guided through the credentialing data sections and prompted to fill out required data. (Talk to your account manager to set up custom requirements for each field.) Any information added during onboarding is automatically copied to the provider's profile and available for viewing and editing. You can request that your provider upload a set of required or optional documents before completing onboarding (e.g. a CV or color photo).

modio

Modio Health Practice

Welcome to Modio Health Practice,

As part of the on-boarding process for our credentialing and provider enrollment process we use a credentialing program - Modio Health.

This email includes the link (at the end of this email) inviting you to begin the on-boarding credentialing/provider enrollment process by creating a password for our data base.

Once you log into Modio Health you will be required to complete your information. Please complete all sections by clicking Save & Next, including:

- Personal Information
- Education & Training
- Facility Affiliations (current and prior)
- Work History
- Peer References
- State & DEA licenses (current or expired)
- Board & additional certifications (current and expired)
- Malpractice information (current and past)

Finally please upload all documents that were requested under separate email from a member of our team. Please be aware that certain fields are required and you will not be allowed to advance until the required field is completed.

You will be able to access this request via your cell, tablet, iPad or laptop (and we recommend Google Chrome browser for the best experience).

Once we receive your provider information we will begin the credentialing/provider enrollment process.

You will then receive the applications requesting your review, completion and electronic signatures under separate emails.

If you need Live Help it is available on the ModioHealth.com website.

Please feel free to contact me as well if you have any questions regarding the credentialing process.

To proceed, click the link below:
https://www.modiohealth.com/physicians/#/signup?email=DrZ@gmail.com&source=10&claim_id=1343174

Disclaimer: You agree to use the information found within our website only for appropriate, legal purposes, and in compliance with all applicable federal, state and local laws and regulations.

modio

Claim your profile.

First Name

Last Name

DrZ@gmail.com

Create Password (use at least 8 characters)

We recommend using a strong password that includes both upper and lower case letters and one or more numerical digits.

I agree to [Terms and Conditions](#) and [Privacy Policy](#)

Claim profile

modio

(844) 696-6346 Settings Help Sign out

Dashboard Manage Credentials Logins Tasks CME

Modio Health QA (San Francisco, CA)

Yasi Givechi MD: Provider Profile

- 1 Personal Information 8
- 2 Education & Training 5
- 3 Hospital Affiliations 1
- 4 Work History 2
- 5 Peer References 1
- 6 Licensure 3
- 7 Certifications 2
- 8 Medical Malpractice 2
- 9 Logins 1
- 10 Documents 1

Please make sure all sections above are complete using the Save & Next button in each section before clicking the View Summary or Submit as Complete buttons.

View Summary **Submit as Complete**

Onboarding

Step 1: Welcome Email

Your provider will receive a welcome email in their inbox with a list of action items that require their attention in order to complete their onboarding process.

*Emails can be customized to list specific steps required in onboarding for your practice. Contact your account manager to set up a custom invitation template.

Provider will need to click the link in the email and then start their profile setup process.



Modio Health Practice

Welcome to Modio Health Practice,

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- Board & additional certifications (current and expired)
- Malpractice information (current and past)

Finally please upload all documents that were requested under separate email from a member of our team. Please be aware that certain fields are required and you will not be allowed to advance until the required field is completed.

You will be able to access this request via your cell, tablet, iPad or laptop (and we recommend Google Chrome browser for the best experience).

Once we receive your provider information we will begin the credentialing/provider enrollment process.

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If you need Live Help it is available on the ModioHealth.com website.

Please feel free to contact me as well if you have any questions regarding the credentialing process.

To proceed, click the link below:

https://www.modiohealth.com/physicians/#/signup?email=DrZ@gmail.com&source=10&claim_id=1343174

Onboarding

Step 2: Claiming Profile

Providers will next navigate onto the Modio "Claim your provider profile" page and enter their full name.

modio (844) 696-6346 Sign in Free sign up

Claim your provider profile.

[Why should I claim my healthcare provider profile?](#)

[Not a provider? Healthcare Organizations click here.](#)

Privacy Policy ©2018 Modio Health. All rights reserved. Terms and Conditions Live Help

Next, your provider will need to enter their title, primary specialty, and email, then create a password to start the OneView onboarding process.

modio (844) 696-6346 Sign in Free sign up

Claim your profile.

Name	NPI #	State License	State License #	Practice	Professional School	DEA	DEA Expiration
Bernie Mann Obstetrics & Gynecology	1999999991	CA +6 more	WA-SU1001	Center Camp 1 Del Playa, Black Rock City, NV 89412	University Of California San Francisco School Of Medicine	Must be verified to view	Must be verified to view

Select Your Title

example: "family medicine"

We recommend using a strong password that includes both upper and lower case letters and one or more numerical digits.

 I agree to [Terms and Conditions](#) and [Privacy Policy](#)

Claim profile

Live Help

Onboarding

Step 3: Completing Onboarding Page

Finally, the provider will be directed to the onboarding page in OneView.

From here, they will be asked to fill in the following information (unless specified otherwise in your initial email) :

- Personal Information
- Education and Training
- Hospital Affiliations
- Work History
- Peer References
- Licensure
- Certifications
- Medical Malpractice
- Logins
- Documents

The screenshot displays the Modio Health QA onboarding page for Bernie Mann MD. The page is titled "Bernie Mann MD: Provider Profile" and features a progress indicator at the top showing 10 steps. The first step, "Personal Information", is currently active and contains the following sections:

- Provider Information:** Includes fields for First Name (Bernie), Middle Name (Middle name), and Last Name (Mann). The Provider Title is set to "MD - Medical Doctor".
- Professional Information:** Includes a field for "Fluent languages" with a "Select languages..." dropdown.
- Contact Information:** Includes fields for Work Email (yasi.givechi@modiohealth.com), Personal Email (@), Home Phone #, and Mobile Phone.
- Emergency Contact Information:** Includes fields for Contact Name, Contact Type, Email, and Phone #.
- Home Address:** Includes fields for Address, Address 2, City, State, Zip Code, County, Country (United States of America), and Mailing Address?
- Birth Information:** Includes fields for Gender, Date of Birth (mm/dd/yyyy), Birth City, Birth State, Birth County, Birth Country, Country of Citizenship, and Citizenship Type.
- Identification:** Includes fields for NPI # (1999999991), Driver License or ID #, State Issued, Expiration Date (mm/dd/yyyy), and Social Security #.

At the bottom of the form, there is a "Save & Next" button. Below the form, a progress bar shows the following steps:

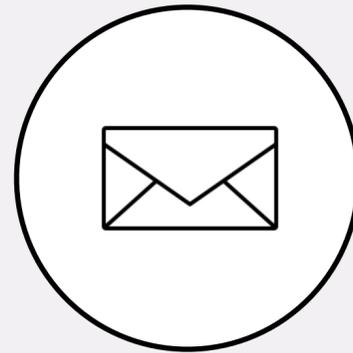
- 1 Personal Information
- 2 Education & Training
- 3 Hospital Affiliations
- 4 Work History
- 5 Peer References
- 6 Licensure
- 7 Certifications
- 8 Medical Malpractice
- 9 Logins
- 10 Documents

At the bottom of the page, there are buttons for "View Summary" and "Submit as Complete". A footer note states: "Please make sure all sections above are complete using the Save & Next button in each section before clicking the View Summary or Submit as Complete buttons."

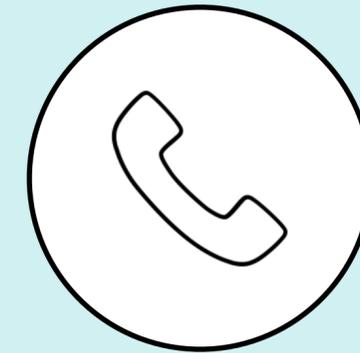
For additional questions or further training,
contact the Modio Team via:



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346