

# OneView<sup>™</sup>

## Provider Onboarding



# ONBOARDING: DASHBOARD

The dashboard shows a list of providers with the following details:

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

### Icon Key:

- New Invitation:**  
Indicates a new provider. Click to invite.
- Accepted Profile:**  
Indicates a provider has accepted the invitation and created a profile.
- Incomplete Profile:**  
Indicates provider has started their 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:**  
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 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. The provider profile is not ready to be reviewed at this time.

**Teams**  
Modio Health QA (San Francisco, CA) X

**Tags**  
...

**Provider Full Name \***  
Type a first and last name...

**Provider Title \***  
...

**Specialty List \***  
...

**Provider Email \***

Notify provider by email

Cancel Save

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

**Specialty List:**  
Enter your provider's specialty.

**Provider's Email:**  
Enter your provider's email here. Make sure that you haven't used the address in OneView before - each provider needs a unique email.

# ONBOARDING: Inviting Your Provider(s)

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

**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.

Set as default template? 

**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.

### Invite to Modio Health (San Francisco, CA)

Email Providers:

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

Template & Attachment

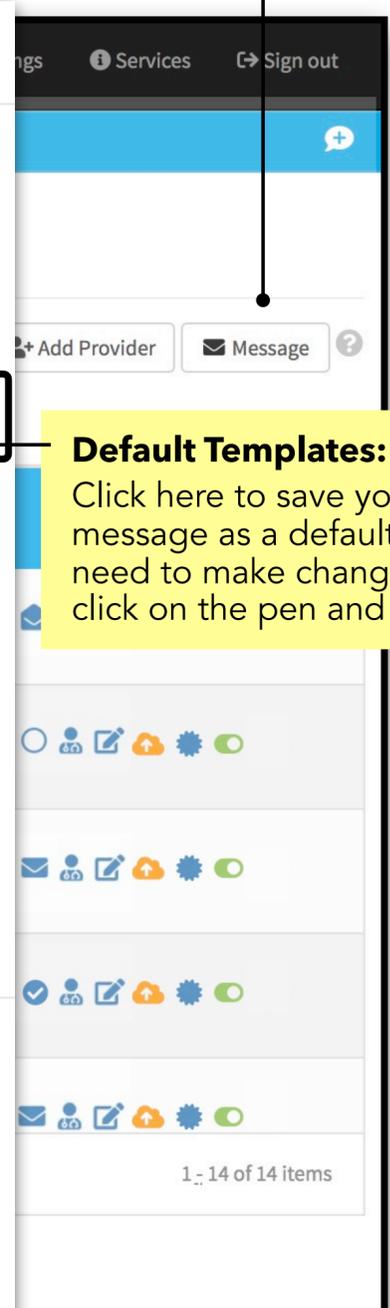
Invite Provider ▼  No file chosen

Email Subject

Email Message

New Invitations (2) Select All

Work Email	Provider Name	Actions
...	...	+
thomas.Lee@modio.email	Thomas Lee	+
Galileo.NY@modio.email	Galileo NY	+



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

# ONBOARDING: Next Steps

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. The provider must use the **same email** address at which they received the invite.

3. The provider is guided through the credentialing data sections and prompted to fill out required data. (Talk to your account rep 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](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.



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To proceed, click the link below:

[https://www.modiohealth.com/physicians/#/signup?email=DrZ@gmail.com&source=10&claim\\_id=1343174](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.

# ONBOARDING: Step 2 - Claiming Profile

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

Claim your provider profile.

Why should I claim my healthcare provider profile?

Start typing your first and last name...

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.

Claim your profile.

Name	NPI #	State License	State License #	Practice	Professional School	DEA	DEA Expiration
Bernie Mann Obstetrics & Gynecology	1999999991	CA <a href="#">+6 more</a>	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

Bernie Mann

Select Your Title

Add a primary specialty  
example: "family medicine"

Bernie@modio.email

\*\*\*\*\*

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®.

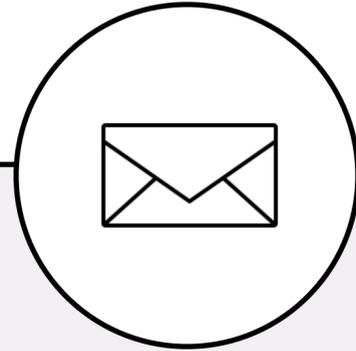
From here, they will be asked to fill in the following information (unless specified otherwise in your initial email) :

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

The screenshot displays the 'Bernie Mann MD: Provider Profile' onboarding page. The progress bar at the top indicates that Step 1, 'Personal Information', is the current step. The form is divided into several sections:

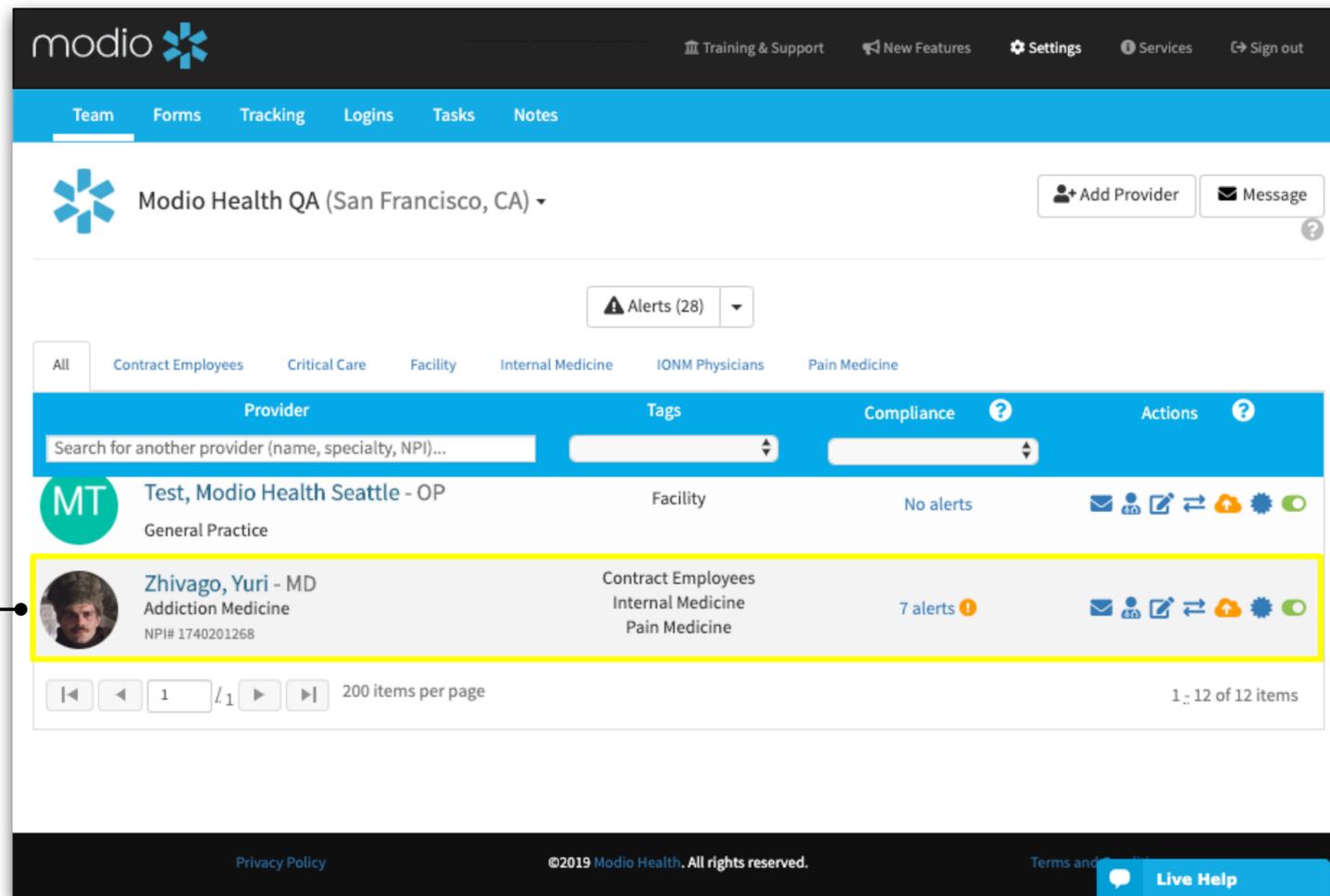
- Provider Information:** Fields for First Name (Bernie), Middle Name (Middle name), Last Name (Mann), and Provider Title (MD - Medical Doctor).
- Professional Information:** A field for 'Fluent languages'.
- Contact Information:** Fields for Work Email (yasi.givechi@modiohealth.com), Personal Email, Home Phone #, and Mobile Phone.
- Emergency Contact Information:** Fields for Contact Name, Contact Type, Email, and Phone #.
- Home Address:** Fields for Address, Address 2, City, State, Zip Code, County, Country (United States of America), and Mailing Address?.
- Birth Information:** Fields for Gender, Date of Birth, Birth City, Birth State, Birth County, Birth Country, Country of Citizenship, and Citizenship Type.
- Identification:** Fields for NPI # (1999999991), Driver License or ID #, State Issued, Expiration Date, and Social Security #.

A 'Save & Next' button is located at the bottom of the form. Below the form, a progress bar shows the remaining steps: 2. Education & Training, 3. Hospital Affiliations, 4. Work History, 5. Peer References, 6. Licensure, 7. Certifications, 8. Medical Malpractice, 9. Logins, and 10. Documents. At the bottom of the page, there are 'View Summary' and 'Submit as Complete' buttons, along with a footer containing 'Privacy Policy', '©2018 Modio Health. All rights reserved.', and 'Terms and Conditions'.

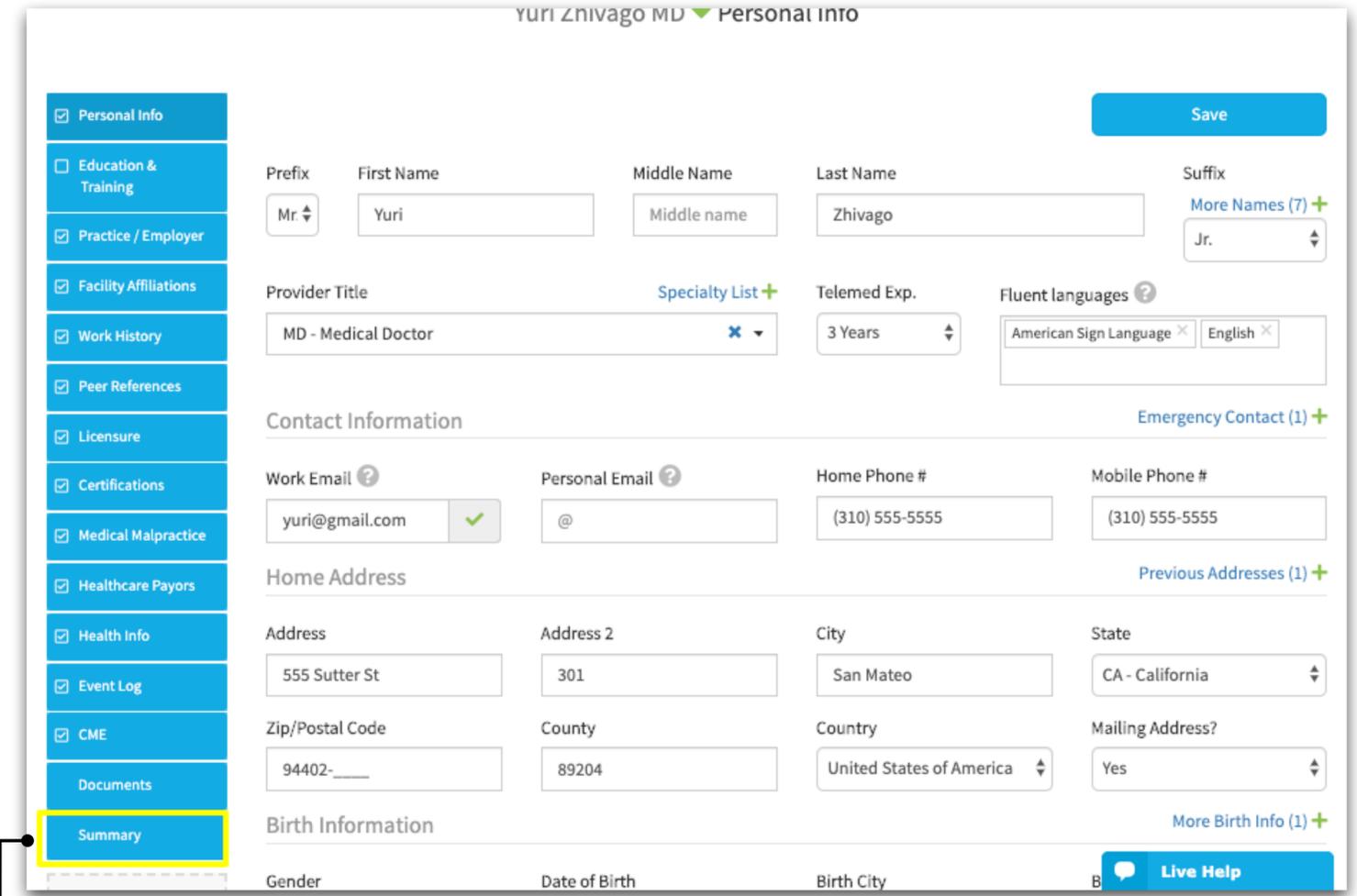


**Configuring Invitations for email  
template and applications.**

## ONBOARDING: Creating Custom Onboarding Invitations

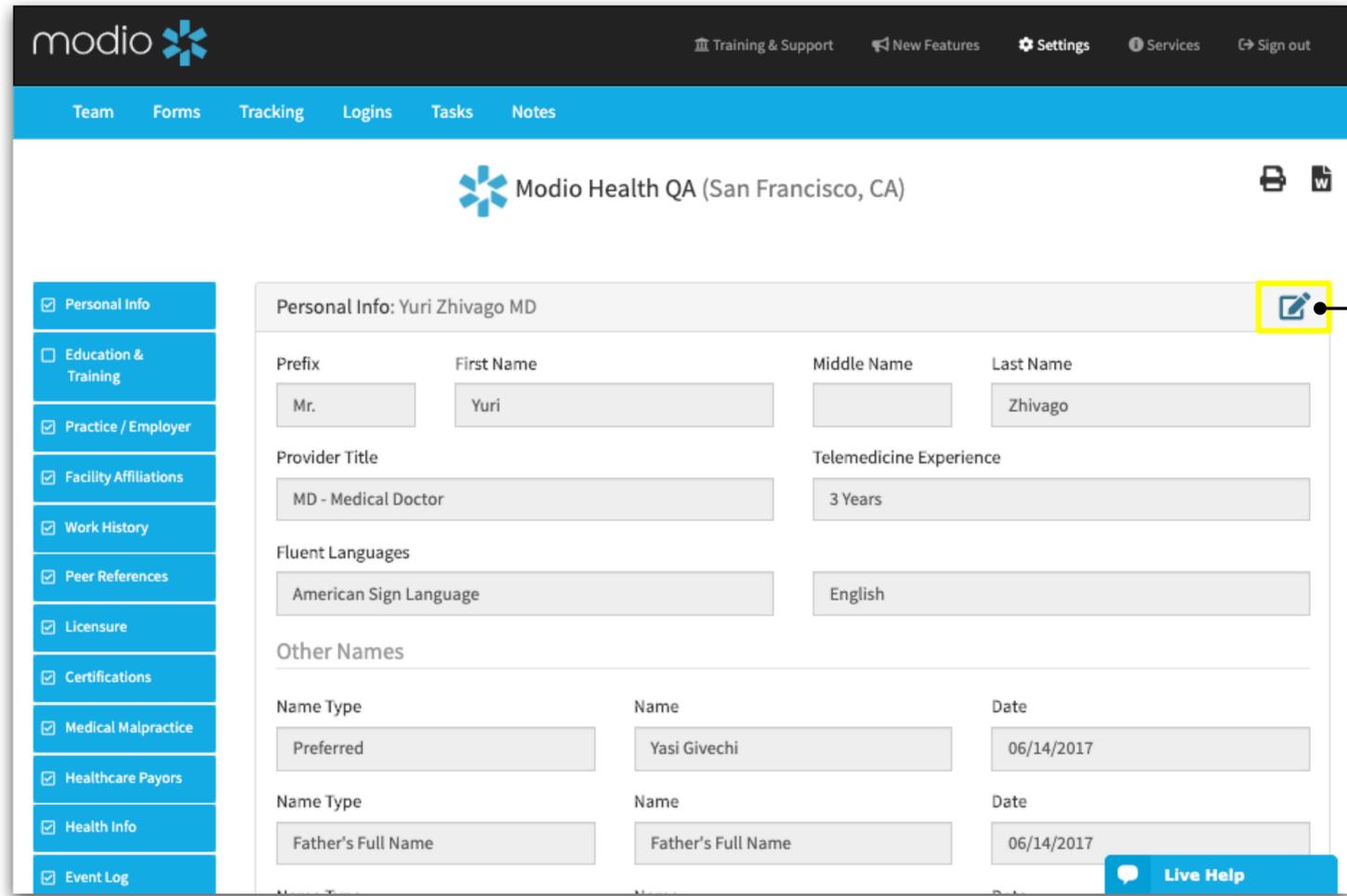


1. To create a custom onboarding application (which is attached to the invitation going out to your provider), start by clicking on any provider in your team roster. This will begin the process to create a custom invitation for your entire team.

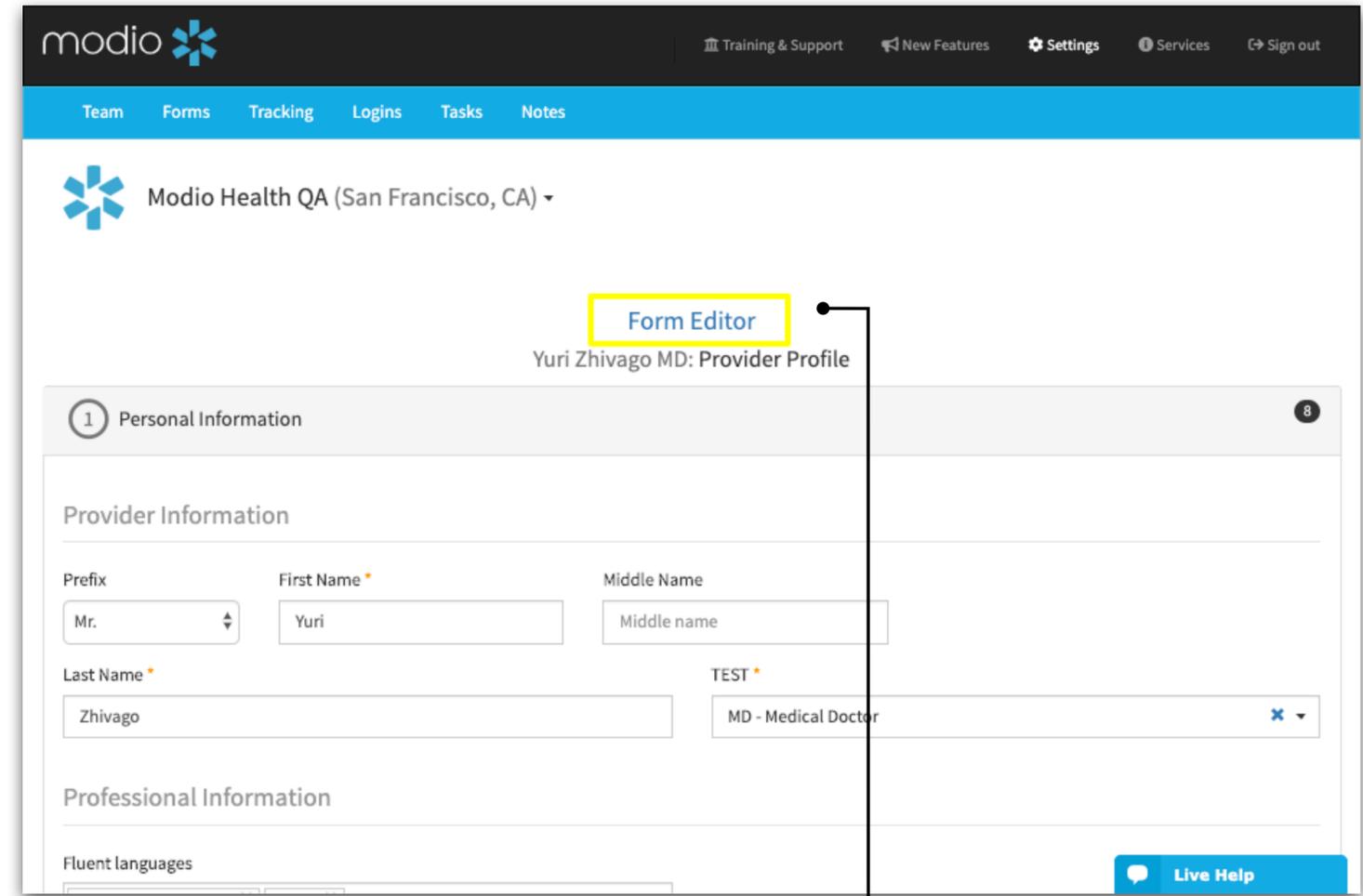


2. Click on the Summary tab.

# ONBOARDING: Creating Custom Onboarding Invitations

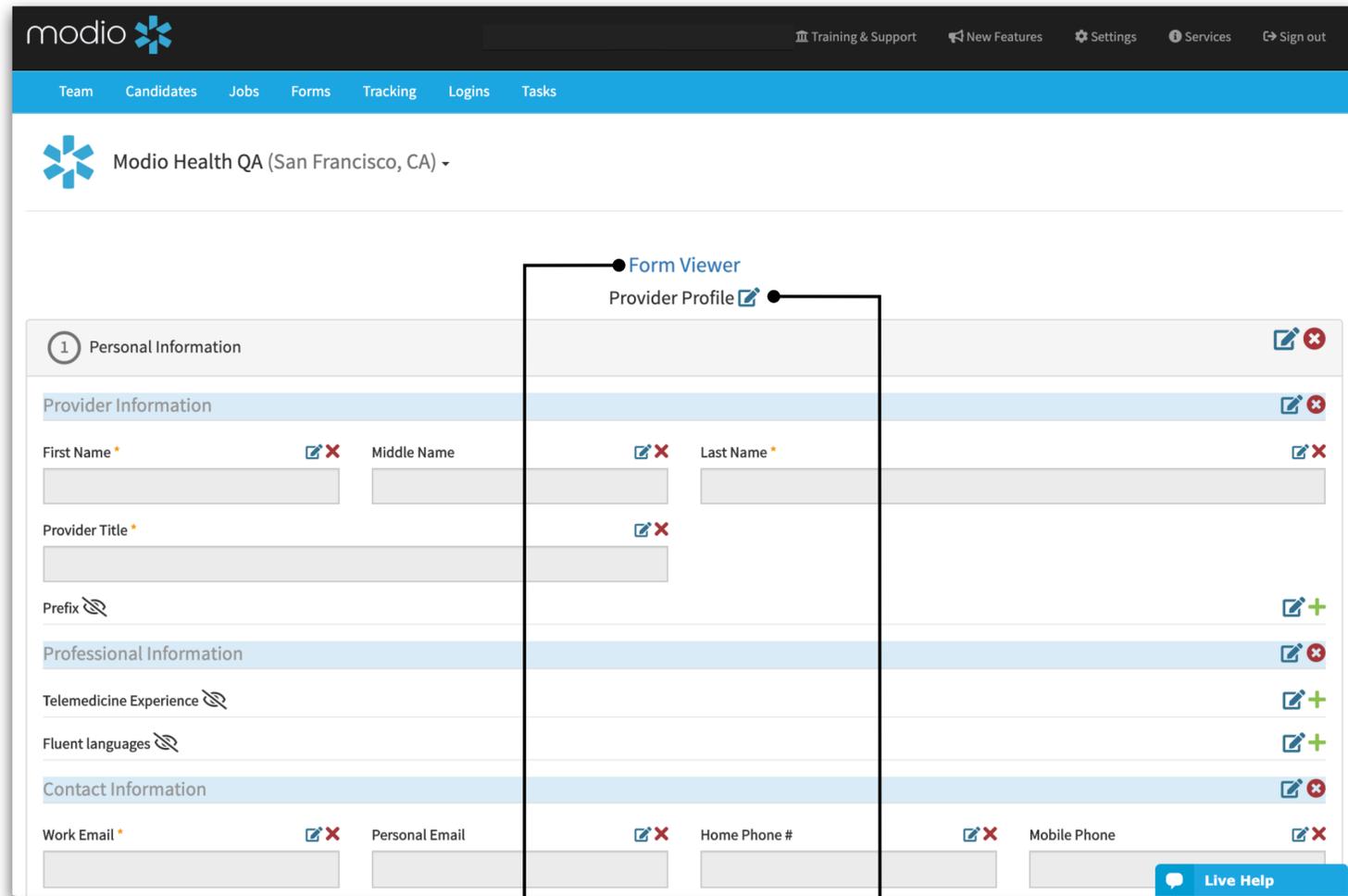


3. Click on the Pencil and Paper "Edit" icon.



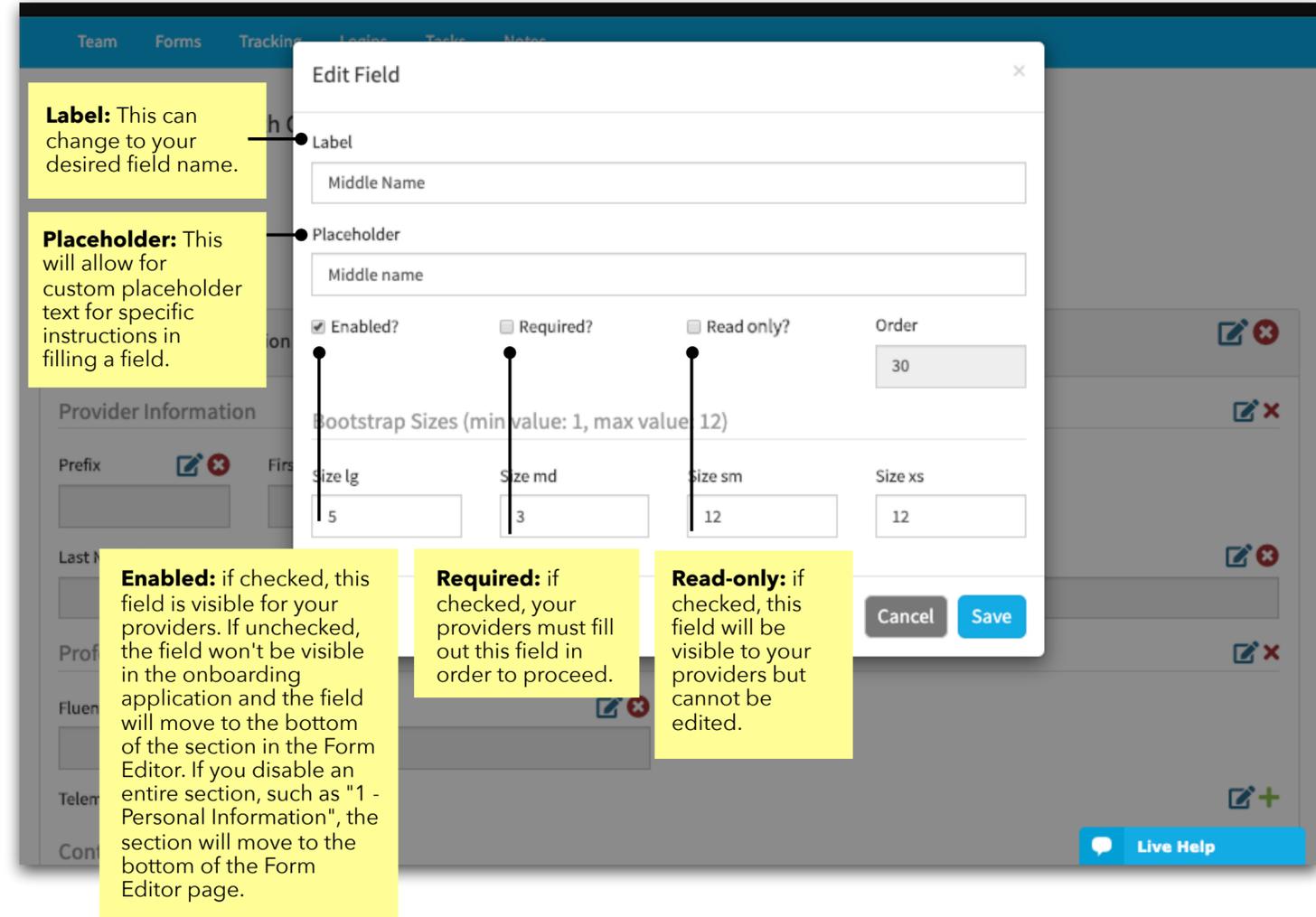
4. The **"Form Editor"** link will now appear on the top of the screen. From here, you can tailor your onboarding invitation fields or keep them as is with the default values.

# ONBOARDING: Creating Custom Onboarding Invitations



5. Once the **Form Editor** title changes to **Form Viewer**, you can start tailoring your invitation.

6. Click the paper and pencil edit icon to activate a specific field.



**Label:** This can change to your desired field name.

**Placeholder:** This will allow for custom placeholder text for specific instructions in filling a field.

**Enabled:** if checked, this field is visible for your providers. If unchecked, the field won't be visible in the onboarding application and the field will move to the bottom of the section in the Form Editor. If you disable an entire section, such as "1 - Personal Information", the section will move to the bottom of the Form Editor page.

**Required:** if checked, your providers must fill out this field in order to proceed.

**Read-only:** if checked, this field will be visible to your providers but cannot be edited.

# ONBOARDING: Form Viewer Icon Key

The screenshot shows the Modio Form Viewer interface for a 'Provider Profile'. The top navigation bar includes 'Team', 'Candidates', 'Jobs', 'Forms', 'Tracking', 'Logins', and 'Tasks'. Below this, the user is logged in as 'Modio Health QA (San Francisco, CA)'. The main content area is titled 'Form Viewer' and 'Provider Profile'. The form is divided into several sections: 'Personal Information', 'Provider Information', 'Professional Information', and 'Contact Information'. Each section and field has associated icons for editing, disabling, and enabling. A 'Live Help' button is located at the bottom right of the form.

**Form Section**

1 Personal Information

**Form Group**

Provider Information

**Form Fields**

First Name \*

Middle Name

Last Name \*

Provider Title \*

Prefix

Professional Information

Telemedicine Experience

Fluent languages

Contact Information

Work Email \*

Personal Email

Home Phone #

Mobile Phone

Live Help

**Edit Icon:** Allows you to edit a specific field title, placeholder text, etc...

**Disable Section:** Allows you to hide an entire section in the onboarding form.

**Disable Group:** Allows you to hide an entire group within a section.

**Disable Field:** Allows you to hide a field within the group.

**Enable Field:** Click here to bring a field back into your onboarding form.

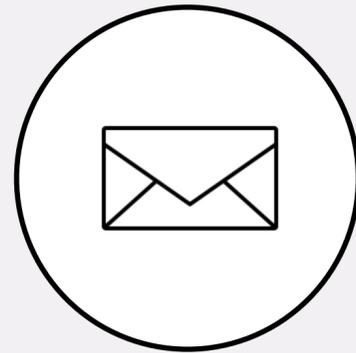
**Hidden Field:** This indicates a hidden item (not visible to providers).

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

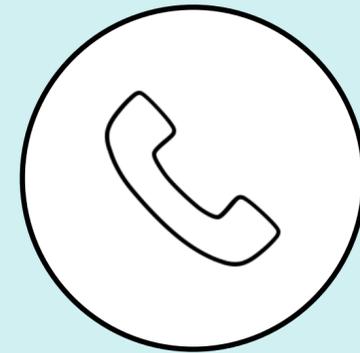
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**Online:**  
Live Chat Support



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



**Phone:**  
844.696.6346