



ONEVIEW 101:
COORDINATORS GUIDE

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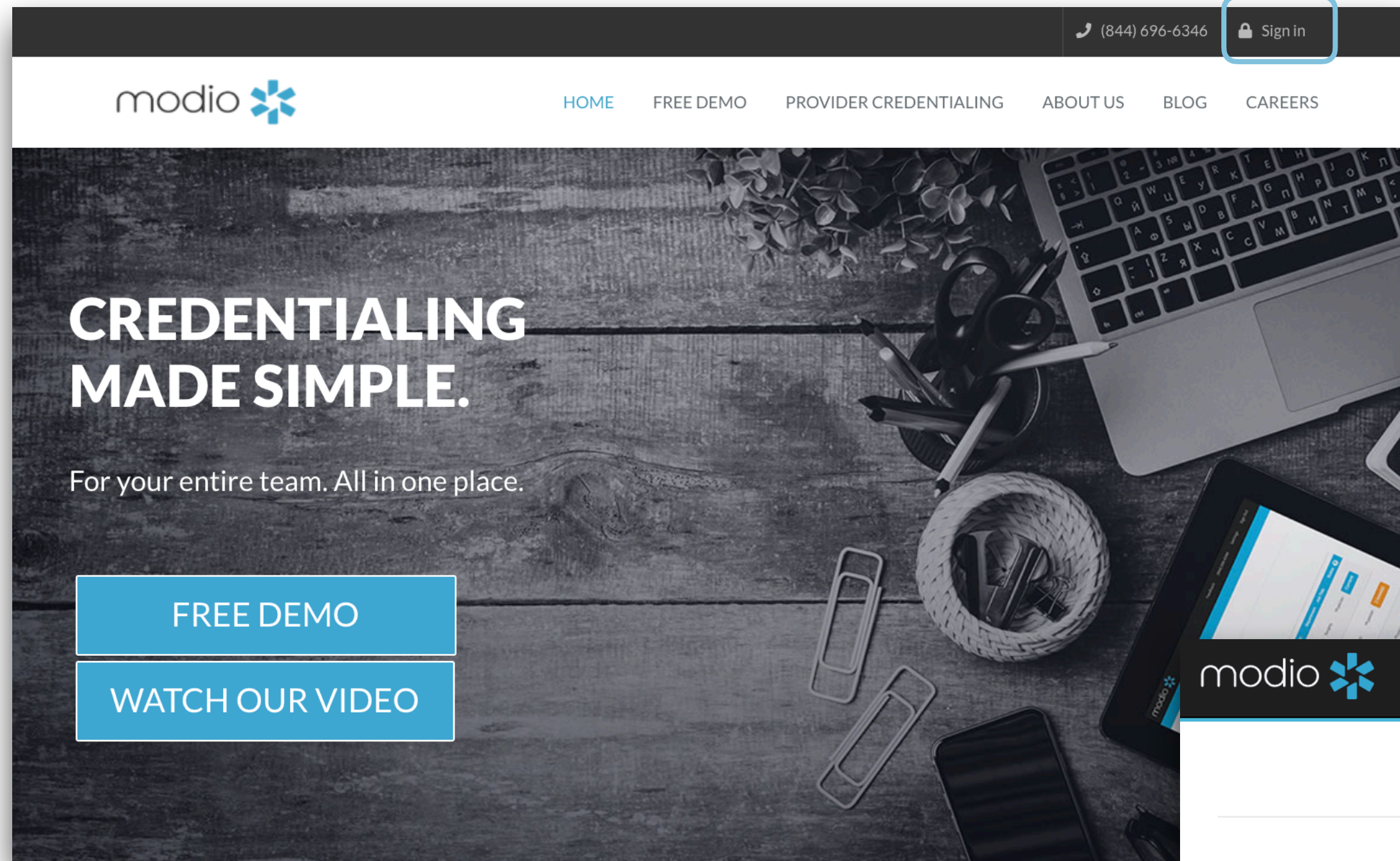
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View a quick demo here: [Documents](#)

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Your Coordinator Toolbar

Here is a quick introduction to the Coordinator Toolbar. If you are a new user, this next short section will help you get started by showing you some helpful features in the OneView platform.

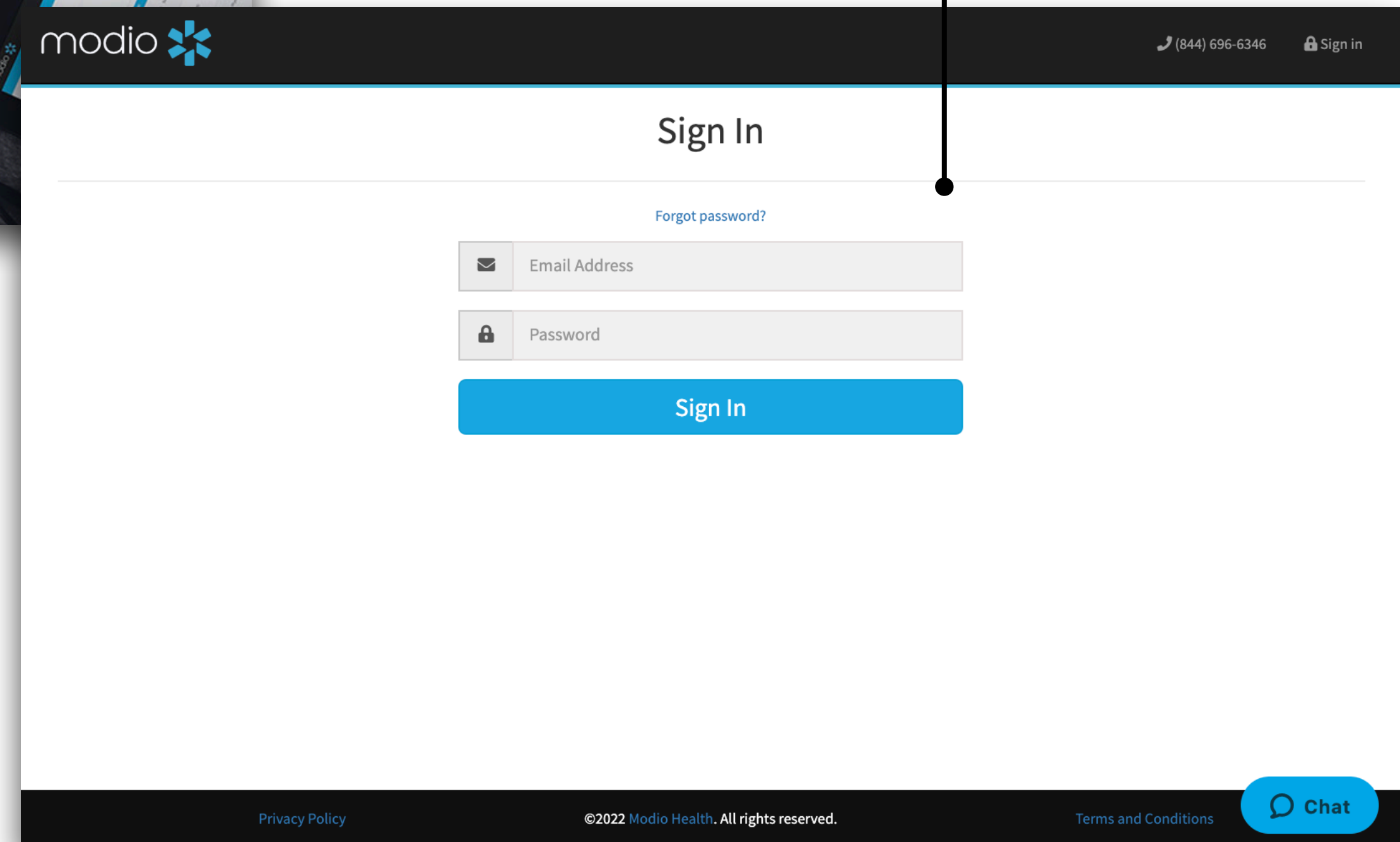


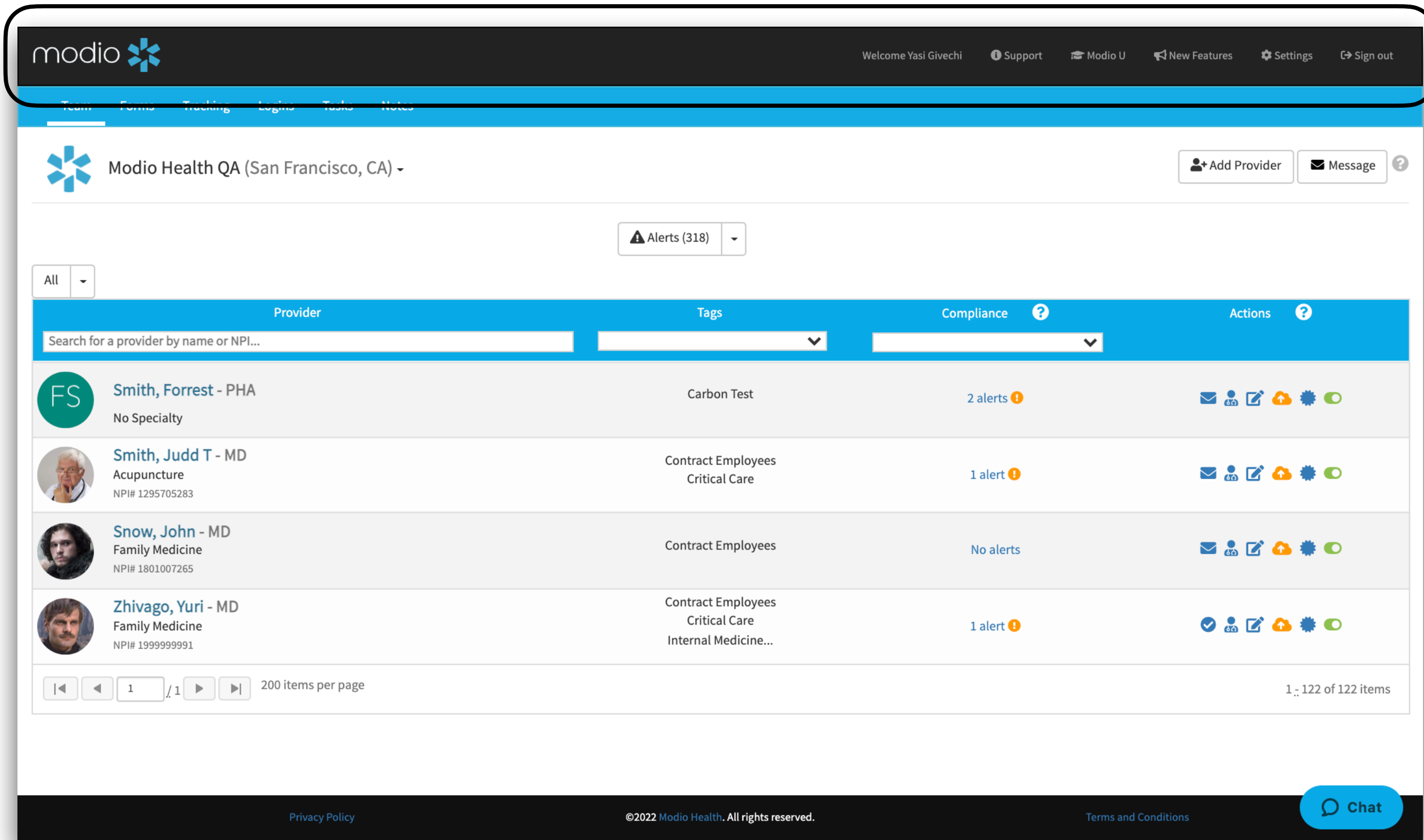
1. **Navigate to Modio:**

Visit our website at: www.modiohealth.com and click "**Sign in**", which is located on the top right hand corner.

2. **Log into OneView:**

Enter in your username & password.
Contact the Modio Support team if you have not received your login information yet by emailing: Support@modiohealth.com





OneView Toolbar Key:

Coordinator indicator: When you are logged in you will see your name displayed here. Your email address is a unique identifier. This means that your email address may not be repeated when creating additional coordinator and provider profiles.

Support: The support tab houses additional tip guides on all the OneView features. Click here to explore those guides and keep checking back in as we update the content frequently. You will also find contact information and other support services.

ModioU: This tab gives you access to a library of pre-recorded videos. There are in-depth videos for your favorite features within OneView. You will also find schedules for our ModioU courses, along with a link to the course registration page.

New Features: Check out this tab every 2nd or 3rd Thursday of the month for a summary of updates and improvements that have been made to the system over the last two weeks.

Settings: Change your password using the settings tab.

Sign out: Remember to sign out of OneView when you are done with your session.



The OneView Team Dashboard

When you log in, you'll see your Team in the OneView Provider Dashboard. From here, you will have access to your provider credentialing profiles as well as other OneView features.

Team Views:

If you manage multiple teams, click this arrow to switch views.

Alerts:

View a Compliance Report for your team here.

Reports:

Use the dropdown arrow to access your Team reporting options.

Add Provider:

Use our 2-step process to add providers to your team roster.

Team:

Welcome to your Team Dashboard! See your Team name here and your provider roster below.










Credentialing Profile:

Click your provider's name to open the entire credentialing profile.

Profile Cards:

To view a provider's profile card, hover over the providers initials and click "profile."

OneView Actions Key:

-  **New Invitation**
Indicates new provider. Click to invite.
-  **Accepted Invitation**
Indicates provider has completed registration.
-  **Incomplete Profile**
Indicates provider has started their profile.
-  **Complete Profile**
Indicates provider has completed their profile.
-  **Manage Credentials**
Securely manage a provider's credentials.
-  **Edit**
Edit provider Tag(s), Job Title, Team(s), Specialty List, and Notes.
-  **Upload Documents**
Securely upload and manage documents.
-  **CME**
Track provider CME goals and credits.
-  **Active/Inactive**
Make a provider active or inactive (does not delete credentialing data).

modio

Welcome Yasi Givechi | Support | Modio U | New Features | Settings | Sign out

Team | Forms | Tracking | Logins | Tasks | Notes

Modio Health QA (San Francisco, CA)

Alerts (318)

Add Provider

Message

All

Provider | Tags | Compliance | Actions

Search for a provider by name or NPI...

<div>FS</div> <div>Smith, Forrest - PHA</div> <div>No Specialty</div>	Carbon Test	2 alerts	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
<div></div> <div>Smith, Judd T - MD</div> <div>Acupuncture NPI# 1295705283</div>	Contract Employees Critical Care	1 alert	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
<div>Profile</div> <div>Snow, John - MD</div> <div>Family Medicine NPI# 1801007265</div>	Contract Employees	No alerts	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>
<div></div> <div>Zhivago, Yuri - MD</div> <div>Family Medicine NPI# 1999999991</div>	Contract Employees Critical Care Internal Medicine...	1 alert	<div></div> <div></div> <div></div> <div></div> <div></div> <div></div>

1

/ 1

200 items per page

1 - 122 of 122 items

Privacy Policy

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Terms and Conditions

Chat

Tags:

Create sub-lists within your provider roster to quickly view or organize the profiles you are working with.

Compliance Issues:

View individual provider alerts here.

Live Chat:

Our live chat support is available from 8 am - 6 pm EST (Mon-Fri).



Team Navigation Bar

Here is an introduction of the 5 core
modules that make up the Team
Navigation Bar.

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Welcome Yasi GivechiSupportModio UNew FeaturesSettingsSign out

TeamFormsTrackingLoginsTasksNotes

Modio Health QA (San Francisco, CA)Add ProviderMessage

Alerts (318)

All

ProviderTagsComplianceActions

Search for a provider by name or NPI...

Carbon Test2 alerts

Smith, Forrest - PHANo Specialty

Smith, Judd T - MD
Acupuncture
NPI# 1295705283

Contract Employees
Critical Care1 alert

Smith, John - MD
Family Medicine
NPI# 1801007265

Contract EmployeesNo alerts

Zhivago, Yuri - MD
Family Medicine
NPI# 1999999991

Contract Employees
Critical Care
Internal Medicine...1 alert

1200 items per page1 / 122 of 122 items

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OneView Dashboard Key:

Teams: Here you will find your home page along with your entire team roster.

Forms: Access all the forms which your organization has submitted to be mapped. Mapped forms which allow you to automatically pull data from your provider's profile and have it pre-populated onto your form/application.

Tracking: A workflow management tool for your coordinators to track all steps and progress while credentialing. Here, everything will be fully customizable to match your exact steps and workflows.

Logins: Securely store usernames and passwords for any website that will be managed on behalf of your organization or providers.

Tasks: This useful feature creates reminder notes or creates basic to-do lists.

Notes: Here you will find an aggregate list of all notes added to any provider, in all sections of their profile, by all users on your team.

9



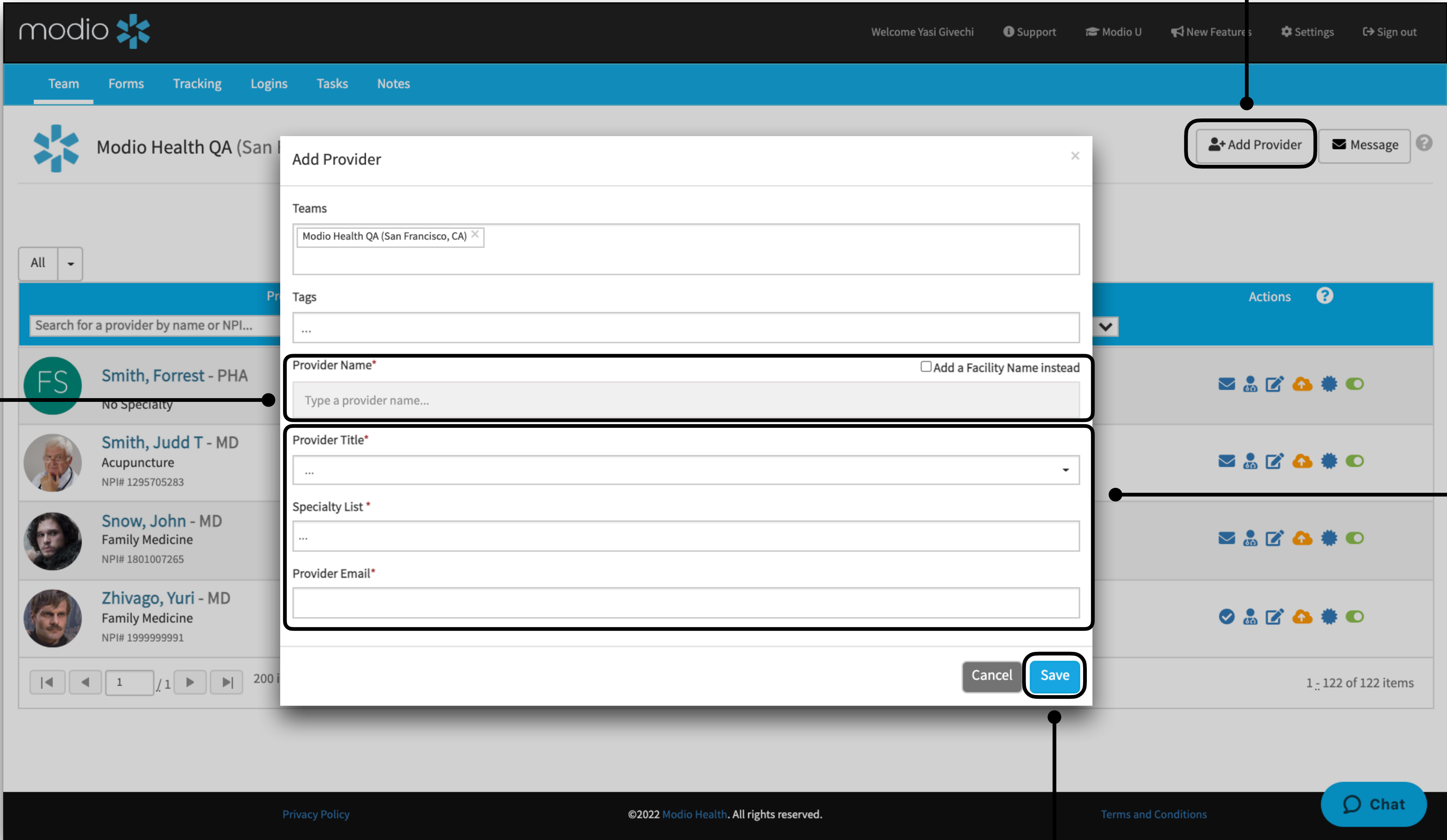
Adding New Providers

Use our 2-step process to quickly add new providers to your Team roster.

Start Step 1

Add Provider:
Click this button to get started.

A Provider Name:
Fill in the name field. A dropdown list of potential matches from an existing provider database will appear. After double-checking the NPI and/or license number, select your provider from the list. If your provider is not found, see Slide #13.



The screenshot shows the Modio OneView Coordinator interface. The 'Team' tab is active, displaying a list of providers. A modal titled 'Add Provider' is open, showing fields for Teams, Tags, Provider Name, Provider Title, Specialty List, and Provider Email. A 'Save' button is highlighted at the bottom right of the modal. A yellow circle with the letter 'A' points to the 'Provider Name' field. A yellow circle with the letter 'B' points to the 'Provider Title', 'Specialty List', and 'Provider Email' fields. A yellow circle with the text 'Start Step 1' points to the 'Add Provider' button in the top right corner. A yellow circle with the text 'Do not forget to click Save!' points to the 'Save' button in the modal.

B Provider Title, Specialty List, Provider Email:
Fill in the three remaining required fields: title, specialty, and email. (If you don't have your provider's email, use a placeholder with your provider's name: first.last@modio.email (e.g. john.smith@modio.email).)

Do not forget to click Save!

Start Step 2

Provider Search:

Type your new provider's name here to locate them on the provider roster within the team page.

Provider Profile Card:

Click on the provider's initials (or photo, if one has been uploaded) to open the "provider profile card."

Provider Photo:

Click on this icon to add or edit a photo of your provider.

Updater Icon:

Use the refresh icon to instantly pull credentialing data from one of the many primary sources we're integrated with. See the next slide (#13) for additional info.

Final Note:

Now that the verified data has been added to your new profile, continue to build out the profile until it is complete per your organization's standards.

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Welcome Yasi Givechi | Support | Modio U | New Features | Settings | Sign out

Team | Forms | Tracking | Logins | Tasks | Notes

Modio Health QA (San Francisco, CA)

Add Provider | Message

Alerts (318)

Provider

Search for a provider by name or NPI...

FS | Smith, Forrest - PHA | No Specialty

Profile

 | Smith, Judd T - MD | Acupuncture | NPI# 1295705283

Profile

 | Snow, John - MD | Family Medicine | NPI# 1801007265

Zhivago, Yuri - MD | Family Medicine | NPI# 1999999991

1 / 1

 | 200 items per page

Provider Profile for John Snow, MD — Family Medicine

Notes

NPI # | 1801007265 | Updated: 10/07/2020

OIG | Pass | DOB: 01/01/1953 | Updated: 01/19/2022

CAQH | 12546732 | Status: Reattestation Successful | Reattest: 07/07/2021

Home Address | | Email: snowdemo@modio.email

Primary Practice | Modio Health Medical

Primary Affiliation | Sierra Vista Regional Medical Center (San Luis Obispo, CA) | 1010 Murray Ave, San Luis Obispo, CA 93405

Professional School | Eastern Virginia Medical School (Norfolk, VA)

Graduation Date |

State Licenses | AK 123456 | RN RN68958 | upd. 06/17/2021 (7 months ago) | upd. 01/13/2022 (19 days ago)

DEA Licenses |

Controlled Substance |

Board Certifications |

Telemed Exp. |

Provider Onboarding | New Invitation | Sent By: Landon Goodson | Sent Date: 10/21/2020

OK

12

Updater Icon:
After running an updater, all available data from the source will be automatically populated on your provider's profile.

Adding a Provider

Add Provider

Teams

Modio Health QA (San Francisco, CA)

Tags

...

Provider Name*

Kirk Heath

Kirk Heath

Surgery

Primary License: VA, License No.: 0101241891

Heather Kirk

Family

Primary License: MS, License No.: R869933

Heather Kirk

Family

Primary License: WV, License No.: 56387

Heather Kirkpatrick

Clinical

Primary License: MI, License No.: 6301011121

Don't see profile listed? Click here to skip profile claim.

☐ Add a Facility Name instead

Cancel Save

Tip #1–
Make sure to confirm your provider's **NPI** before adding – the provider database can include duplicate names.

Tip #2–
If your provider has had a name change, try looking under their previous name.

Tip #3 –
If your provider is not listed, click here to skip profile claim. This will create the profile without populating NPI, license number, or other data.

Provider Profile

Provider Profile for John Snow, MD — Family Medicine

Notes

NPI #

1801007265

Updated: 10/07/2020

OIG

Pass

DOB: 01/01/1953

Updated: 01/19/2022

CAQH

12546732

Status: Reattestation Successful

Reattest: 07/07/2021

Home Address

Email: snowdemo@modio.email

Primary Practice

Modio Health Medical

Primary Affiliation

Sierra Vista Regional Medical Center (San Luis Obispo, CA)
1010 Murray Ave, San Luis Obispo, CA 93405

Professional School

Eastern Virginia Medical School (Norfolk, VA)

Graduation Date

State Licenses

AK 123456 RN RN68958 RN

upd. 06/17/2021 (7 months ago) upd. 01/13/2022 (19 days ago)

DEA Licenses

Controlled Substance

Board Certifications

Telemed Exp.

Provider Onboarding

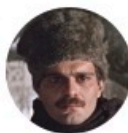
New Invitation

Sent By: Landon Goodson


Sent Date: 10/21/2020

OK

Summary:
·Optimize the Add Provider process by leveraging our integration options up-to-date
·Existing database allows you to pull up to date information to add to your provider profiles



Provider Profile for Yuri Zhivago Jr., DPM — Internal Medicine




Notes

Moving to new address in 3 weeks.

NPI #

1234567890



Primary Practice

Modio Health Demo (San Francisco, CA)
535 Mission St, San Francisco, CA 94105

Start Date 03/29/2018

Primary Affiliation

Professional School

Rush Medical College of Rush University (Chicago, IL)

Graduation Date

06/30/1987

ECFMG? Yes

State License(s)


CA - 123456789 (NP)
KS - KST1321
NY - 1312321 (DPM)
TN - TN-1342
TX - J3501 (MD)
VA - VA 123123

exp. 11/30/2016
exp. 07/09/2017

exp. 07/27/2017

exp. 10/03/2020

upd. 08/22/2018 (5 days ago)
upd. 05/04/2018 (4 months ago)
upd. 06/05/2018 (3 months ago)
upd. 05/04/2018 (4 months ago)
upd. 01/19/2018 (7 months ago)
upd. 05/04/2018 (4 months ago)




DEA License(s)

CA - 987654321

exp. 01/01/2022

upd. 01/17/2018 (7 months ago)



Controlled Substance License(s)

CA - CA092134 (MD)

exp. 08/03/2019

upd. 01/17/2018 (7 months ago)

Board Certification(s)

American Board of Internal Medicine
Internal Medicine
American Osteopathic Board of Surgery
Family Physicians

exp. 01/01/2016

Telemedicine Experience

3 Years

Provider Onboarding

Incomplete Profile

OK

Notes:

Use the Edit action on the dashboard to update the provider notes displayed here.

NPI #:

Click on the NPI updaters button to get NPPES data in seconds. Accept the updates for practice address, state licenses, payors, education and more. The NPPES search will return:

- Current Practice Address – displays practice address
- Current License Info – displays licenses found
- Current Healthcare Payor Info – displays payors found

State Licenses:

View the provider’s state licenses by state, number and last date updated.

- Primary Source Links** – click on the magnification glass to access state primary source sites.
- Info:** State abbrev. – number (type), expiration, last updated – use the “update” date value to verify when the data was last verified.

Telemedicine Experience:

Optional field found in Personal Info.

Primary Practice:

Lists primary practice from Practice/ Employer section.

Primary Affiliation:

Lists primary affiliation from Hospital Affiliations section.

DEA Licenses:

Add DEA license(s): click on the updater icon to run a DEA search for:

- Current DEA Info
- Primary Source Verification PDF

Controlled Substance License(s):

Lists CSL license(s) from Licensure.

14



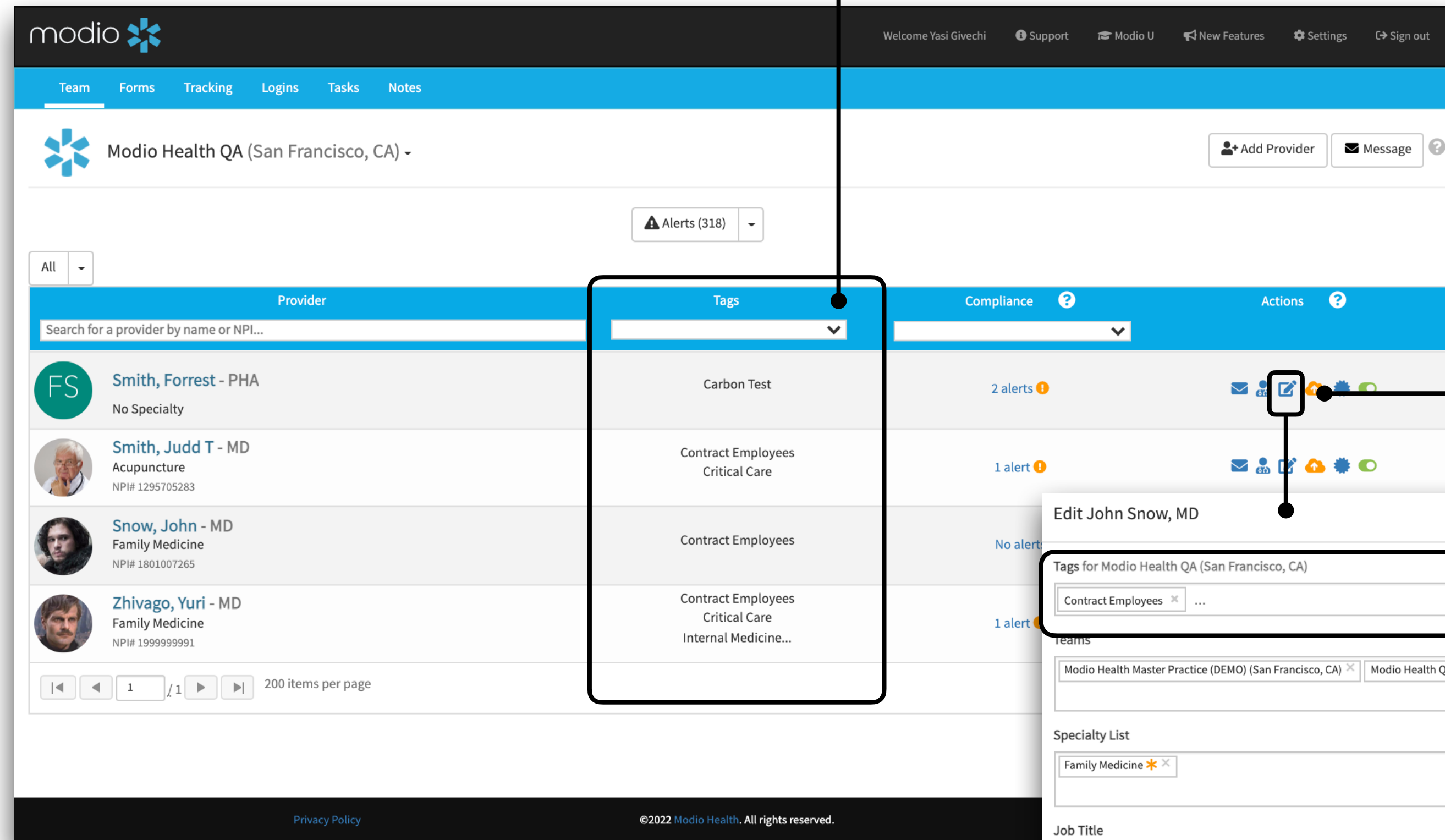
Tags

Use the Tags feature to customize your team dashboard by creating sub lists within your provider roster.

OneView Coordinator Guide Creating Tags

Tag(s): Add a tag(s) to your provider profiles to create sub-lists within your Team. View the tags in the Tag column of your team dashboard.

Filter: Use the Tags column to filter by a specific tag.



Start Step 1

Edit Icon: Click here to access the edit feature. The top section is where you can add and remove tags.

Adding a new Tag: Free text to enter in your tag and then click the "tab" button on your keyword to create a new tag. This tag will be available to use for any provider on your team.

Removing a Tag: From the edit popup select the small gray X on your tag and press save. All tags must be removed from a team in order to disappear from the tags list. Your tag will be removed from that profile. Tags that already exist in your Team can easily be added to additional providers; click into the tag field to view the dropdown list of existing tags.

Tags : Tips for success

- Providers can have more than one tag
- Use cases: Service locations, Title, Practice type, etc...

Edit John Snow, MD

Tags for Modio Health QA (San Francisco, CA)

Contract Employees ✕ ...

Teams

Modio Health Master Practice (DEMO) (San Francisco, CA) ✕ Modio Health QA (San Francisco, CA) ✕

Specialty List

Family Medicine ✕ ✕

Job Title

MD

Notes

Public 0 Team 0

☒ Prepend Yasi Givechi (0 of 3000)

Save Note

Cancel Save



Compliance Alerts











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

Start
Step 1


Alerts: View your entire team’s compliance report and see which items are nearing expiration by clicking on the Alerts button. The number displayed is the current number of alerts for your team.




State Licenses

State Licenses  3							
Provider Name	License	State	Status	Exp. Date	Expires In	Last Updated	Actions
...
Yuri Zhivago, DPM	123456789 (NP)	CA	Active	11/30/2016	expired	09/13/2018	   
Yuri Zhivago, DPM	KST1321	KS	Active	07/09/2017	expired	05/04/2018	   
Yuri Zhivago, DPM	TN-1342	TN	Active	07/27/2017	expired	05/04/2018	   


DEA Licenses

DEA Licenses  8						
--	--	--	--	--	--	--


State Controlled Substance Licenses

State Controlled Substance Licenses  0						
---	--	--	--	--	--	--


ABMS Certifications

ABMS Certifications  1						
---	--	--	--	--	--	--


OIG

OIG  0						
---	--	--	--	--	--	--


CAQH

CAQH  1						
--	--	--	--	--	--	--


Other Certifications

Other Certifications  0						
--	--	--	--	--	--	--





Documents

Documents  11						
--	--	--	--	--	--	--

Malpractice Insurance

Malpractice Insurance  1						
---	--	--	--	--	--	--

Actions Icon Key:

-  **Update**
Click the Update icon to update license from state primary source.
-  **Manage Credentials**
Click the Provider icon for secure access to the provider's credentials.
-  **Edit**
Click the Edit icon to change Tag(s) and Notes current license.
-  **Disable Alert**
Click the Disable Alert icon to unlist the license from the report.

Compliance page:

View the details of alerts for your entire team across these credentialing sections.

Color Coded Indicators

- Yellow:** There are 60 or fewer days until the license expires.
- Red:** The license is expired.

You can access our primary source integrations (updaters) in the Alerts/Compliance feature, indicated by the refresh icon. OneView will search the indicated source site to pull in primary source data about your provider.

Primary Source Integration Sections:

State Licenses

DEA Licenses

State Controlled Substance Licenses

OIG

modio

Welcome Yasi GivechiSupportModio UNew FeaturesSettingsSign out

TeamFormsTrackingLoginsTasksNotes

Modio Health Master Practice (DEMO) (Sa

State Licenses

DEA Licenses

State Controlled Substance Licenses

Provider Name

State

Licens

Dwayne Johnson, MD

IN

01073

ABMS Certifications

OIG

CAQH CAQH

Other Certifications

Update VA license 010123441891 for Kirk Heath MD

Current License Info

Number010123441891

License StatusCurrent Active

OccupationMedicine

Provider NameJohn W Heath

StateVA

Expiration Date04/30/2022

Issue Date06/04/2007

Supervisorn/a

Address InfoNorfolk, VA 23502

Multi stateNo

RX AuthorityNo

Additional Public InformationNo

Updated License Info

Number010123441891

License StatusCurrent Active

OccupationMedicine

Provider NameKirk W Heath

StateVA

Expiration Date04/30/2022

Issue Date06/04/2007

Supervisorn/a

Address InfoVirginia Beach, VA 23451

Multi stateNo

RX AuthorityNo

Additional Public InformationNo

Acknowledge and Close

☒ Upload primary source document

Accept Changes

New data (in yellow) will update

12

16

1

01/18/2022

5

1

5

Chat

Color Coded Indicators


Yellow: There are 60 or fewer days until the license expires.

Red: The license is expired.

Step 1: Click the updater icon to search the corresponding database for updated licensure data. The updated data will be highlighted in yellow.


Step 2: If the license has already been renewed, you can automatically add the renewed licensing data to your provider profile and pull the primary source document in one click. Click the "Upload primary source document" box and then click "Accept Changes". The document will be added to the provider's document section, the updated license info will be documented, and the alert will be removed from the compliance list.



Built into the Alerts/Compliance feature is a messaging function for you to quickly communicate with your providers and coordinators. Indicated by the email icon, you can click on the email icon to send alerts to your providers and/or coordinators.











modio 


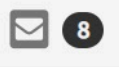
Welcome Yasi Givechi [Training & Support](#) [Settings](#) [Services](#) [Sign out](#)



[Team](#) [Forms](#) [Tracking](#) [Logins](#) [Tasks](#) [Notes](#)



 Modio Health QA (San Francisco, CA) ▾



 State Licenses 



Provider Name	License	State	Status	Exp. Date	Expires In	Last Updated	Actions
Yuri Zhivago, DPM	123456789 (NP)	CA	Active	11/30/2016	expired	09/13/2018	   
Yuri Zhivago, DPM	KST1321	KS	Active	07/09/2017	expired	05/04/2018	  
Yuri Zhivago, DPM	TN-1342	TN	Active	07/27/2017	expired	05/04/2018	  



 DEA Licenses 



 State Controlled Substance Licenses 



 ABMS Certifications 


 OIG 

 CAQH 

 Other Certifications 

 Documents 

 Malpractice Insurance 

 Live Help

Email Alert Icon:
This icon will appear on the right-hand side of any section containing existing alerts. Use this email feature to quickly communicate with your providers and/or coordinators and let them know that they have a license that will be expiring soon.



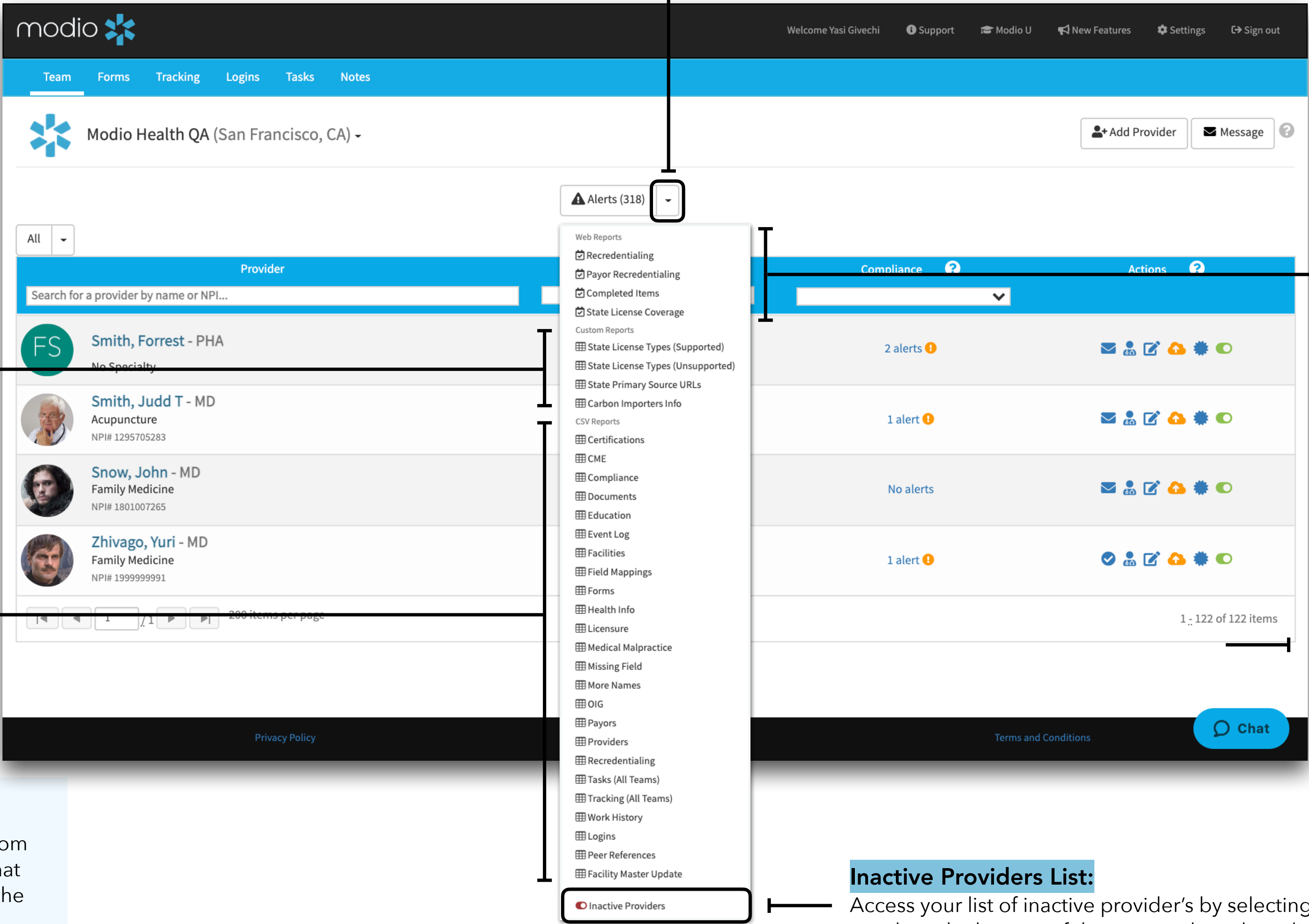
Reports

Quickly run a variety of web and CSV reports from the reporting dropdown arrow.

Viewing Reports:
Use the dropdown caret to access your Team reporting options. Select from CSV and Web reports.

Custom Reports:
If your organization has a reporting need that is not met by an existing report, let our support team know and we can build a custom report just for you.

CSV Reports
These reports will download an Excel file to your computer's files.. All the columns can be sorted, filtered and manipulated through Excel.



Web Reports:
This section of the column stores the web reports. These reports will open a dashboard on your screen where you will view the data within your Team. You will be able to sort and filter each column, but not make edits or changes.

Inactive Providers List:
Access your list of inactive provider's by selecting the red toggle at the bottom of the reports drop down list.

Key takeaway:
All the data in these reports is coming from you provider's profiles. The more data that is housed within your provider profiles, the more robust your reports will be.



Credentialing Profile Audit

Learn to effectively and efficiently add data to the 13 sections of your provider's credentialing profile.

Credentialing Sections:

Use our database of facility master records to add locations to your provider credentialing profiles.

The credentialing sections that utilize master record are:

- Education and Training
- Practice/Employer
- Facility Affiliations
- Work History

Personal Info

Education & Training

Practice / Employer

Facility Affiliations

Work History

Peer References

Licensure

Certifications

Medical Malpractice

Healthcare Payors

Health Info

Event Log

CME

Documents

Summary

Practice/Employer 7

Current Practice/Employer	Office Type	Staff Category	Reappointm...	Start Date	End Date	Actions
★ Modio Health - OnDemand (Virginia Beach, VA - 20764) 2228 W Great Neck Rd, Ste 205, Virginia Beach, VA 23451	Other Practice					
★ Medically Home Group, Inc (Boston, MA - 32348) 133 Brookline Ave, Boston, MA 02215	Other Practice					
★ Mobile Rehab Group LLC (Eagle, ID - 46189) 516 S Wooddale Pl, Eagle, ID 83616-7713 - TIN: 852790183	Other Practice					
★ Modio Health QA (San Francisco, CA - Client ID #) Address, Address 2, San Francisco, CA 94102 - TIN: 555555555	Other Practice					
★ CT - 151 - Cheshire (Cheshire, CT - MED - 151) 1785 Highland Ave, Cheshire, CT 06410-1272 - TIN: 475525260	Other Practice					
★ CT - 154 - Hamden (Hamden, CT - MED - 154) 2165 Dixwell Ave, Hamden, CT 06514-2116 - TIN: 475525260	Other Practice					
★ Modio Health Master Practice (DEMO) (San Francisco, CA - OV) 535 Mission St, San Francisco, CA 94105 - TIN: 555555555	Other Practice					

Add Practice/Employer for Yuri Zhivago MD

Current Practice/Employer Name *

Office Type *

Current Position Held

Practice/Employer Type

Start Date

End Date

Staff Category

List this Practice/Employer in:

Patient Age Range

Patient Type

Accepting new patients?

Case Load

Credentialing Dates

Initial Credentialing Date

Last Credentialed Date

Credentialing End Date

Reappointment Start Date

Credentialing Status - Modio Health QA (San Francisco, CA)

Notes

Public 0

Team 0

Prepend Yas Givechi

(0 of 3000)

Tip: The required fields are indicated by an **orange star**. The rest of the fields are optional for you to fill out according to your credentialing needs.

Current Practice/Employer:

Search for your practice location by address keywords, e.g. "1234 Smith". A dropdown list of potential matches will appear for you to select from. If your address does not generate a match, try to search by name. If the location is still not found, email us at Support@modiohealth.com so that we can create a new record for you. It is required that you include the name and address of the location you wish to add. You may include other optional data like NPI, TIN, and billing address (reach out to our team for a full list of fields).

Required fields will be indicated by an orange star (*). The rest of the fields are optional for you to fill out according to your credentialing needs. The data that is added to these different sections will all be accessed when using the reports feature as well as the forms module. Complete your credentialing profiles now to set yourself up for success in the future.

Add data to these sections:

modio

TeamFormsTrackingLoginsTasksNotes

Personal Info

Education & Training

Practice / Employer

Facility Affiliations

Work History

Peer References

Licensure

Certifications

Medical Malpractice

Healthcare Payors

Health Info

Event Log

CME

Documents

Summary

Drop documents here
or
Click here to browse

Accepted file formats:
pdf, docx, txt, rtf, gif, jpg, png

Peer References0

Add Peer Reference for Yuri Zhivago MD

CancelSave

Prefix

Reference Name *

Degree

Select a degree

Specialty

Reference Title

Relationship Type

Length of Time Known

Reference Date

mm/dd/yyyy

Reference Status

Active

Contact

Email

@

Phone #

() - -

Fax #

() - -

Notes

Public0Team0

☒ Prepend Yes Givechi

(0 of 3000)

Documents

0

Address

Facility Name

Address

Address 2

City

State/Province

Zip/Postal Code

Refer a Friend

Chat

Start Step 1

Use the green add button and a new modal will open for you to add your data.

Credentialing Sections:

All these sections have an option to add free text notes.

Add Notes:

Select the Public tab or the Team tab to determine who can see the notes. Once you have added notes to your provider profiles you will be able to use the Notes tab from the Team Navigation Bar to view them.

Public Notes:

Everyone on your team will be able to view these notes. This includes your coordinators, read only/full access, and providers that may have access to the platform.

Team Notes:

These notes will be visible to coordinators within the specified team who have full access.

modio

TeamFormsTrackingLoginsTasksNotes

Personal Info

Education & Training

Practice / Employer

Facility Affiliations

Work History

Peer References

Licensure

Certifications

Medical Malpractice

Healthcare Payors

Health Info

Event Log

CME

Documents

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EmailPhone #Fax #

Notes

Public0Team0

Prepend Yas Givechi(0 of 3000)

Documents0

Address

Facility Name

AddressAddress 2

CityState/ProvinceZip/Postal Code

SupportModio UNew FeaturesSettingsSign out

titleReference DateActions

Add+

Chat



Documents

Upload, download, and share from the Documents section in your provider credentialing profiles.

Completed Forms:

View the forms completed for your providers here.

Upload:


Upload one or more files directly into your provider's file.

Download:

Download a zip file of all documents.

Email:

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

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Welcome Yas Givechi | Support | Modio U | New Features | Settings | Sign out

Team | Forms | Tracking | Logins | Tasks | Notes

Yuri Zhivago MD Documents










Securely Upload, Download, and Email Documents.

Documents

Completed Forms

Personal Info

3

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Color Photo	Powell Alisha - Color Photo.jpg	02/14/2018	Public		Active	  
Color Photo	Udall Dana - Color Photo.jpg	02/14/2018	Public		Active	  
Curriculum Vitae (CV)	Analytics Results 1.8-1.14.18.xlsx	02/20/2018	Public		Active	  

Health Info

0

Malpractice







0

Education

0

Miscellaneous

2

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Other Misc	Kick-off graph 2:19:18 .png	02/20/2018	Public		Active	  
Other Misc	macbook.png	10/31/2017	Public		Active	  

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Upload

Download

Email

Chat

Start Step 1

Drag and Drop:

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

Batch Document Uploading:

Upload multiple files by clicking here.

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

File Type:

Select the file Type(s) from the drop-down menu if they did not auto populate.

Expiration:


Expiring or expired documents will show up in the Alerts or compliance section.

File Name:

Name your file. OneView will auto-detect the type of documents you upload if they are titled in this format: Provider name, Document type, EXP date. Example: "John Smith NY State License exp 12312022."

Permissions:

- Public** - Visible to the provider and to any coordinators on the team.
- Coordinator** - Visible to only Coordinators on the team.

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Team | Forms | Tracking | Logins | Tasks | Notes

Yuri Zhivago MD Documents

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Drop documents here or Click here to browse

Accepted file formats: pdf, docx, txt, rtf, gif, jpg, png

File Uploads for Leah Sanborn MD

File name	386.29 KB	Type	Expiration	<input type="checkbox"/> Not Applicable?	Permission
Kirk Heath ABMS EXP 01012021	.pdf	Board Certification	01/01/2021	<input type="checkbox"/>	Public
Kirk Heath DEA Utah EXP 01012021	.pdf	DEA	01/01/2021	<input type="checkbox"/>	Public
Kirk Heath Diploma EXP 01012021	.pdf	Diploma	01/01/2021	<input type="checkbox"/>	Public

Cancel Upload







Color Photo	Udall Dana - Color Photo.jpg	02/14/2018	Public	Active	  
Curriculum Vitae (CV)	Analytics Results 1.8-1.14.18.xlsx	02/20/2018	Public	Active	  

Health Info 0

Malpractice 0

Education 0

Miscellaneous 2

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Other Misc	Kick-off graph 2:19:18 .png	02/20/2018	Public		Active	  
Other Misc	macbook.png	10/31/2017	Public		Active	  

Chat

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

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 01022022.' When you upload that file to our platform, it will automatically fill in the category and expiration date (Curriculum Vitae expiring on 01/02/2022).

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 01022022
Color Photo	photo, image	Jane Doe Photo EXP 01022022
PPD Test Results	ppd	Jane Doe PPD EXP 01022022
Certificate of Insurance (COI)	coi, insurance	Jane Doe COI EXP 01022022
ECFMG Certificate	ecfmg	Jane Doe ECFMG EXP 01022022
MD Diploma	diploma, school	Jane Doe Diploma EXP 01022022
Residency, Internship, Fellowship Certificates	residen, resident, residency, intern, fellow	Jane Doe Residency EXP 01022022
Social Security Card	ssn, social	Jane Doe SSN EXP 01022022
Immunization Information	immun, flu	Jane Doe Immun EXP 01022022
Case Logs	case, logs	Jane Doe Case EXP 01022022
Board Certification Certificate(s)	board, abms	Jane Doe ABMS EXP 01022022
NPDB Self-Query	npdb	Jane Doe NPDB EXP 01022022
Facility Applications	app	Jane Doe App EXP 01022022
Facility Attestations	attest	Jane Doe Attestation EXP 01022022
Payor Contracts	payor, medicare, medicaid, aetna, etc. (get payor list)	Jane Doe Payor EXP 01022022
Driver License Copy	dl, driver	Jane Doe DL EXP 01022022
Passport Copy	passport	Jane Doe Passport EXP 01022022
DD214	dd214	Jane Doe dd214 EXP 01022022
State Controlled Substance Document	csl	Jane Doe CSL EXP 01022022
DEA	dea	Jane Doe DEA EXP 01022022
State Medical License	license	Jane Doe License EXP 01022022
Other Certs (ATLS, BLS, PALS etc)	atls, acls, arls, bls, pals, nals, nccpa, also, corec, cpr, nrp	Jane Doe ATLS EXP 01022022
Exam Scores	score, usmle	Jane Doe Score EXP 01022022
Malpractice Case Response	malpractice, mal practice	Jane Doe Malpractice EXP 01022022
Tax Documents	tax, w9, w-9	Jane Doe Tax EXP 01022022
Delineation of Privileges (DOP)	dop, privilege	Jane Doe DOP EXP 01022022
Reference Letters	peer, refer	Jane Doe Peer EXP 01022022
Modio Health	admin	Jane Doe Admin EXP 01022022
Background Check	bgc, background	Jane Doe Background EXP 01022022
CME	cme	Jane Doe CME EXP 01022022
AMA Profile	ama profile	Jane Doe AMA Profile EXP 01022022
Facility Contracts	contract	Jane Doe Contract EXP 01022022
Other	"unknown"	Jane Doe Unknown EXP 01022022

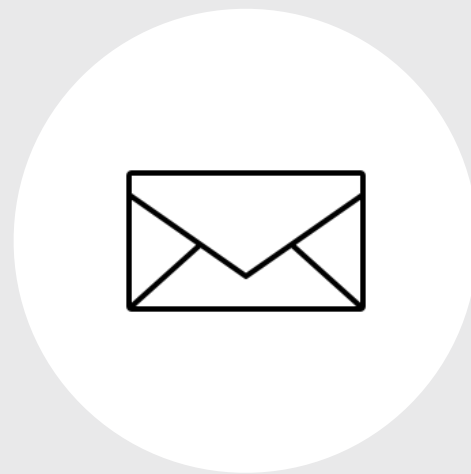
*For a more detailed guide to Documents, please refer to the Documents Guide in the Support Section

This tip guide was designed as a high level overview of the OneView dashboard and covers all topics that are detailed in the OneView 101 Training Course. You can view more in-depth tip guides for each section of OneView on the Support page or by clicking the links on the table of contents.

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346