

OneView

ONEVIEW 101: COORDINATORS GUIDE



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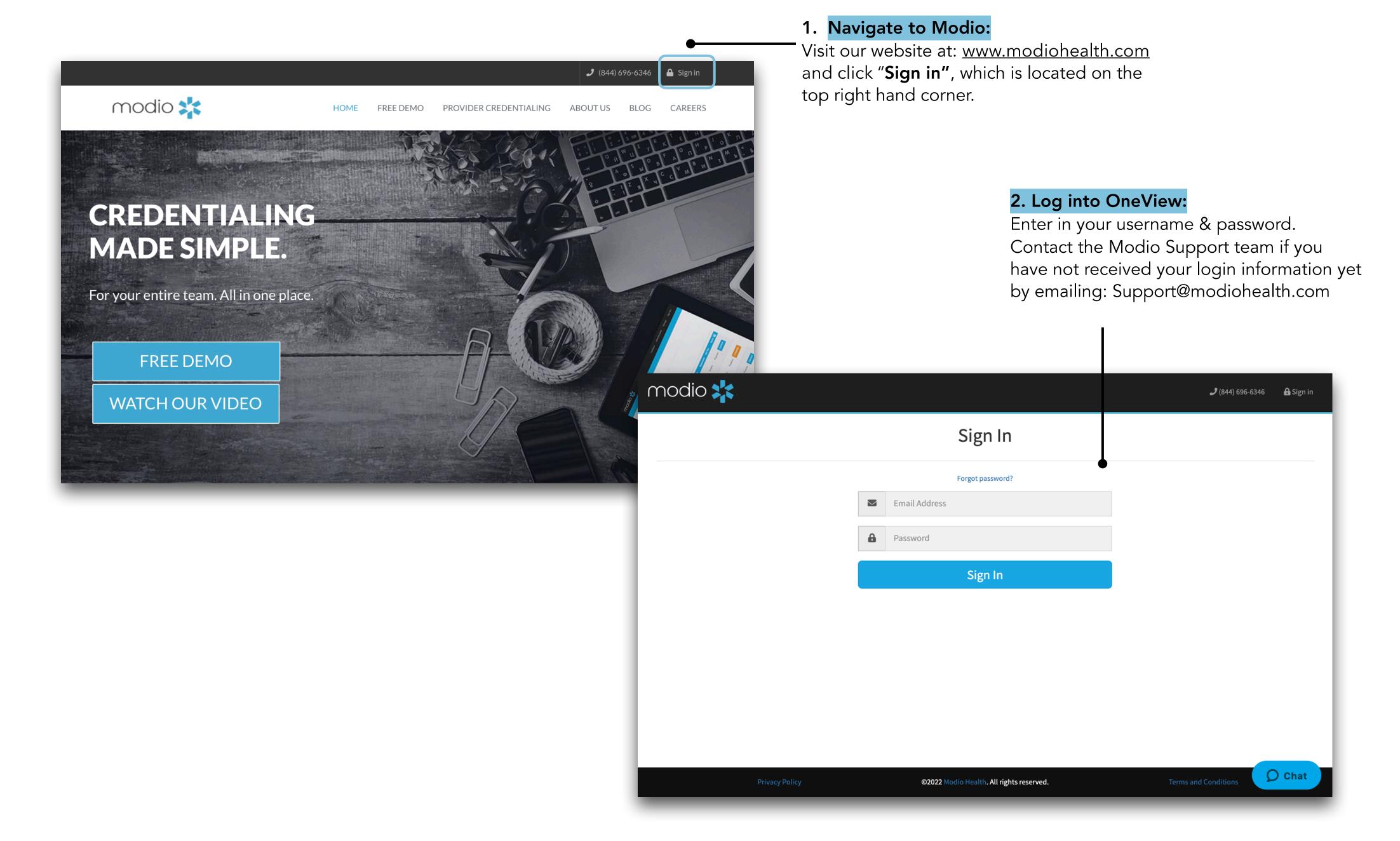
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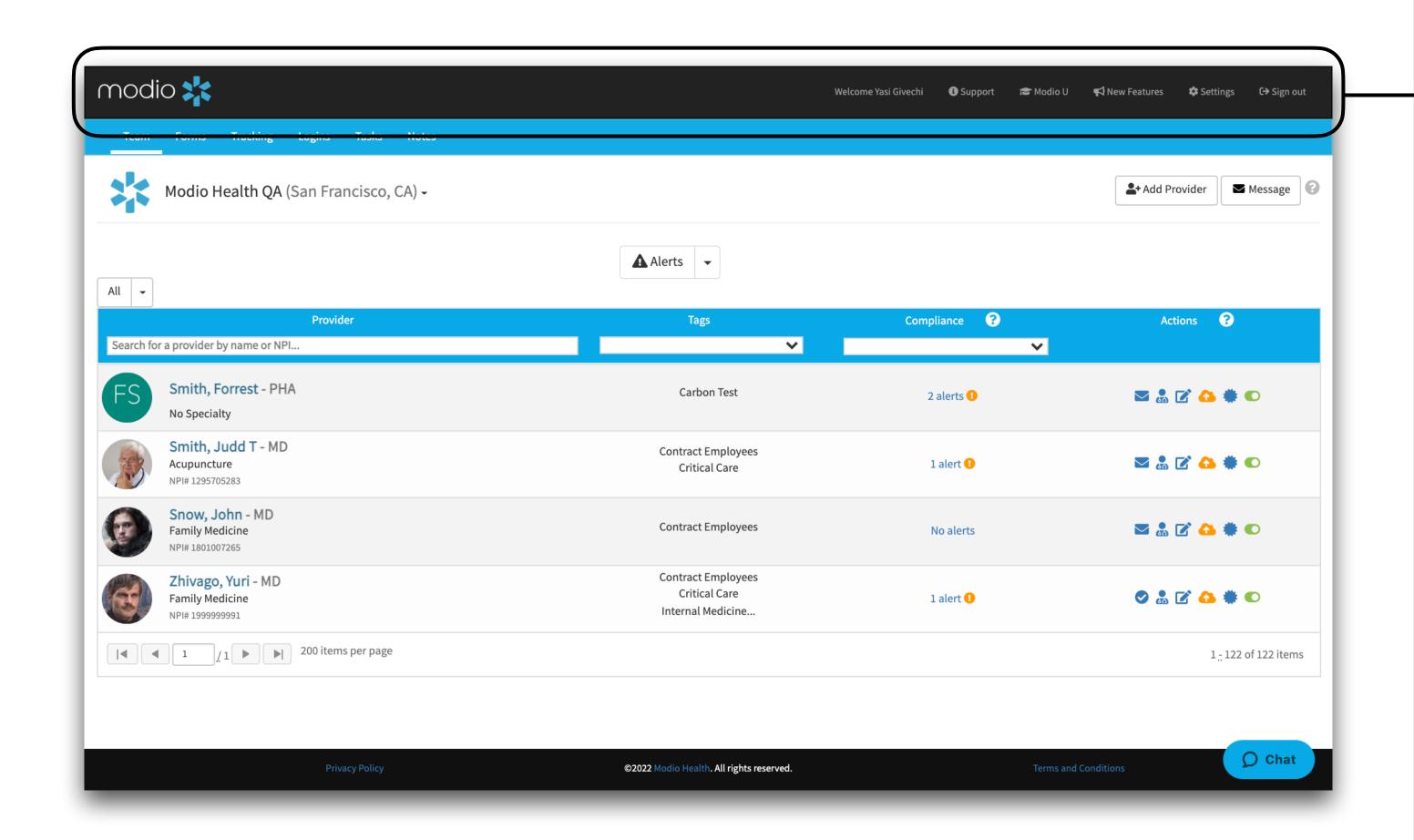
Your Coordinator Toolbar

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.









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.

Tags:

Create sub-lists within your

view or organize the profiles

provider roster to quickly

you are working with.

View individual

provider alerts here.

Live Chat:

Our live chat support

is available from 8 am

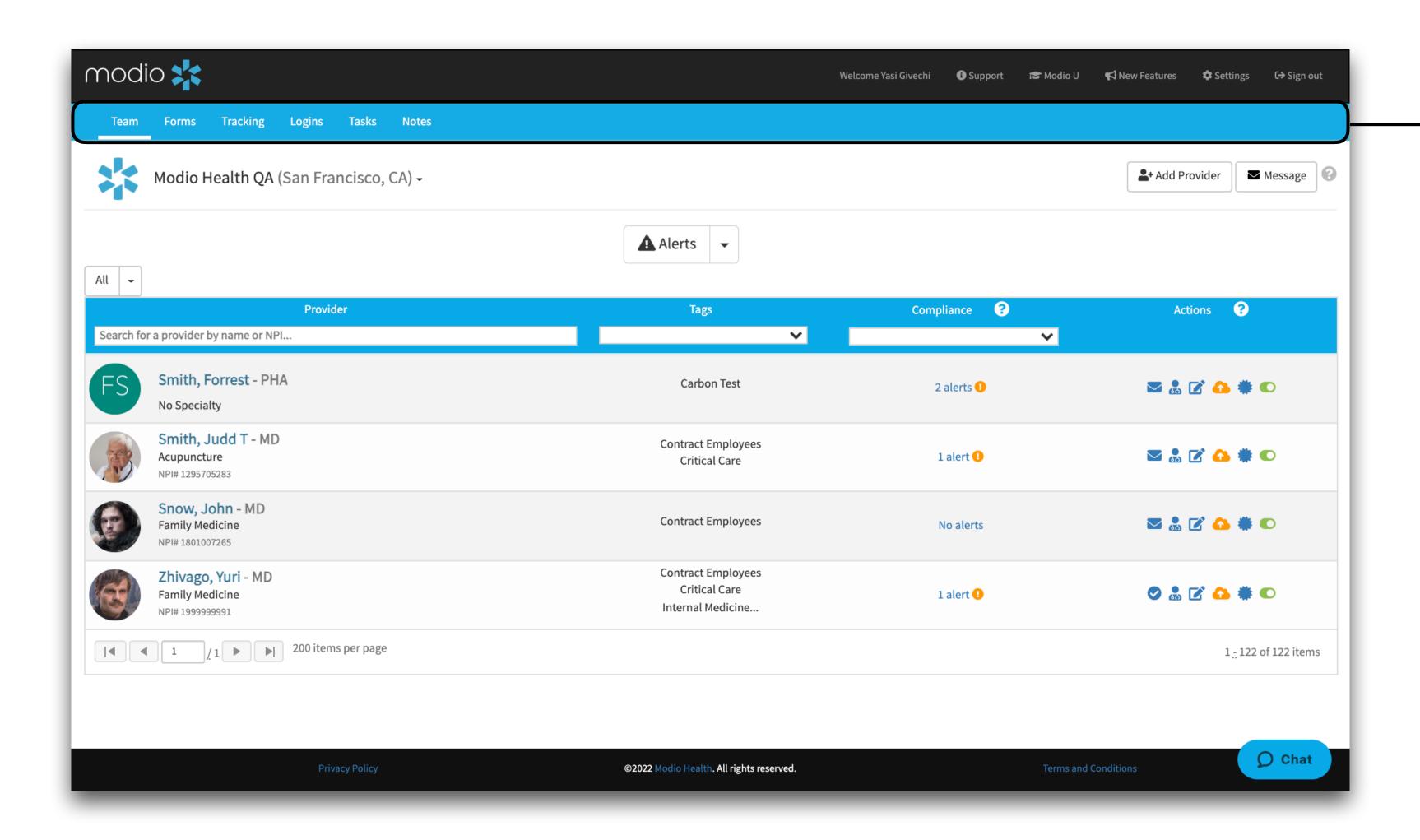
- 6 pm EST (Mon-Fri).



Team Navigation Bar

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





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.



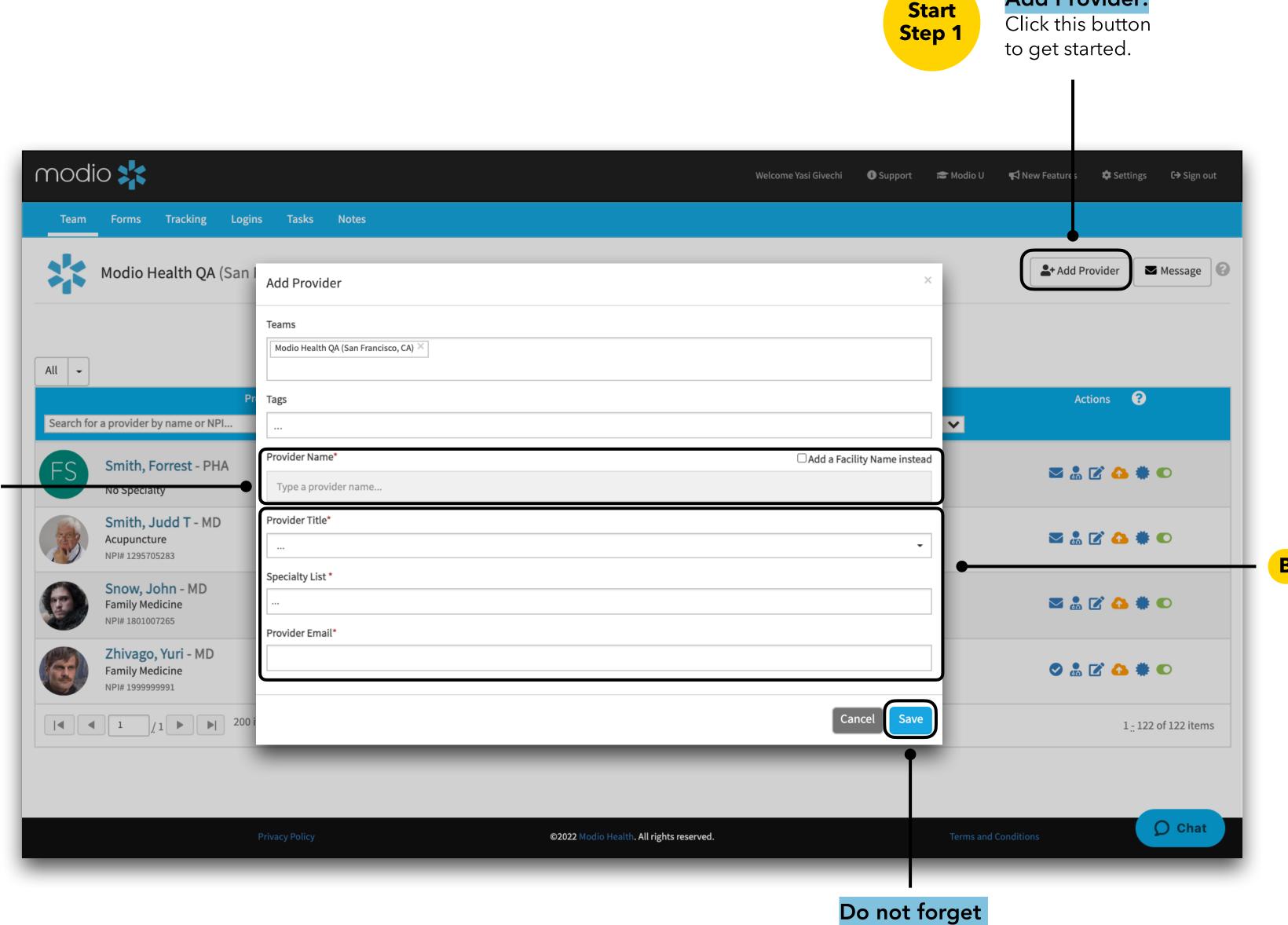
Adding New Providers

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



Add Provider:

to click Save!



Provider Name:

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

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).)



Provider Photo:

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

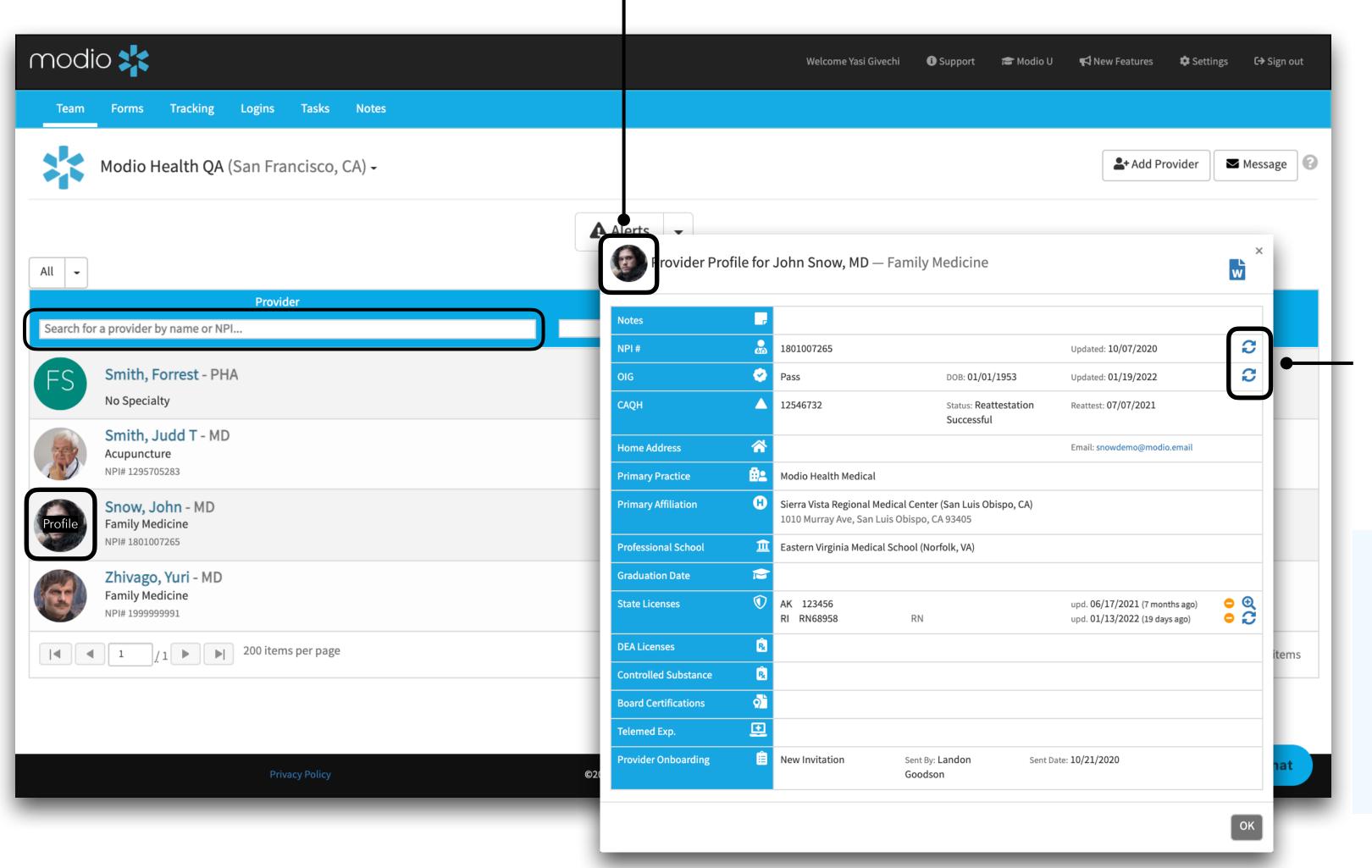


Provider Search:

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."



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.

Tip #1-

names.

Tip #2-

Make sure to confirm

your provider's NPI

before adding - the

include duplicate

If your provider has

had a name change,

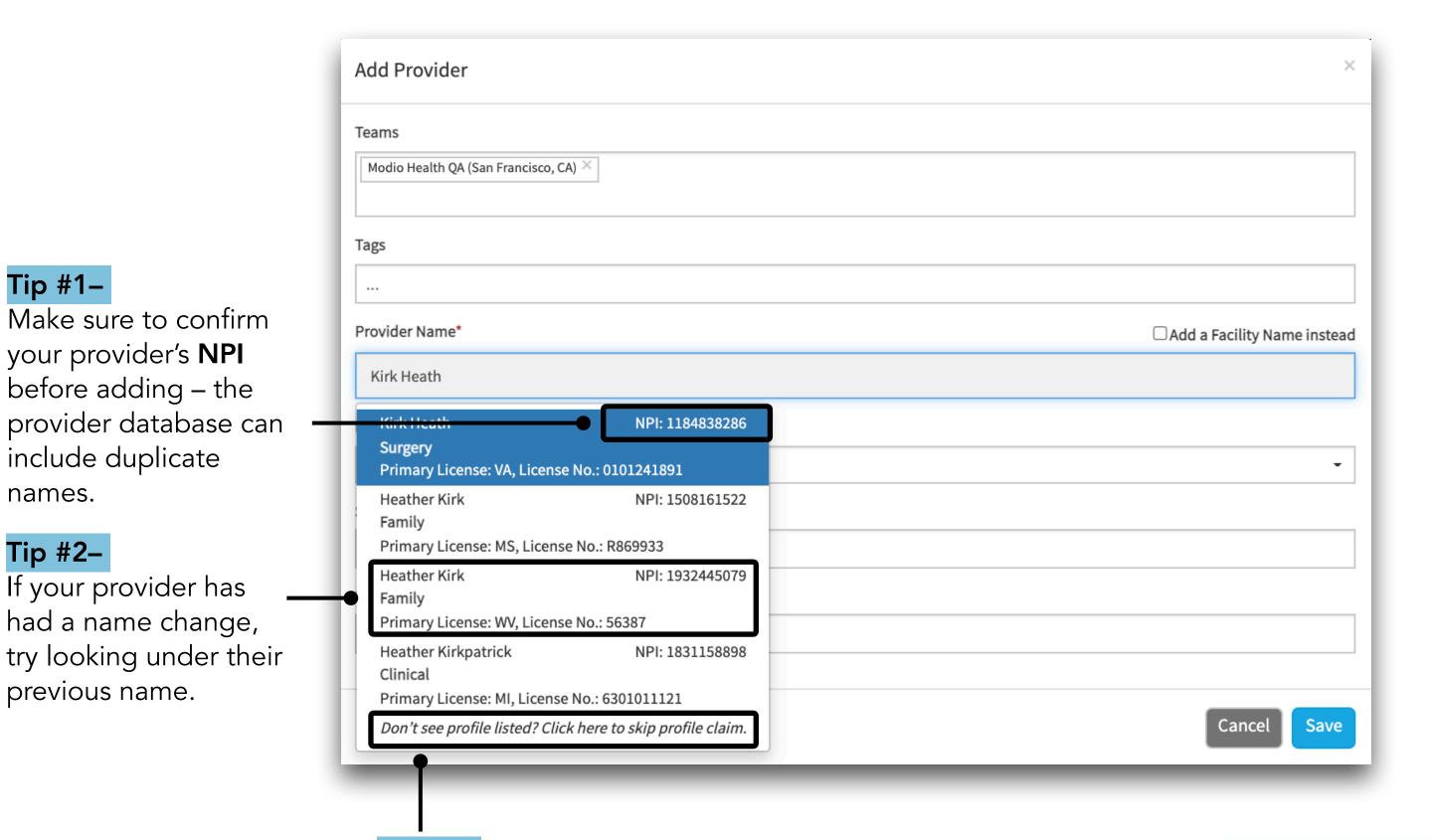
previous name.



Updater Icon:

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

Adding a Provider



Provider Profile Provider Profile for John Snow, MD — Family Medicine C 1801007265 NPI# Updated: 10/07/2020 C DOB: 01/01/1953 Updated: 01/19/2022 CAQH 12546732 Reattest: 07/07/2021 Status: Reattestation **Home Address** Email: snowdemo@modio.email Modio Health Medical rimary Practice 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 upd. 06/17/2021 (7 months ago) RI RN68958 upd. 01/13/2022 (19 days ago) **DEA Licenses Controlled Substance Board Certifications** elemed Exp. Provider Onboarding New Invitation Sent By: Landon Sent Date: 10/21/2020 Goodson ОК

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.

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





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

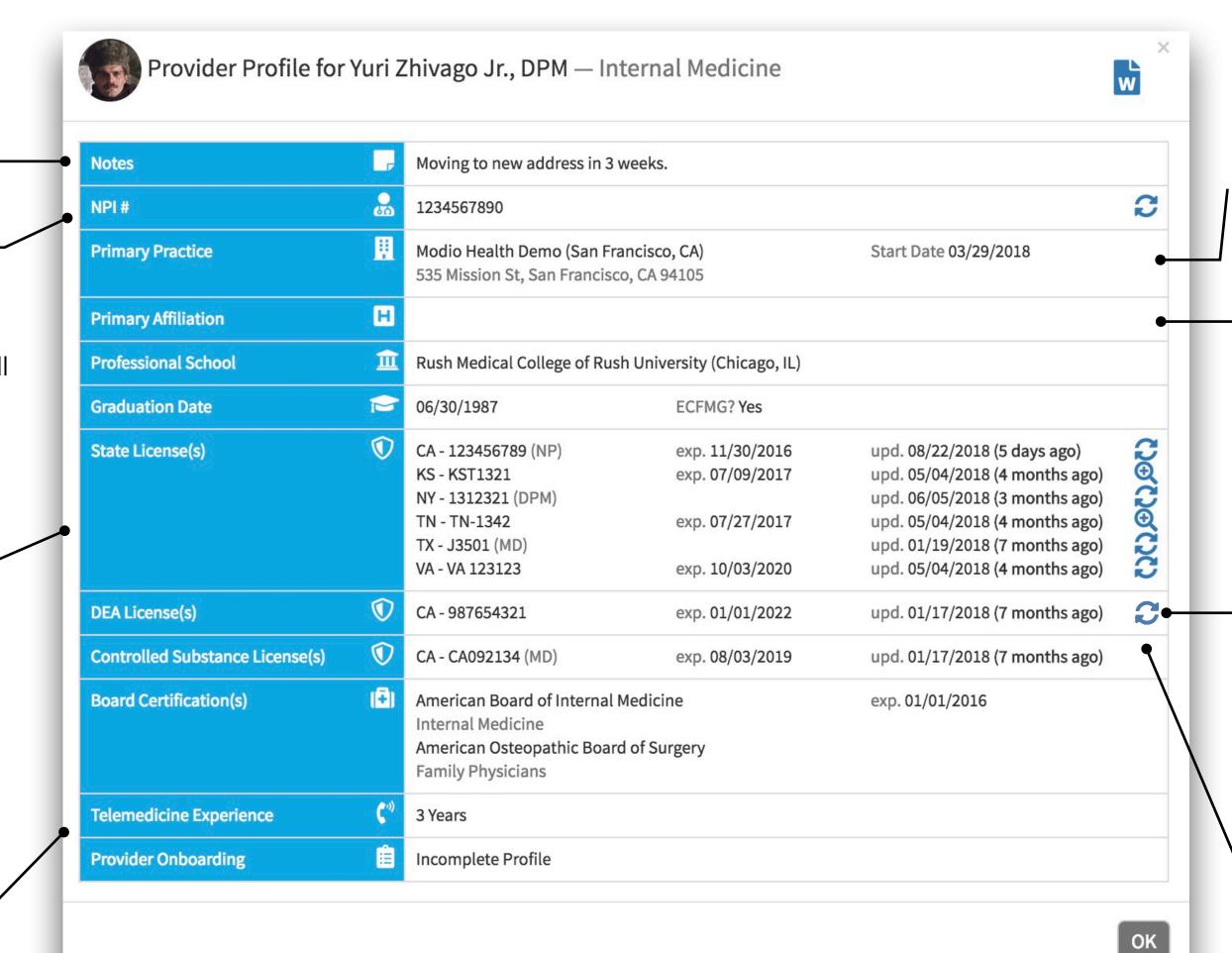
State Licenses:

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.

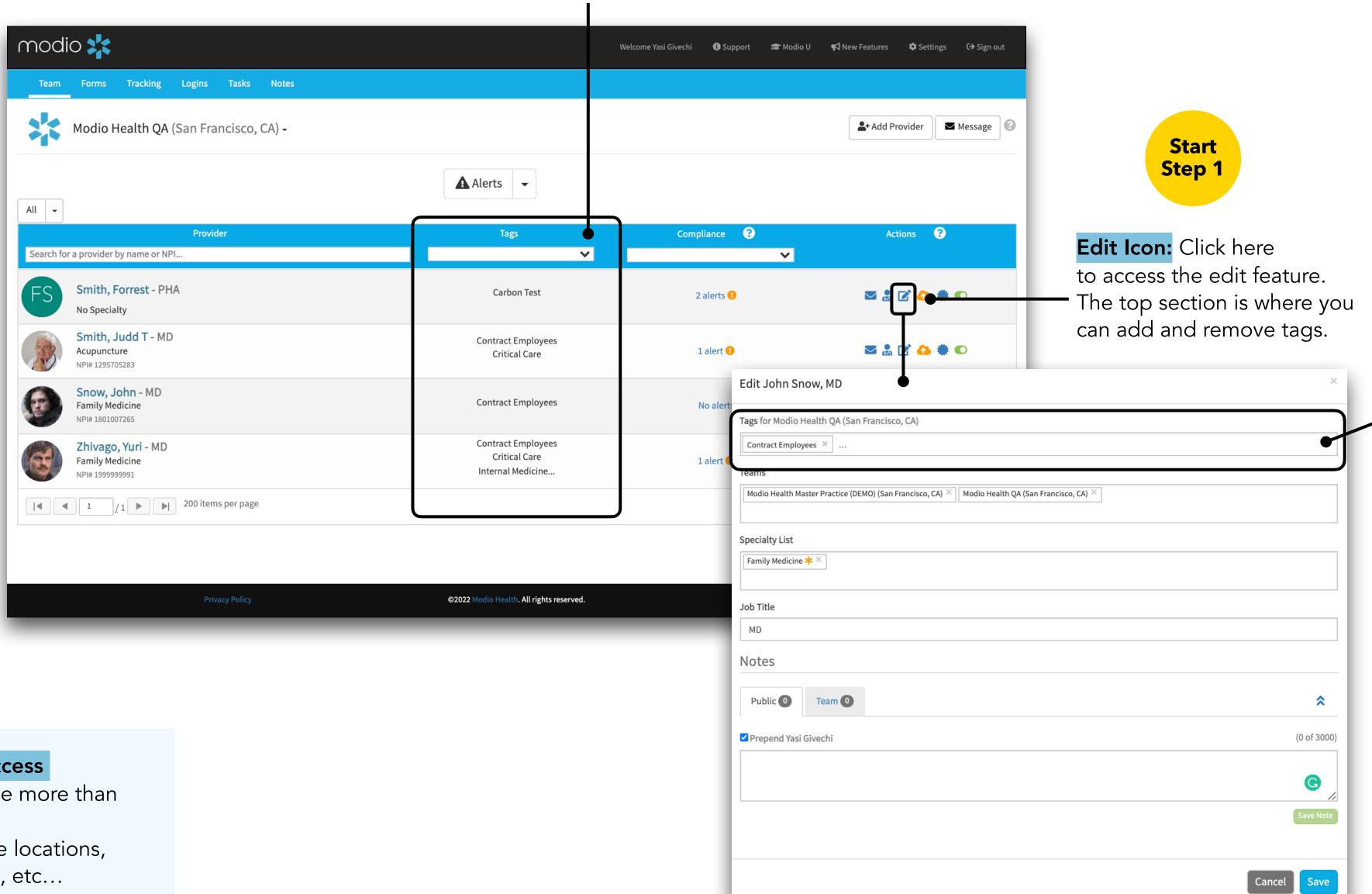


Tags

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



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.



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.

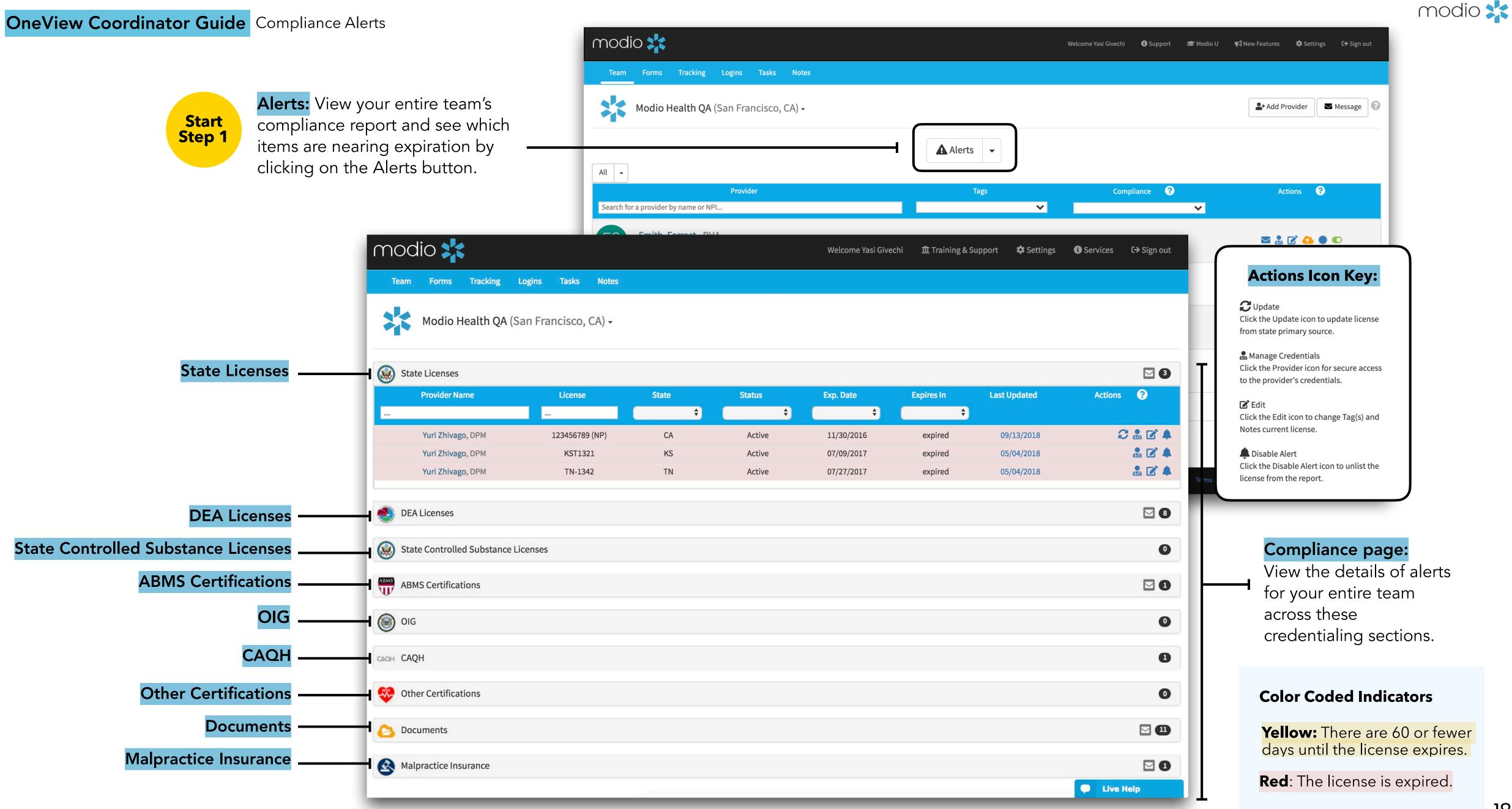
Tags: Tips for success

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



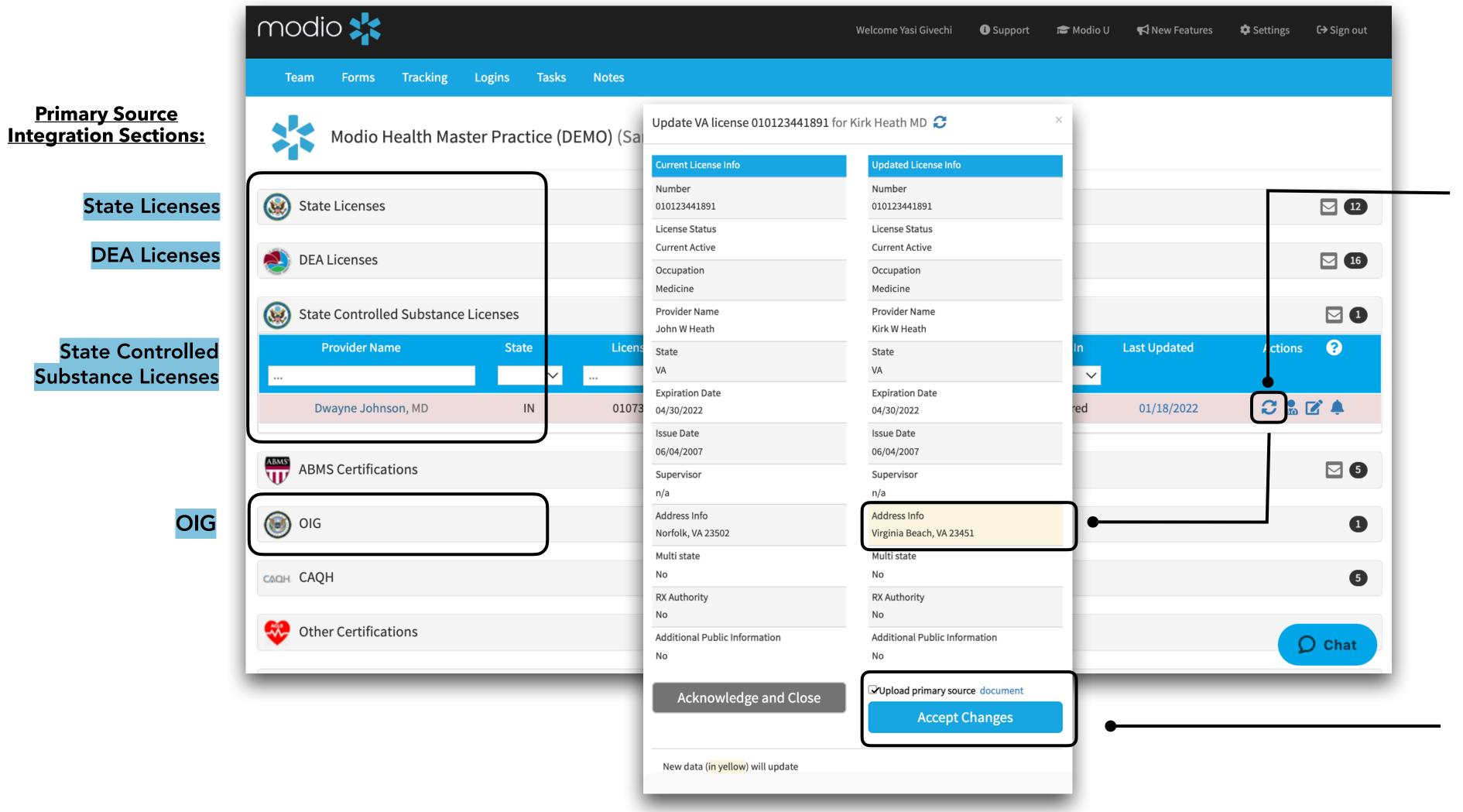
Compliance Alerts

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





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.



Color Coded Indicators

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

Red: The license is expired.

Step 1:

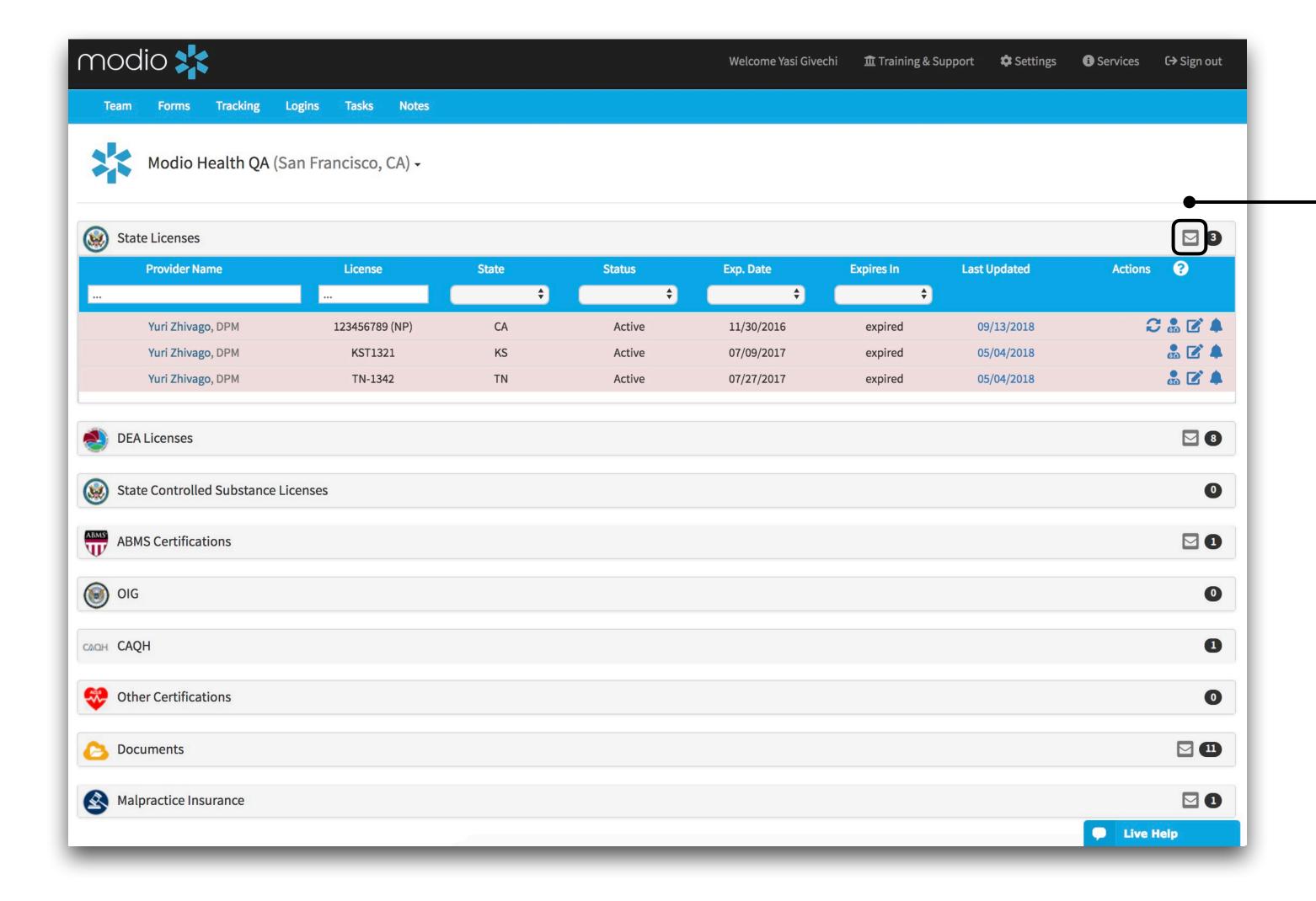
Click the updater icon to search the corresponding database for updated licensure data. The updated data will be highlighted in yellow.

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.



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.

Custom Reports:

for you.

CSV Reports

through Excel.

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

These reports will download an

sorted, filtered and manipulated

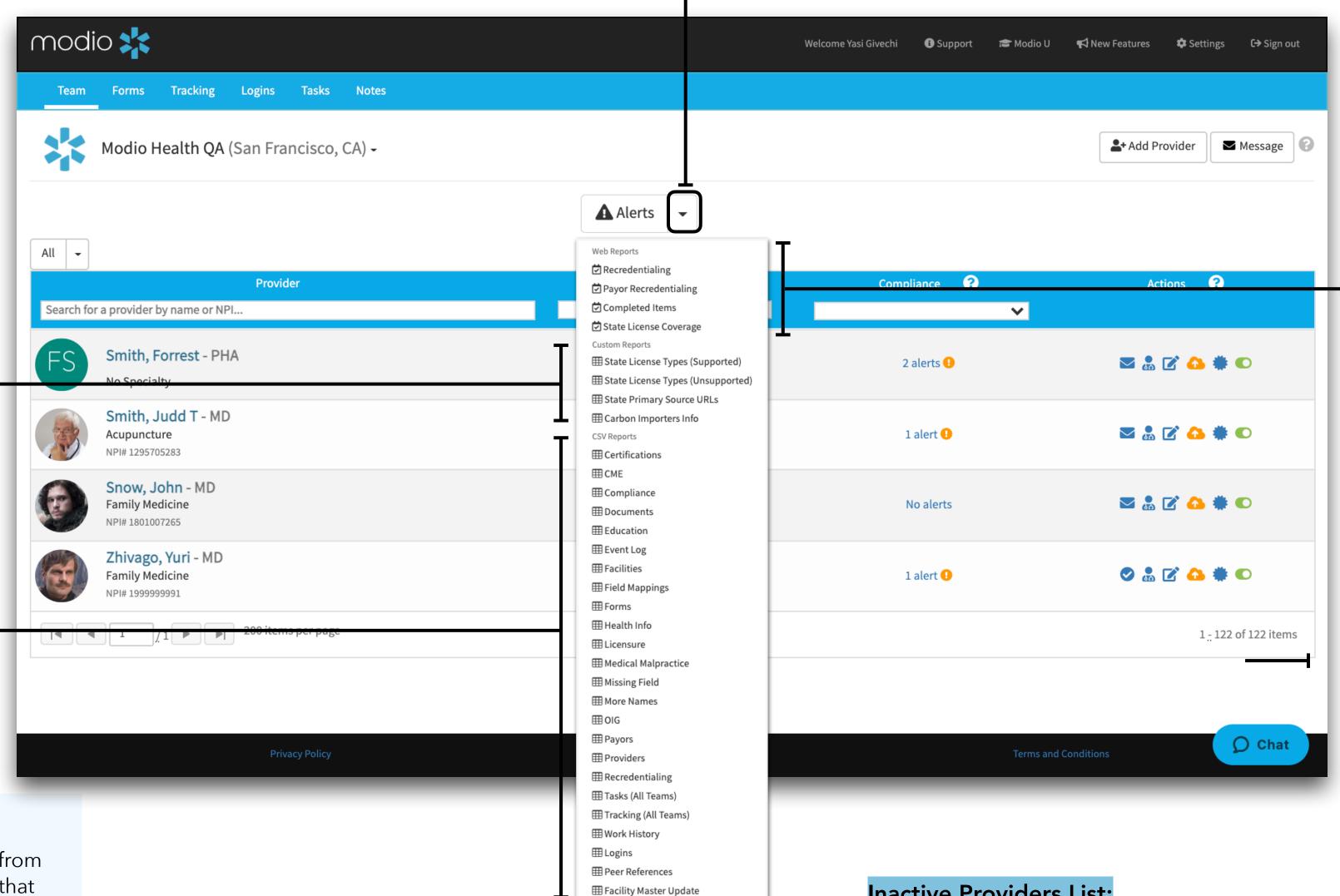
Excel file to your computer's

files.. All the columns can be



Viewing Reports:

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



Inactive Providers

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.

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.

Inactive Providers List:

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



Credentialing Profile Audit

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

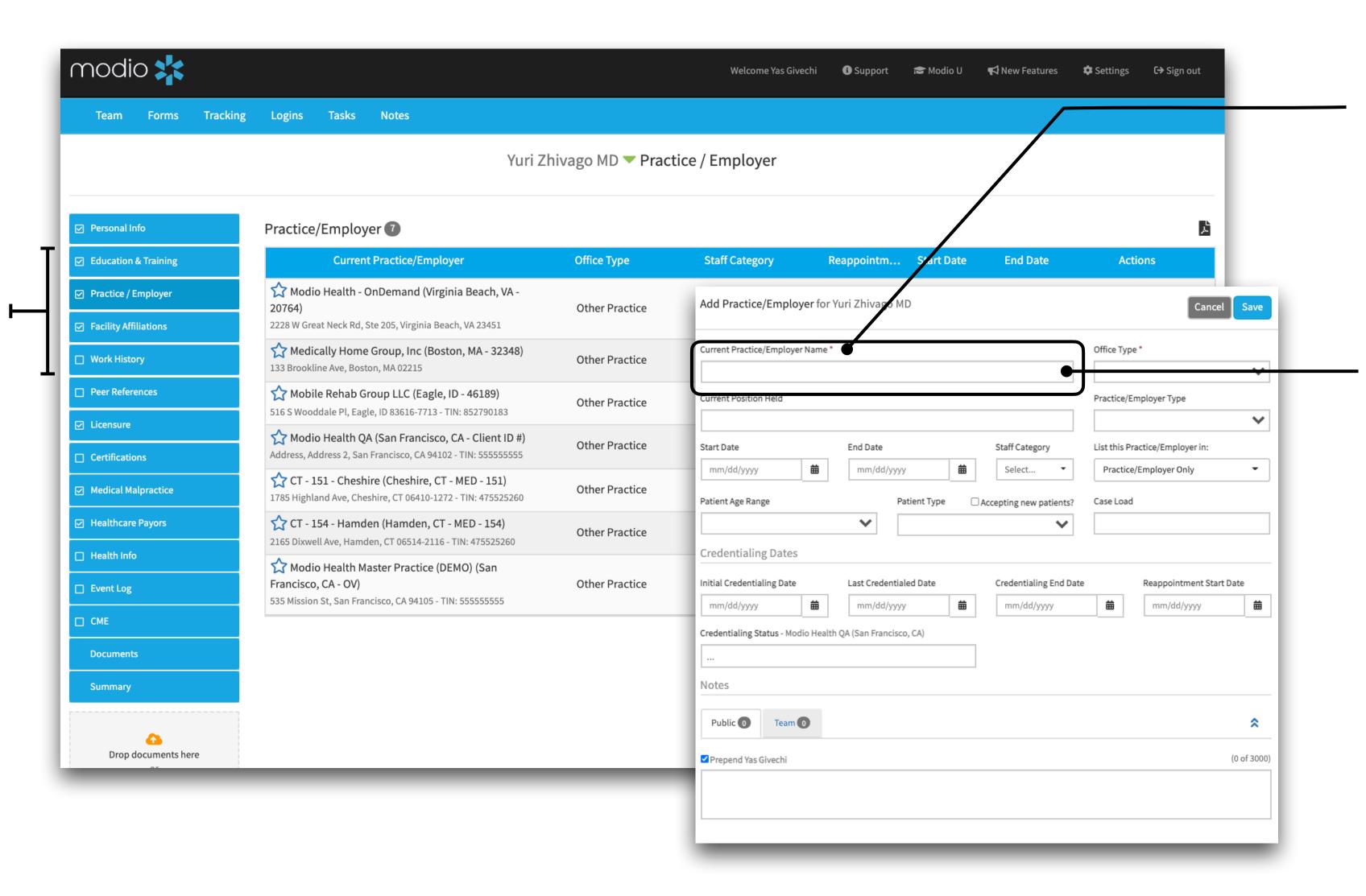


Credentialing Sections:

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



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).



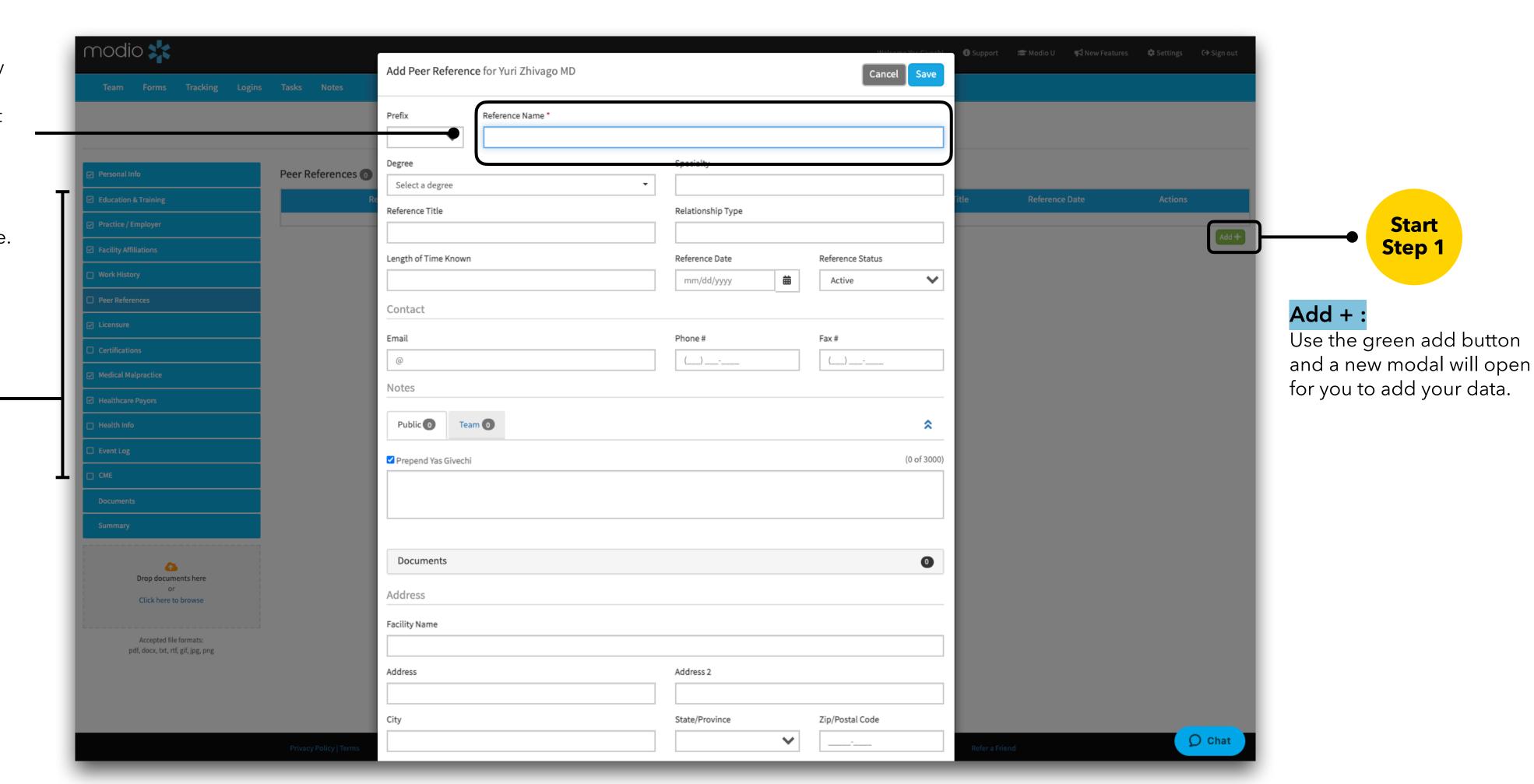
Start

Adding Data Tip:

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.

Credentialing Sections:

Add data to these sections:





Add Notes:

Select the Public tab or the

Team tab to determine who

can see the notes. Once you

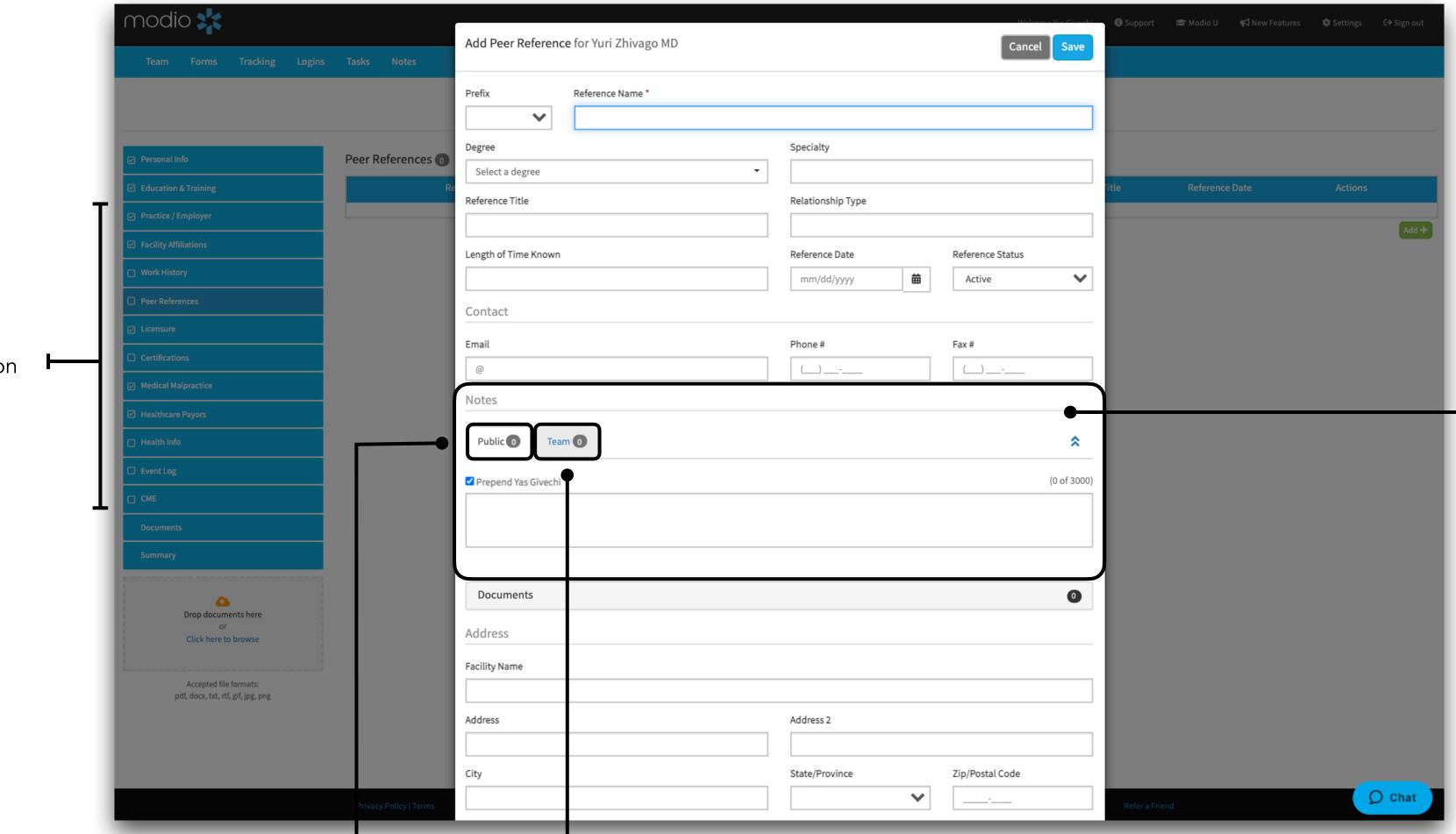
provider profiles you will be

have added notes to your

able to use the Notes tab

from the Team Navigation

Bar to view them.



Credentialing Sections:

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

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.



Documents

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

Start

Step 1

To upload a single document,

Batch Document Uploading:

Upload multiple files by clicking

simply drag and drop to the

Drag and Drop:

platform.

here.

Email:

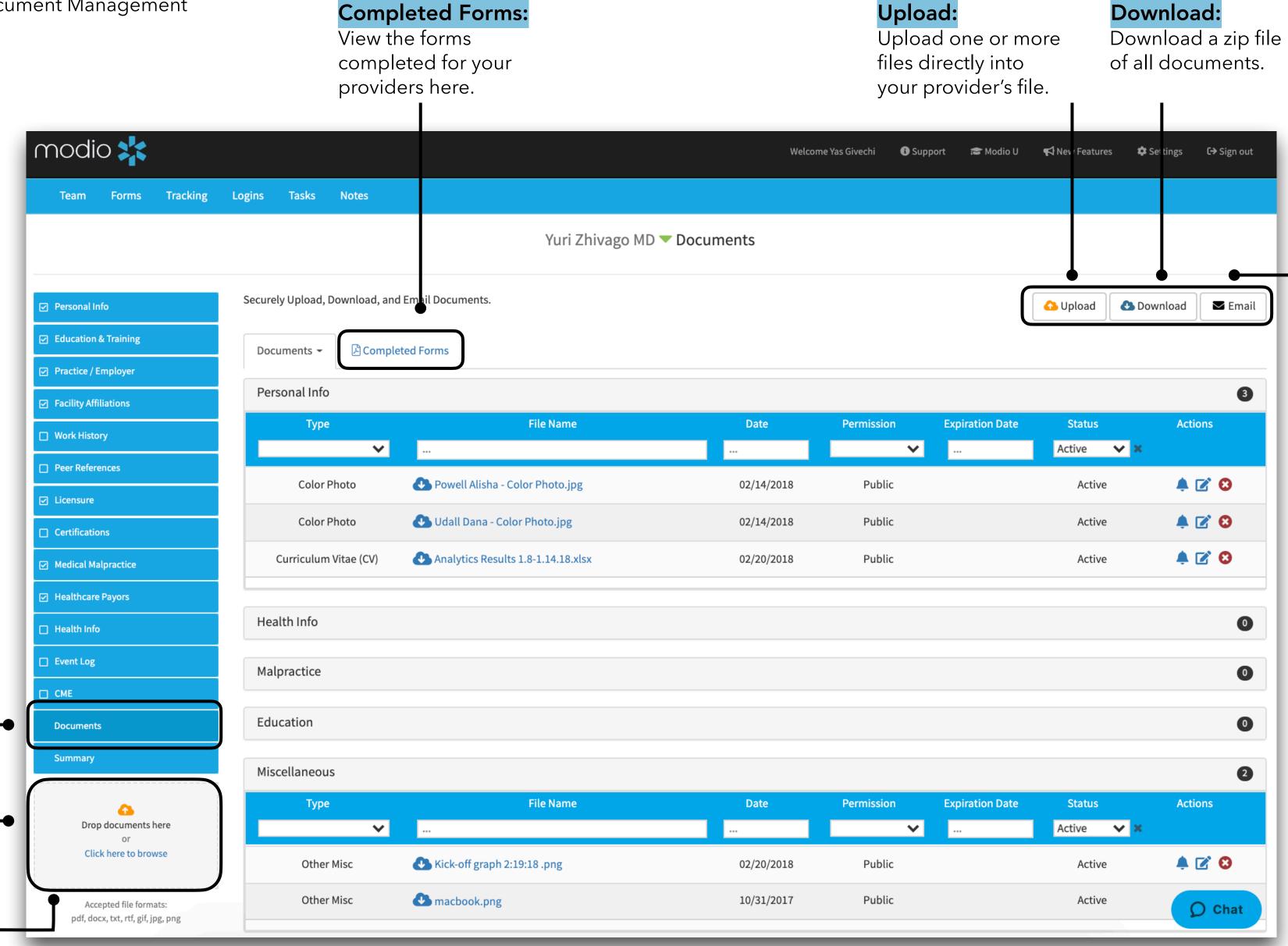
Share any

document directly

with your provider

or any coordinator

in your team.



^{*}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.

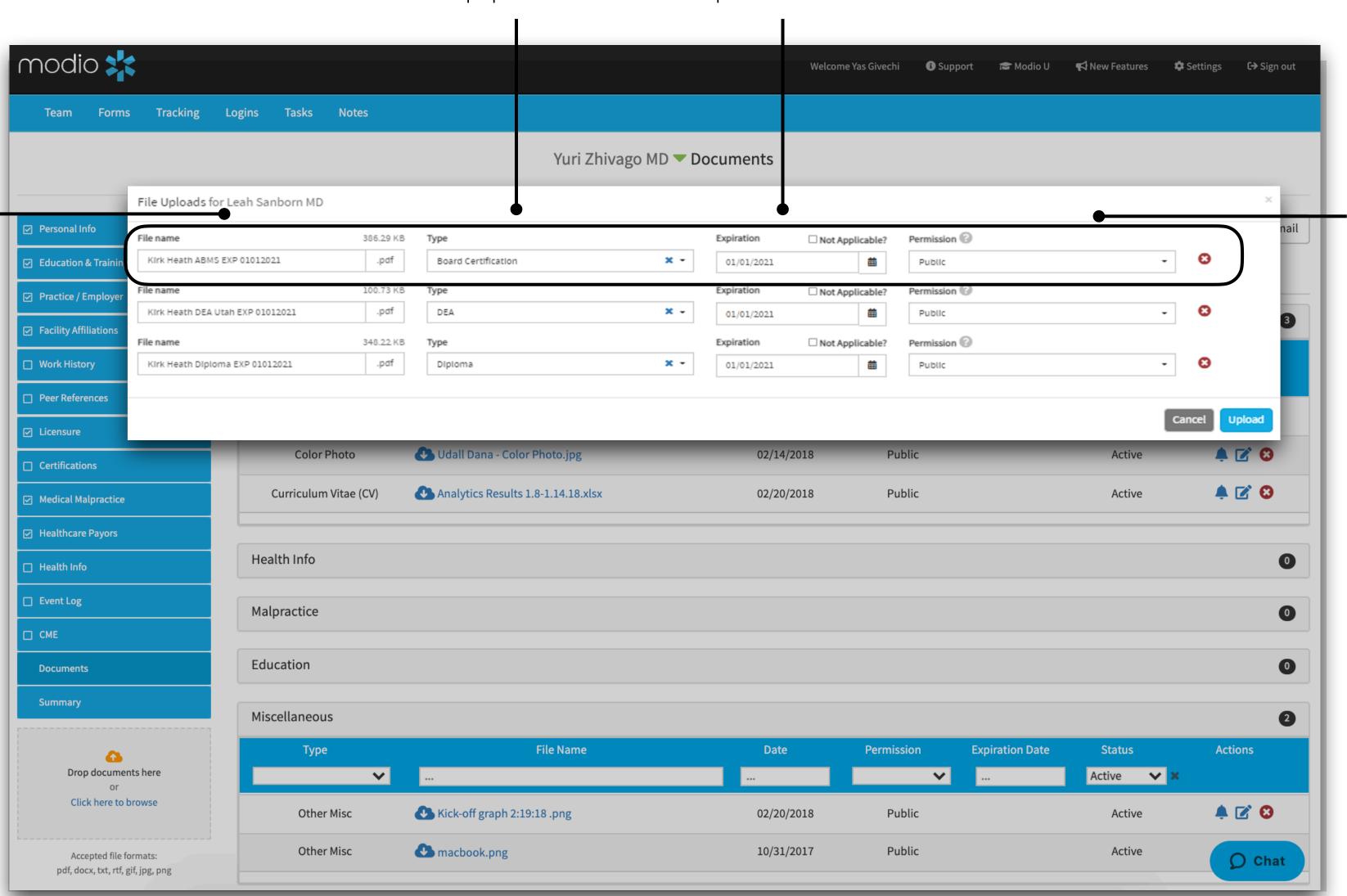
Expiration:

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

modio 💥

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.

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	арр	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 DEAI 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

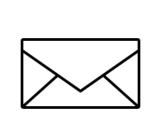


This tip guide was designed as a high level overview of the OneView dashboard and covers all topics that are detailed in the OneView 101 Training Course. You can view more in-depth tip guides for each section of OneView on the Support page or by clicking the links on the table of contents.

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



Online: Live Chat Support



Email: support@modiohealth.com



Phone: 844.696.6346