OneView®

Team Structure Tip Guide

A OneView® Team is a dedicated workspace for your organization and is the foundation for your credentialing workflows within our platform. Teams are designed & customized based on your organizations structure and credentialling workflows & needs.

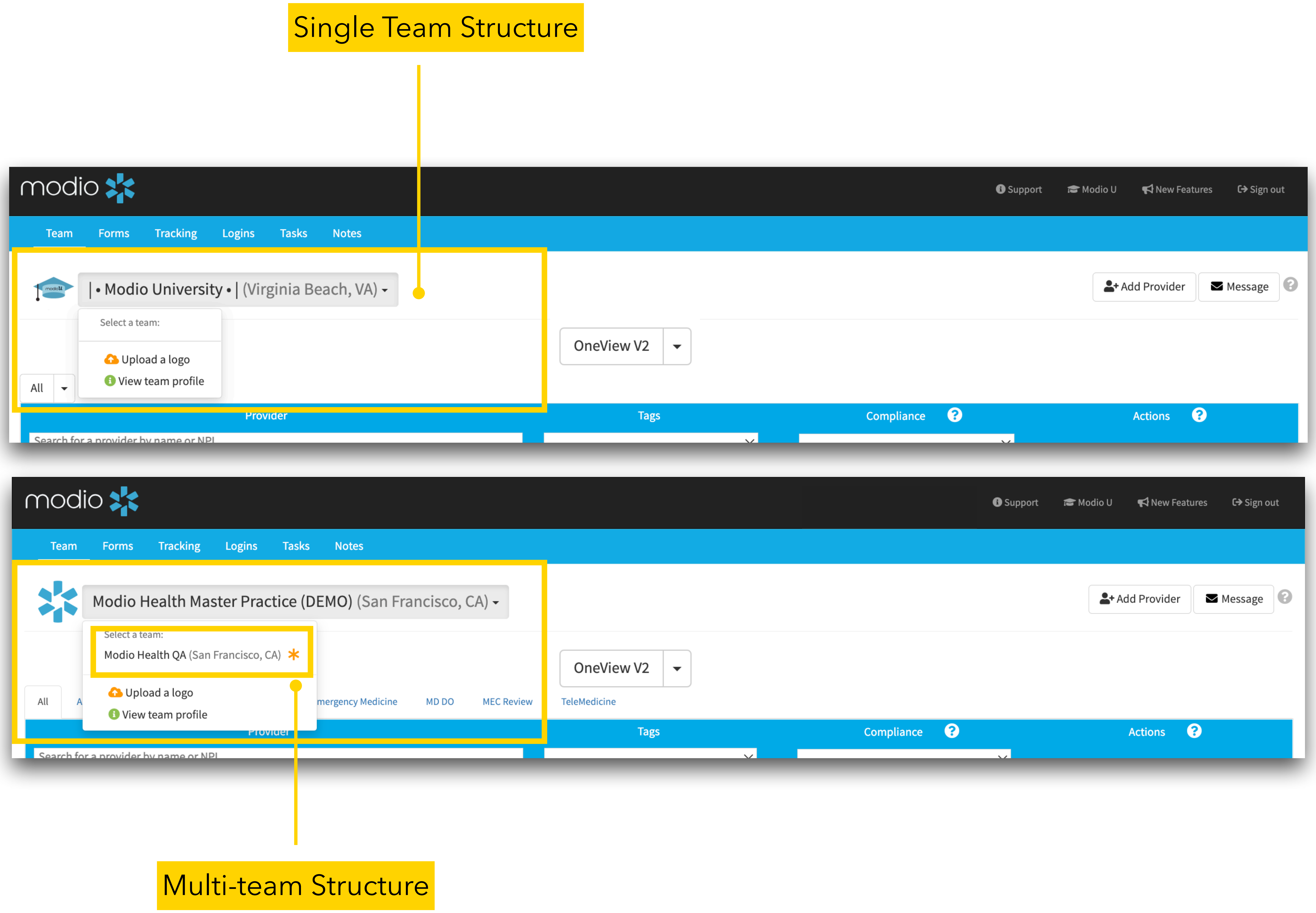
Tip Guide: Team Structure

What is a OneView Team?

OneView® Teams are created & maintained in our OneView database. Once established, these Team Dashboards will be available to the coordinators previously authorized to have them.

Your OneView® Team structure directly impacts & correlates to the features within the Team Navigation Bar (Forms, Tracking, Logins, Task, Notes, Onboarding, Tags, Alerts, Reports…) Any actions completed within these features will be Team specific and will not be available or reflect within other OneView® Teams.

Use this document to review the differences between a Single-Team structure and a Multi-Team structure and determine the best Team structure for your organizations credentialing needs.



Tip Guide: Team Structure

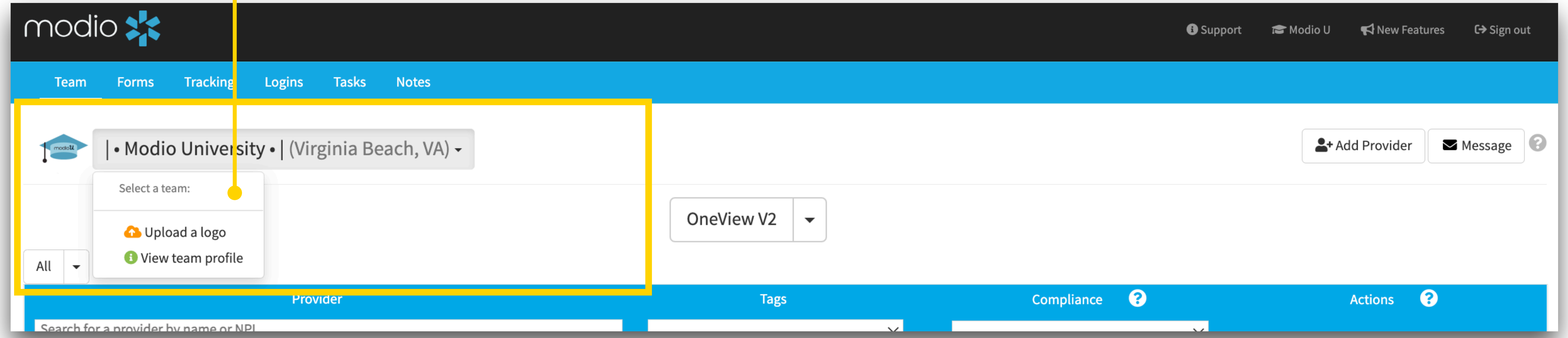
What is a Single Team Structure?

A single Team structure is our most common Team setup and is the best structure for most organizations. All profiles will live together on one Team and the features on the navigation bar will apply to your entire profile roster.

- All profiles are together on one Team
- All Team Level features will be streamline and complete. Team level features include: Forms, Tracking Logins, Notes, Onboarding, Alerts, and Reporting.
- Profile documentation is simplified with singe team structure.

Helpful Alternative – Tags can be used to filter and sort profiles on your roster by creating a “Sub-roster” within your team. Tags can be an option that meets your profile sorting needs while maintaining the benefits of a Single-Team structure. *See the 101 Coordinator Tip guide for additional information on Tags.

Single Team Structure



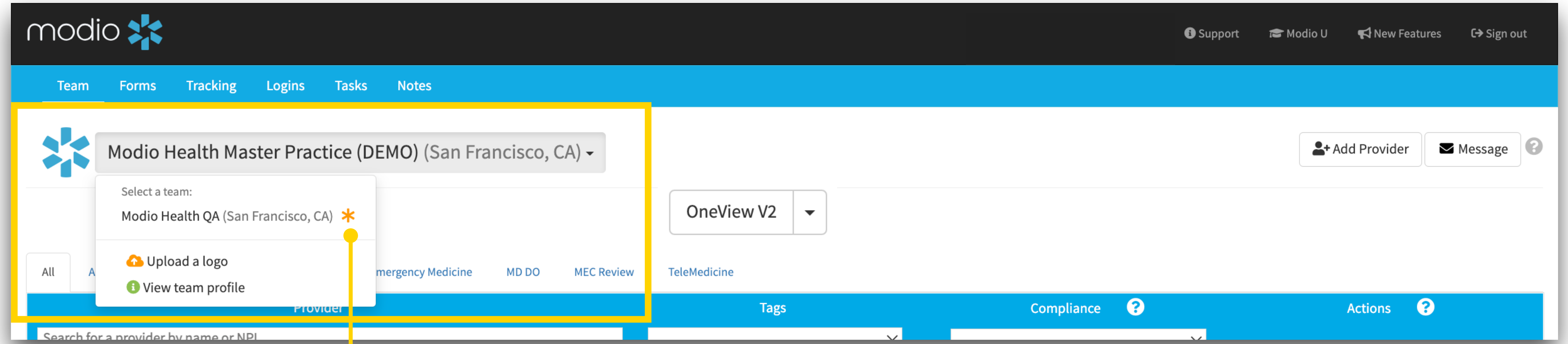
Tip Guide: Team Structure

What is a Multi-Team Structure?

A Multi-Team structure could prove beneficial depending on your organizations credentialing needs. A call may be set up with your account manager to review your workflows and talk through the best team set-up for your organization. If you have more than one team, you can use the team-name drop down to toggle between the different rosters.
A multi-team structure is typically set up with a “Parent Team” that holds all profiles. Then, “Child Teams” are created with different groups of profiles.

Multi Team structure limitations:

•Tracking and Reporting will be separate. You will need to work out of multiple dashboards to access tracking and reporting
•Log-ins are Team level and will not carry over to multiple teams
•Document management is Team level and certain permission settings will not share documents to multiple teams
•Completed Forms will only live on the Team from where the Form was sent.
•Alerts- The Alerts feature is Team level. You will need to check all your organizations Teams Alerts buttons individually.



Multi-team Structure

Tip Guide: Team Structure

Do I need a multi-team structure?

Use Cases for multi-team structure:

•Restricting access to a group of profiles at a coordinator level – If you need to give or restrict access to specific groups of profiles, then a multi-team structure is necessary.

•Onboarding Invite is Team level – If you require different Onboarding templates and messages for different types of providers then a multi-team stricture might be right for you.

Profile Management/Workspace separation – Tracking and Forms are Team level. Most often organizations prefer to keep them all together in one team or in a Parten team, but child teams can be used hold additional tracking types & Subtypes as well as different Forms.

Non Use-cases for multi-team structure:

•Separating a group of providers by location. This would be solved by using Tags

•Separating a group of providers by Title or Specialty. This would also be solved by using Tags.

•If you are not sure why a Child Team would help your organization, we suggest a requesting a call to talk to one of our OneView experts to review your organizations credentialing needs before requesting an additional Team. Teams can complicate and inhibit workflows and profile management if they are not necessary.

FAQs – Frequently Asked Questions on Team Structure

1. Does the Provider Live on Both the Child and Parent Team?
Not in all instances, however, it is advised to add the provider to the parent team along with the child team (s) that an assigned coordinator will be managing the credentials of the provider under. There are special cases you would not want to have the provider added to the parent team if the child team being represented as if it is acting as a parent team. *Example*: An organization treating each team as a totally separate location with no affiliation with one another.

2. What Info Is Needed To Create a Team?
- Name of child team(s)
- Address. Please include city, state and zip
- Coordinator Name and Email – First and Last, Email Address – Must match the client domain, unless it is for affiliated access
- Access Level (READ-ONLY or FULL) – Please ask for clarification on this if you are unsure
- Any additional POCs

3. Does Tracking Exist on the Child Team? How Do We Add Tracking to a Child Team?
Tracking does not exist on a child team unless it is requested. Tracking can be "copied" from the parent team to the Child team if you would like the exact same Types and Subtype workflows added. Because tracking is fully customizable, clients have the option to have a new/unique set of Types and Subtypes per team. Feel free to reach out for support when creating your own unique Types and Subtypes for tracking.

4. If I Enter Notes on a Child Team Will They Show Up on a Parent Team?
Notes that are entered on the child team at the "Public" level will be visible on all teams the profile lives on. These permission levels can be changed to "Team" specific which will then be visible only to the specific team they were entered.

5. If I Enter Logins on the Child Team Will They Populate on the Parent Team?
No, Logins are considered a Team-Level feature and are only accessible from the Team they are created in.

6. What Features or Data Automatically Lives on Both Parent and Child Teams?
Only a provider's demographics "carry" from one team to another. This is the information that is entered under the Managed Credentials section – Personal Information, Education & Training, Practice/Employer, Facility Affiliations, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Healthcare Payors, Health Info, Event Log, CME & Documents*

- Note: Document Access level – can also determine who can view the uploaded documents from specific teams.

- Features that are Team-level and <u>do not</u> apply to all teams within your organization: Forms, Tracking, Logins, Tasks, Onboarding, Alerts, Reporting, Notes (Team-Level).

7. Is Onboarding a Parent Team Only Feature or Can It Be Used on a Child Team as Well?
You can customize the onboarding invite at the Team level. If your organization requires multiple versions of the onboarding invite (Specifically for the requested data impute fields), we would need to create child teams to accommodate.

Tip Guide: Team Structure FAQs – Frequently Asked Questions on Team Structure

8. Alerts: if I Put Something on the Parent Team for a Provider Will It Flow to the Child Team?
Alerts are provider-level specific. Alerts exist on the provider's profile and on all team(s) that profile lives on. Ex. If a license is due to expire for a provider and they belong to parent team and child team, the alerts will show up on both teams.

9. Custom Reports: if I Add Those on the Parent Team Will They Automatically Apply to a Child Team?
No. Reporting is a Team-Level feature. When requesting a custom report, please specify which team this report should be long to. Unless otherwise stated, the report will be defaulted to the parent team. *Important – The data that queries on a report is Team-Level. Even if the same custom report lives on multiple teams, the data in the report will only reflect the data in the team you are running the report from.

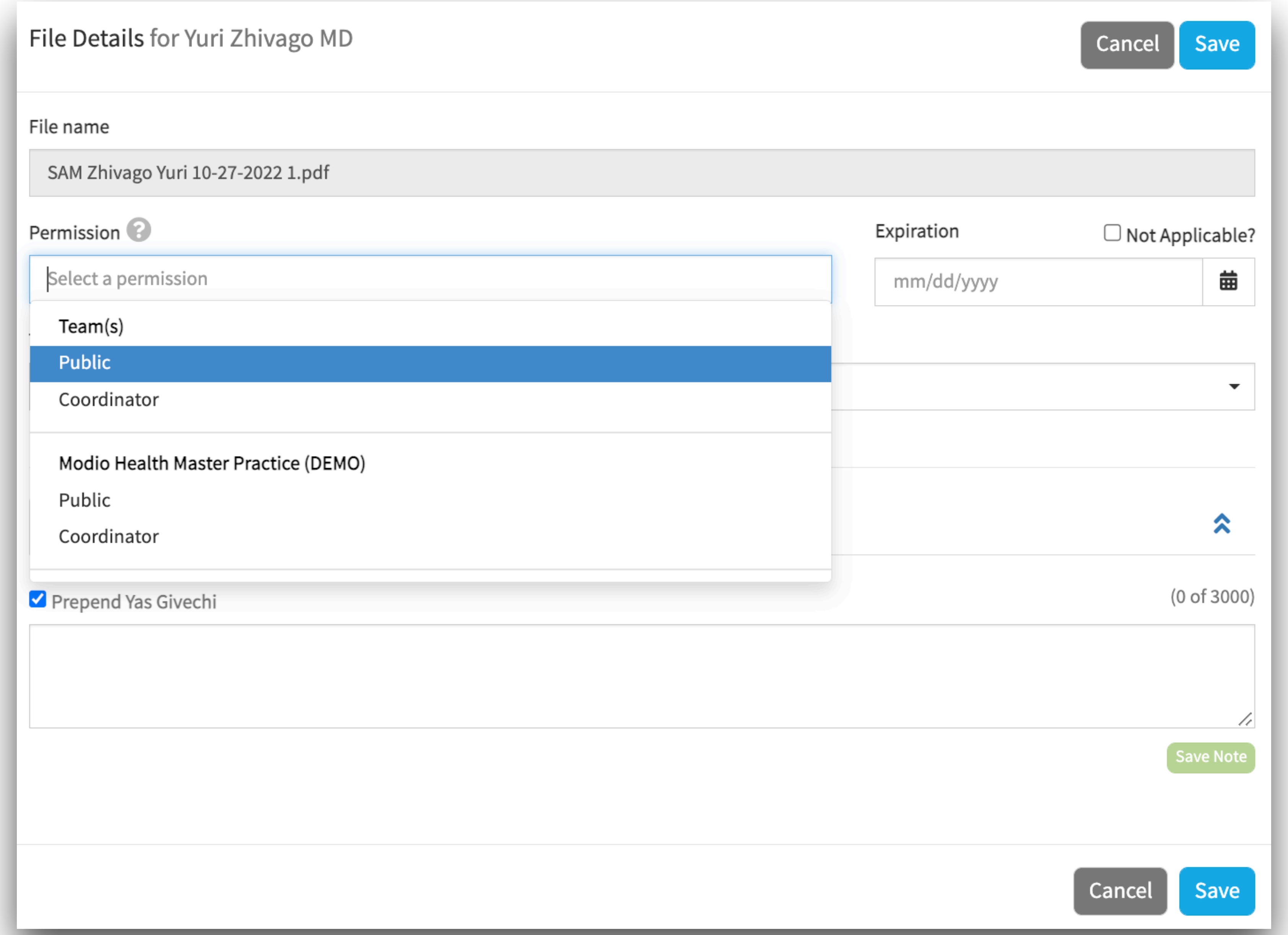
10. Tags: Are Tags Team Specific?
Yes, tags are team specific. If a tag is entered onto a parent or child team, it will only be able to be used on that team.

11. Forms: Is This a Parent Team Only Feature?
No. Forms can be added and sent through all Parent and Child Teams. Forms is still considered a Team-Level feature. You will need to request forms to be added to additional teams because they do not carry over from one team to another automatically.

12. Document Permissions per Child Team : How Does This Work?
Document permissions: some documents are only viewable at a Team level and other setting allow the document to be accessible on both Parent and Child Teams.
Team(s)

- **Public**: All Coordinators with access to the child team <u>and</u> the individual Provider can access the document
- **Coordinator** – All coordinators will be able to view the document and Provider will <u>not</u> have access to this document

Parent Team Name: See screenshot to the right
Public: ALL Coordinators with access to the child team <u>and</u> the parent team can access the document. The provider can also view this document
Coordinator: ALL Coordinators with access to the child team <u>and</u> the parent team (not the provider).



13. Why Would We Want To Create a Child Team in General?
Typical Child Team use case: when an organization has multiple branches of locations or practices with providers belonging to those specific practices. The additional of a Child team can help organize the data as well as the providers as well as give and restrict access to specific groups of coordinators. The parent Team typically houses all providers, and child teams have subsets of providers based on defined criteria.

14. How Does Affiliated Access Effect Child Teams?
Affiliated access is typically used when a client wants to give access to another client outside of their organization. This is noted when the email domains don't match their organization, or if they refer to the other users as "giving their clients access". Affiliated access is only offered with read-only access, at no additional cost. If an organization would like to have full access for their coordinators outside of their organization, the account management team will need to review the details. This may result in an increased cost to your organization.

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

Online:
Live Chat Support

Email:
support@modiohealth.com

Phone:
844.696.6346