

# OneView<sup>™</sup>

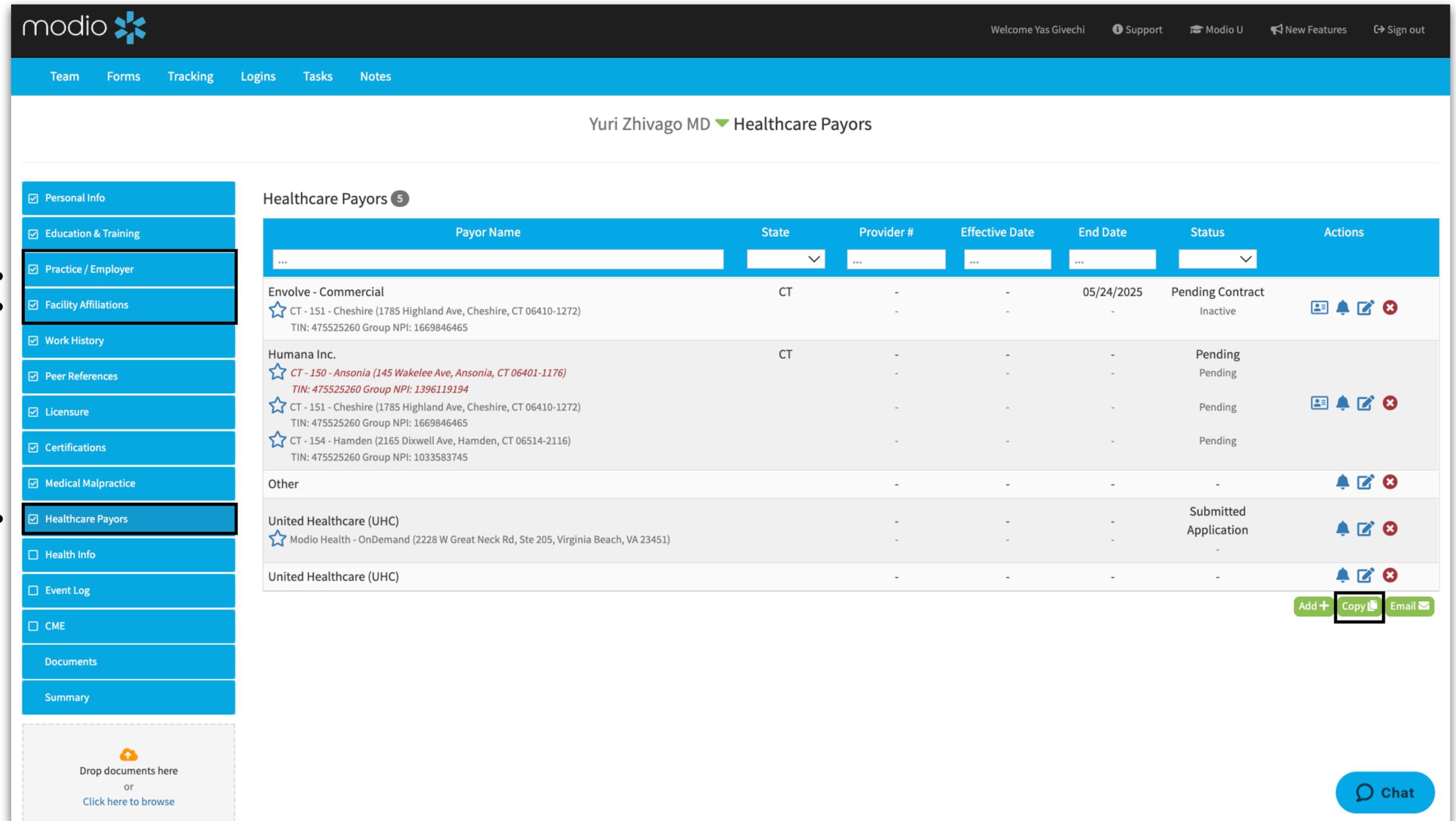
## Tip Guide: Copy Feature



**Introduction:** Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and provider profiles have the copy feature.

The copy Feature is available in these three sections:

- Practice/Employer
- Facility Affiliation
- Healthcare Payors



Yuri Zhivago MD ▾ Healthcare Payors

Healthcare Payors <sup>5</sup>

Payor Name	State	Provider #	Effective Date	End Date	Status	Actions
Envolv - Commercial ★ CT - 151 - Cheshire (1785 Highland Ave, Cheshire, CT 06410-1272) TIN: 475525260 Group NPI: 1669846465	CT	-	-	05/24/2025	Pending Contract Inactive	  
Humana Inc. ★ CT - 150 - Ansonia (145 Wakelee Ave, Ansonia, CT 06401-1176) TIN: 475525260 Group NPI: 1396119194	CT	-	-	-	Pending Pending	  
★ CT - 151 - Cheshire (1785 Highland Ave, Cheshire, CT 06410-1272) TIN: 475525260 Group NPI: 1669846465	-	-	-	-	Pending	  
★ CT - 154 - Hamden (2165 Dixwell Ave, Hamden, CT 06514-2116) TIN: 475525260 Group NPI: 1033583745	-	-	-	-	Pending	  
Other	-	-	-	-	-	  
United Healthcare (UHC) ★ Modio Health - OnDemand (2228 W Great Neck Rd, Ste 205, Virginia Beach, VA 23451)	-	-	-	-	Submitted Application	  
United Healthcare (UHC)	-	-	-	-	-	  

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Copy Feature: Tip Guide **Practice/Employer & Facility Affiliations**

Navigate to the profile you wish to add locations to. Use the copy function to quickly add multiple locations to existing profiles.

The screenshot shows the Modio interface for a user profile. The left sidebar contains navigation tabs: Personal Info, Education & Training, Practice / Employer (highlighted), Facility Affiliations, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Healthcare Payors, Health Info, Event Log, CME, Documents, and Summary. The main content area is titled 'Yuri Zhivago MD Practice / Employer'. A modal window is open, titled 'Copy Practice(s) / Employer(s) for Yuri Zhivago MD'. The modal contains a 'Team' dropdown, a 'Copy from: (optional)' dropdown, a 'Location(s) \*' dropdown, and a 'Copy to: \*' text field containing 'Yuri Zhivago (yurizhivago@gmail.com)'. The modal has 'Cancel' and 'Save' buttons. In the background, a table lists various practices with columns for 'End Date' and 'Actions'. A 'Copy' button is highlighted in the bottom right of the table.

**Step 1** - Select the copy button from the lower right side. The **"Copy to:"** section will auto populate the name of the profile you are currently in. (note - If this section is blank, select "Cancel" and click "Copy" again.)

**Step 2** - You have a choice to select either the "Copy from:" or "Location(s)" section.

**Step 3** - Review the locations you have selected. Use the small gray **"x"** to remove any locations that you may not need.

**Step 4** - Click **Save**. The selected locations will now appear in the provider profile.

**KEY:**

**Copy from:** This will display a drop down of all other profiles in your team roster. Select a profile from that list and the locations attached to that profile will appear in the location section.

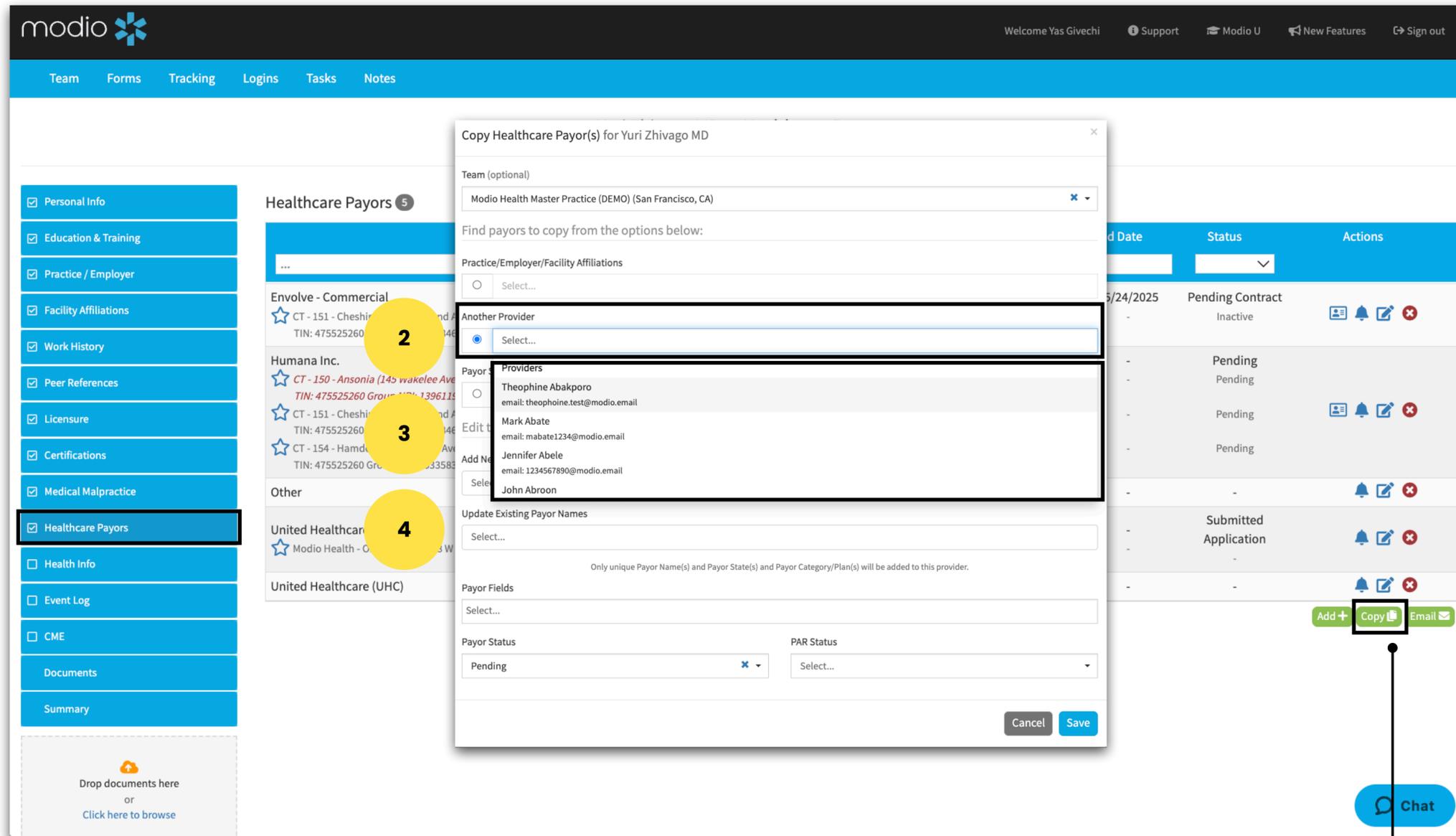
**Locations:** This section will provide a drop down of individual locations that you can chose from. You will have the option to select as many locations from the drop down as you would like.

**Start here!**



## Copy a group of payors from one profile to another

**Introduction:** Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and provider profiles have the copy feature.



**Step 1** - Click the copy button on the lower right.

**Step 2** - Select the radio button for "Another provider"

**Step 3** - A drop down list of the other providers on your roster will appear. Select the provider or FAC profile that you want to copy.

**Step 4** - The payors from the selected profile will appear in the **"Add New Payors Names"** and **"Update Existing Payor names"** Review and remove any payors that you do not need to copy over.

**Start here!**



**Continued**

## Copy a group of payors from one profile to another

**Introduction:** Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and provider profiles have the copy feature.

The screenshot displays the Modio web interface. A modal dialog titled "Copy Healthcare Payor(s) for Yuri Zhivago MD" is open. The dialog contains several sections: "Team (optional)" with a dropdown menu; "Find payors to copy from the options below:" with a "Practice/Employer/Facility Affiliations" dropdown and an "Another Provider" dropdown; "Payor State" with a dropdown menu; and "Edit the list of payors to be copied:" which includes "Add New Payor Names" (highlighted with a yellow circle and '4') and "Update Existing Payor Names". The "Add New Payor Names" section shows a list of payor names with checkboxes, including "United Healthcare (UHC)(GA)", "Medicare(MD)", and others. Below this is a "Payor Fields" section with a dropdown menu, and a "Payor Status" dropdown set to "Pending". A "PAR Status" dropdown is also present. At the bottom of the dialog, there are "Cancel" and "Save" buttons, with the "Save" button highlighted by a yellow circle and the number '5'. The background shows a profile page for "Yuri Zhivago MD" with a sidebar menu where "Healthcare Payors" is selected. A table of payors is visible in the background, with columns for "End Date", "Status", and "Actions".

**Step 4** - The payors from the selected profile will appear in the **"Add New Payors Names"** and **"Update Existing Payor names"** Review and remove any payors that you do not need to copy over.

**Step 5** - Click **Save**

Copy Feature: Tip Guide **Payors**

There are additional time saving options in the Payor Copy feature. Use the information in the screenshot below to save time and ensure accuracy when copying payors to profiles.

**Step 2:** Click **"Payor Status"** and select from four different statuses in the drop down. The status selected will apply to all Payors listed above.

**Step 1:** Select the **"Payor Fields"** section. **Select "Payor Contact"** Any contact information saved in the payor profile will copy over.

**Step 3:** Select **"Practice Employer/ FacilityAffiliations"** A new field labeled **"Practice/Affiliations Fields"** will appear. Use the dropdown to select existing locations to copy over with the selected payors. (The location must live in both the profile you are copying from AND the profile you are currently working in.)

**Step 4:** Select **"PAR Status"** and select from PAR or non-PAR. This selection will apply to all Payors listed above.

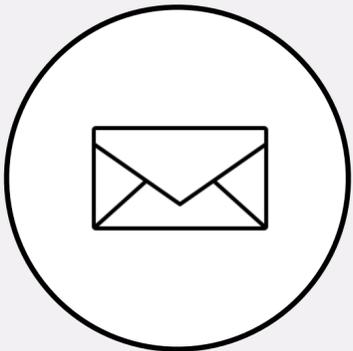
**Step 5:** Click **"Save"** and your payors and payor statuses will be added to your provider profile.

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

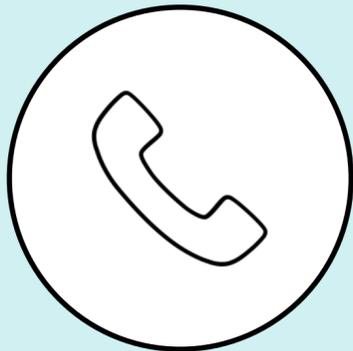
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