



TIP GUIDE: PROVIDER ONBOARDING

## INTRODUCTION

The provider onboarding feature is a customizable way to quickly gather data and complete your Teams provider profiles. Once sent, the onboarding invitation will welcome your new provider to your organization and prompt them create a OneView® login. From there they will be prompted to fill in requested data that will be automatically added to their profile.

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## **PART 1**

### SENDING THE ONBOARDING MESSAGE

## Tip Guide: Provider Onboarding

**Sending The Onboarding Message:** Step 1 : Adding Your Provider(s) to your team roster. Your profile must be added with a valid email address before sending the Onboarding invite.

Follow your add provider workflow by selecting **"Add Provider"** and filling in the 4 required fields.

### Provider Full Name or NPI:

Enter your provider's first and last name or their NPI. If there is not a match in the dropdown, select "Don't see profile listed? Click here to skip profile claim."

### Provider Title:

Select from the list of professional titles.

### Specialty List:

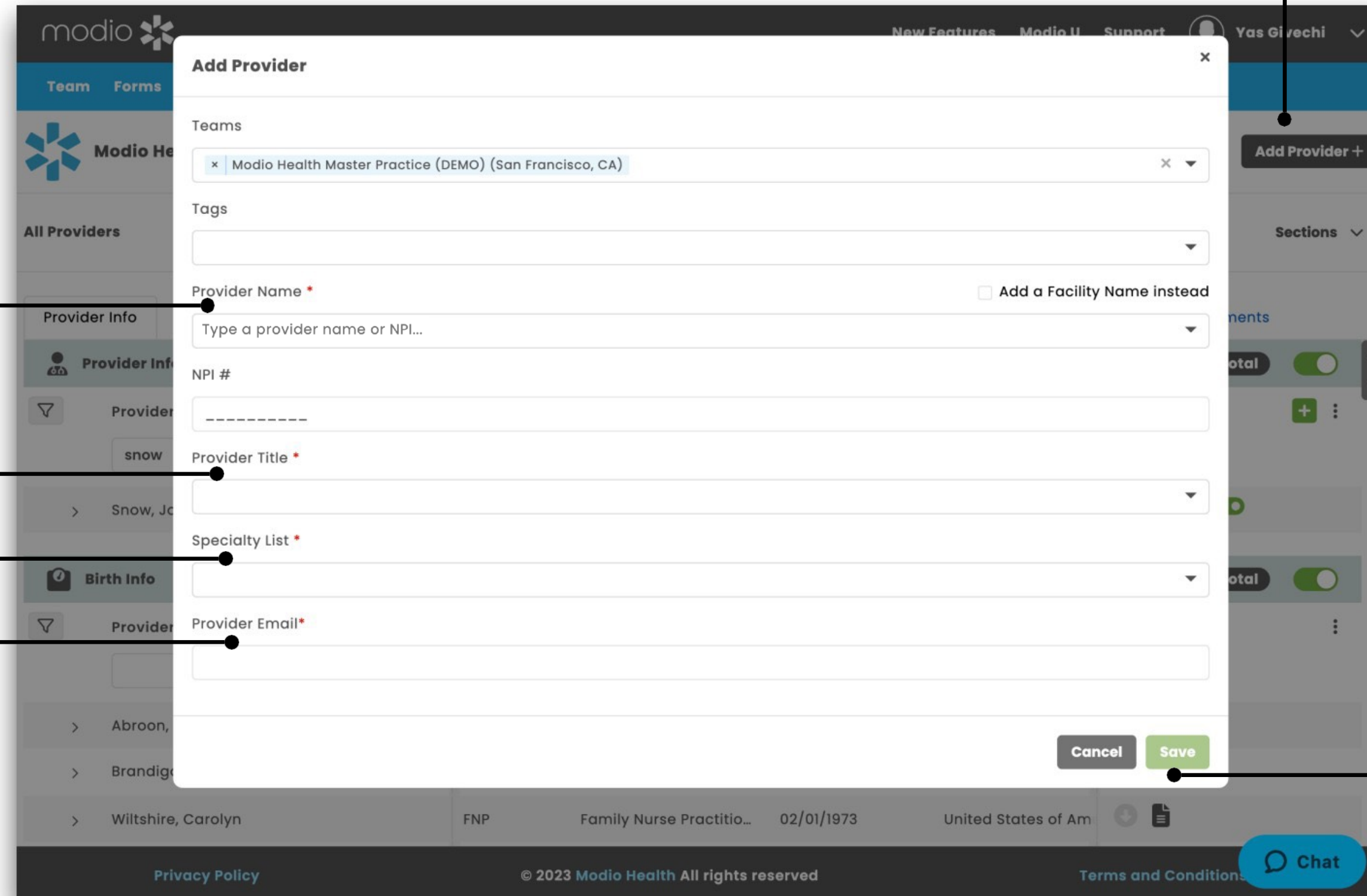
Enter your providers specialty or specialties.

**Provider's Email:** Enter your provider's email. Use an email that you would use to contact your provider. This email is linked to the onboarding invitation.

**Start here**

**Add Provider:**

Select the Add Provider button in either V1 or V2



The screenshot shows the 'Add Provider' modal form in the Modio application. The form is overlaid on a blurred background of the 'All Providers' list. The form fields are as follows:

- Teams:** A dropdown menu with one selected item: 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. A callout points to this field with the text 'Start here'.
- Tags:** An empty dropdown menu.
- Provider Name:** A text input field with a red asterisk indicating it is required. The placeholder text is 'Type a provider name or NPI...'. A checkbox to the right is labeled 'Add a Facility Name instead'. A callout points to this field with the text 'Add Provider: Select the Add Provider button in either V1 or V2'.
- NPI #:** A text input field with a dashed line placeholder.
- Provider Title:** A dropdown menu with a red asterisk indicating it is required. A callout points to this field with the text 'Provider Title: Select from the list of professional titles.'
- Specialty List:** A dropdown menu with a red asterisk indicating it is required. A callout points to this field with the text 'Specialty List: Enter your providers specialty or specialties.'
- Provider Email:** A text input field with a red asterisk indicating it is required. A callout points to this field with the text 'Provider's Email: Enter your provider's email. Use an email that you would use to contact your provider. This email is linked to the onboarding invitation.'

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'. A callout points to the 'Save' button with the text 'Click Save: This will add the provider profile to your Team roster.'

**Click Save:** This will add the provider profile to your Team roster.

## Tip Guide: Provider Onboarding

**Sending The Onboarding Message: Step 2-** Inviting Your Provider(s). Now that your providers are added to your Team roster, you are ready to send the Onboarding Invite. The Onboarding invite may be sent from both V1 and V2

### Message Provider in V1:

1. Click the Message button



The screenshot shows the Modio V1 interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, a header for 'Modio University • (Virginia Beach, VA)' includes 'Add Provider' and 'Message' buttons. A dropdown menu is open for 'OneView V2'. A message banner states: 'The improvements keep coming! Message Provider (your way to invite providers to complete onboarding) is being upgraded with a new look. This is on top of our improved data source for Add Provider and access to all of OneView V2's great features for managing provider data and compliance. Check our blog (link) for videos and tip guides that show how you can take advantage of these changes!'. Below this is a table of providers with columns for Provider, Tags, Compliance, and Actions. The 'Message' button in the Actions column for the first provider is highlighted with a red box.



### Message Provider in V2:

1. Navigate to the Provider Info grid within the Provider Info Tab.
2. Find the provider you wish to send the Onboarding invite.
3. Right click on the Provider's name.
4. Select Message Provider.

The screenshot shows the Modio V2 interface. The 'Provider Info' tab is selected, showing a grid of providers. A context menu is open over the provider 'Abele, Jennifer', with the 'Message Provider' option highlighted. The grid has columns for Provider Name, Specialty, NPI #, Work Email, Personal Email, Mobile Phone #, Last Updated, and Actions. Below the grid is a 'Birth Info' section with a table of provider details including Country of Citizenship, Title, Primary Specialty, Citizenship/Work Auth, US Work Auth, Date of Birth, and Last Updated.

## Tip Guide: Provider Onboarding

### Sending The Onboarding Message: Step 3 - Filling out the Onboarding send invite.

#### Tag(s):

Quickly add a specific group of providers by selecting the corresponding Tag. These Tags are pulling from your Team page in V1 and the Provider Info grid located in the Provider info tab in V2.

#### Email Providers:

As you click the closed envelop icon, you will see your providers emails appear here. All email address changes must be done through the personal info section of your profiles.

#### Email Subject & Message:

Enter a desired subject and then add a message to your provider. This area can be customized as well. There are message templates available to help you get started. Those templates are located on the ModioU tab next to the Onboarding video.

#### Attachment:

Optional feature to add one attachment. (like a welcome packet). Attachments will be sent as Read: Only files and are not intended to be filled out, signed or returned.

#### Edit Icon:

Use this to make and save edits and changes to your Onboarding invite Subject and Message section.

#### Email a Copy:

This field is available when sending a single invite at a time. The email will be delivered to the coordinator email of the signed in user. If this option is checked but no providers are added, the coordinator can send the invite to themselves to test. The onboarding link will be hidden since the request is not tied to a specific provider.

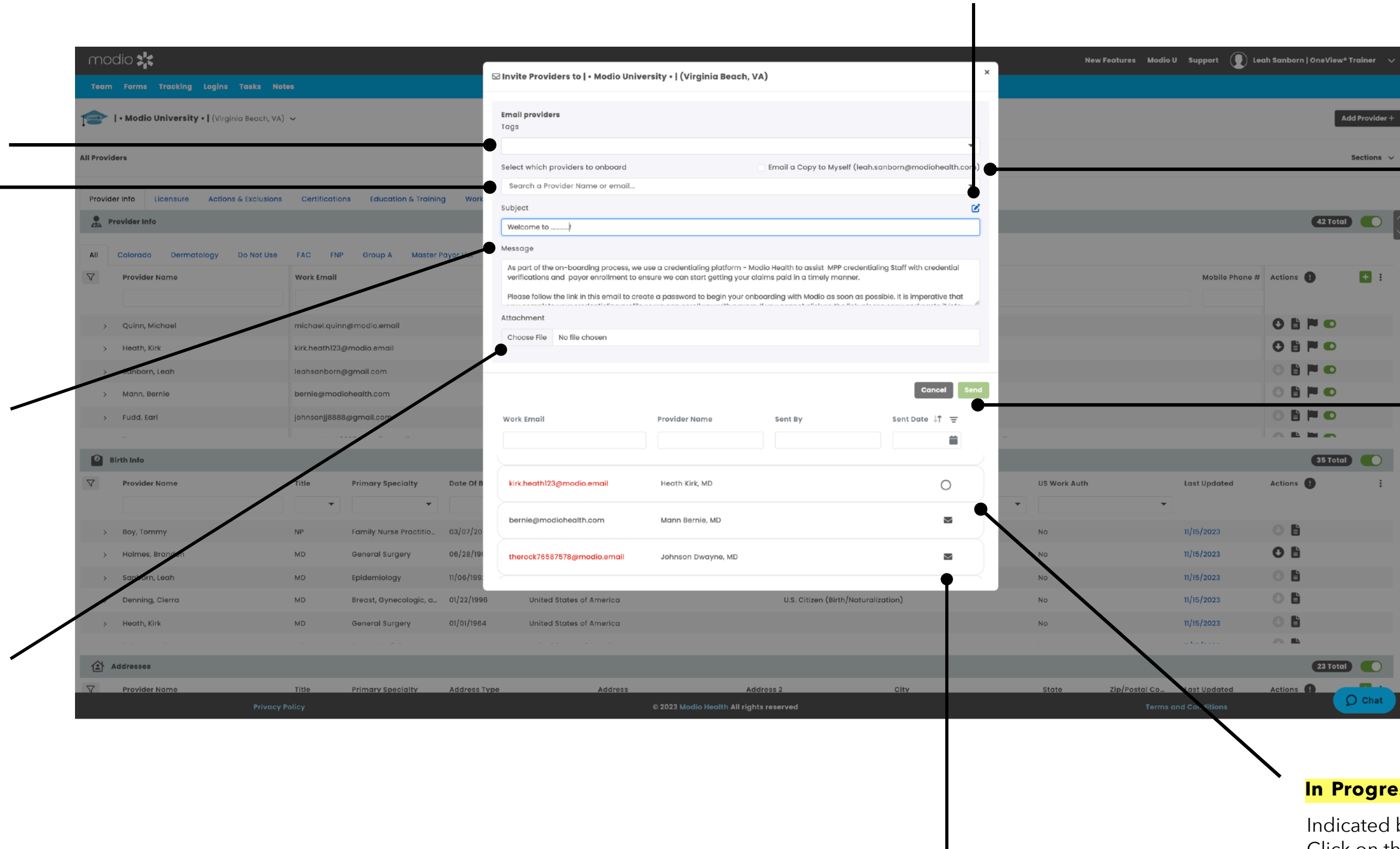
#### Send:

Click send once you have set up your subject, message and selected providers to receive the invite.

#### In Progress Invitations:

Indicated by the clear circle icon. Click on the clear circle to open a new tab and view that providers progress in filling out the onboarding invite.

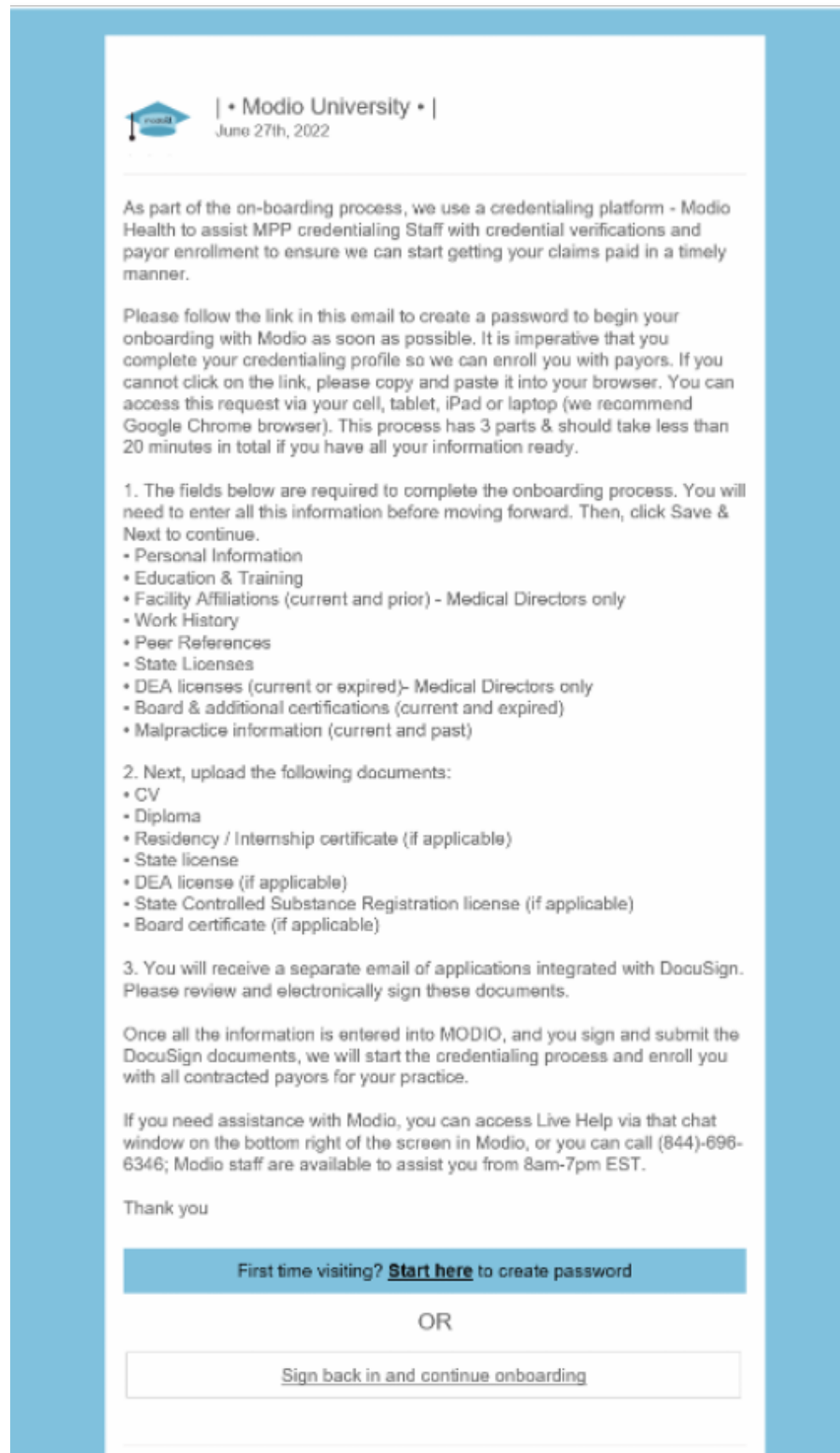
**New Invitations:** Click the Envelop Icon to add provider emails to the invitation list. If an email address is red and missing a green plus sign - that indicates an invalid email address. Update the email in personal info section in the field labeled "Work Email".



## Tip Guide: Provider Onboarding

**Onboarding:** This is a high: level overview of what your providers workflow will look like once they receive the Onboarding message.

1. The provider will receive your message in their email. Your Team Logo and name will display on the top.



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. DO NOT change this Email section – it must be the same email the invite was sent to in order to function correctly.

### Claim your profile.

leahannelala@gmail.com

characters)

**STRONG PASSWORD REQUIREMENTS**

- At least 8 characters — the more characters, the better
- A mixture of both uppercase and lowercase letters
- A mixture of letters and numbers
- Inclusion of at least one special character, e.g., ! @ # ? ]

I agree to [Terms and Conditions](#) and [Privacy Policy](#)

[Claim profile](#)

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

Team Forms Tracking Logins Tasks Notes

Modio Health QA (San Francisco, CA)

Onboarding Editor  
Yuri Zhivago MD: Provider Profile

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

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](#) [Mark as Incomplete](#)

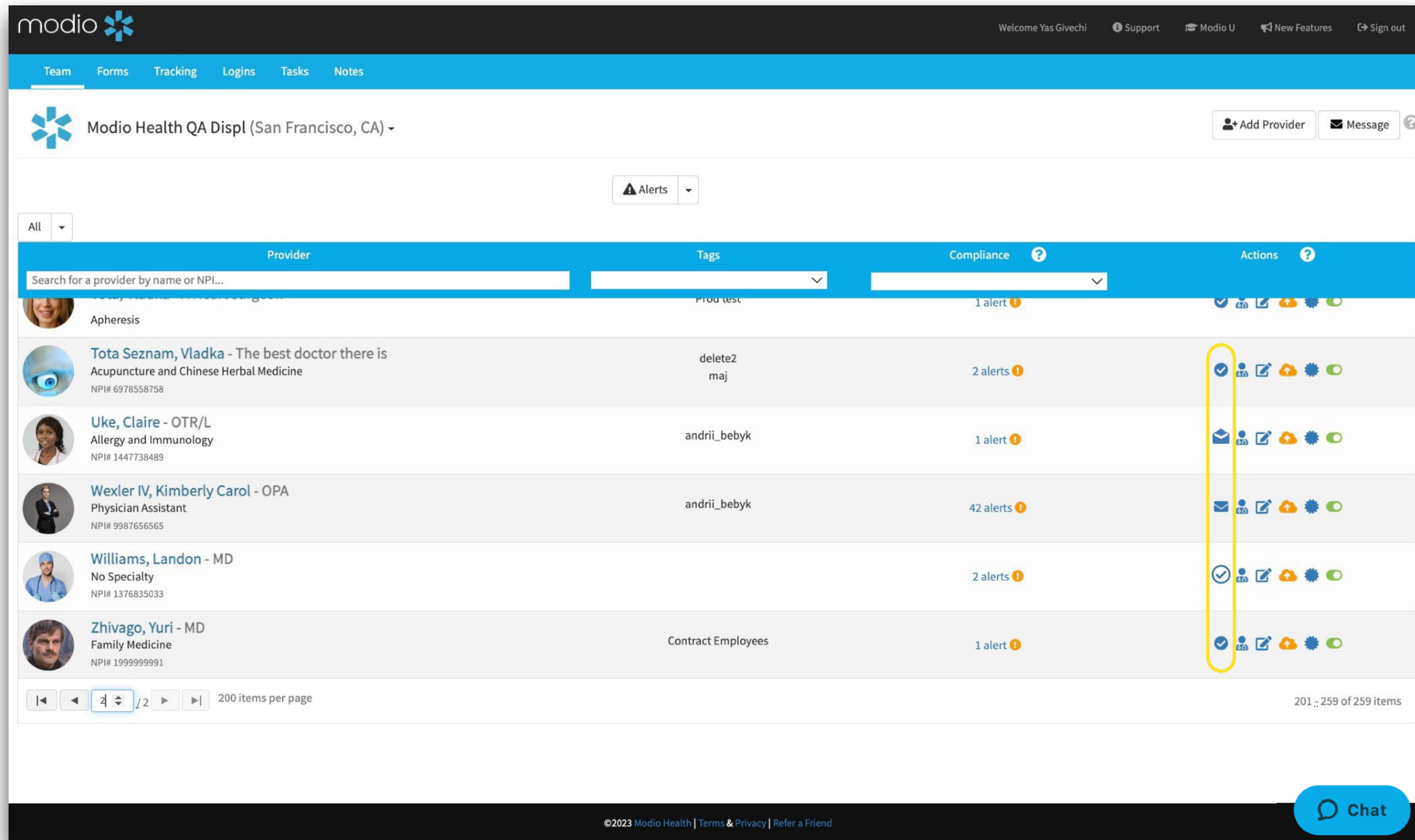
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Chat

\*View the "Provider Onboarding Tip: Guide" for an in: depth look at your Providers workflow and best practices to successfully navigate the Onboarding process.

## Tip Guide: Provider Onboarding

**Onboarding:** Managing your providers Onboarding Status using the Envelope Icon.









The screenshot shows the Modio Health QA Displ (San Francisco, CA) dashboard. The top navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The main header displays the organization name and options to 'Add Provider' and 'Message'. Below this is an 'Alerts' dropdown and a search bar. The main content area is a table with columns: Provider, Tags, Compliance, and Actions. The 'Actions' column contains various icons representing different onboarding stages. A yellow circle highlights the 'Actions' column for the provider 'Tota Seznam, Vladka'.

Provider	Tags	Compliance	Actions
Apheresis	Prod test	1 alert	
Tota Seznam, Vladka - The best doctor there is Acupuncture and Chinese Herbal Medicine NPI# 6978558758	delete2 maj	2 alerts	
Uke, Claire - OTR/L Allergy and Immunology NPI# 1447738489	andrii_beyk	1 alert	
Wexler IV, Kimberly Carol - OPA Physician Assistant NPI# 9987656565	andrii_beyk	42 alerts	
Williams, Landon - MD No Specialty NPI# 1376835033		2 alerts	
Zhivago, Yuri - MD Family Medicine NPI# 1999999991	Contract Employees	1 alert	

The **envelope icons** will update in real time as your provider moves through the onboarding process. See the **icon key** below to interpret what stage of onboarding your providers are currently in.

### Icon Key:

-  **New Invitation:**  
Indicates a new provider.  
Click to invite.
-  **Sent Invitation**  
Indicate and Invite has been sent but not started.
-  **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.
-  **Completed Profile:**  
Indicates that a coordinator has completed onboarding for this provider.



# Tip Guide: Provider Onboarding

**Onboarding:** Onboarding - Managing your providers Onboarding Status using Reports.

From your **reports drop down** run the Web report titled **"Completed Items"**

The **"Completed Items"** report has a column dedicated to onboarding statuses. Use this **"Onboarding"** column to quickly filter and sort by the current status your providers are in throughout the onboarding process.

The screenshot shows the Modio Health QA Displ interface. On the left, a list of providers is displayed, including Tota, Vladka - A Heart surgeon, Tota Seznam, Vladka - The best doctor there is, Uke, Claire - OTR/L, Wexler IV, Kimberly Carol - OPA, Williams, Landon - MD, and Zhivago, Yuri - MD. A dropdown menu is open over the 'Alerts' section, with 'Completed Items' highlighted. The main report, titled 'Completed Items for Modio Health QA Displ', shows a table with the following data:

Provider Name	Onboarding	Forms	Documents	Logins	Tasks
Amber Dennis, LLC, FAC	New Invitation	0	1	0	0
Connecticut 1, FAC	New Invitation	0	0	0	0
DEMO California, FAC	New Invitation	0	1	0	0
Jessie Huston, LLC, FAC	New Invitation	0	0	0	0
Kelly Butwid, LLC, FAC	New Invitation	0	0	0	0
Kim Hutchinson, LLC, FAC	New Invitation	0	0	0	0
Laura Broughton LLC, FAC	New Invitation	1	1	0	4
Marisa Pellerin, LLC, FAC	New Invitation	0	0	0	0
Payor Example, FAC	New Invitation	0	3	0	2
Payor Practice Copy TEST, FAC	New Invitation	0	0	0	1

# Tip Guide: Provider Onboarding

**Onboarding:** Onboarding - Managing your providers Onboarding Status using Reports.

From your **reports drop down** run the CSV report titled **"Providers"**

The **"Providers"** report has a column dedicated to onboarding statuses. Use this **"Onboarding"** column to quickly filter and sort by the current status your providers are in throughout the onboarding process.

The screenshot shows the Modio Health QA Displ interface on the left and a Microsoft Excel spreadsheet of the 'Providers' report on the right. In the Modio interface, the 'Alerts' dropdown menu is open, and the 'Providers' report is highlighted. The Excel spreadsheet shows a table with columns for Provider ID, Creation Date, Onboarding Status, and various provider details. A filter dialog box is open over the spreadsheet, showing the 'Onboarding' column selected for filtering. The filter options are: (Select All), Complete Profile - Coordinator, Complete Profile - Provider, Incomplete Profile, New Invitation, and Sent Invitation. The 'Auto Apply' checkbox is also checked.

Provider ID	Creation Date	Onboarding Status	First Name	Middle Name	Last Name	Work Email	Personal Email	Home Address	Home Phone	Mobile Phone	CAQH ID	Account Number	CAQH Status	CAQH Last Update
493204	12/15/22	New Invitation	Avel eCare, LLC		FAC	avelecarellc@modio.email		1111111111	modiouniver thomas.adde 111 Street, USA	(111) 111-1111		Admin	Pending	
225779	7/15/20	New Invitation	Group/Organization Nam		FAC	modiouniver thomas.adde 111 Street, USA		1111111111		(555) 555-5555		Admin	Pending	
481501	11/2/22	New Invitation	StarshipEnterprise		FAC	azuresfac@modio.email				(666) 666-6666		Admin	Pending	
413840	5/4/22	New Invitation	Sunrise Medical Lab		FAC	sunrisemedicallab@modio.email				(111) 111-1111		Admin	Pending	
478511	10/21/22	New Invitation	Texoma Independent Phys		FAC	texomaindependentphysicians@modio.email				(999) 111-1222		Admin	Pending	
612302	10/3/23	New Invitation	Test Provider		MD	test@modio.testemail@gmail.com						Admin	Pending	
158129	12/12/19	Complete Profile	Theophine David		HAD	1972564813 theophoine.test@gmail.cc 103 Station Place Way, Te	(757) 939-39	65775858				Admin	Complete	4/13/22
63729	10/15/18	Complete Profile	Jennifer A		MD	1073502779 1234567890.123456789a, USA	(845) 914-12	(757) 988-88	785hty7l			Admin	Reattestatio	1/16/24
299754	3/12/21	Complete Profile	Tommy		NP	8888888888 tommy.boy@tommyemail USA				(801) 258-6580		Admin	Pending	
350666	9/30/21	Sent Invitation	John Kent		MD	1215987557 12346984258@modio.em test, , test, C (444) 444-4444						Admin	Pending	
113614	8/9/19	Incomplete Profile	Arthur		MD	1111111111 ajbulman10@gmail.com				(222) 222-2222		Admin	Pending	
185014	4/15/20	New Invitation	Thomas George		MD	1659311579 tom.clifford@modio.email USA						Admin	Pending	
452000	8/8/22	Incomplete Profile	Ciera		MD	1234567891 cdenning23@c.denning@modio.email	(919) 222-22	(919) 111-1111				Admin	Pending	
603877	9/5/23	New Invitation	Jane		MD	Jane.Doorbell@modio.email						Admin	Pending	
453725	8/12/22	Complete Profile	Earl		MD	1710087036 johnsonj8888@gmail.com						Admin	Pending	
481117	11/1/22	Complete Profile	Azure V		MD	1234567890 azuresgiles@gmail.com			Star Trek Enterprise E	(918) 567-8901		Admin	Pending	
325407	6/28/21	New Invitation	Kirk W		MD	1184838286 kirk.heath123@modio.em 1234 Virginia Beach Way, USA						Admin	Pending	
618742	10/18/23	New Invitation	Kirk William		MD	1184838286 kirk.heath.modiouniversty@moio.email						Admin	Pending	
250066	11/6/20	Incomplete Profile	Brandon		MD	9999999999 testing99823.brandon.holr, , USA				(801) 546-2136		Admin	Pending	
459835	8/25/22	New Invitation	Brandon		MD	1275527384 bholmes@gmail.org						Admin	Pending	
611846	10/2/23	New Invitation	brandon		MD	brandon.holmes@modiohelath.email						Admin	Pending	
328870	7/12/21	New Invitation	Dwayne Edward		MD	1841379187 therock76587578@modio 123456789, Williamsburg	(801) 888-8888					Admin	Pending	2/27/23
560611	7/12/23	New Invitation	Frida		LPATA	Frida.Kahlo@modio.email						Admin	Pending	
513003	2/27/23	New Invitation	Rhonda		CNA	rhonda.pratt@modio.email						Admin	Pending	
496884	1/4/23	Incomplete Profile	Christine		MD	christine955smith@gmail.com						Admin	Pending	
373018	12/14/21	New Invitation	Bernie		MD	1999999991 bernie@modiohealth.com						Admin	Pending	
538647	5/22/23	New Invitation	Minnie		DC	minnie.mous minnie@gmail.com				(919) 233-3344		Admin	Pending	
324763	6/24/21	Incomplete Profile	George R		WAIV - Waiv	7777666665 goldenpathh goldenpathh 17400 Brand	(317) 333-40	(317) 333-0740				Admin	Incomplete	
583561	7/31/23	New Invitation	Darrell Lee		MD	1447250170 darrell.murray@modio.email						Admin	Pending	
312938	5/5/21	Incomplete Profile	Jennifer		MD	1235332255 123456@email.com USA						Admin	Pending	
70309	1/2/19	New Invitation	Test		MD	1234567890 test.provider.personalems 123 Main Street, Indianap	(555) 551-5551					Admin	Pending	
223759	7/2/20	New Invitation	Michael John		MD	1568453348 michael.quinn@modio.en USA						Admin	Pending	
340009	8/16/21	Complete Profile	Leah		MD	1234567890 leahsanborn@gmail.com			3255 Newtor	(970) 214-9429		Coordinator	Pending	10/6/21
443466	7/18/22	Complete Profile	Michael		MD	5689412378 michael.scott@modio.email				(098) 754-6654		Admin	Pending	
487670	11/29/22	Incomplete Profile	Christine		MD	christine2smith@gmail.com						Admin	Pending	



## **PART 2**

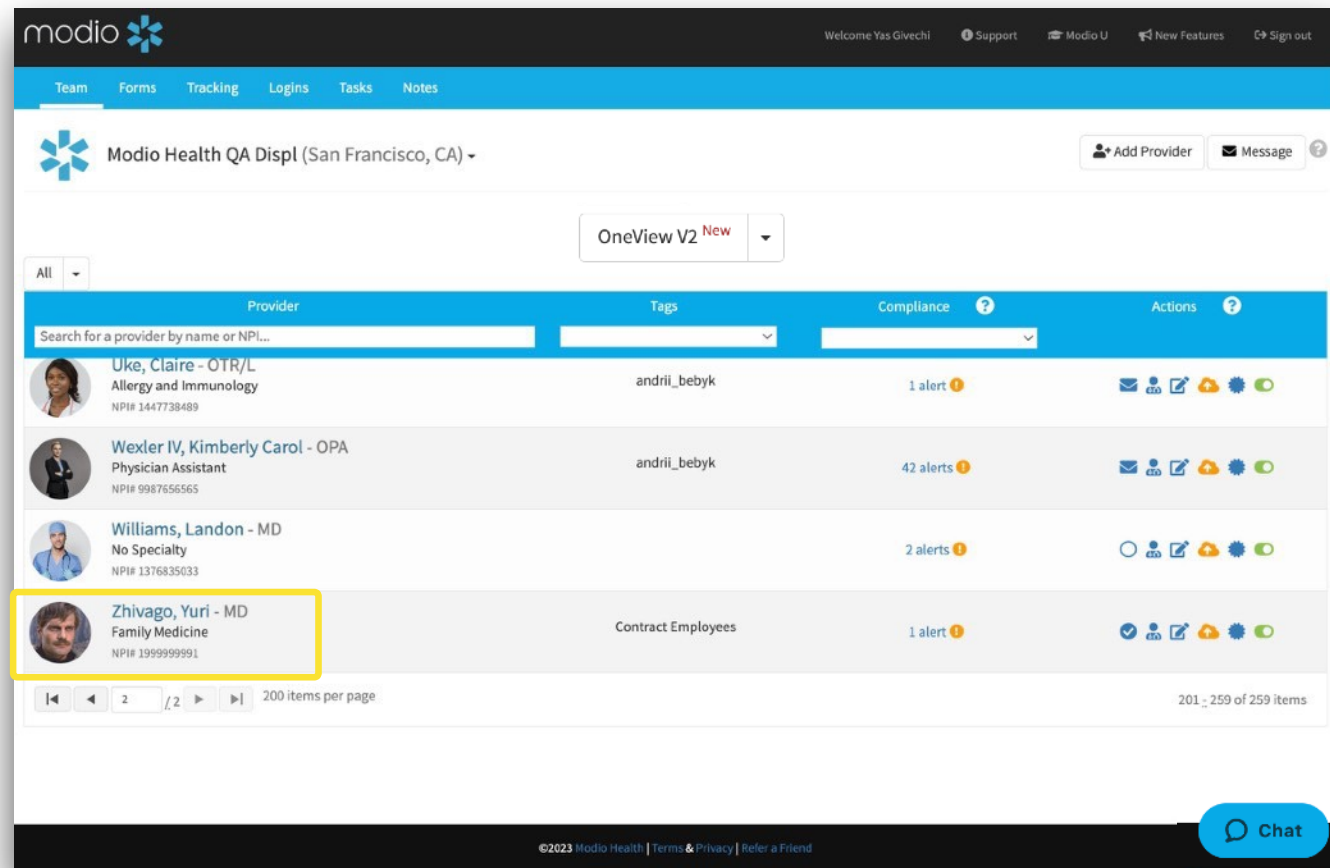
### CUSTOMIZING THE ONBOARDING TEMPLATE

**Tip Guide: Provider Onboarding**

**Onboarding:** Creating Custom Onboarding Invitations. Follow these 4 clicks to access and edit the Onboarding Template.

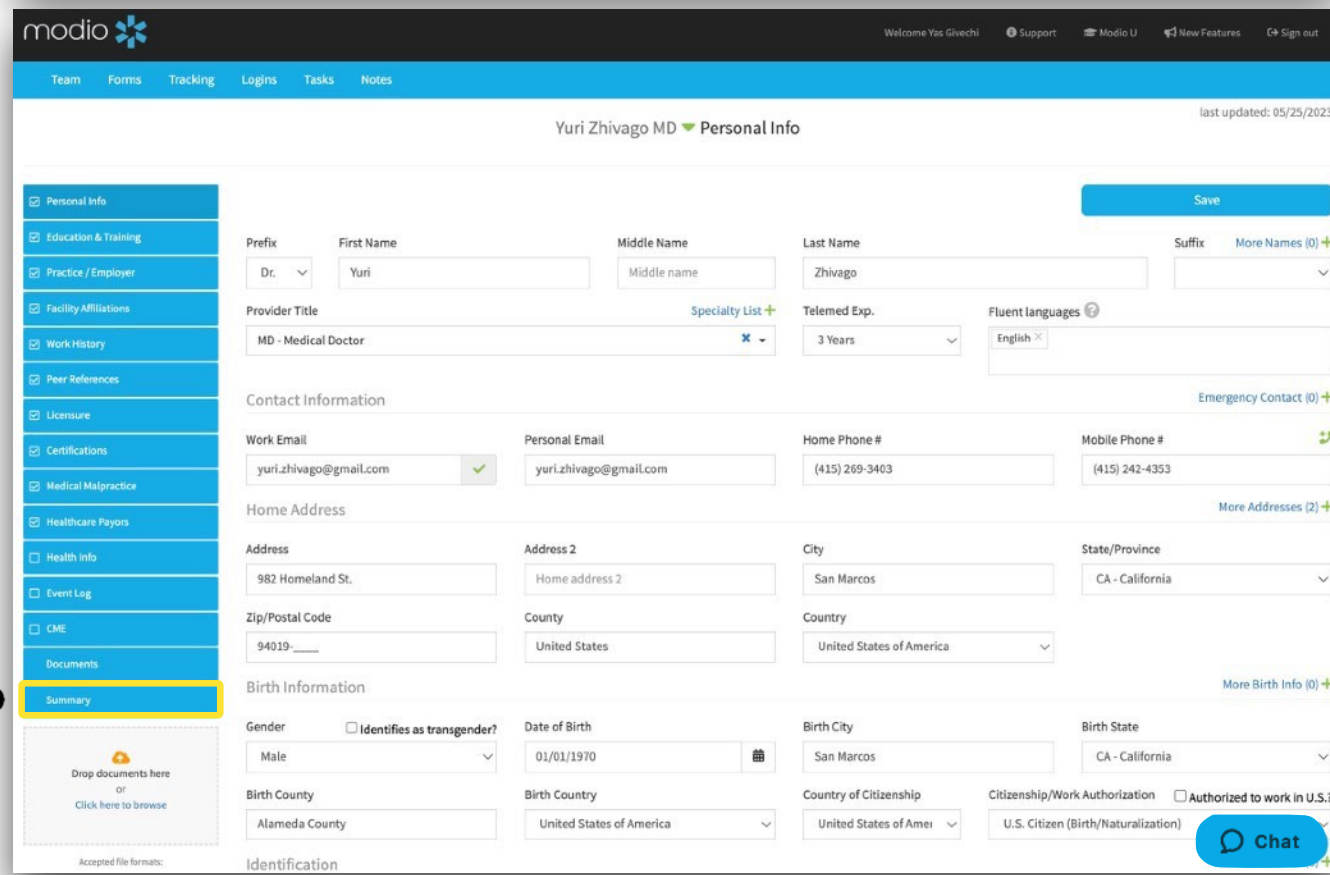
1

Click on any **provider's name** to open their profile.



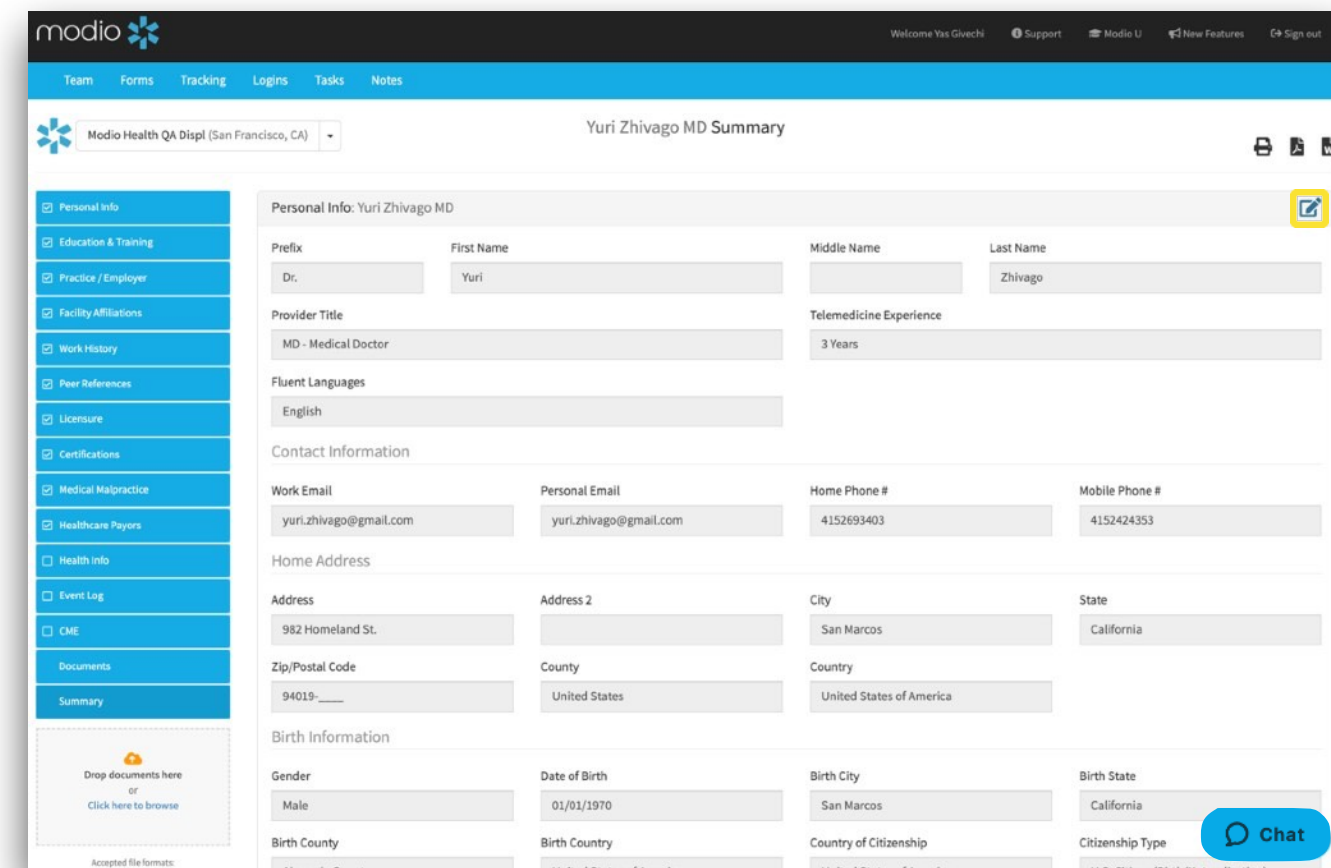
2

Select **Summary**



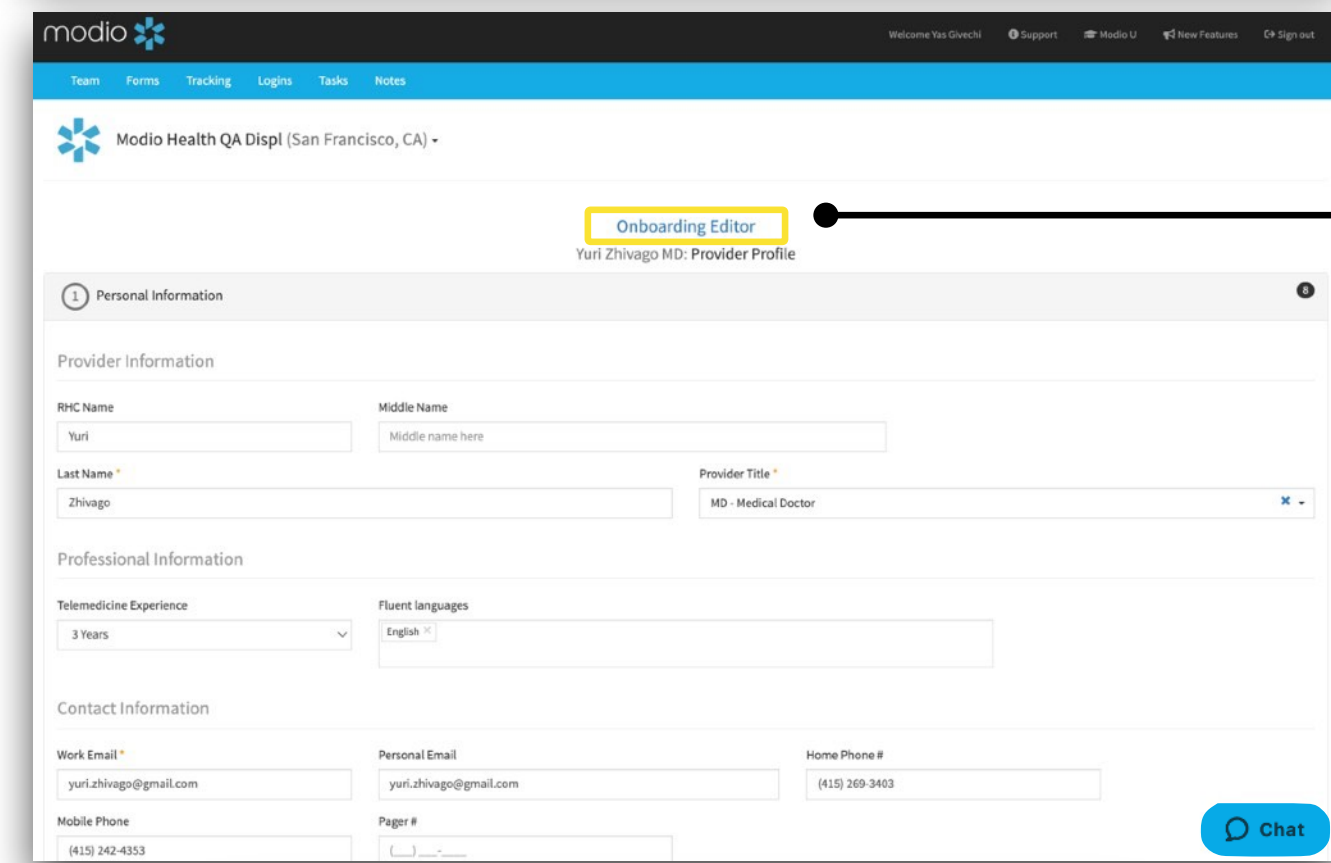
3

Select the **"Edit Icon"**



4

**"Onboarding Editor"** link will now appear on the top of the screen. Click the "Onboarding Editor" link to tailor your onboarding invitation fields or keep them as is with the default values.



## Tip Guide: Provider Onboarding

**Onboarding:** Creating Custom Onboarding Invitations. Your onboarding template can be edited to meet your organizations needs. Add the sections you want your providers to fill out. Remove the sections or fields that you don't need or that your coordinators will fill in for your providers.

Once the **Onboarding Editor** title changes to **Onboarding Viewer**, you can start customizing your invitation. Use this to toggle back and forth from the Edit view to the Provider view to review how your changes will look to the provider.

**Sections:** There are 10 different sections to modify

**Group:** Each section has a group level highlighted in blue.

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

### Onboarding Fields

The screenshot shows the 'Onboarding Viewer' interface for a provider profile. The form is organized into several sections, each with a blue header bar and an edit icon (pencil) and a disable icon (red X) on the right. The sections are:
 

- Personal Information:** Includes fields for RHC Name, Middle Name, Last Name, and Provider Title. The 'Prefix' field is hidden, indicated by a greyed-out icon.
- Professional Information:** Includes fields for Telemedicine Experience and Fluent languages.
- Contact Information:** Includes fields for Work Email, Personal Email, Home Phone #, Mobile Phone, and Pager #.
- Emergency Contact Information:** Includes fields for Contact Name, Contact Type, Email, and Phone #.
- Home Address:** Includes fields for Address, Address 2, City, and State.

 A 'Chat' button is located at the bottom right of the form. The top navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The user's name 'Welcome Yas Givechi' and other navigation options like 'Support', 'Modio U', 'New Features', and 'Sign out' are also visible.

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

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

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

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

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

**Tip Guide: Provider Onboarding**

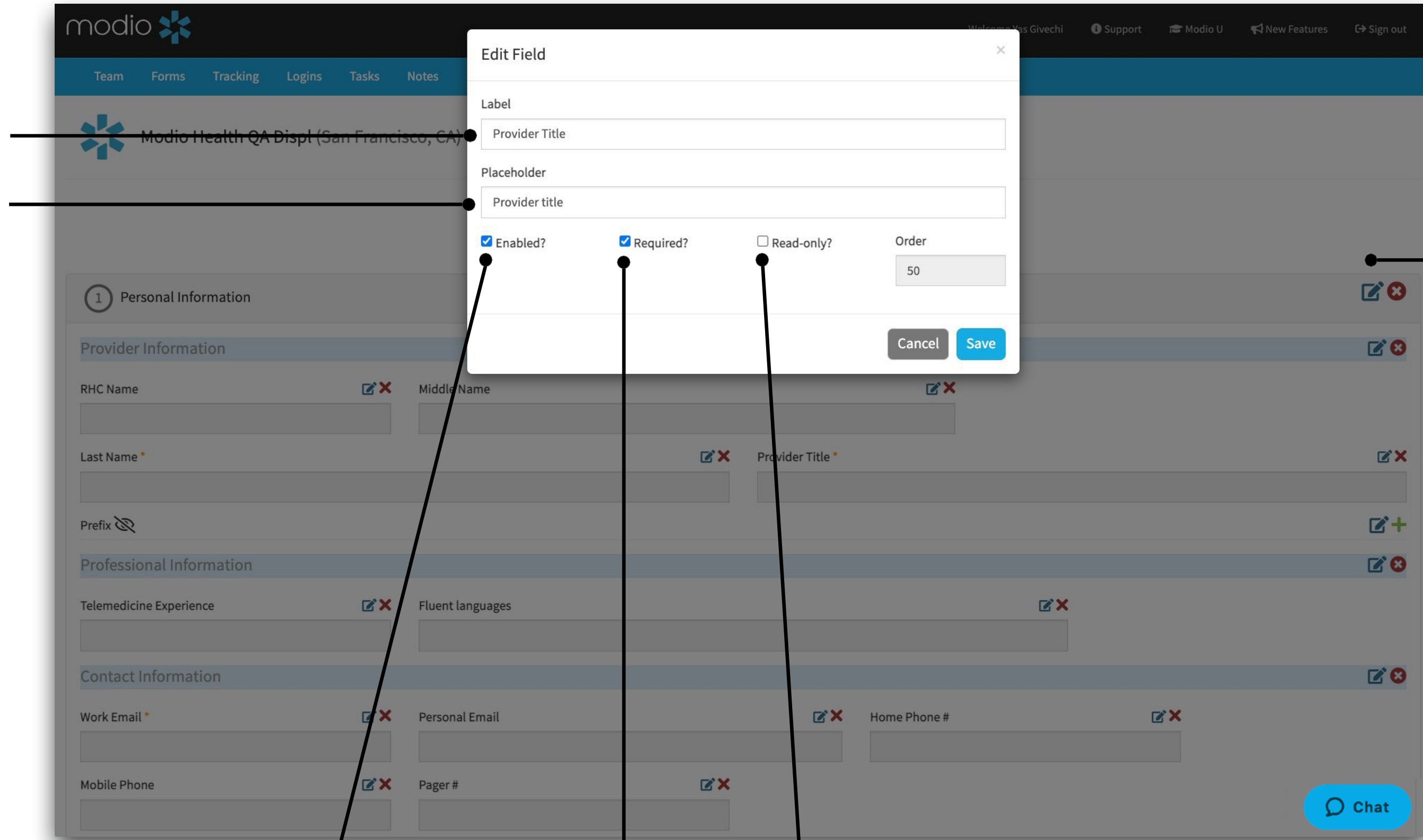
**Onboarding:** Creating Custom Onboarding Invitations. Your onboarding template can be edited to meet your organizations needs. Add the sections you want your providers to fill out. Remove the sections or fields that you don't need or that your coordinators will fill in for your providers.

**Label:**

Indicates the field this is connected to in the provider's profile.

**Placeholder:**

Add a custom placeholder text for specific instructions in filling a field.



Click the **paper and pencil edit icon** to activate a specific field. Each individual field has an edit icon.

Each section also has an edit icon and a red "X". Use the red "X" to remove the corresponding section from your providers invite if that data is not needed for your organizations credentialing needs.

**Enabled:**

if checked, this field is visible for your providers. If unchecked, the field won't be visible.

**Required:**

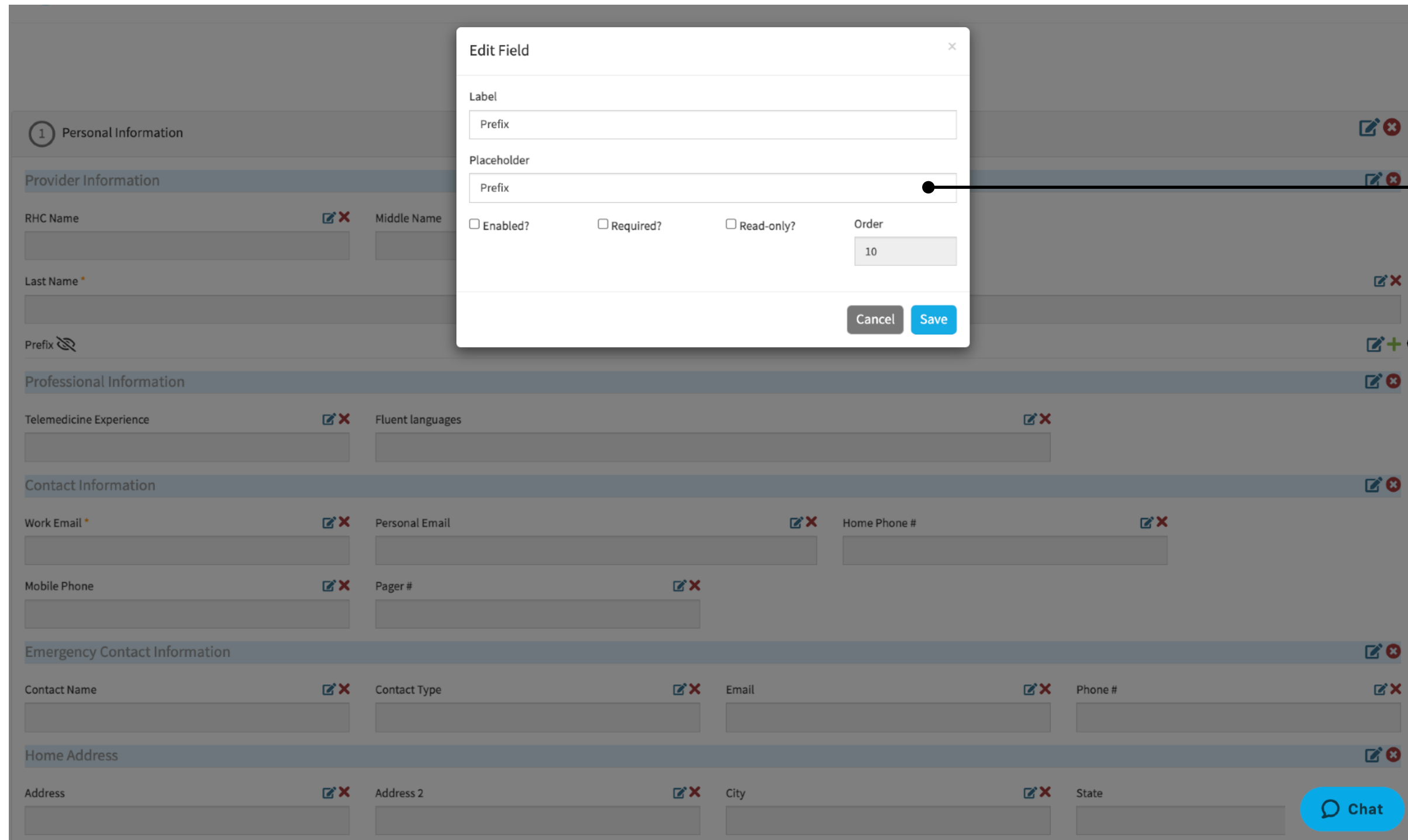
If checked, your providers must fill out this field in order to click Save and Next.

**Read: only:**

If checked, this field will be visible to your providers but cannot be edited.

## Tip Guide: Provider Onboarding

**Onboarding:** Creating Custom Onboarding Invitations. Your onboarding template can be edited to meet your organizations needs. Add the sections you want your providers to fill out. Remove the sections or fields that you don't need or that your coordinators will fill in for your providers.



The screenshot shows a multi-section form for provider onboarding. The sections are: Personal Information, Provider Information, Professional Information, Contact Information, Emergency Contact Information, and Home Address. Each section contains various input fields. An 'Edit Field' modal is open, showing fields for Label, Placeholder, Enabled?, Required?, Read-only?, and Order. The Placeholder field is highlighted with a black dot and a line pointing to the text 'Placeholder:' in the adjacent text block.

### Placeholder:

Use the placeholder to add any details or special instructions to a specific field. The text you add to the placeholder will appear in gray when the provider is filling out their data.

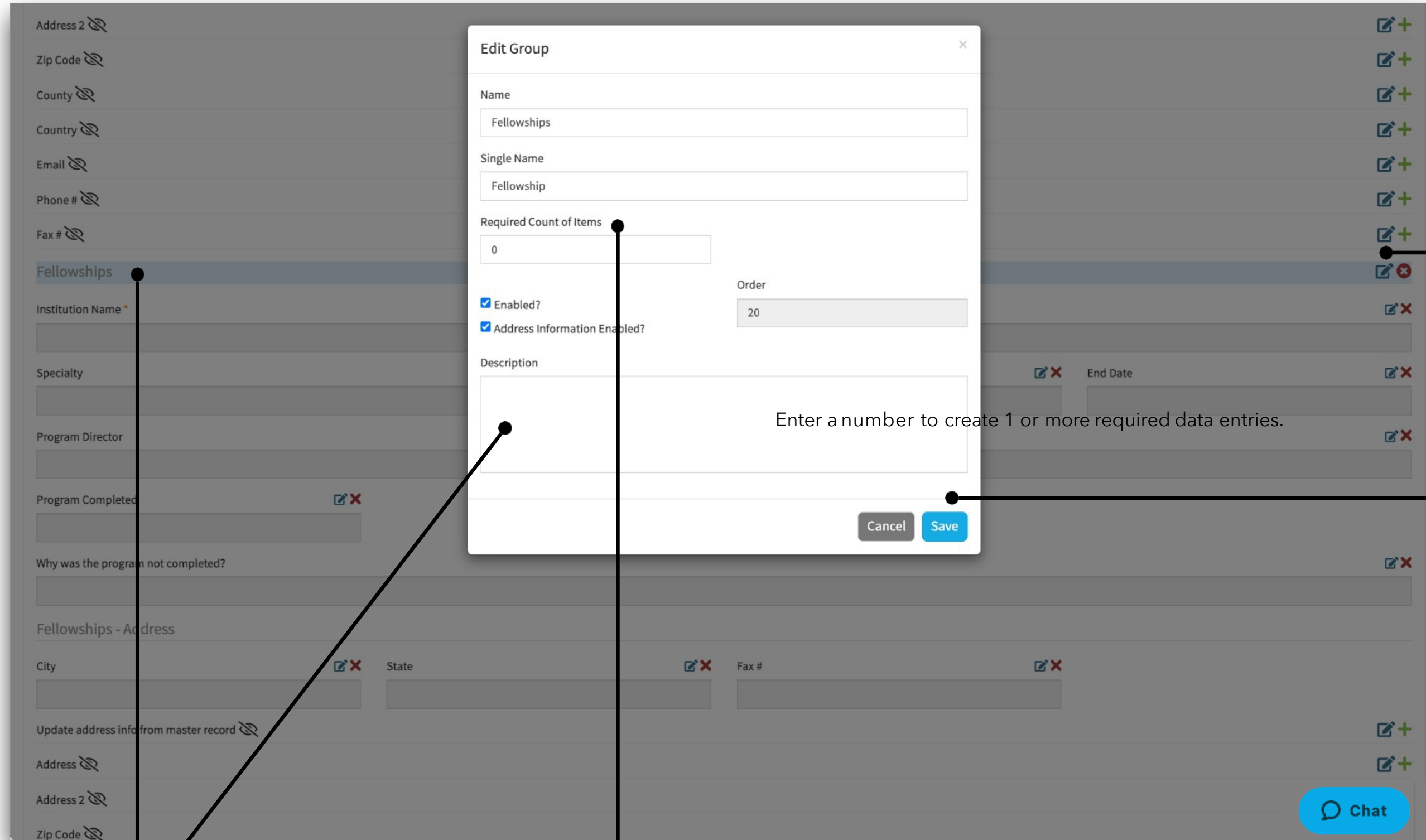
One common use: case is to add a placeholder note in the peer reference section to specify the type of reference that is required. Example: Peer, Direct Supervisor, or Client.

The provider will see the placeholder text as they are filling out the requested fields.

**Tip Guide: Provider Onboarding**

**Onboarding:** Customizing Team Level Onboarding Invitations – Group Level options

This example shows the **Peer Reference section**. If your organization requires 3 peer references, enter the number 3. Your provider will see 3 required line items and will be required to complete all three before clicking "Save"



**Group Level:** Each section of the onboarding template will have a "Group Level" Edit option. The group is a blue section with an edit icon. Click the group level edit icon for additional customization features.

**Save:** Click save when you are finished making changes.

**Description:** Use this field to add any special instructions for your providers. Anything entered in this section will appear in the question mark icon in the group level line.

**Required count of items:** Enter a number to create 1 or more required data entries.





## **PART 3**

### FREQUENTLY ASKED QUESTIONS

## Tip Guide: Provider Onboarding

### Frequently Asked Questions

There is an additional Onboarding tip guide on the support page created specifically for providers. Review that guide for an overview of your providers workflow or send it to your providers as a guide while they are working through the onboarding process.

#### **Q: Why are there are two different links in the email that the provider receives?**

The first link is to claim the profile. The second on it to continue the application (log in again) We recommend that your provider save this email so they can easily log into their profile in the future.

#### **Q: What if my providers email is incorrect when I select the message button?**

Any provider email that needs to be updated MUST be done through the personal info section in the Work Email field. Additionally, the provider must NOT change their email when they claim their profile.

#### **Q: My provider signed out of the onboarding invitation before completing, how can they get back in?**

The provider can re-open the link in the original email they received (it will not expire). If they do not have the email, you can copy the link from the providers "Onboarding Viewer" section to the invitation and paste it within an email to the provider outside of the platform. They will be prompted to log in and continue filling out their profile.

#### **Q: My provider says they didn't receive the invitation what should I do?**

Encourage them to check their spam folder or their junk folder. Additionally, your IT team may need to whitelist or add the email to the safe sender list within your organization.

#### **Q: I sent out invitations but forgot to make an item required.**

Can I edit invitations that were already sent out? Yes, any changes made to the invitation or "Editor" sections will apply to invitations already sent if the provider has not completed filling out the sections that were changed.

#### **Q: Can I have more than one onboarding template within my team?**

No, each team is limited to one onboarding template. The onboarding template is a "Team Level" feature. This means that once you update it, it will apply to all providers on your team. You will only need to set up the Onboarding template once for your team.

#### **Q: I added SSN and Driver's license to the invitation, why can I not see them within Onboarding Viewer?**

These are encrypted fields within the profile, your providers will see these fields if you have enabled them within your invitation.

#### **Q: There is an option to attach a document to the Onboarding feature, how many can I attach and is this the same as sending a form?**

You can only attach ONE document to the Onboarding invite. Any document that you send through onboarding will not be integrated with DocuSign. If you attach a document to the onboarding invite it should not be intended to be signed or filled out - it should be a read only, or information document only.

#### **Q: If I select the "Email Copy to Myself" option when sending one invite at a time, will my provider be able to reply directly to me from the email invite.**

Yes! This is a new addition to our onboarding invite. If you include yourself when sending the invite, the provider will have the option to reply to by email.

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

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