



OneView[®]

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 you 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

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, the user is logged in as Leah Sanborn. A 'Message' button is highlighted with a red box in the top right corner. The main content area shows a list of providers with columns for Provider, Tags, Compliance, and Actions. The providers listed include Avel eCare, LLC - QMHS, Group/Organization Name - Credentialing Record, StarshipEnterprise - FAC, Sunrise Medical Lab - FAC, Texoma Independent Physicians - FAC, and Abakporo, Theophine David - Employed. The 'Message' button in the Actions column for the first provider is highlighted.

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, and a grid of providers is displayed. A context menu is open over the provider 'Abakporo, Theophine', with the 'Message Provider' option highlighted. The grid has columns for Provider Name, Country of Citizenship, Title, Primary Specialty, Citizenship/Work Auth, US Work Auth, Date of Birth, Last Updated, and Actions. The providers listed include Abakporo, Theophine, Snow, John, Bay, Tommy, Holmes, Brandon, Sanborn, Leah, Denning, Clerra, and Heath, Kirk.

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:

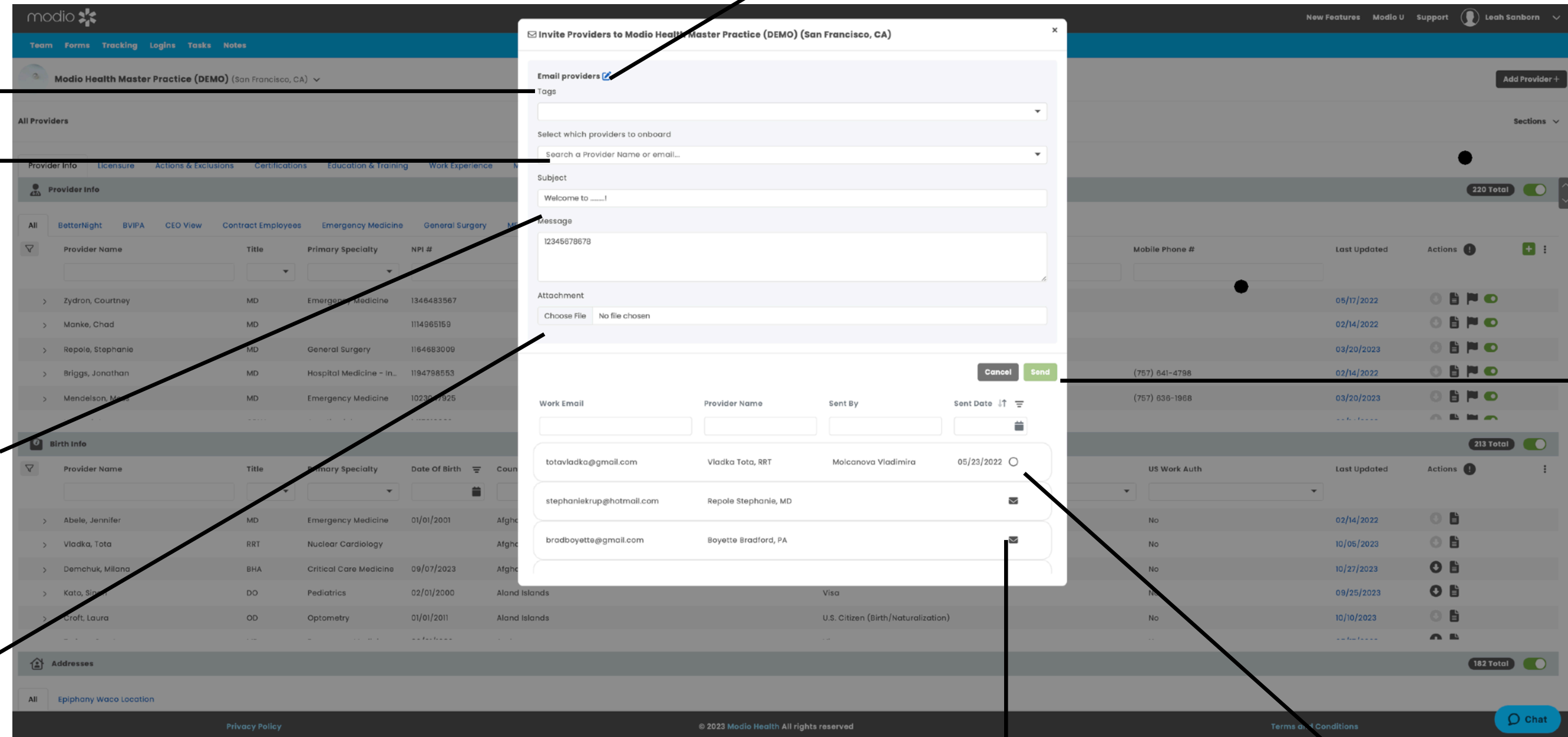
Enter a desired subject and then add a message to your provider. This area can be customized as well. There are message templates available to help you get started. Those templates are located on the ModioU tab next to the Onboarding video.

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.



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.

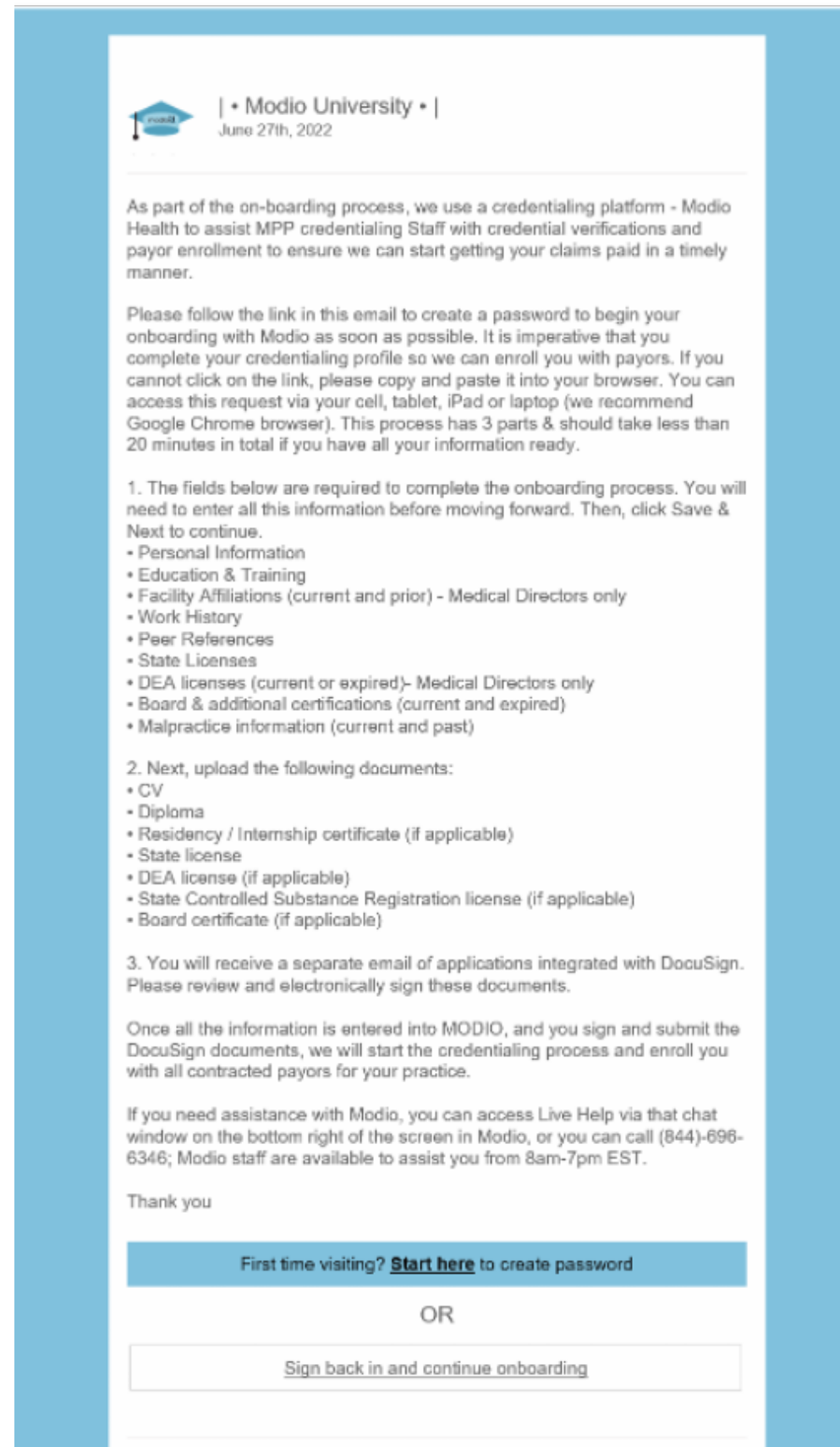
New Invitations:

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" .

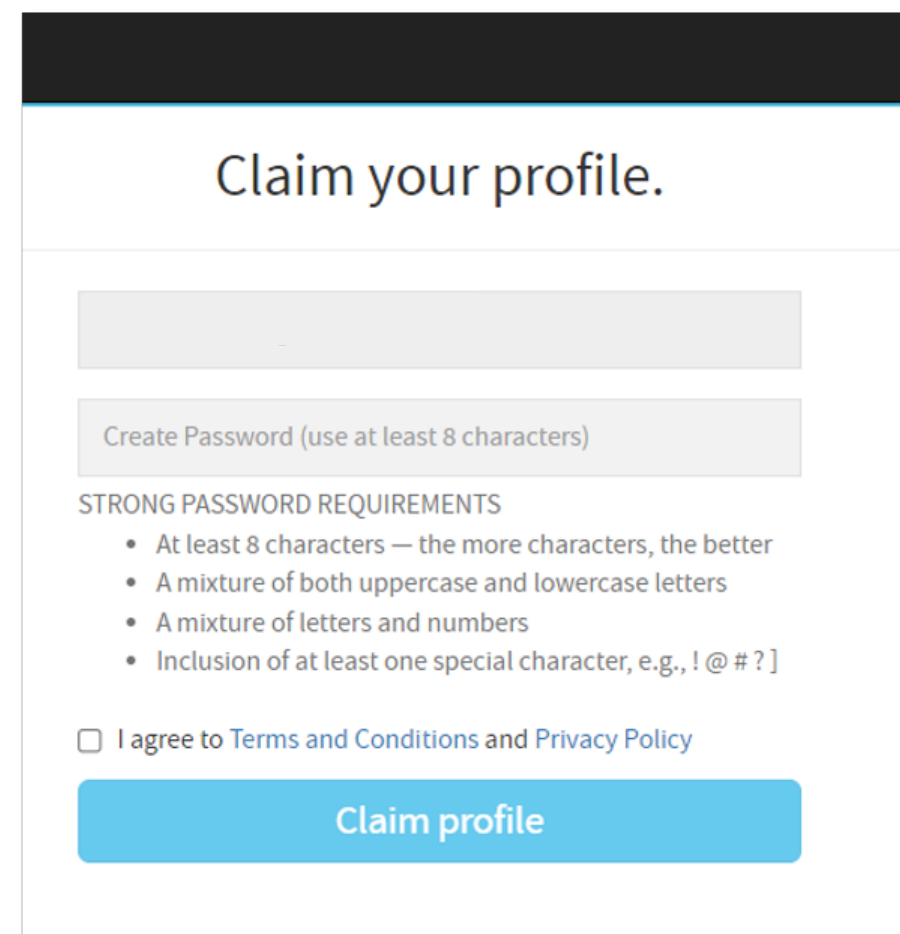
Tip Guide: Provider Onboarding

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

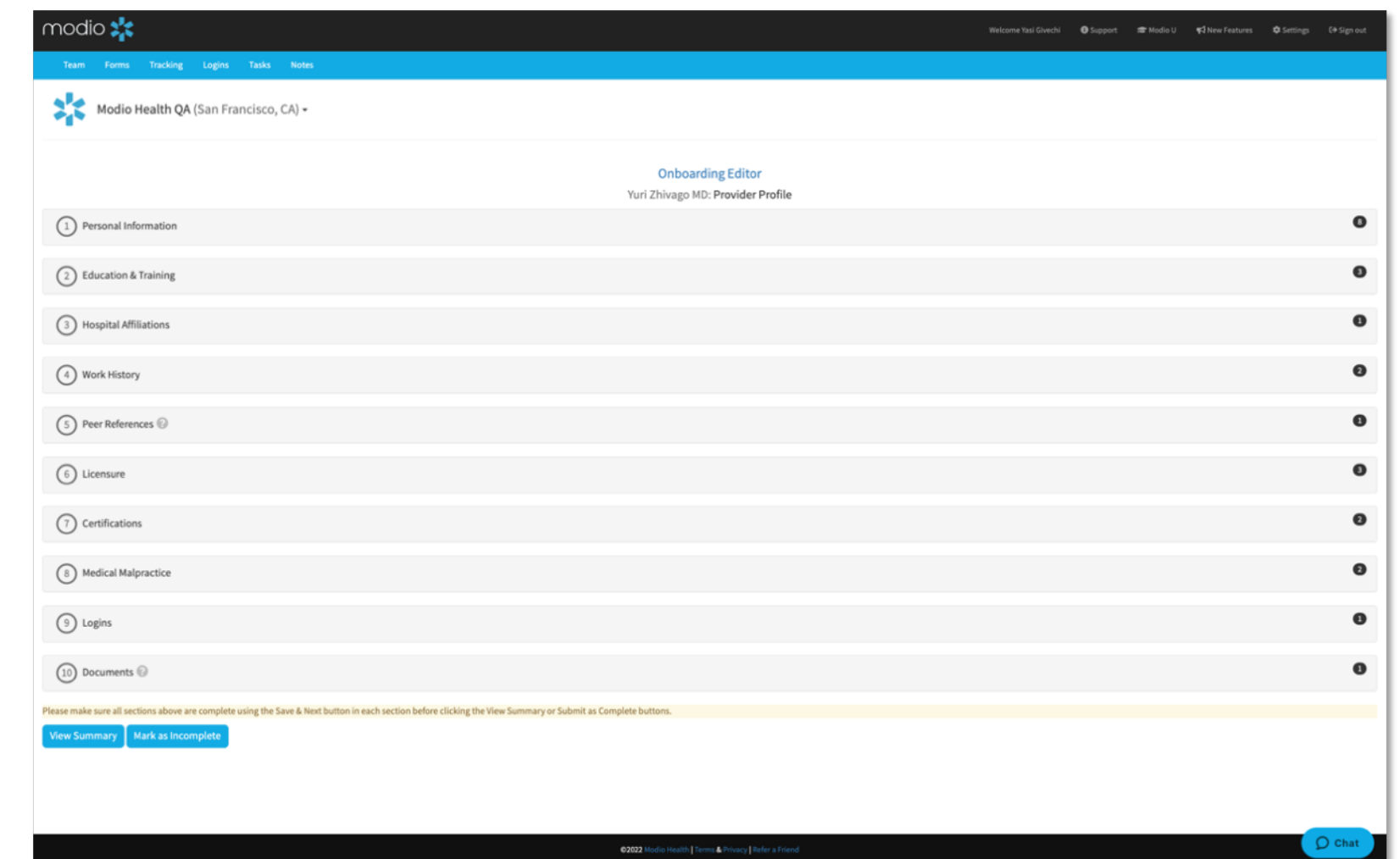
1. The provider will receive your message in their email. Your Team Logo and name will display on the top.



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.



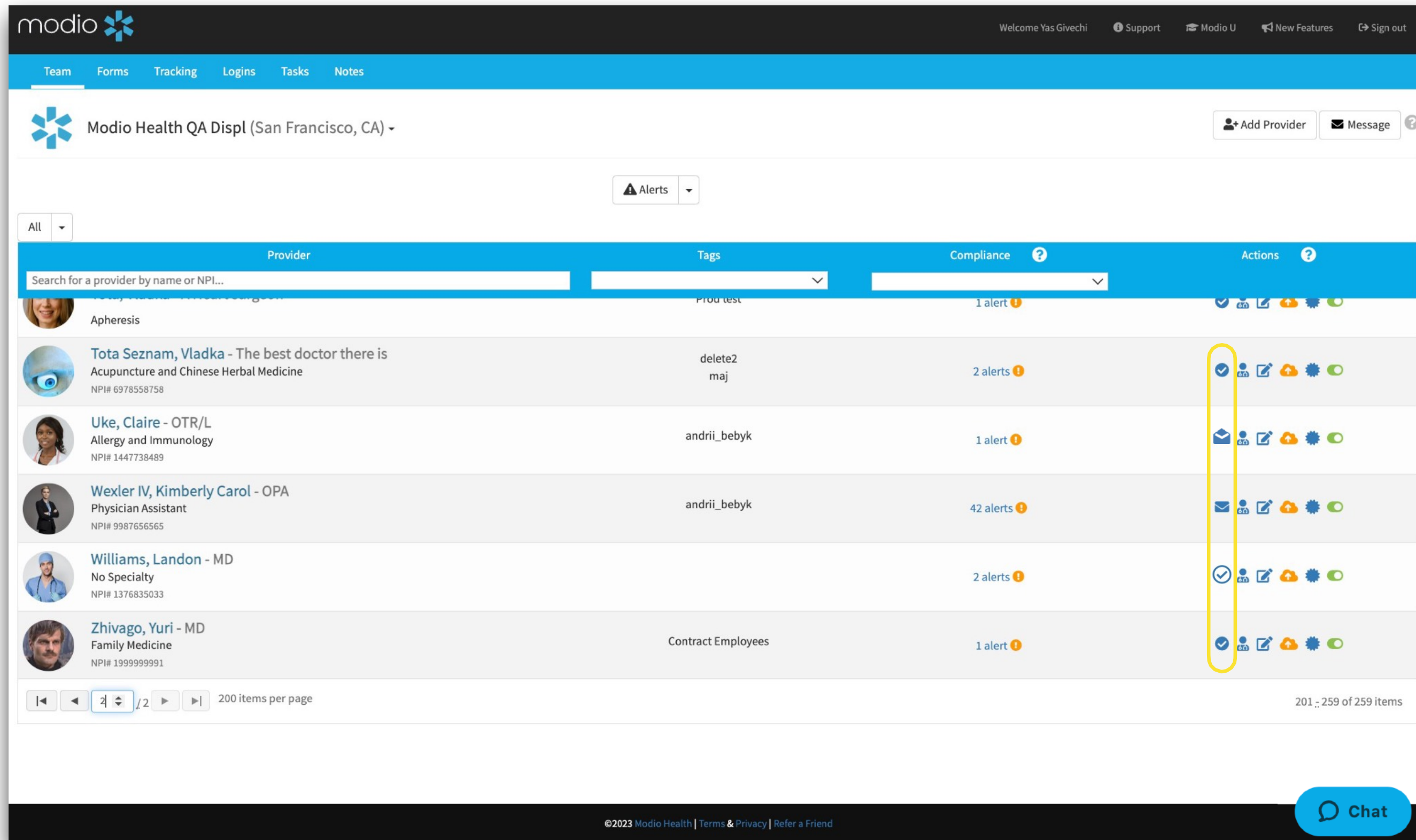
3. The provider is guided through the credentialing data sections and prompted to fill out required data. (Talk to your account rep to set up custom requirements for each field.) Any information added during onboarding is automatically copied to the provider's profile and available for viewing and editing. You can request that your provider upload a set of required or optional documents before completing onboarding (e.g. a CV or color photo).

































*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 'Add Provider' and 'Message' buttons. Below the header is a search bar and a table of providers. The table has columns for 'Provider', 'Tags', 'Compliance', and 'Actions'. 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"**

Alerts

- Web Reports
- Recredentialing
- Payor Recredentialing
- Completed Items**
- State License Coverage
- CSV Reports
- Certifications
- CME
- Compliance
- Documents
- Education
- Event Log
- Facilities
- Forms
- Health Info
- Licensure
- Medical Malpractice
- Missing Field
- More Names
- OIG
- Payors
- Providers
- Recredentialing
- Tasks (All Teams)
- Tracking (All Teams)
- Work History
- Peer References
- Facility Master Update
- Inactive Providers

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.

Completed Items for Modio Health QA Displ

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 C S V 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 web interface on the left and an Excel spreadsheet on the right. In the web interface, the 'Alerts' dropdown menu is open, and the 'Providers' report is highlighted. The spreadsheet shows a list of providers with columns for Provider ID, Creation Date, Onboarding Status, and Onboarding Tags. A filter dialog is open over the spreadsheet, showing the 'Onboarding' column selected with the following filters checked: (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	Onboarding Tags	Job Title	Last Name	Suffix	First Name	Middle Name	Provider Type	NPI #	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		avelcarellc@modio.email							Admin	Pending	
225779	7/15/20	New Invitation					Group/Organization Name		FAC	1111111111	modio@univer.thomas.adde		111 Street, USA		(111) 111-1111		Admin	Pending		
481501	11/2/22	New Invitation					StarshipEnterprise		FAC		azuresfac@modio.email				(555) 555-5555		Admin	Pending		
413840	5/4/22	New Invitation					Sunrise Medical Lab		FAC		sunrisemedical@modio.email				(666) 666-6666		Admin	Pending		
478511	10/21/22	New Invitation					Texoma Independent Phys		FAC	5555555544	texomaindependentphysicians@modio.email				(111) 111-1111		Admin	Pending		
612302	10/3/23	New Invitation					Test Provider		MD		test@modio.testemail@gmail.com				(999) 111-1222		Admin	Pending		
158129	12/12/19	Complete Profile					Theophine David		HAD	1972564813	theophine.test@gmail.c		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	785hty71		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,, 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.em		USA				Admin	Pending		
452000	8/8/22	Incomplete Profile					Ciera		MD	1234567891	cdennin23@c.dennin@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	azuresgilles@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.modio@universty@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		





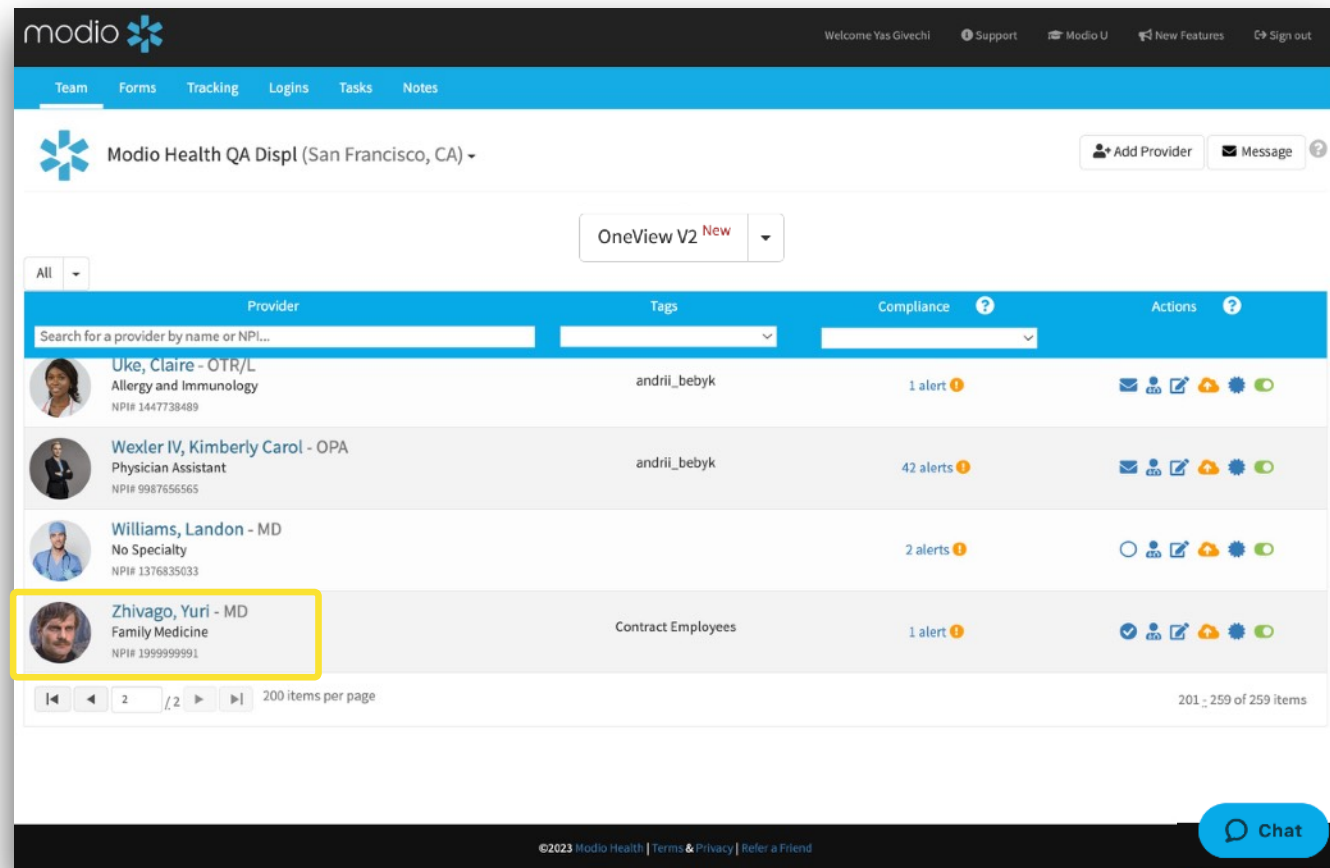
PART 2 -
CUSTOMIZING THE ONBOARDING TEMPLATE

Tip Guide: Provider Onboarding

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

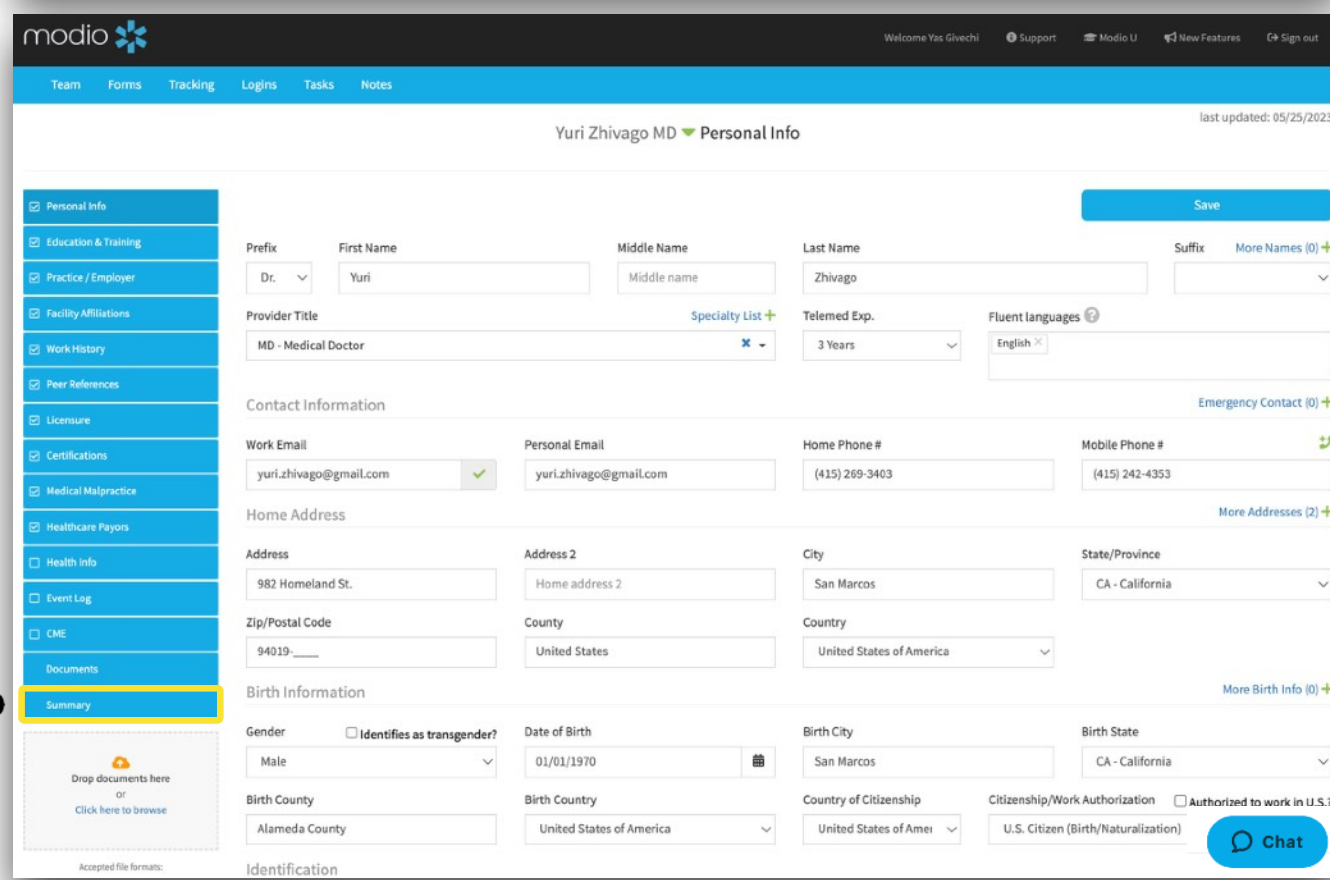
1

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



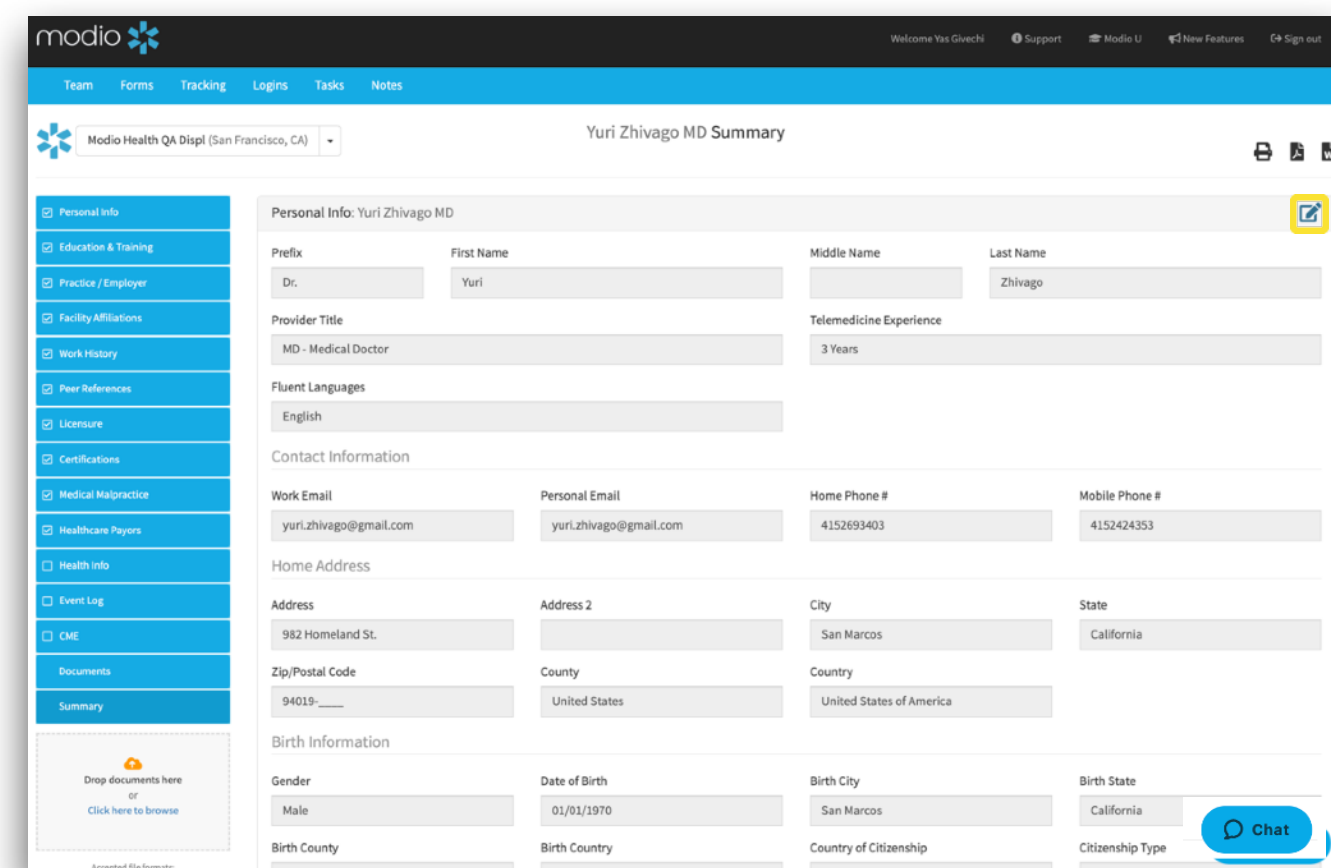
2

Select **Summary**



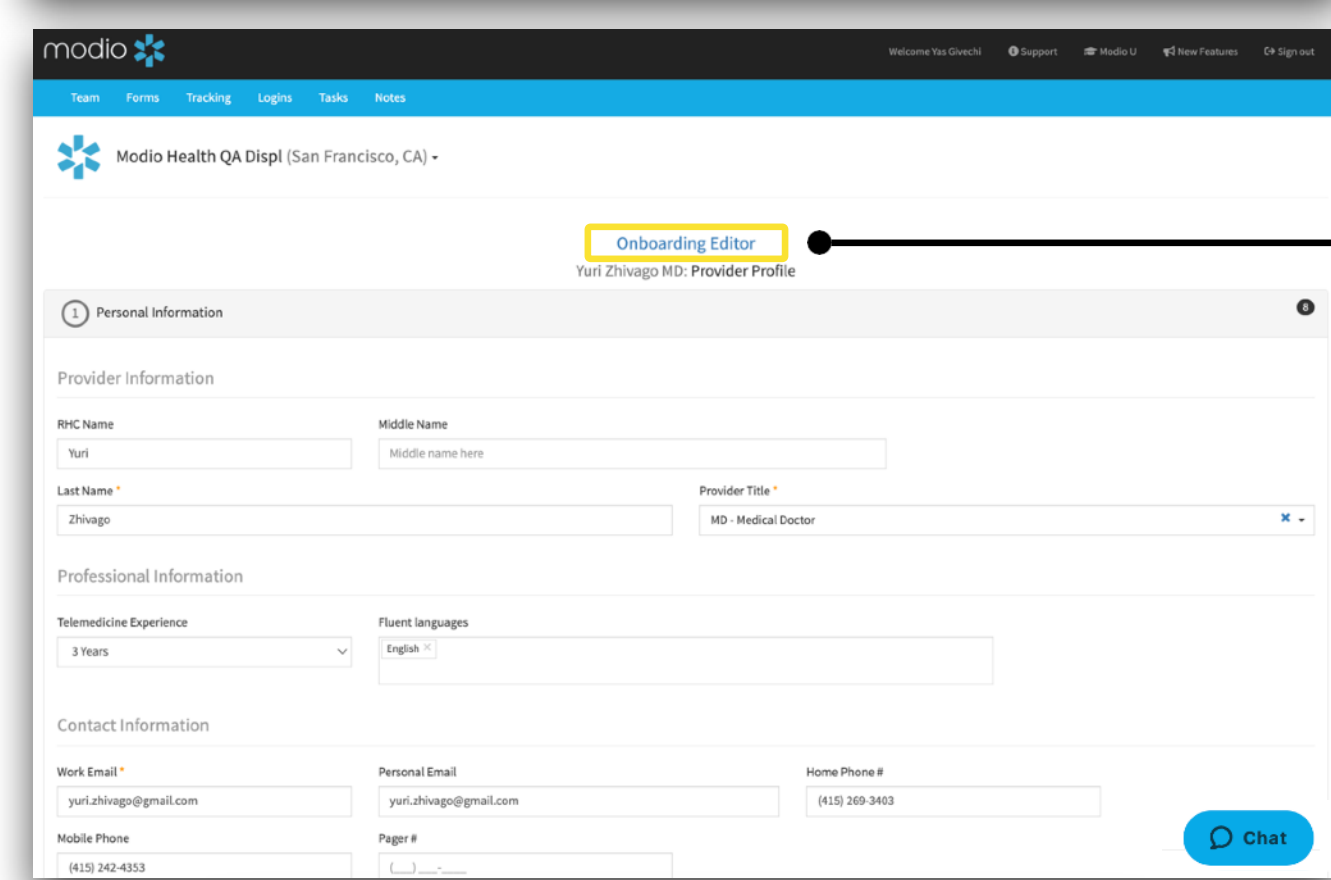
3

Select the **"Edit Icon"**



4

The **"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

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.

The screenshot shows the Modio provider onboarding interface. An 'Edit Field' modal is open, allowing configuration of a field. The modal includes the following options:

- Label:** Provider Title
- Placeholder:** Provider title
- Enabled?:** (checked)
- Required?:** (checked)
- Read-only?:** (unchecked)
- Order:** 50

Buttons for 'Cancel' and 'Save' are at the bottom of the modal. The background interface shows sections for Personal Information, Provider Information, Professional Information, and Contact Information, each with edit and delete icons.

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:

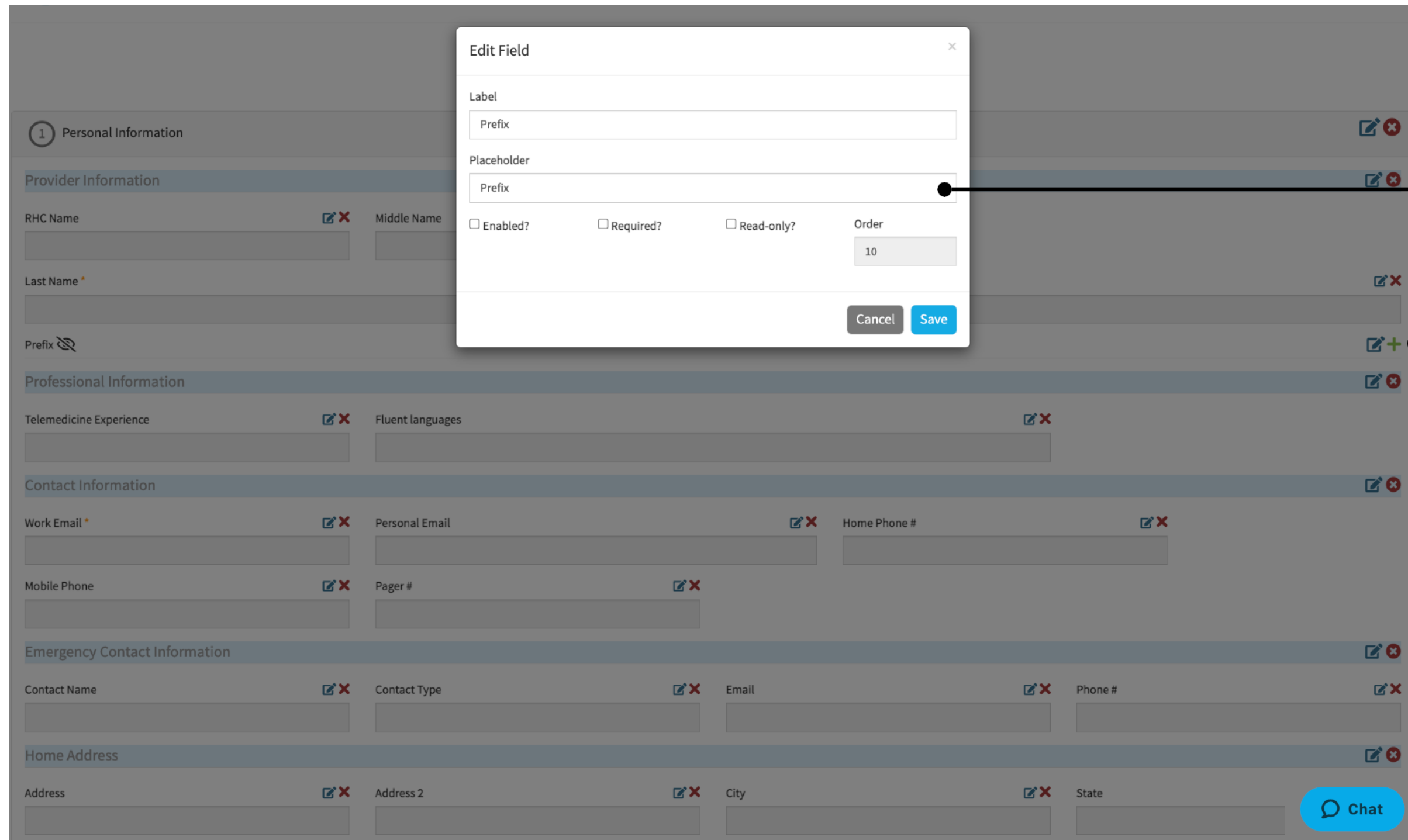
If checked, your providers must fill out this field in order to click Save and Next.

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 with edit and delete icons. An 'Edit Field' modal is open, showing fields for Label, Placeholder, Enabled?, Required?, Read-only?, and Order. The Placeholder field is highlighted with a yellow box and a callout line pointing to the text 'Placeholder:'. The modal also has 'Cancel' and 'Save' buttons.

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.

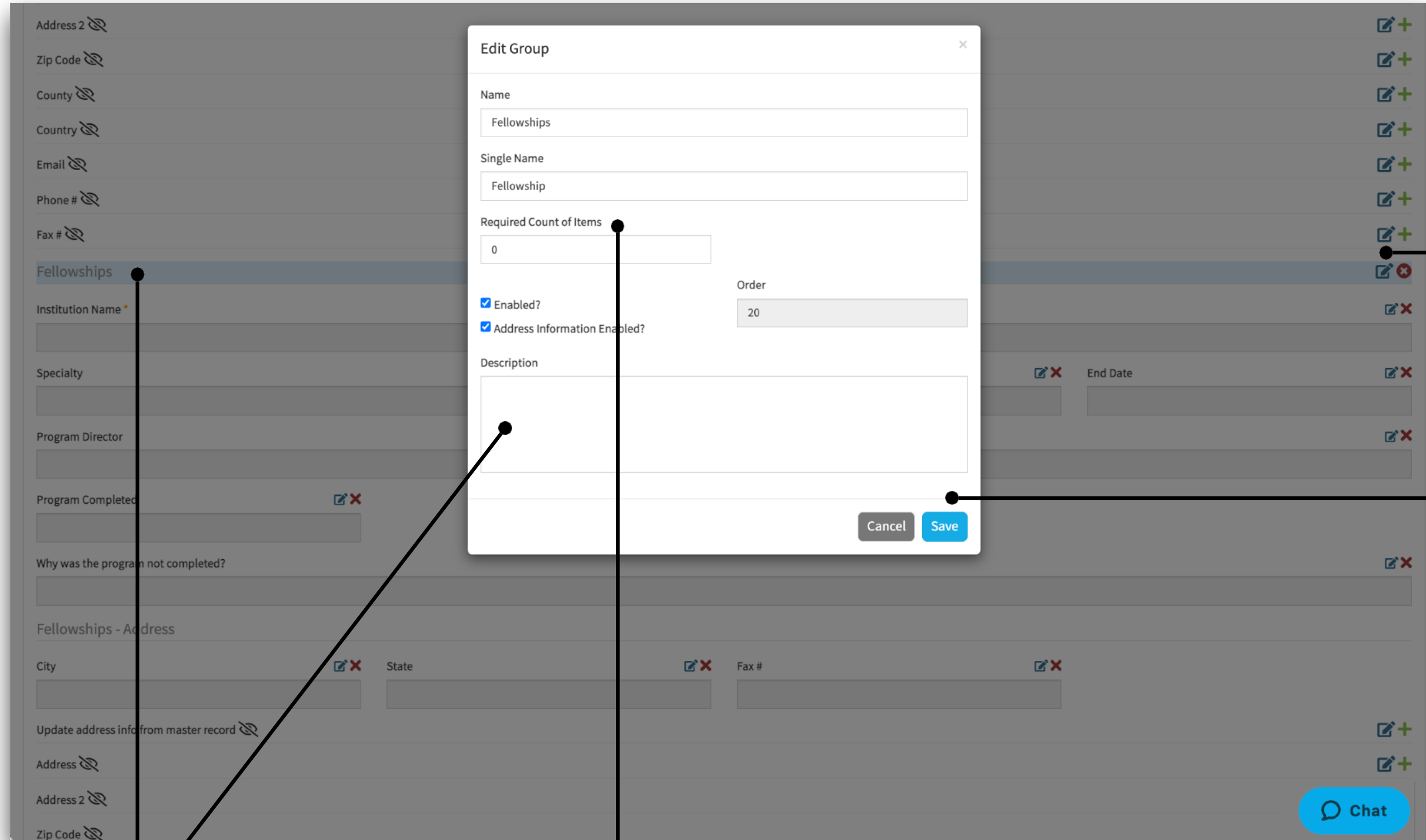
One common use-case is to add a placeholder note in the peer reference section to specify the type of reference that is required. Example: Peer, Direct Supervisor, or Client.

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.

- 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.

- 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.

- 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.

- 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.

- 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.

- 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 you team.

- 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.

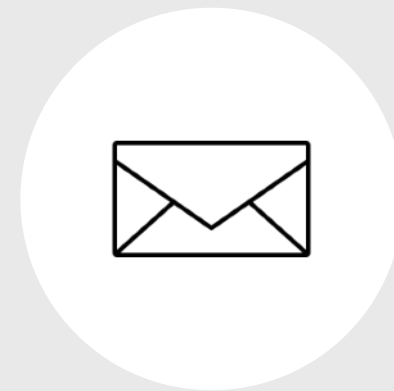
- There is an option to attach a document to the Onboarding feature, how many can I attach and is this the same as sending a form?

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.

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346