



**OneView**<sup>®</sup>

A PROVIDERS GUIDE  
TO ONBOARDING

### **What to expect from the Onboarding Process with OneView®?**

If you have received the Welcome email Onboarding Invite, then your organization has decided to use the OneView® onboarding feature to simplify the onboarding process of completing your Provider Profile.

This tip guide will outline expectations and workflows to help you navigate and complete the onboarding intake template sent from our credentialing platform, OneView®.

Once you receive the Onboarding Invitation, you will be prompted to create an account, log in and complete the template.

Throughout this guide you will find screenshots, tips and tricks, and more to successfully fill out the new provider onboarding template sent to you by your organization.

Please do not hesitate to reach out to your organization with additional questions or to [Support@modioHealth.com](mailto:Support@modioHealth.com) to reach our customer support team.

### **Tip Guide Key:**

#### **Part I**

**Slide 1 – 2** – Welcome to the onboarding Invitation

**Slide 3 – 6** – The provider workflow for completing the onboarding invite

**Slide 7** – Filling out location-based data points

**Slide 8 – 9** – Entering Login Credentials and uploading documents

#### **Part II**

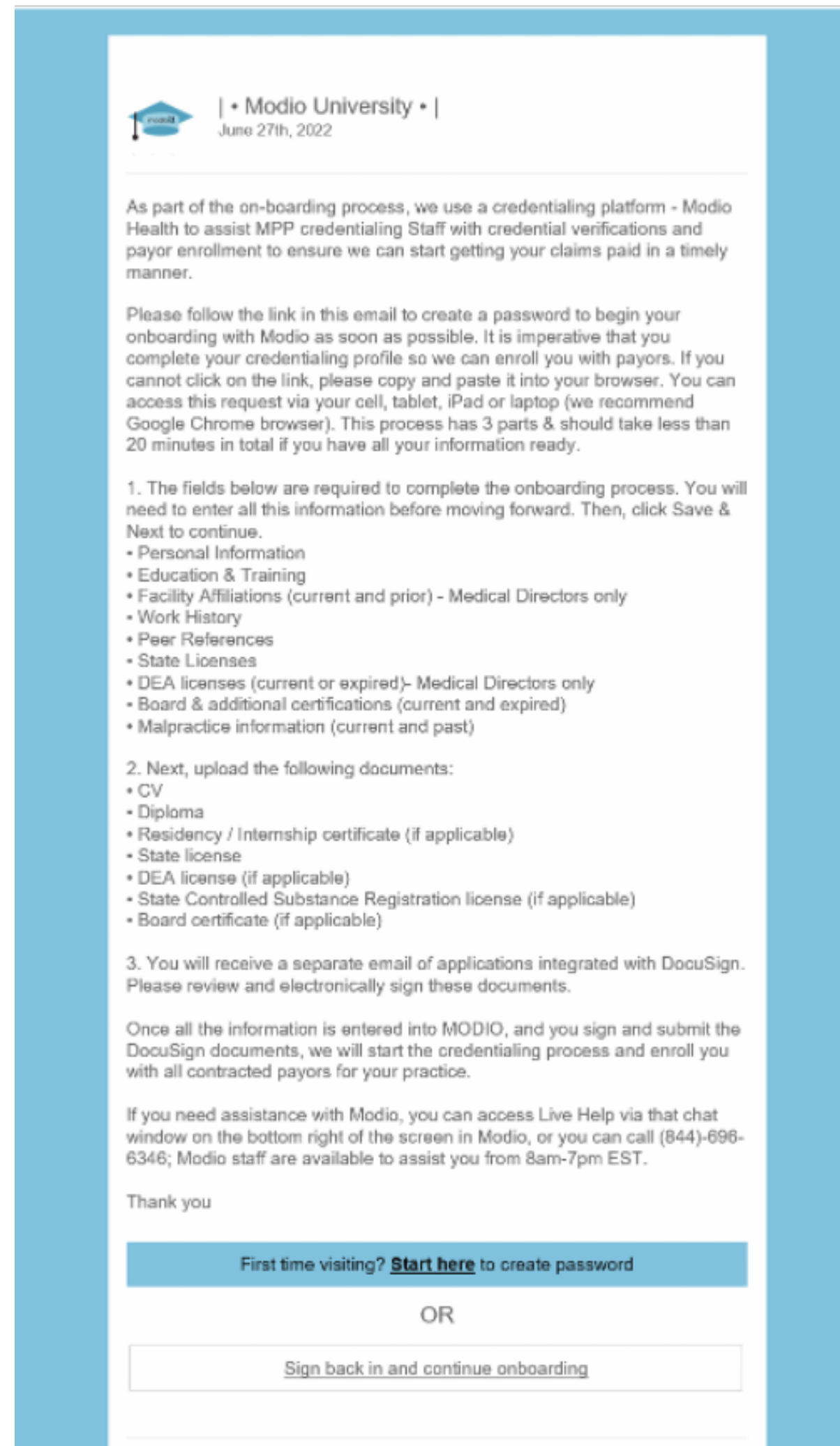
**Slide 10 – 13** – Logging back into the Onboarding Application

**Slide 14** – Support and Contact info

## Tip Guide: Provider Onboarding

### Onboarding - High Level Overview of Provider Onboarding Workflow

1. Providers will receive their individual onboarding message by email.



2. Providers should click the link on the bottom of the message and then claim their profile to start the onboarding process. You must use the same email address at which they received the invite.

The screenshot shows a web form titled "Claim your profile." It includes a text input field for an email address (leahannelala@gmail.com), a password creation field with a requirement of at least 8 characters, and a section for "STRONG PASSWORD REQUIREMENTS" listing specific rules. There is a checkbox for "I agree to Terms and Conditions and Privacy Policy" and a prominent blue "Claim profile" button.

### Claim your profile.

leahannelala@gmail.com

Create Password (use at least 8 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. Each organization will customize the requested data points so this part will vary between organizations. Any information added during onboarding is automatically copied to the provider's profile and available for viewing and editing by designated OneView coordinators. You may be requested to upload a set of required or optional documents and entering username and passwords to specific websites before completing onboarding.

The screenshot shows the "Onboarding Editor" interface for Modio Health QA (San Francisco, CA). It displays a list of sections to be completed, including Personal Information, Education & Training, Hospital Affiliations, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Logins, and Documents. A "View Summary" button and a "Mark as Incomplete" button are visible at the bottom.

modio

Welcome | Modio U | Support | New Features | Settings | Sign out

Team | Forms | Tracking | Logins | Tasks | Notes

Modio Health QA (San Francisco, CA)

Onboarding Editor

Yuri Zhivago MD: Provider Profile

- 1 Personal Information
- 2 Education & Training
- 3 Hospital Affiliations
- 4 Work History
- 5 Peer References
- 6 Licensure
- 7 Certifications
- 8 Medical Malpractice
- 9 Logins
- 10 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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## Tip Guide: Provider Onboarding

### Onboarding - Step 1 - Welcome Email Received

When you receive your Welcome email, it will look similar to this example. It will come from sender Message@modiohealth.com

If your organization sends you the invite and you did not receive it, please check your spam folder.

Your organizations logo and Team name will display here

Welcome email may include important details from your organization and a list of action items that require attention in order to complete the onboarding process.

Please read the entire message to best prepare to start the onboarding process.

Click this link to claim your provider profile and start your individual onboarding process.

Save this email for future use. This second link will never expire. You can use it to access your provider profile anytime in the future.

| • Modio University • |  
June 27th, 2022

As part of the on-boarding process, we use a credentialing platform - Modio Health to assist MPP credentialing Staff with credential verifications and payor enrollment to ensure we can start getting your claims paid in a timely manner.

Please follow the link in this email to create a password to begin your onboarding with Modio as soon as possible. It is imperative that you complete your credentialing profile so we can enroll you with payors. If you cannot click on the link, please copy and paste it into your browser. You can access this request via your cell, tablet, iPad or laptop (we recommend Google Chrome browser). This process has 3 parts & should take less than 20 minutes in total if you have all your information ready.

1. The fields below are required to complete the onboarding process. You will need to enter all this information before moving forward. Then, click Save & Next to continue.

- Personal Information
- Education & Training
- Facility Affiliations (current and prior) - Medical Directors only
- Work History
- Peer References
- State Licenses
- DEA licenses (current or expired)- Medical Directors only
- Board & additional certifications (current and expired)
- Malpractice information (current and past)

2. Next, upload the following documents:

- CV
- Diploma
- Residency / Internship certificate (if applicable)
- State license
- DEA license (if applicable)
- State Controlled Substance Registration license (if applicable)
- Board certificate (if applicable)

3. You will receive a separate email of applications integrated with DocuSign. Please review and electronically sign these documents.

Once all the information is entered into MODIO, and you sign and submit the DocuSign documents, we will start the credentialing process and enroll you with all contracted payors for your practice.

If you need assistance with Modio, you can access Live Help via that chat window on the bottom right of the screen in Modio, or you can call (844)-696-6346; Modio staff are available to assist you from 8am-7pm EST.

Thank you

First time visiting? [Start here](#) to create password

OR

[Sign back in and continue onboarding](#)

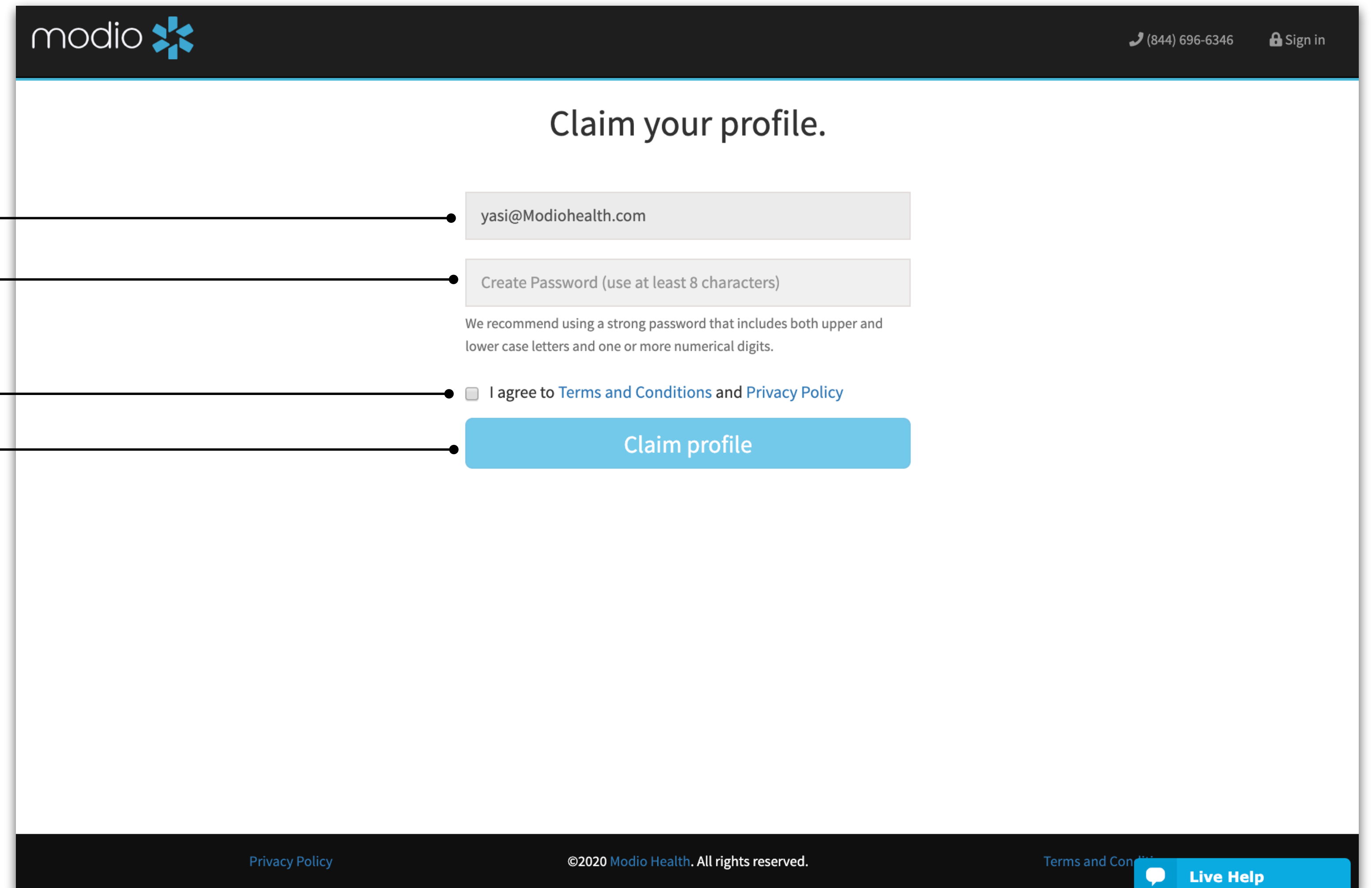


Providers will next navigate onto the Modio **"Claim your provider profile"** page and enter their email and create a password. You MUST use the email address where the Onboarding invite was originally sent.

Create a unique password

Agree to the Terms and Conditions

Select "Claim profile"



The screenshot shows the 'Claim your profile' page with the following elements and annotations:

- Header:** modio logo and contact information: (844) 696-6346, Sign in.
- Title:** Claim your profile.
- Email Field:** yasi@Modiohealth.com (Annotated with: Providers will next navigate onto the Modio "Claim your provider profile" page and enter their email and create a password. You MUST use the email address where the Onboarding invite was originally sent.)
- Password Field:** Create Password (use at least 8 characters) (Annotated with: Create a unique password). Below the field is a note: We recommend using a strong password that includes both upper and lower case letters and one or more numerical digits.
- Terms and Conditions:**  I agree to [Terms and Conditions](#) and [Privacy Policy](#) (Annotated with: Agree to the Terms and Conditions).
- Submit Button:** Claim profile (Annotated with: Select "Claim profile").
- Footer:** Privacy Policy, ©2020 Modio Health. All rights reserved., Terms and Conditions, Live Help.

## Tip Guide: Provider Onboarding

### Onboarding – Step 2 - Claiming Your Profile

Once you log in you will be directed to the onboarding page in OneView®.

From here, you will be asked to fill in specific data points requested by your organization. Your unique invite may include all or some of the following sections:

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

Any required fields will be indicated with an orange star.

Fill out every requested field in the section and click "Save & Next" to navigate to the next section.

Tip: If you can not complete the entire onboarding application, save the original email invite and use the link at the bottom to log in later. You can also bookmark the link to easily log back in.

modio

Welcome Bernie Mann | (444) 696-6346 | Settings | Help | Sign out

Dashboard | Manage Credentials | Logins | Tasks | CME

Modio Health QA (San Francisco, CA) -

Bernie Mann MD: Provider Profile

1 Personal Information

Provider Information

First Name \* Bernie Middle Name Middle name Last Name \* Mann

Provider Title \* MD - Medical Doctor

Professional Information

Fluent Languages Select languages...

Contact Information

Work Email \* yasj.givechi@modiohealth.com Personal Email @ Home Phone # Mobile Phone

Emergency Contact Information

Contact Name Contact Type Email Phone #

Home Address

Address Home address Address 2 Home address 2 City Home city State

Zip Code Country Home county United States of America Mailing Address?

Birth Information

Gender Date of Birth mm/dd/yyyy Birth City Birth state

Birth County Birth Country Country of Citizenship Citizenship Type

Identification

NPI # 1999999991 Driver License or ID # State Issued Expiration Date mm/dd/yyyy

Social Security #

Save & Next

2 Education & Training

3 Hospital Affiliations

4 Work History

5 Peer References

6 Licensure

7 Certifications

8 Medical Malpractice

9 Logins

10 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 Submit as Complete

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**Tip Guide: Provider Onboarding**

Onboarding - Location Based Sections

The Onboarding Intake Template is customized by your organization. Some of these sections may not appear in your unique onboarding invitation.

Hover any "?" icons to view detailed instructions from your organization

Use the **green add button** to start a new data entry.

Once you click the green add button you will be prompted to fill in location data. Search by name or address to find the correct location. If there is not location match, please enter the address in manually.

The screenshot shows a multi-step onboarding form. The sections are:
 

- 2 Education & Training (with a question mark icon)
- 3 Hospital Affiliations (with a question mark icon)
- 4 Work History (with a question mark icon and an 'Add +' button)
- Military Experience (with an 'Add +' button)

 A 'Save & Next' button is at the bottom left. A green circle with '0' is highlighted next to the 'Add +' button for the Work History section.

The 'Work History 1' modal form contains the following fields:
 

- Former Practice/Employer Name \***: A search input field with a dropdown menu showing several Adventist health locations such as 'Adventist Behavioral Health (Rockville, MD)', 'Adventist Health Bakersfield (Bakersfield, CA)', etc.
- End Date**: A date input field with a calendar icon and a placeholder 'mm/dd/yyyy'.
- Position Held**: A text input field.
- Address**: A text input field.
- Address 2**: A text input field.

 A red 'X' close button is in the top right corner.

**Tip Guide: Provider Onboarding** Onboarding - Documents and Logins Sections

The Onboarding Intake Template is customized by your organization. Some of these sections may not appear in your unique onboarding invitation.

Your organization may request usernames and passwords for accounts they manage for you. Any credentials entered here will be securely stored in the OneView® platform. If you would like to add additional login credentials, use the green add button.

Once all requested login credentials are entered, click **"Save & Next"**

If your organization is requesting documents, you will see a list similar to this. Required documents are in red and will fall off the list as they are added to your profile.

Best practice is to name your documents in the format of "Provider name. Document Type. Expiration Date" before uploading.

Use the **"Drag and Drop"** option or select **"Click here to browse"** to access all documents on the device you are working from.



Once you have filled in all requested data, entered any login information and uploaded documents, select **“Submit as Complete”**

This will change the status of your onboarding invite to **“Completed”** and your organization will review your completed profile.



The screenshot displays a vertical list of 10 onboarding sections, each with a numbered circle on the left and a progress indicator on the right:

- 1 Personal Information (6)
- 2 Education & Training (5)
- 3 Hospital Affiliations (1)
- 4 Work History (2)
- 5 Peer References (1)
- 6 Licensure (2)
- 7 Certifications (2)
- 8 Medical Malpractice (1)
- 9 Logins (1)
- 10 Documents (1)

Below the sections is a yellow warning bar: "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." At the bottom, there are two buttons: "View Summary" and "Submit as Complete". A black box highlights the "Submit as Complete" button, with a line pointing to the text in the adjacent yellow box.



## **PART II**

### LOGGING BACK INTO THE ONBOARDING INTAKE TEMPLATE

**Tip Guide: Provider Onboarding** Onboarding - Logging back into OneView®

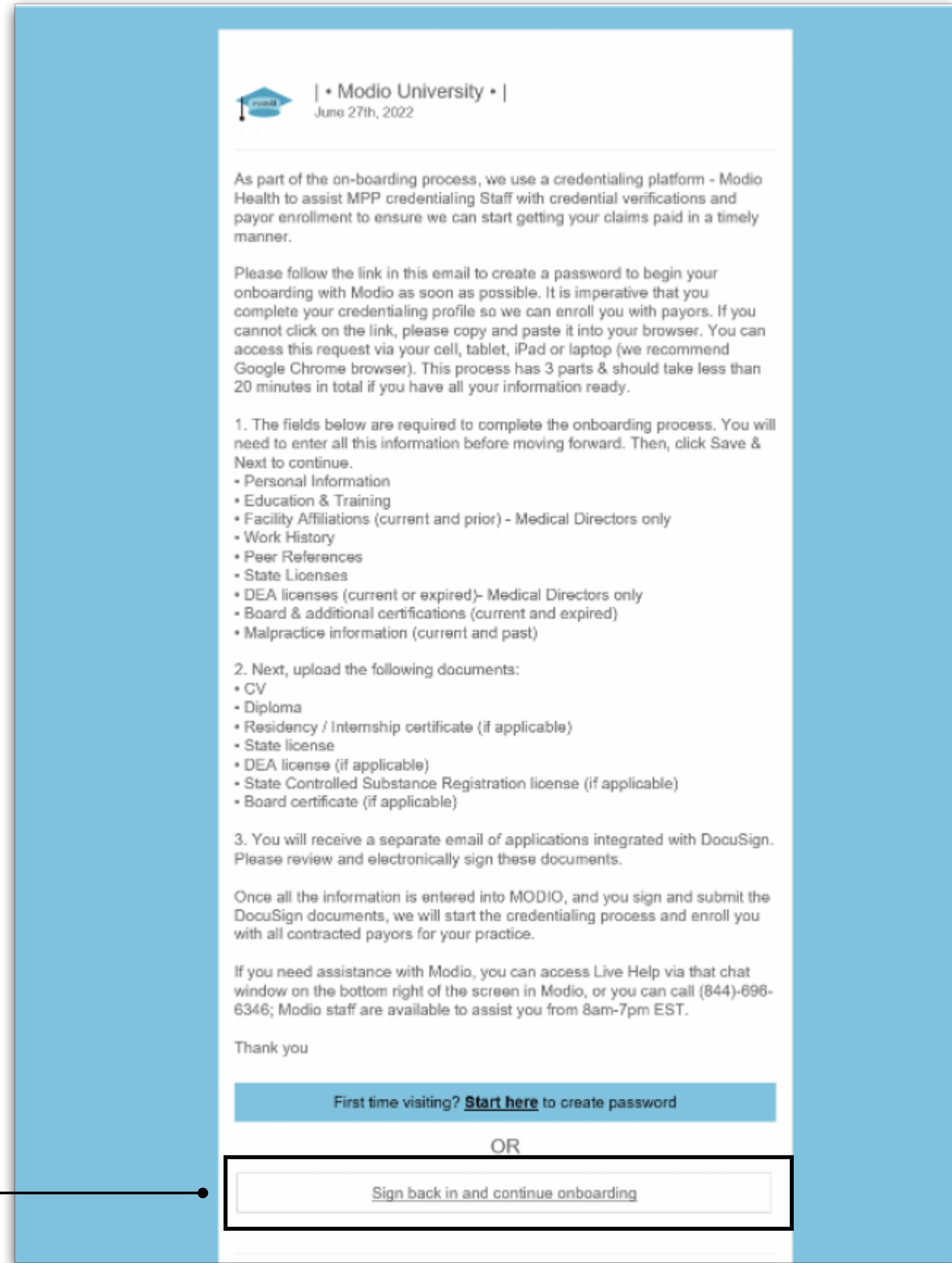
There are several ways to log back in and continue filling in your Onboarding Intake Template.

Best option: Use the provider sign in link listed here: [www.modiohealth.com/physicians/#/signin](http://www.modiohealth.com/physicians/#/signin)

Remember to bookmark this link to quickly login in the future.

Second option: Use the original email invitation and click the second link to log back in. Enter your username and password. If you can not remember your password there will be a password reset prompt.

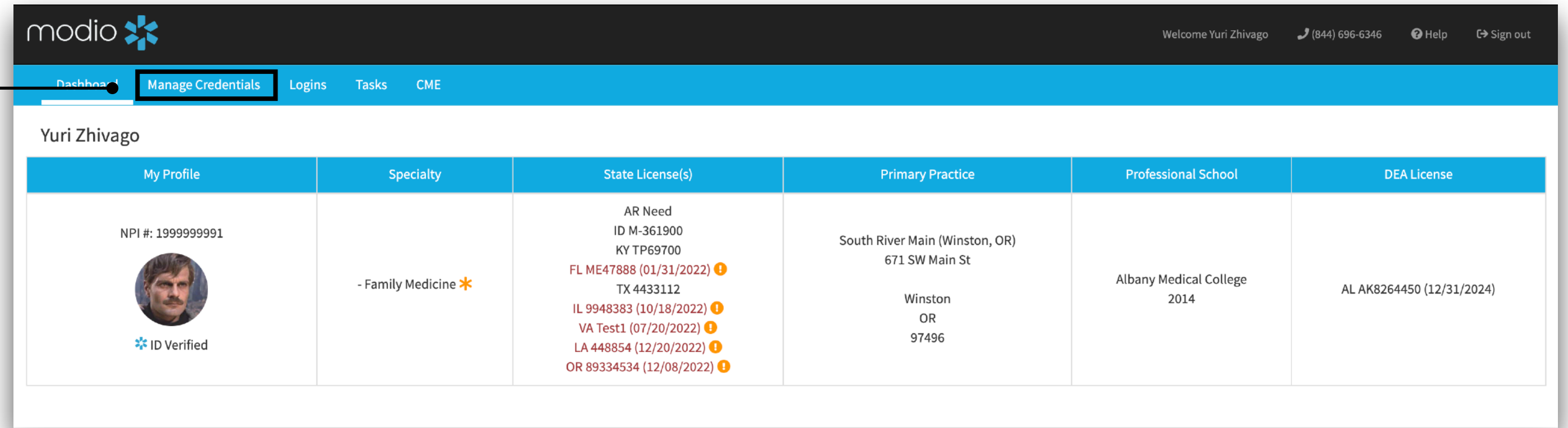
If your need support while logging in, please reach out to: [support@modiohealth.com](mailto:support@modiohealth.com)



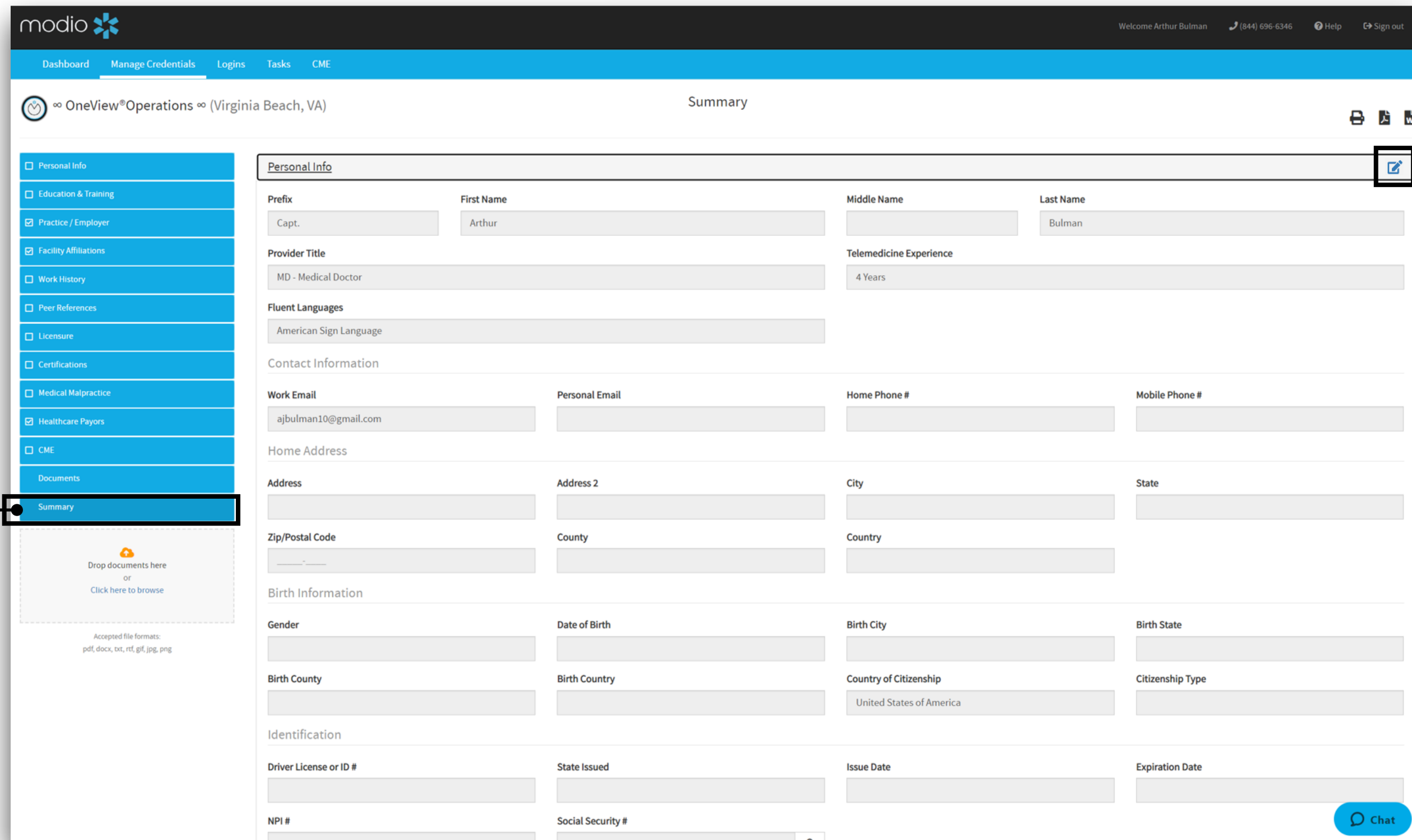
**Tip Guide: Provider Onboarding** Onboarding - Navigating back to the Onboarding Intake Template

Once you are logged back into OneView, follow this 3-step process to navigate back to your Onboarding Intake Template.

Step 1- Click on the **Manage Credentials** Section



Step 2 - Click **Summary**



Step 3 - Click **Edit**

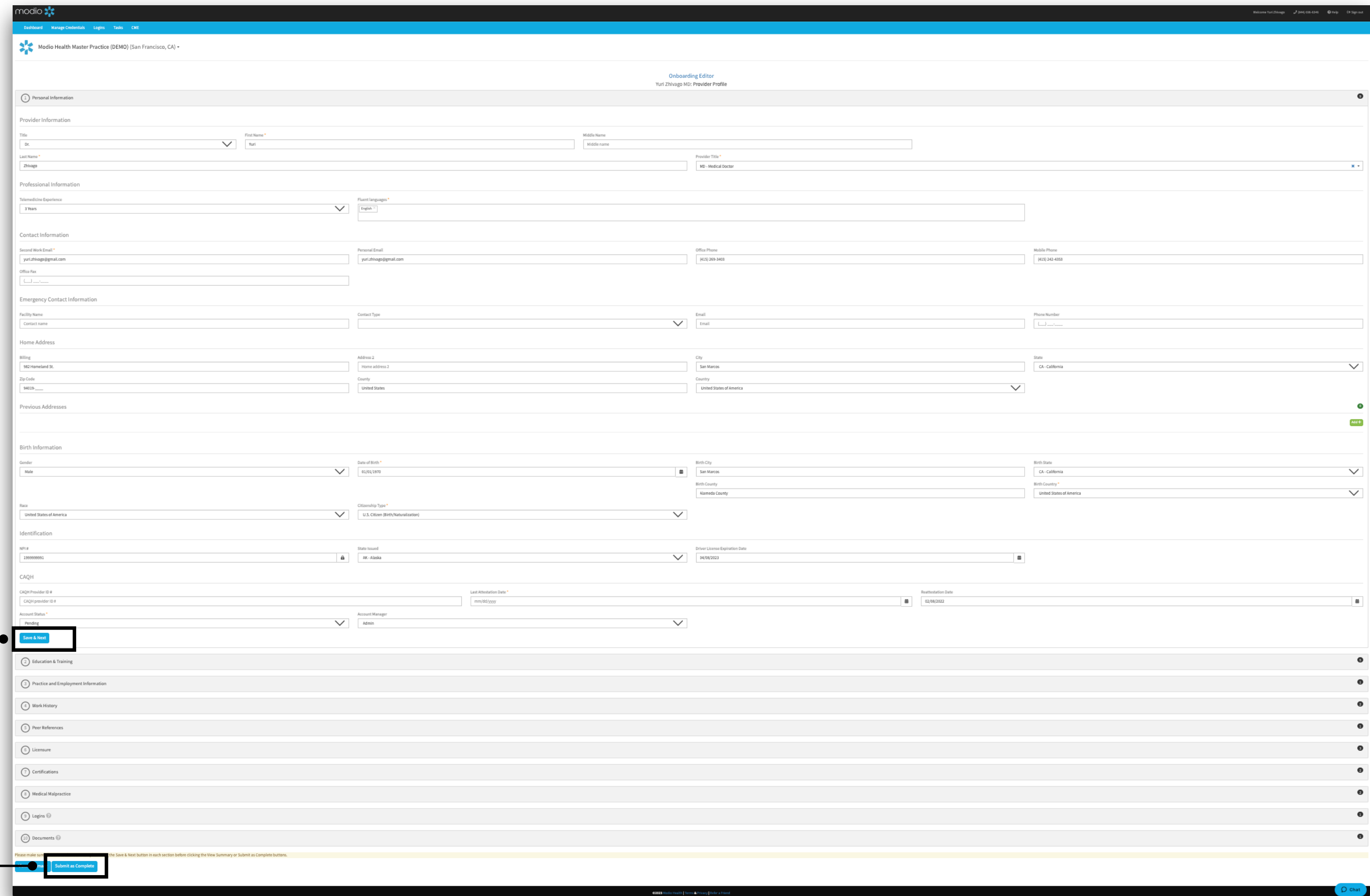


## Tip Guide: Provider Onboarding

Onboarding - Navigating back to the Onboarding Intake Template

Now that you are logged back into the Onboarding Intake Template you can continue to work through the different sections. Select **“Save and Next”** to navigate through each section

When all sections have been filled out completely, click **“Submit as Complete”**



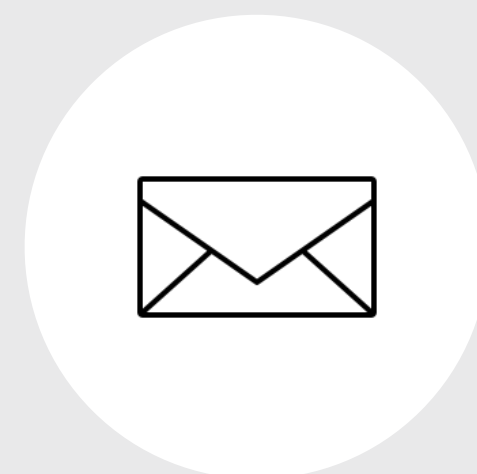
The screenshot displays the 'Onboarding Editor' for a provider profile. The interface is organized into several sections, each with a progress indicator (a circle) on the left side of a vertical sidebar. The sections are: Personal Information, Provider Information, Professional Information, Contact Information, Emergency Contact Information, Home Address, Previous Addresses, Birth Information, Identification, CAQH, Education & Training, Practice and Employment Information, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Legals, and Documents. The 'Personal Information' section is currently active and contains the following fields: Title (Dr.), First Name (Yuri), Middle Name (Middle name), Last Name (Zhang), Provider Title (MD - Medical Doctor), Board/College Experience (7 Year), Board Language (English), Personal Email (yuri.zhang@gmail.com), Office Phone (415) 243-4433, Mobile Phone (415) 243-4533, Facility Name, Contact Type, Email, Phone Number, Billing (982 Homestead St), Address 2 (Home address 2), City (San Marcos), State (CA - California), Zip Code (94538), Country (United States), Birth Information (Gender: Male, Date of Birth: 01/01/1970, Birth City: San Marcos, Birth State: CA - California, Birth Country: Alameda County, Birth Country: United States of America), Identification (State Issued: AK - Alaska, Expiration Date: 04/30/2023), CAQH (CAQH Provider ID #, CAQH Provider ID #, Last Attestation Date: mm/dd/yyyy, Recertification Date: 02/28/2023), Account Status (Pending), and Account Manager (Admin). A 'Save & Next' button is highlighted with a red box and a red arrow pointing to it. At the bottom of the form, a 'Submit as Complete' button is also highlighted with a red box and a red arrow pointing to it.

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

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**Online:**  
Live Chat Support



**Email:**  
[support@modiohealth.com](mailto:support@modiohealth.com)



**Phone:**  
844.696.6346