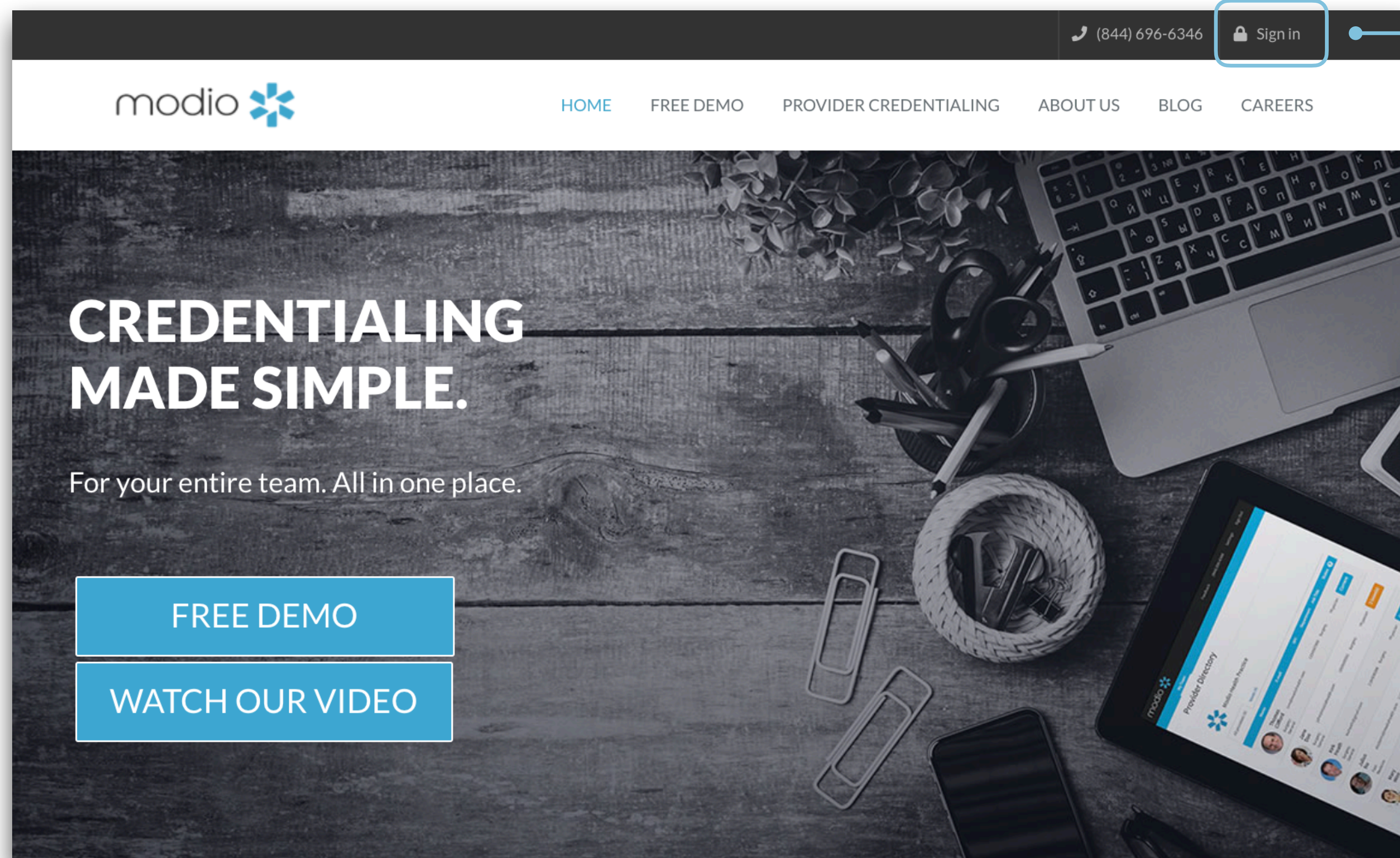




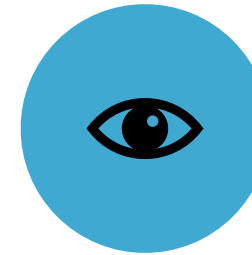
TIP GUIDE - COORDINATOR READ-ONLY



Navigate to Modio:

Visit our website at: www.modiohealth.com and click **"Sign in,"** which is located on the top right hand corner.

If you have previously bookmarked the login page you will be automatically redirected to the new login page, which you can also bookmark for quick access.



Read-only permissions grant access to your Team's Profiles within **OneView**.[®] The following lists the features which you can view.

Main **OneView** Dashboard

TEAM PAGE

View the following:

- Entire Team Roster
- Individual Profile compliance report
- Provider profile cards
- Filter or Sort by Tags
- CMEs

Navigate to each provider's Manage Credentials section

INDIVIDUAL COMPLIANCE REPORT

- View provider's compliance status.
- Download documents directly from report

PROVIDER PROFILE CARD

- View provider's profile card with snapshot and quick link to credentialing sections.
- Customize and Download CV/Resume directly from profile card.

Manage Credentials Section

MANAGE CREDENTIALS

View provider's credentialing data which includes:

- | | |
|------------------------|-----------------------|
| • Personal Info | • Licensure |
| • Education & Training | • Certifications |
| • Practice/Employer | • Medical Malpractice |
| • Facility Affiliation | • Healthcare Payors |
| • Work History | • CME |
| • Peer References | • Documents |
| | • Summary |
- Read-only users can add and view Public Notes in credentialing sections.
 - View your provider's detailed credentialing data by clicking on the eye icon associated with different data entries.

UPLOADING / DOWNLOADING DOCUMENTS

- Read-only users can View, Upload and Download documents.
- View & download completed Forms.

VIEW SUMMARY

- Download printable provider summary.
- Download printable CV/Resume.

When you log in, you'll see your **Team(s) in the Provider Dashboard.**

Teams:

View the entire team, all in one page.

Compliance:

View individual provider compliance issues.

Tags:

Filter by sub-lists within your provider roster to quickly view or organize the profiles you are working with.

Profile Cards:

View a provider's profile card by clicking on their picture. See next slide for profile card details.

The screenshot shows the Modio Team Dashboard for 'Modio Health QA Displ (San Francisco, CA)'. At the top, there's a navigation bar with the Modio logo, user name 'Welcome Yas Givechi', and links for Support, Modio U, New Features, and Sign out. Below the navigation bar, the 'Team' section is active, showing the team name and a dropdown menu set to 'OneView V2'. A search bar is available for providers. The main content is a table with columns: Provider, Tags, Compliance, and Actions. The table lists three providers: Smith, Joshana - RN (No Specialty, Carbon Test, No alerts), Smith, Judd T - MD (Acupuncture, NPI# 1295705283, Contract Employees, View alerts), and Snow, John - MD (Family Medicine, NPI# 1801007266, Contract Employees, No alerts). Each provider row has a profile picture and a gear icon for actions. At the bottom, there's a pagination control showing '1 / 2' and '200 items per page', and a 'Chat' button.

Inactive Profile Roster:

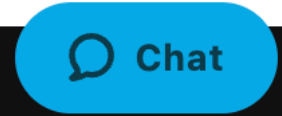
Use the dropdown to toggle between Active and Inactive Profiles.

Manage Credentials:

Click here or on the provider icon to view your provider's credentials.

CME Tracking:

Hover over the CME Certification icon to view the provider's CME goals and credits.



Tip Guide: Read-Only Profile Card

Profile Card:

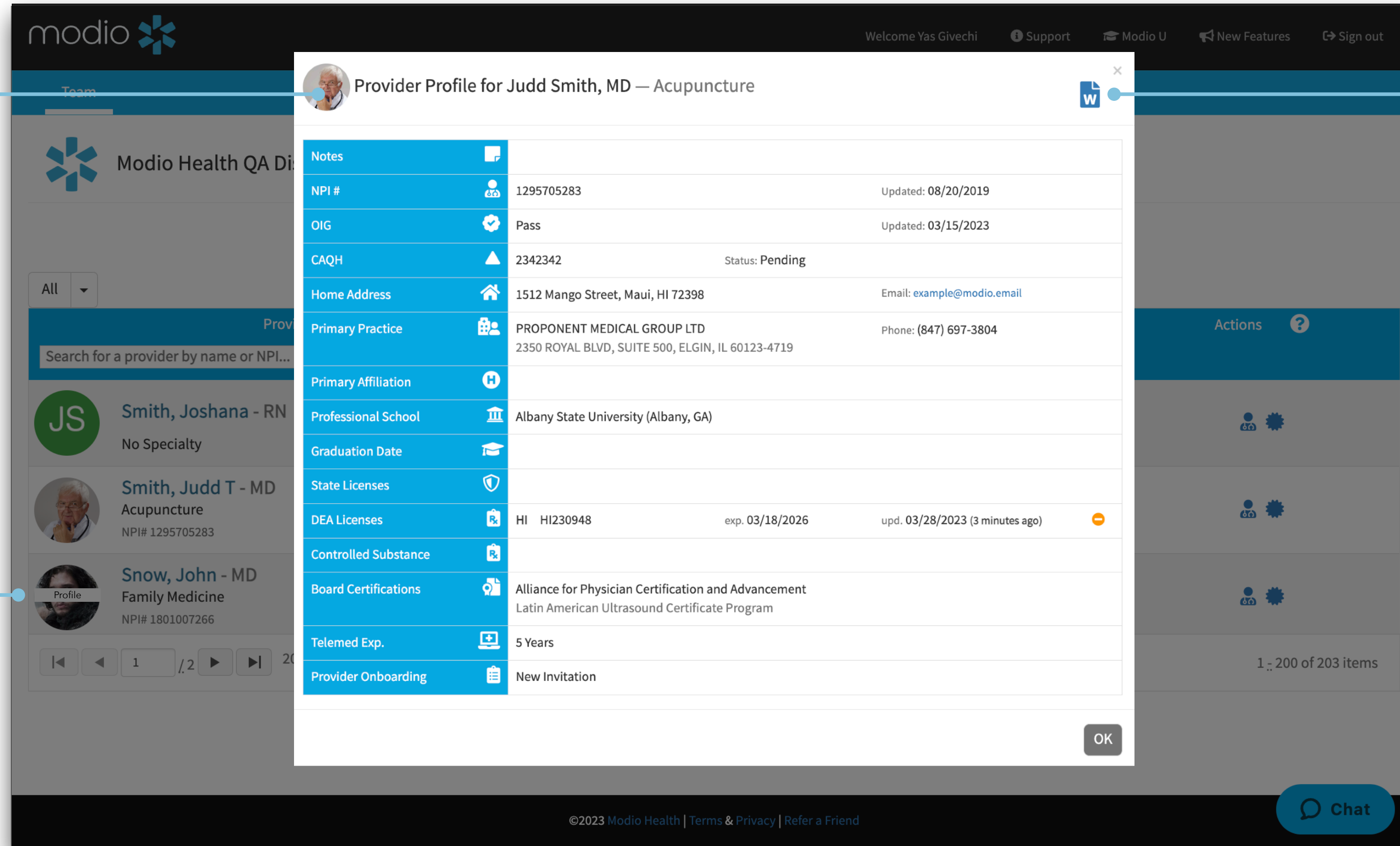
View a snapshot of credentialing data within your provider's profile. Click on the blue sections for a quick link to access the corresponding section with additional data.

Start Here:

View a provider's profile card by click on their profile image or initials

CV/Resume

Click here to generate a customizable CV using the data in your provider's profile



The screenshot shows the Modio Health QA Dashboard interface. At the top, there's a navigation bar with the Modio logo, user information (Welcome Yas Givechi), and links for Support, Modio U, New Features, and Sign out. The main content area displays a list of providers. The first provider, Judd Smith, MD (Acupuncture), is selected, and his profile card is expanded. The profile card contains the following information:

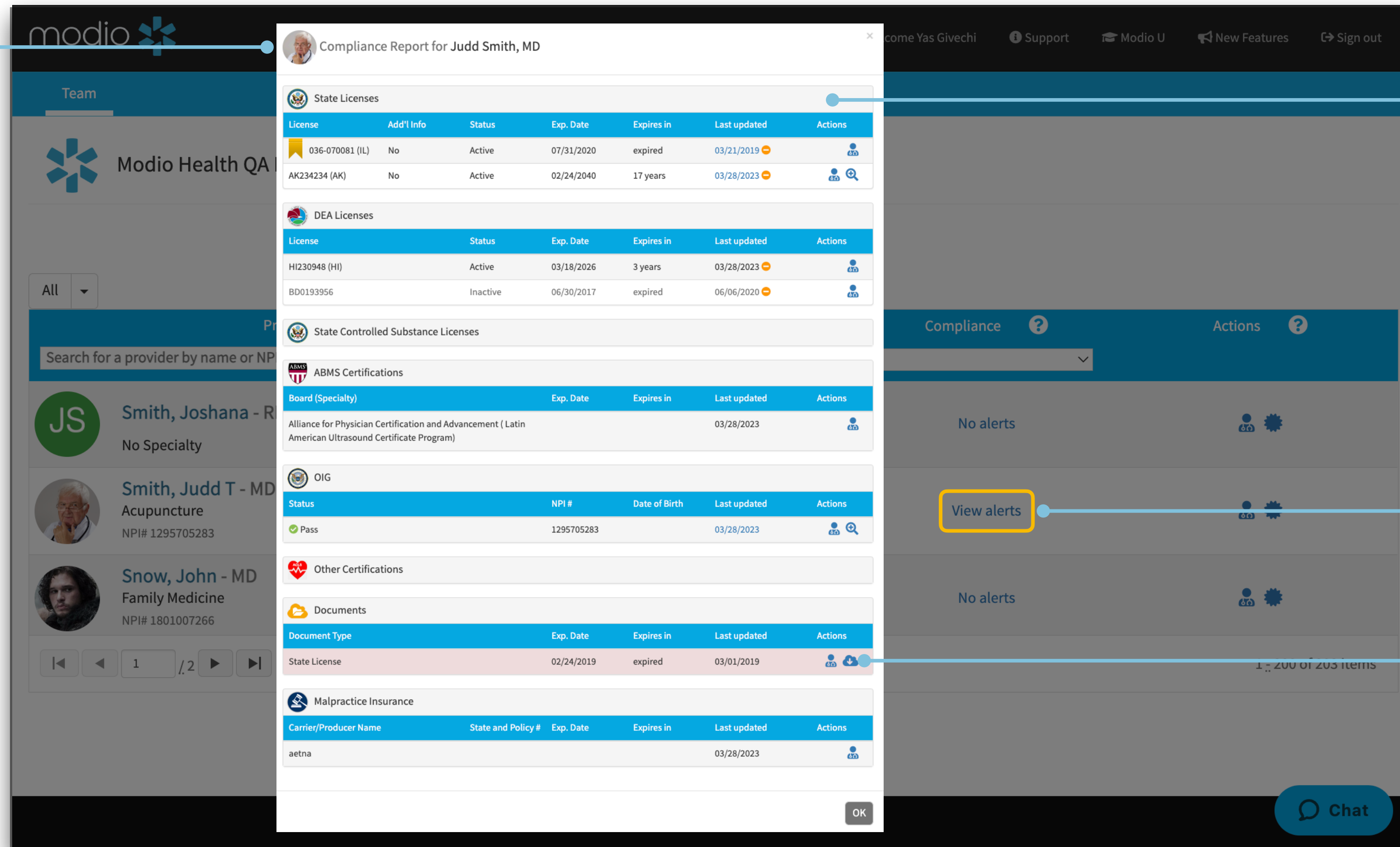
- Notes** (icon: notepad)
- NPI #**: 1295705283 (Updated: 08/20/2019)
- OIG**: Pass (Updated: 03/15/2023)
- CAQH**: 2342342 (Status: Pending)
- Home Address**: 1512 Mango Street, Maui, HI 72398 (Email: example@modio.email)
- Primary Practice**: PROPONENT MEDICAL GROUP LTD, 2350 ROYAL BLVD, SUITE 500, ELGIN, IL 60123-4719 (Phone: (847) 697-3804)
- Primary Affiliation** (icon: hospital)
- Professional School**: Albany State University (Albany, GA)
- Graduation Date** (icon: graduation cap)
- State Licenses** (icon: shield)
- DEA Licenses**: HI HI230948 (exp. 03/18/2026, upd. 03/28/2023 (3 minutes ago))
- Controlled Substance** (icon: pill)
- Board Certifications**: Alliance for Physician Certification and Advancement, Latin American Ultrasound Certificate Program
- Telemed Exp.**: 5 Years
- Provider Onboarding**: New Invitation

On the right side of the profile card, there is an 'Actions' menu with a question mark icon. Below it, there are three icons representing different actions: a person with a gear, a person with a gear, and a person with a gear. At the bottom of the profile card, there is an 'OK' button. The background shows a list of other providers: Smith, Joshana - RN (No Specialty), Smith, Judd T - MD (Acupuncture, NPI# 1295705283), and Snow, John - MD (Family Medicine, NPI# 1801007266). A search bar is visible above the list. At the bottom of the dashboard, there is a 'Chat' button and a footer with copyright information: ©2023 Modio Health | Terms & Privacy | Refer a Friend.

Tip Guide: Read-Only Individual Compliance Report

Individual Compliance Report:

View the status of your provider's State, DEA, and Controlled Substance Licensure, ABMS, OIG, Documents, etc...



Compliance Report for Judd Smith, MD

State Licenses

License	Add'l Info	Status	Exp. Date	Expires in	Last updated	Actions
036-070081 (IL)	No	Active	07/31/2020	expired	03/21/2019	
AK234234 (AK)	No	Active	02/24/2040	17 years	03/28/2023	

DEA Licenses

License	Status	Exp. Date	Expires in	Last updated	Actions
HI230948 (HI)	Active	03/18/2026	3 years	03/28/2023	
BD0193956	Inactive	06/30/2017	expired	06/06/2020	

State Controlled Substance Licenses

ABMS Certifications

Board (Specialty)	Exp. Date	Expires in	Last updated	Actions
Alliance for Physician Certification and Advancement (Latin American Ultrasound Certificate Program)			03/28/2023	

OIG

Status	NPI #	Date of Birth	Last updated	Actions
Pass	1295705283		03/28/2023	

Other Certifications

Documents

Document Type	Exp. Date	Expires in	Last updated	Actions
State License	02/24/2019	expired	03/01/2019	

Malpractice Insurance

Carrier/Producer Name	State and Policy #	Exp. Date	Expires in	Last updated	Actions
aetna				03/28/2023	

View alerts

OK

Chat

View Licensure:

Click the provider icon to navigate to the license section.

Start Here

Compliance Alerts:

View individual provider issues by clicking on the alerts link.

Documents:

Download documents from the documents section.

Navigate to a credentialing profile by clicking on the provider's name or selecting the "Manage Credentials" icon from on the Team page.

The screenshot displays the 'View State License for Judd Smith MD' form. The form includes the following fields and options:

- License State:** AK - Alaska (with a 'Multi-state?' checkbox).
- License #:** AK234234 (with a 'Primary License?' checkbox).
- Issue Date:** 02/15/2023
- Expiration Date:** 02/24/2040
- License Status:** Active (with a 'Do not renew?' checkbox).
- License Type:** DC - Doctor of Chiropractic
- Taxonomy Code:** Otolaryngology - Facial Plastic Surgery (207YS0123X)
- Primary Source Link:** <https://www.commerce.alaska.gov/cbp/main/search/professional>
- Enrolled in Prescription Drug Monitoring Program?:** (dropdown menu)
- Additional public information:** No (selected) / Yes
- Notes:** A section with a 'Public' toggle and a text area containing 'Prepend Yasi Givechi'.
- Documents:** A table listing documents associated with the profile.

The documents table below the form is as follows:

File Name	Type	Date	Permission	Expiration	Actions
modio univ-02.png (108.13 KB)	State License	02/28/2019	Public	02/24/2019	

Credentialing Tabs:

Click on these tabs to view a provider's credentialing information.

Documents:

Click the **Pen and Paper (edit icon) icon** to add an additional document.

Click the **Cloud icon** to download an existing document.

PDF Icon:

Click the **PDF icon** to generate a chart with all data entries from that section. You can upload or download the PDF from here.

Licensure View:

Click the **Eye icon** to view additional details or leave notes specific to that line item.


Public Notes:

Leave public notes here. These will be public to the entire team.


Documents:

Click the **Eye icon** to view or add documents to a specific note.

Tip Guide: Read-Only Provider Summary

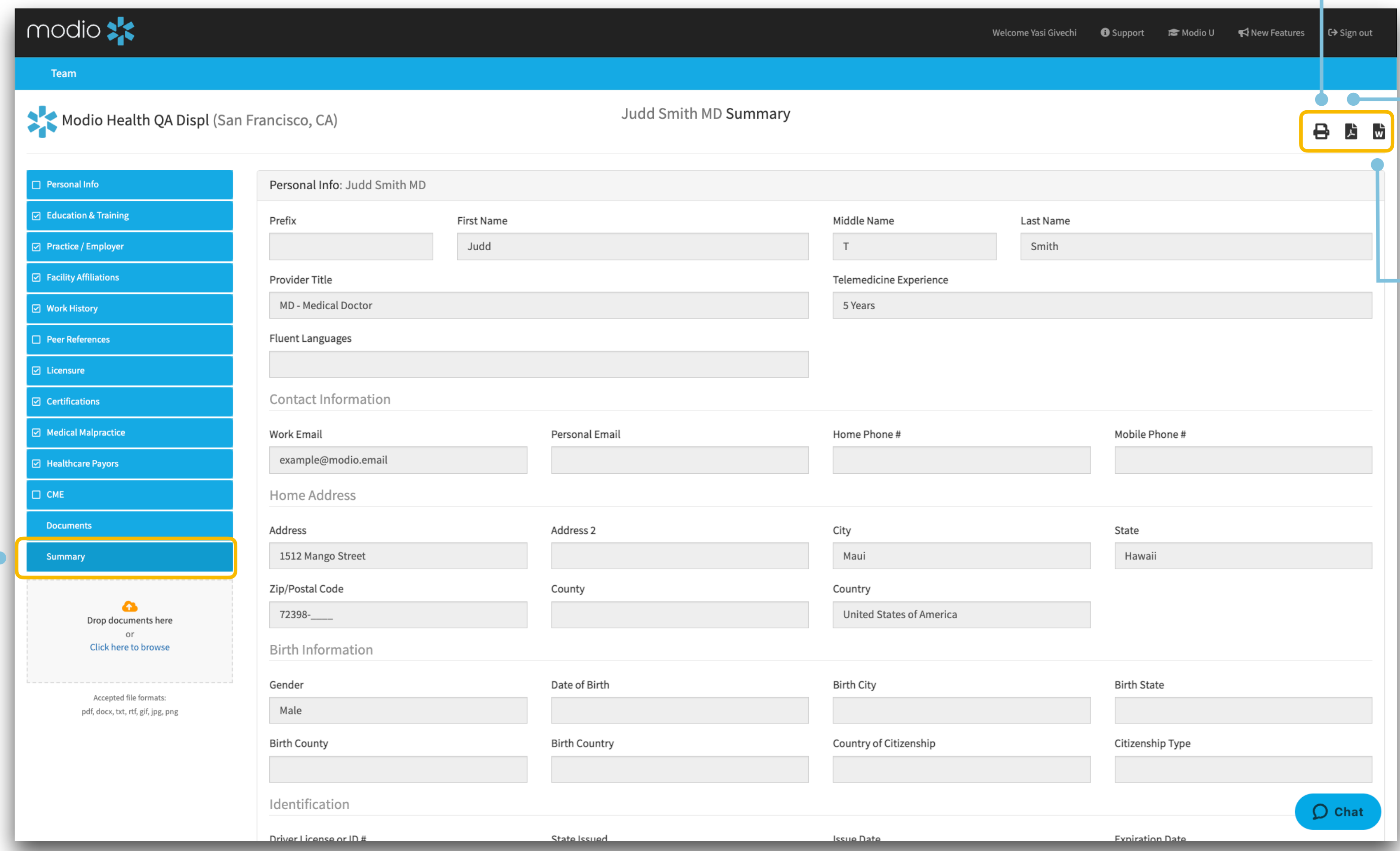
 **Print Summary:**
Click here to print a copy of the provider's credentialing summary.

 **PDF:**
Click the PDF icon to generate a PDF version of the provider summary.

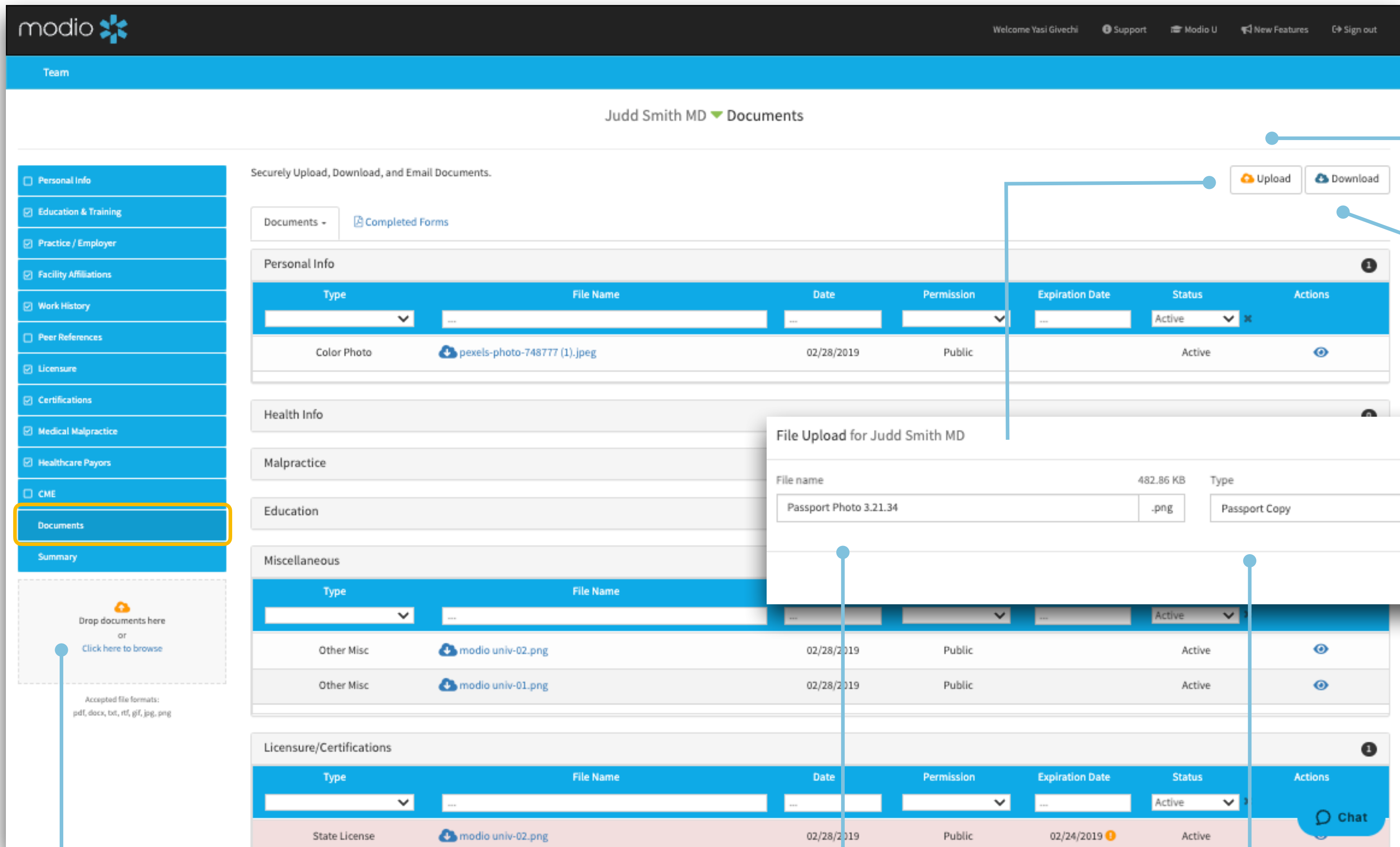
 **CV/Resume Download:**
Click the document icon to generate a copy of the provider's CV.

 **Start Here**

Summary:
View a complete credentialing summary for your provider by starting here.




Tip Guide: Read-Only Document Management



Start Here

Upload Documents:
Upload one or more files directly into your provider's profile.

Download:
Download existing documents.

Option 1 - Drag & Drop
To upload a single or multiple documents, simply drag and drop to the platform.

Option 2 - Click to Upload
Click here to browse for your document(s), then choose which ones to upload.

File name:
Name your file. Use our keyword guide to have document type auto-detected.

Type:
Select the file type(s) from the drop-down menu.

Expiration:
Click the Expiration date(s). Expiring or expired documents will show up in the "Compliance Report"

Permissions:
Public - Visible only to your team(s)
Coordinator - Visible only to Coordinator(s)

Tip Guide: Read-Only

Frequently Asked Question

- Why do I get an error when I click on the button for OneView V2?

Currently V2 is limited to "Full Access" users. However, as we make enhancements to V2, we hope to include read-only access users in the future.

-Who can request to add read-only coordinators?

Read-only access can be requested by a primary coordinator.

- How many read-only coordinator accounts can I have?

There is no additional cost for read-only coordinator accounts.

- Are there any sections that are missing or restricted in read-only that full access coordinators can see?

Yes, read-only coordinators do not have access to see Health Information or the Event Log. They also will not see the driver's license or social security number. Additionally, Read-Only coordinators will not have access to V2, Reports, and Forms, Tracking, Notes, Tasks tabs.

- What permission level of notes and documents can a read-only coordinator access?

Any profile note that is listed as a Public note and all documents.

- What are common use cases for adding a Read-Only coordinator to my team?

There are many use cases for adding a Read-Only coordinator to your team. If you have someone who you would like to be able to view the data but not make any changes, then Read-only access is a solution. Popular examples are HR teams, Scheduling teams, and Individuals who need to view payors and payor statuses.

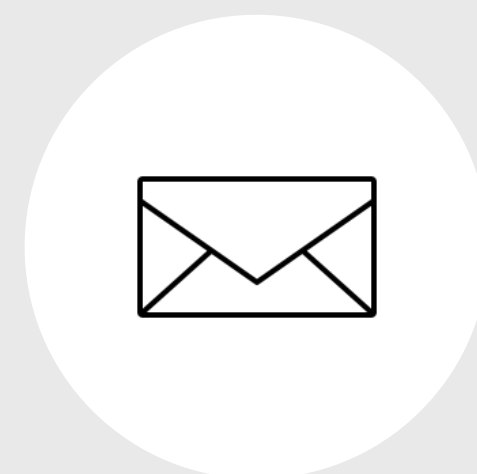
- Does a Read-Only coordinator have permission to request tracking changes?

Read-Only Coordinators do not have access to the tracking tab and may not request changes to their teams tracking templates. Any changes regarding tracking or adding coordinator access will need to be requested by a full access coordinator.

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346