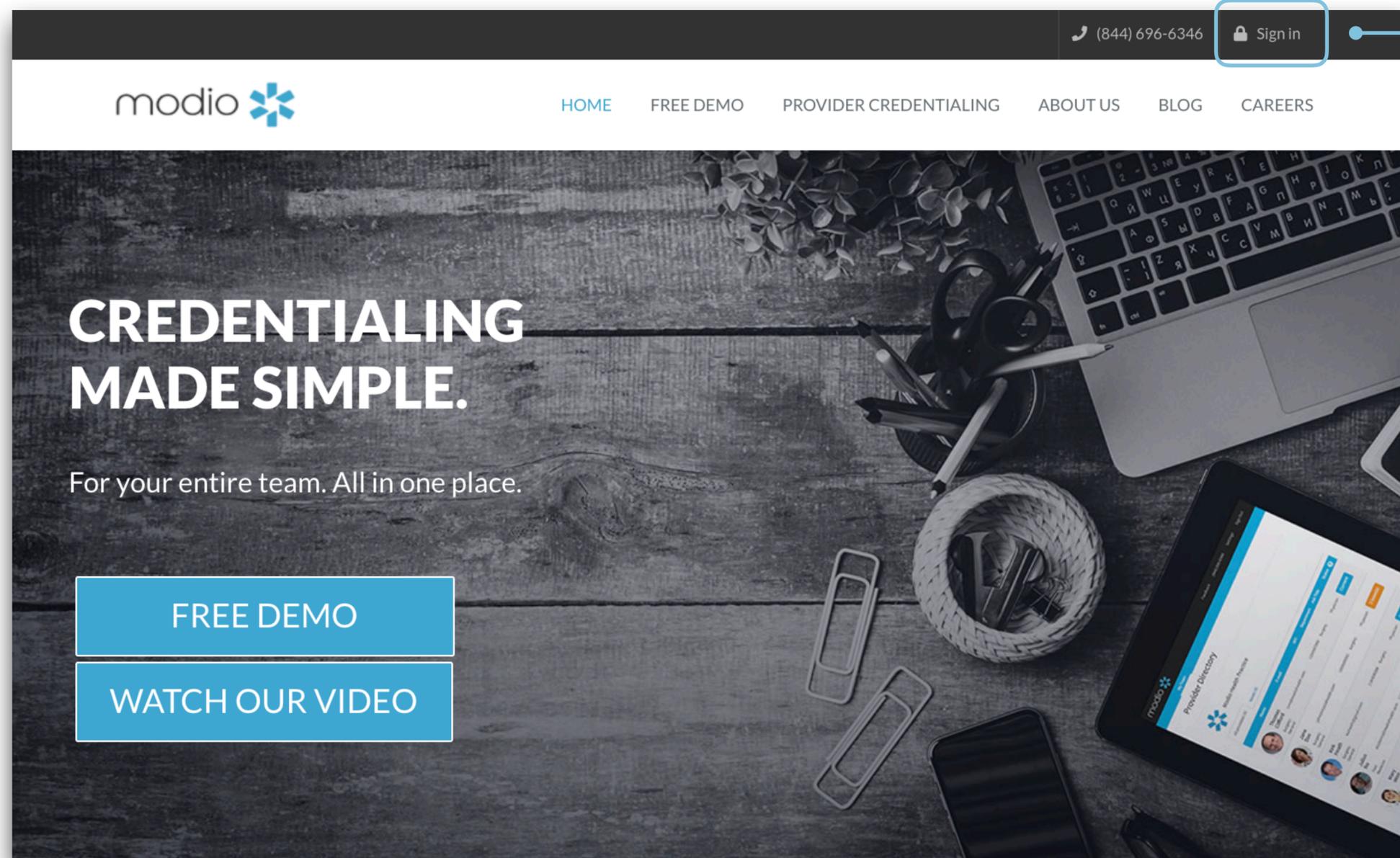




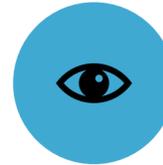
TIP GUIDE - COORDINATOR READ-ONLY



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
 - Education & Training
 - Practice/Employer
 - Facility Affiliation
 - Work History
 - Peer References
 - Licensure
 - Certifications
 - Medical Malpractice
 - Healthcare Payors
 - CME
 - 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 interface. 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 this is a 'Team' header for 'Modio Health QA Displ (San Francisco, CA)'. A dropdown menu is set to 'OneView V2'. There are filters for 'All' and a search bar for providers. The main table lists three providers: Joshana Smith (RN), Judd T. Smith (MD), and John Snow (MD). Each row includes a profile picture, name, specialty, tags, compliance status, and actions. A pagination bar at the bottom shows '1 / 2' and '200 items per page'. A 'Chat' button is in the bottom right corner.

Provider	Tags	Compliance	Actions
Smith, Joshana - RN No Specialty	Carbon Test	No alerts	
Smith, Judd T - MD Acupuncture NPI# 1295705283	Contract Employees	View alerts	
Snow, John - MD Family Medicine NPI# 1801007266	Contract Employees	No alerts	

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.



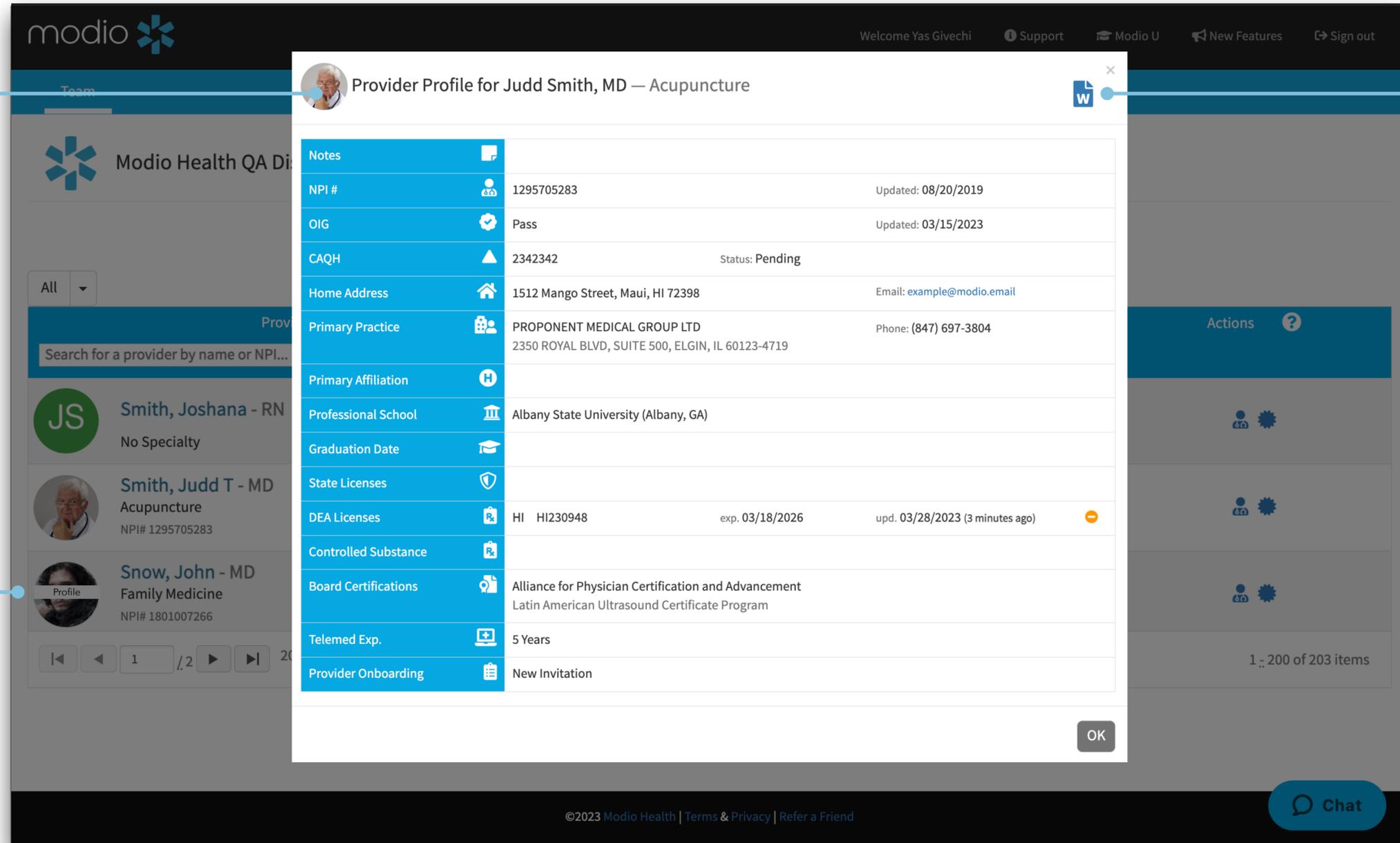
Tip Guide: Read-Only Profile Card

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



The screenshot displays the Modio Health QA Dashboard. A modal window titled "Provider Profile for Judd Smith, MD — Acupuncture" is open, showing the following details:

- Notes**
- 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**
- Professional School**: Albany State University (Albany, GA)
- Graduation Date**
- State Licenses**
- DEA Licenses**: HI HI230948 (exp. 03/18/2026, upd. 03/28/2023 (3 minutes ago))
- Controlled Substance**
- Board Certifications**: Alliance for Physician Certification and Advancement, Latin American Ultrasound Certificate Program
- Telemed Exp.**: 5 Years
- Provider Onboarding**: New Invitation

The background shows a list of providers including Smith, Joshana - RN, Smith, Judd T - MD (Acupuncture), and Snow, John - MD (Family Medicine). A "Start Here" callout points to the profile image of Judd Smith in the list. A "CV/Resume" callout points to a document icon in the top right of the profile modal. The footer includes "©2023 Modio Health | Terms & Privacy | Refer a Friend" and a "Chat" button.

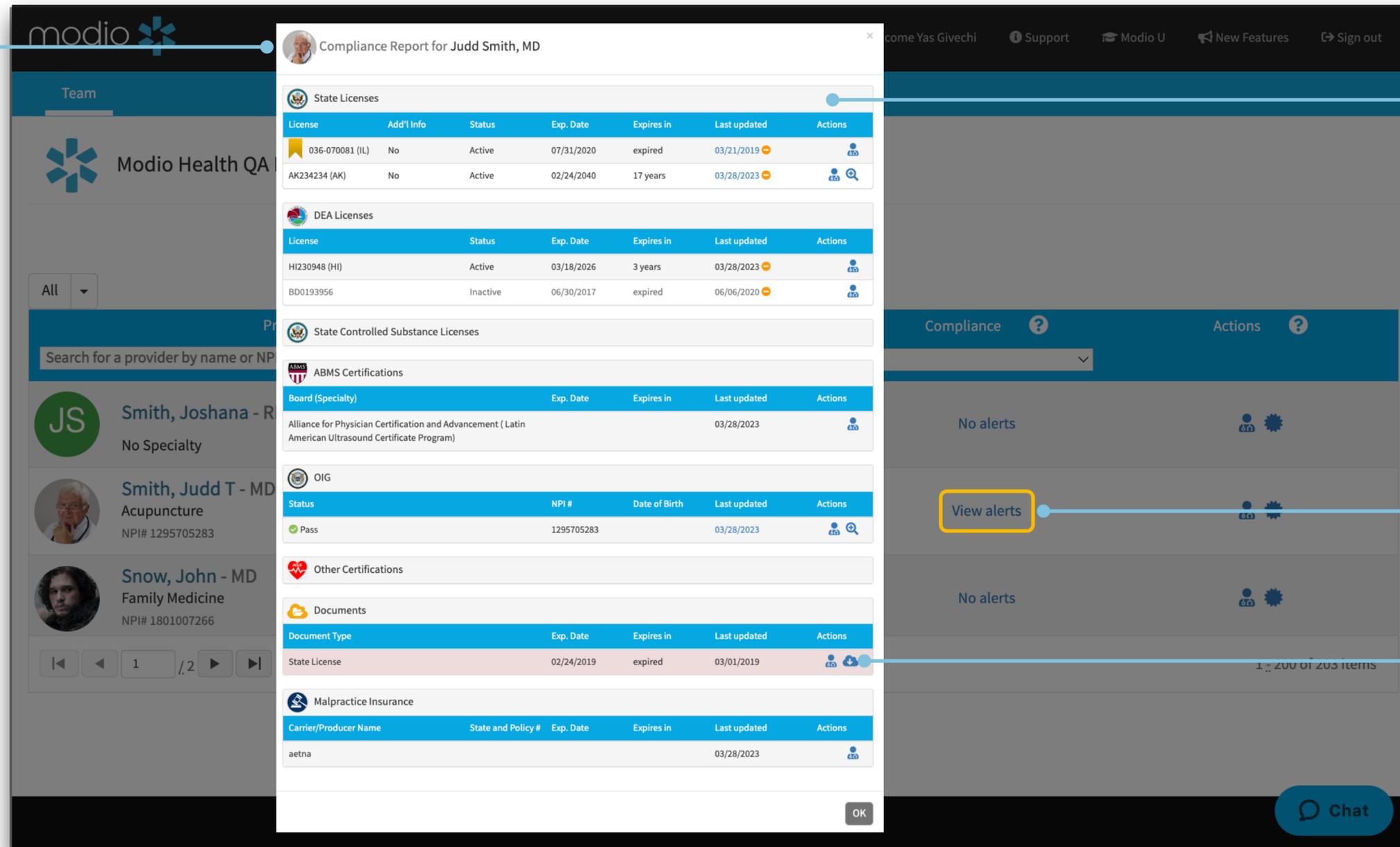
CV/Resume

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

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

Start Here

Compliance Alerts: View individual provider issues by clicking on the alerts link.

Documents: Download documents from the documents section.

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.

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.

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: Public 0, with a text area containing 'Prepend Yasi Givechi' and a 'Save Note' button.

Below the form is a 'Documents' table:

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

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

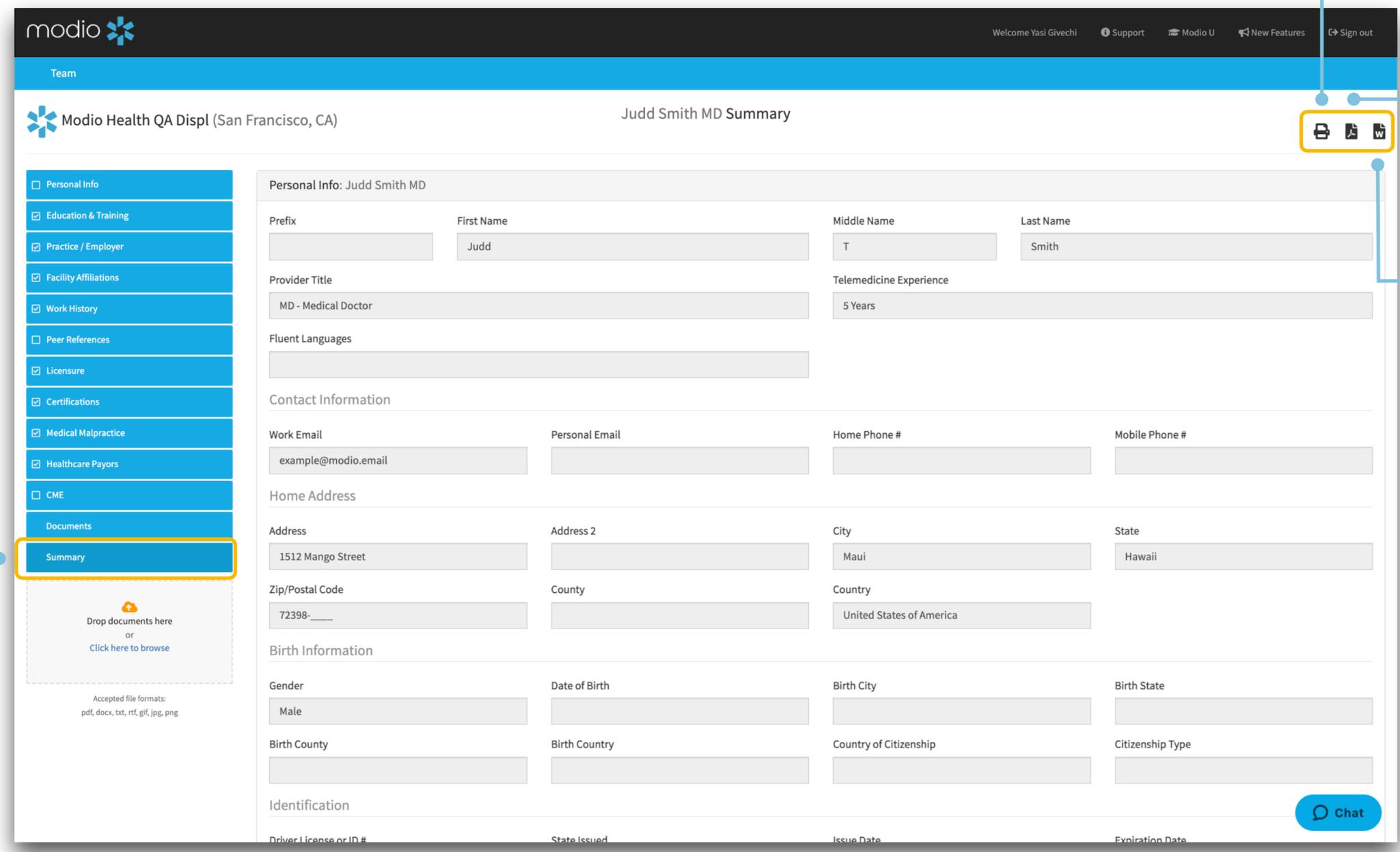
 **Print Summary:**
Click here to print a copy of the provider's credentialing summary.

 **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.



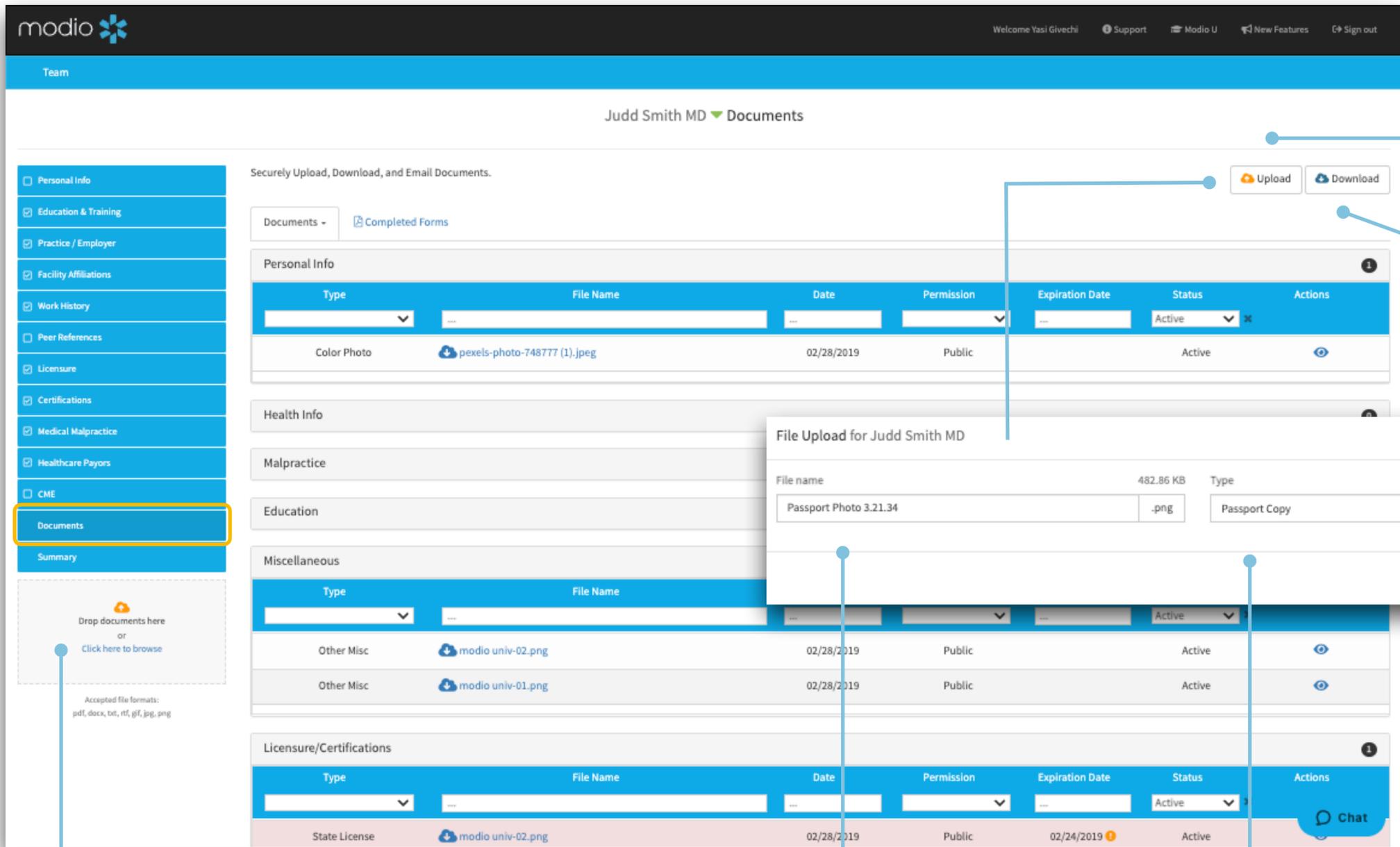
The screenshot shows the Modio Health QA Displ (San Francisco, CA) interface. The top navigation bar includes the Modio logo, user name 'Welcome Yasí Givechi', and links for 'Support', 'Modio U', 'New Features', and 'Sign out'. The main header displays 'Team' and 'Modio Health QA Displ (San Francisco, CA)'. The page title is 'Judd Smith MD Summary'. On the left sidebar, the 'Documents' section is expanded, and the 'Summary' option is highlighted with a yellow box. The main content area displays the following information for Judd Smith MD:

- Personal Info:** Prefix (empty), First Name (Judd), Middle Name (T), Last Name (Smith), Provider Title (MD - Medical Doctor), Telemedicine Experience (5 Years), Fluent Languages (empty).
- Contact Information:** Work Email (example@modio.email), Personal Email (empty), Home Phone # (empty), Mobile Phone # (empty).
- Home Address:** Address (1512 Mango Street), Address 2 (empty), City (Maui), State (Hawaii), Zip/Postal Code (72398-____), County (empty), Country (United States of America).
- Birth Information:** Gender (Male), Date of Birth (empty), Birth City (empty), Birth State (empty), Birth County (empty), Birth Country (empty), Country of Citizenship (empty), Citizenship Type (empty).
- Identification:** Driver License or ID # (empty), State Issued (empty), Issue Date (empty), Expiration Date (empty).

A 'Chat' button is located in the bottom right corner of the main content area.



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)

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346