



**OneView**<sup>®</sup>  
TIP GUIDE: TRACKING

1 Start here

### About Tracking

Use Tracking to keep an eye on provider management workflows, from licensure applications to payor enrollment. Tracking provides a step-by-step view of your most important credentialing processes. You can assign tracking ownership to different users on your team, export excel reports to check on workflow progress, and communicate with your team through dated, timestamped notes. Set turnaround times on individual steps, and add customized follow up dates as needed.

Any note in tracking can be flagged as important so you can easily identify on reports what needs to be escalated or prioritized.

Note that tracking does not complete or submit applications on behalf of your provider; it's purpose is to serve as an internal tool to stay organized and on top of credentialing work your team needs to complete.

The screenshot shows the Modio Tracking interface. At the top, there is a navigation bar with 'Team', 'Forms', 'Tracking' (highlighted with a '1 Start here' callout), 'Logins', 'Tasks', 'Notes', and 'Reports'. Below this is a header for 'Modio University' (Virginia Beach, VA) with buttons for '+ Add Provider' and 'Message'. A 'OneView V2' dropdown is also present. The main content is a table with columns: Provider, Tags, Compliance, and Actions. The table lists several providers with their details and alert counts.

Provider	Tags	Compliance	Actions
SEARCH FOR A PROVIDER BY NAME OR NPI... No Specialty	East Coast	No alerts	[Icons]
 <b>Abakporo, Theophine David</b> - Employed Acute Care Imaging NPI# 1972564813	Group A	6 alerts	[Icons]
 <b>Abele, Jennifer B</b> - MD Emergency Medicine NPI# 1073502779	Colorado Group A MD	11 alerts	[Icons]
 <b>Ambati, Balamurali Krishna</b> - OD Ophthalmology NPI# 1750397576	Danessa	17 alerts	[Icons]
 <b>Appleseed, Johnny</b> - PA-C Certified Physician Assistant NPI# 1122889993	East Coast	1 alert	[Icons]

At the bottom of the table, there is a pagination control showing '1 / 1' and '200 items per page'. The footer of the page includes '©2025 Modio Health | Terms & Privacy | Refer a Friend' and a 'Chat' button.

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[Support](#) [Modio U](#) [New Features](#) [Settings](#) [Sign out](#)

[Team](#) [Forms](#) [Tracking](#) [Logins](#) [Tasks](#) [Notes](#) [Reports](#)
+

**Modio Health QA (San Francisco, CA)** + Add Tracking ?

All 1/10 10/12 CAQH: NEW test Test 1/16 Test 11/1 Test 3/14 Test 9.27

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due I...	Assignee	Provider	Est. Due Da...	Actions
49481	Normal	State License	New	Credentia...	New - State License - CA - California (MD) - G	Pending			Mc Dreamy	03/16/2020	
601	Normal	Facility Affiliation	Initial	Naomi Lam	Initial - Facility Affiliation	In Progress	N/A	Sue Barton	Julius No	12/19/2017	
293	Normal	Malpractice	Renewal	Naomi Lam	Renewal - Malpractice Insurance	In Progress	New	Naomi Lam	Julius No	12/20/2017	
2525	Normal	Payor	Initial	Sue Barton	Initial - Payor - Sentara Princess Anne Hospi	In Progress	New	Sue Barton	Kirk Heath	09/04/2018	
4724	Normal	State License	Renewal	Sue Barton	Renewal - State License - VA - Virginia (MD) -	In Progress	New	Sue Barton	Kirk Heath	09/04/2018	
5837	Normal	Provider App	Review	Sue Barton	Review - Provider Application Practice/Emp	In Progress	New	Sue Barton	Kirk Heath	09/05/2018	
9009	Normal	Payor	Initial	Sue Barton	Initial - Payor - Emergency Physicians of Tid	In Progress	New	Sue Barton	Bradford B...	08/09/2019	
15860	Escalation	CAQH	Reattestation	Yasi Givechi	Reattestation - CAQH	In Progress	New	Yasi Givechi	Yuri Zhivago	01/23/2019	
19514	Normal	State License	New	Richard Rupp	New - State License - CA - California (MD) - 1:	In Progress	New	Richard R...	Yuri Zhivago	04/16/2019	

1 / 1 200 items per page
 
1 - 16 of 16 items

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Terms and Conditions
Live Help

2

**Add Tracking:**  
 Click here to start tracking a new workflow. If Tracking hasn't been set up for your team yet, contact your Customer Success Manager.

The screenshot shows the 'New Tracking' form in the Modio application. The form is titled 'New Tracking for | • Modio University • |'. It includes several sections: 'Details', 'Description', and 'Steps'. The 'Details' section contains fields for Priority (Normal), Status (Pending), Start Date (04/18/2025), Due Date (mm/dd/yyyy), Completed Date, Owner (Leah Sanborn), Type (State License), Subtype (Renewal), State License (Select License...), Tracking Name (Renewal - State License), and Share (Read Only). The 'Description' section has a large text area. The 'Steps' section shows a progress bar and a checkbox for 'Auto-shift Estimated Dates?'. At the bottom right, there are buttons for Start, Save, Cancel, and Chat.

**3** **Priority:** Choose a priority and start date for the tracking report.

**7** **Subtype:** If applicable, pick the subtype for the application (typically either "New" or "Renewal").

**8** **Provider:** Select the provider this task relates to.

**4** **Owner:** Select who "owns" this task.

**6** **Type:** Depending on the item type you chose, you'll be able to pick an item from the drop-down menu. This could be a facility, a license number, malpractice carrier, or other option. Pick the item that corresponds to the application you are working on.

**9** **State License:** Select the state license this tracking event is required for.

**11** **Tracking Name:** Edit the tracking name if desired (optional).

**12** **Share:** if you have multiple facilities, you can share this tracking event but it will only appear in a "Read Only" view. This means the tracking event is locked in their view.

**14** **Date auto-shift:** The box for Auto-shift Estimated Dates is automatically checked. This means the estimated start and due dates correspond to the number of estimated days it will take to complete each step. (For example, if the default for step 1 is 3 estimated days beginning on Jan 1 and due on Jan 3, and you change the estimated days to 5, the due date will automatically change to Jan 5.)

**5** **Tag(s):** Add any tags to help with better organizing.

**10** **Append to Tracking Name:** If checked, the practice/ employer will be added to the Tracking Name.

**12** **Description:** Add a description to your workflow.

**15** **Save:** Once you have set up tracking, click Save. The tracking item will be saved as "Pending." When you are ready, click Start and tracking will be moved to "In Progress" status.

Support Modio U New Features Sign out

Team Forms **Tracking** Logins Tasks Notes Reports
+

Modio Health QA (San Francisco, CA) ▾
+ Add Tracking ▾ ?

All
1/10 10/12 CAQH: NEW test Test 1/16 Test 11/1 Test 3/14 Test 9.27

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due I...	Assignee	Provider	Est. Due Da...	Actions
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4724	Normal	State License	Renewal	Sue Barton	Renewal - State License - VA - Virginia (MD) -	In Progress	New	Sue Barton	Kirk Heath	09/04/2018	
5837	Normal	Provider App	Review	Sue Barton	Review - Provider Application Practice/Emp	In Progress	New	Sue Barton	Kirk Heath	09/05/2018	
9009	Normal	Payor	Initial	Sue Barton	Initial - Payor - Emergency Physicians of Tid	In Progress	New	Sue Barton	Bradford B...	08/09/2019	
15860	Escalation	CAQH	Reattestation	Yasi Givechi	Reattestation - CAQH	In Progress	New	Yasi Givechi	Yuri Zhivago	01/23/2019	
19514	Normal	State License	New	Richard Rupp	New - State License - CA - California (MD) - 1.	In Progress	New	Richard R...	Yuri Zhivago	04/16/2019	

1 / 1 200 items per page
 
1 - 16 of 16 items

16 On the Tracking dashboard, click edit to view or change an existing application. Tracking Records that have been saved but not started have the status "Pending."

**Actions Key**

- Edit Tracking item**
- Escalate Tracking item**
- Archive Tracking item**
- Email Tracking Item**

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Team Forms **Tracking** Logins Tasks Notes Reports

### New Tracking for | • Modio University • |

**Details**

Priority * Normal	Status * Pending	Start Date * 04/18/2025	<input checked="" type="checkbox"/> Use current date?	Due Date mm/dd/yyyy	Completed Date
Owner * Leah Sanborn   OneView® Trainer (leah.sanborn@modiohealth.com)		Tag(s) ...			
Type * Onboarding	Subtype * Provider	Provider * Kirk Heath (kirk.heath123@modio.email) x		NPI# 1184838286	

Tracking Name \*  
Provider - Onboarding

Share (Read Only):  
...

Description

Steps 7

Auto-shift Estimated Dates?

0 steps completed in 0 of 15 days

**Start** **Save** **Cancel**

17 Edit and save any additional details before you click **Start**; these cannot be changed once you begin the tracking process. Finally, click **Start** to proceed.

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Team Forms Tracking Logins Tasks Notes Reports

Start Tracking on 04/18/2025

Are you sure you want to start this item?

Cancel Start

Details

Priority \* Normal

Status \* Pending

Start Date \* 04/18/2025  Use current date?

Due Date mm/dd/yyyy

Completed Date

Owner \* Leah Sanborn | OneView® Trainer (leah.sanborn@modiohealth.com)

Tag(s)

Type \* Onboarding

Subtype \* Provider

Provider \* Kirk Heath (kirk.heath123@modio.email) NPI# 1184838286

Tracking Name \* Provider - Onboarding

Share (Read Only):

Description

Steps 7 0 steps completed in 0 of 15 days

Auto-shift Estimated Dates?

Start Chat

18

Edit and save any additional details before you click **Start**; some of these (start date, status, Type and Subtype) cannot be changed once you begin the tracking process.

**Tip Guide: Tracking - Updating/Completing an Application or Workflow**

**Step Name:** Each Type & Subtype combination has a set of steps with an estimated timeline. We will work with you to customize these for your organization. For each step, you can specify the name, estimated days, and start/due dates for each step to fit your needs.

**Start Step:** When the step is complete, fill out the "Completed Date" and any notes, then click **Complete**.

**Start Date:** The Start Date will default to the current calendar date when you started working on the task referenced in the step, then add any notes.

**Auto-start:** Auto-start is automatically checked. This means the next step will start automatically as soon as the previous step has been completed. Without auto-start, you will need to manually click start on each consecutive step, which is why we set this for you.

**Assigned To:** Each step is automatically assigned to the tracking Owner you designated. At the step level, you can reassign each step as needed by entering the name of another team member under Assignee. You can assign steps to different people within the same application.

**Add Follow-up Date:** Click here to **Add a follow up date**. A new modal will appear asking for the follow up date and the reason. This will be recorded in the notes, and then the due date adjusts automatically.

**Continuing Steps:** Repeat for each step until you reach the end of the designated steps. You can leave the tracking report and come back to it at any time - your progress will be saved, and you'll see the status on the tracking report set as "In Progress."

The screenshot shows a workflow tracking interface with the following elements:

- Callout 19:** Points to the 'Step Name' field containing 'Start'.
- Callout 20:** Points to the 'Assignee' dropdown menu showing 'Credentialing Requests (credrequests@modiohealth.com)'.
- Callout 21:** Points to the 'Start Date' field containing '01/03/2020'.
- Callout 22:** Points to the 'Start Step' and 'Add Follow-up Date' buttons.
- Callout 23:** Points to the 'Auto-start?' checkbox in the 'Step Settings' section.
- Callout 24:** Points to the 'Add Follow-up Date' button.

The workflow steps listed are:

- 1 Start - N/A day(s)
- 2 Request/Retrieve App - 3 day(s)
- 3 Blank App Received - 5 day(s)
- 4 App Out to Provider - 2 day(s)
- 5 Signed App Received - 5 day(s)
- 6 Submitted to Entity - 1 day(s)
- 7 Confirm App Rcvd by Entity - 5 day(s)
- 8 Follow w/Entity for Status - 10 day(s)

Additional details in the interface include: 'Est. Start Date: 01/17/2020', 'Est. Due Date: 01/17/2020', 'Due: 01/03/2020', 'Completed Date: 01/18/2020', 'Notes - Mc Dreamy, MD - New - State License - CA - California (MD) - G2840400 (12/30/2020) Active', and 'NPI# 1999999991'.

**Filtering:** After you create your first tracking report, you can return to the Tracking tab at any time to view, edit, and sort through your team's tracking reports. Use the filter feature to sort through applications by type, name, priority, status, or creator/ assignee/ provider name. You can also click on the header for each section to sort alphabetically, in date order or in numerical order (depending on the field values)

**Workflow Summary:** To view a summary of a tracking report, hover over the name of the report. A step-by-step status update will appear. If you scroll to the bottom of this window, you will see the most recent report on this tracking item.

The screenshot shows the Modio Health QA interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', 'Notes', and 'Reports'. Below this is a header for 'Modio Health QA (San Francisco, CA)'. A table of tracking reports is displayed with columns for ID, Priority, Type, Subtype, Owner, and Name. A popup window titled 'Renewal - Malpractice Insurance' is open, showing a workflow summary with 7 steps: 1. Renewal Request Received, 2. App Out to Provider, 3. Signed App Received - 5 work day(s), 4. Submitted to Entity - 1 work day(s), 5. Confirm App Rcvd by Entity - 5 work day(s), 6. Follow w/Entity for Status - 10 work day(s), and 7. Approved Certificate Received - 10 work day(s). The popup also shows due dates and completion status.

ID	Priority	Type	Subtype	Owner	Name
601	Normal	Facility Affiliation	Initial	Naomi Lam	Initial - Facility Affiliation
293	Normal	Malpractice	Renewal	Naomi Lam	Renewal - Malpractice Insurance
2525	Normal	Payor	Initial	Sue Barton	Initial - Payor - Sentara Princess Anne
4724	Normal	State License	Renewal	Sue Barton	Renewal - State License - VA - Virginia
5837	Normal	Provider App	Review	Sue Barton	Review - Provider Application Practice
9009	Normal	Payor	Initial	Sue Barton	Initial - Payor - Emergency Physician
15860	Escalation	CAQH	Reattestation	Yasi Givechi	Reattestation - CAQH
19514	Normal	State License	New	Richard Rupp	New - State License - CA - California
22125	Normal	Payor	Initial	Naomi Lam	Medicaid CA - California Pacific Me
24702	Normal	CAQH	New	Yasi Givechi	New - CAQH
43697	Normal	Payor	Initial	Marie Robertson	Blue Shield of California CA Test Plan - Blue Shield -
46665	Escalation	Provider App	New	Cindy Adams	New - Provider Application Practice/Employer - Med
49481	Normal	State License	New	Credentialing ...	New - State License - CA - California (MD) - G284040C
50016	Normal	Facility Affiliation	Initial	Naomi Lam	Initial - Facility Affiliation - Modio Health QA (San Fra

27

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28

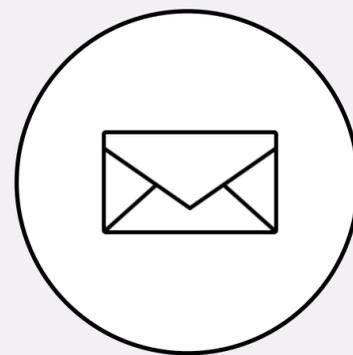
**Archiving Workflows:** Click on the **red X** icon to archive workflows. Archive tracking when you no longer need to work on it, it will not appear on the tracking grid unless you manually change the status to All Statuses or Archived. If you need to restore an archived tracking, you can do so. You can also permanently delete Archived tracking if you never need to access it again.

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

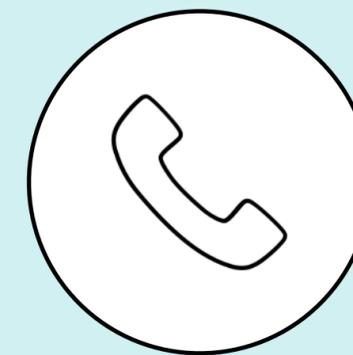
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