OneView®

TIP GUIDE: TRACKING

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Start here

1

About Tracking

Use Tracking to monitor provider management workflows, from licensure applications to payor enrollment, with a clear step-by-step view of key credentialing processes. You can assign ownership, export Excel reports to track progress, and collaborate with your team using dated, timestamped notes. Tracking also allows you to set turnaround times, add custom follow-up dates, and flag important notes so priorities and escalations are easy to identify in reports.

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.

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✳ **Modio Health Master Practice (DEMO)** (San Francisco, CA) ▾

👤+ Add Provider   ✉ Message   ?

OneView V2 ᴺᵉʷ ▾

| All | Credentialing Committee | Dental | Emergency Medicine | MD DO | Onboarding | Pediatrics | TeleMedicine |

Provider	Provider Tags	Compliance	Actions ?
Search for a provider by name or NPI...			
Family Healthcare - FAC No Specialty NPI# 1548200181	Emergency Medicine	View alert(s)	✉ 👤 ✏ ☁ ✳ ⬤ 🔧
Abakporo, Theophine David - NP Acute Care Imaging NPI# 1972564813	Dental MD DO	View alert(s)	✓ 👤 ✏ ☁ ✳ ⬤ 🔧
Abele, Jennifer B - MD Emergency Medicine NPI# 1073502779		View alert(s)	✓ 👤 ✏ ☁ ✳ ⬤ 🔧
Abrams, Pamela D - MD Pediatric Endocrinology NPI# 1851502215	Pediatrics	View alert(s)	✉ 👤 ✏ ☁ ✳ ⬤ 🔧
Abroon, John David - MD	Credentialing Committee		

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➕ **Add Tracking** ▾   ❓

Shared Reports (Read Only) ▾

All | Client A | Demo | gjpdfjgjpdf | New Test | New Test Tag | Tag2 | Test | Test1 | Test2

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due In	Assignee	Provider	Est. Due Date	Actions
...	... ▾	... ▾		...	...	... ▾	... ▾	...	...	...	
569962	Normal	Payor	Recredentialing	Leah Sanborn | On...	90 Degrees AZ PHO - University of Utah (201 Presidents Cir, Salt	In Progress	98 day(s)	Leah Sanborn | O...	Cierra Denning	05/02/2023	✉ ✎ ⚑ ❌
318551 👁	Normal	State License	Initial	Brandon Holmes | ...	Initial - State License - MS - Mississippi - N/A Active	In Progress	99 day(s)	Brandon Holmes...	Brandon Holmes	08/31/2022	✉ ✎ ⚑ ❌
1161441	Normal	Facility Affiliation (XCS)	Reappointment	Brandon Holmes | ...	Reappointment - Facility Affiliation (XCS) - Aakaish Healthcare L	In Progress	99 day(s)	Brandon Holmes...	Jennifer Abele	01/24/2025	✉ ✎ ⚑ ❌
535907	Normal	Payor	Recredentialing	Danessa McShane...	Aetna AZ PPO - Baxter Regional Medical Center (624 Hospital Dr,	In Progress	100 day(s)	Danessa McShan...	Jennifer Abele	04/24/2023	✉ ✎ ⚑ ❌
1241484	Normal	CLIA	Group	Leah Sanborn | On...	Group - CLIA	In Progress	100 day(s)	Leah Sanborn | O...	Leah Sanborn	02/25/2025	✉ ✎ ⚑ ❌
1029319	Normal	Facility Affiliation (XCS)	Reappointment	Leah Sanborn | On...	Reappointment - Facility Affiliation (XCS) - Canyon Vista Medical	In Progress	102 day(s)	Leah Sanborn | O...	Jennifer Abele	10/01/2024	✉ ✎ ⚑ ❌
1289718	High	Onboarding	Provider	Danessa McShane...	Provider - Onboarding	In Progress	102 day(s)	Danessa McShan...	Kirk Heath	12/25/2024	✉ ✎ ⚑ ❌
1308132	Normal	Onboarding	Provider	Cierra Barnes | On...	Provider - Onboarding	In Progress	103 day(s)	Cierra Barnes | O...	Tommy Boy	01/08/2025	✉ ✎ ⚑ ❌
1392749	High	Onboarding	Provider	Leah Sanborn | On...	Provider - Onboarding	In Progress	103 day(s)	OneView®Admin...	Kirk Heath	03/06/2025	✉ ✎ ⚑ ❌
878359	Normal	Credentialing To Do	Misc	Leah Sanborn | On...	Call Cigna for approval Letters	In Progress	103 day(s)	Leah Sanborn | O...	Michael Scott	03/04/2024	✉ ✎ ⚑ ❌
1294253	Normal	CAQH	New	Leah Sanborn | On...	New - CAQH	In Progress	105 day(s)	Leah Sanborn | O...	Bradford Boyette	01/03/2025	✉ ✎ ⚑ ❌
1294156	Normal	CAQH	Attestation (Remi...	Leah Sanborn | On...	Attestation (Remind Provider) - CAQH	In Progress	105 day(s)	Leah Sanborn | O...	Brandon Holmes	12/17/2024	✉ ✎ ⚑ ❌
1314547	Normal	Onboarding	Provider	Cierra Barnes | On...	Provider - Onboarding	In Progress	120 day(s)	Cierra Barnes | O...	Tommy Boy	01/16/2025	✉ ✎ ⚑ ❌
1240210	Normal	State License	Initial	Leah Sanborn | On...	Initial - State License - GA - Georgia (GC) - pending-123456 Activ	In Progress	124 day(s)	Leah Sanborn | O...	Leah Sanborn	02/27/2025	✉ ✎ ⚑ ❌

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⑵

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 by reaching out to **support@modiohealth.com**

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

3

Subtype: Pick the subtype for the tracking event (typically either "New" or "Renewal").

7

Provider: Select the provider associated with this tracking event. If this applies to a group, choose the FAC profile from the dropdown.

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New Tracking for | • Modio University • |

Details

Owner: Select who "owns" this task.

4

Type: Based on the item type selected, choose the appropriate item from the dropdown—such as a facility, license type, malpractice carrier, or other relevant option—that matches the workflow you're working on.

6

State License: If applicable, select the state license this tracking event is required for.

9

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

11

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.

12

Priority *	Status *	Start Date * ☑ Use current date?	Due Date	Completed Date
Normal	Pending	04/18/2025	mm/dd/yyyy 📅	

Owner *

Leah Sanborn | OneView® Trainer (leah.sanborn@modiohealth.com)   ✕ ▾

Tag(s)

...

Type *

State License

Subtype *

Renewal

Provider *

Select a provider

☐ Append to Tracking Name

State License *

Select License...   ▾

Tracking Name *

Renewal - State License

Share (Read Only):

...

Description

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

5

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

10

Description: Add a description to your workflow.

13

Date auto-shift: The Auto-shift Estimated Dates box is checked by default, meaning the estimated start and due dates automatically adjust based on the number of estimated days for each step. For example, increasing a step from 3 to 5 estimated days will automatically update the due date accordingly.

14

Steps ⑥

0 steps completed in 0 of 48 days

Auto-shift Estimated Dates? ☑

Start   Save   Cancel

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ⓘ Verify that provider meets eligibility requirements 1 day(s)

New - ☆

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.

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➕ Add Tracking ▾   ❓

Shared Reports (Read Only) ▾

All   Client A   Demo   gjpdfjgipdf   New Test   New Test Tag   Tag2   Test   Test1   Test2

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due In	Assignee	Provider	Est. Due Date	Actions
...	▾	▾	▾	...	...	▾	▾	...	...	...	
569962	Normal	Payor	Recredentialing	Leah Sanborn | On...	90 Degrees AZ PHO - University of Utah (201 Presidents Cir, Salt	In Progress	98 day(s)	Leah Sanborn | O...	Cierra Denning	05/02/2023	✉ ✎ ⚑ ❌
318551 👁	Normal	State License	Initial	Brandon Holmes | ...	Initial - State License - MS - Mississippi - N/A Active	In Progress	99 day(s)	Brandon Holmes...	Brandon Holmes	08/31/2022	✉ ✎ ⚑ ❌
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(16) On the Tracking dashboard, click edit to view or change an existing tracking event. The ones 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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Shared Reports (Read Only) ▾

All   Client A   Demo   gjpdfjgipdf   New Test   New Test Tag   Tag2   Test   Test1   Test2

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due In	Assignee	Provider	Est. Due Date...	Actions
...	▾	▾		...	...	Archived ▾ ✕		...	...	...	
107927	Normal	Onboarding	v2 Provider	OneView®Ad…	Initial - Onboarding	Archived		OneView®Ad…	Thomas Cliff…	03/04/2021	⊕ 🗑
108089	Normal	Onboarding	v2 Provider	Brandon Hol…	Initial - Onboarding	Archived		Kalin Allen	Brandon Hol…	03/15/2021	⊕ 🗑
112460	Normal	Facility	Initial Privile…	OneView®Ad…	Initial Privileging - Facility - Intermountain Medica	Archived		OneView®Ad…	Brandon Hol…	06/01/2021	⊕ 🗑
113685	Normal	Facility	Reappointment	OneView®Ad…	Reappoinment - Facility - Intermountain Medical	Archived		OneView®Ad…	Brandon Hol…	05/26/2021	⊕ 🗑
114524	Normal	Facility	Reappointment	OneView®Ad…	Reappoinment - Facility - Sentara Hospitals Norfo	Archived		OneView®Ad…	Thomas Cliff…	06/18/2021	⊕ 🗑
146401	Normal	Onboarding	v2 Provider	OneView®Ad…	Initial - Onboarding	Archived		OneView®Ad…	Theophine A…	07/29/2021	⊕ 🗑
160853	Normal	Onboarding	v2 Provider	OneView®Ad…	Initial - Onboarding	Archived		OneView®Ad…	Tommy Boy	09/13/2021	⊕ 🗑
167697	Normal	Onboarding	v2 Provider	OneView®Ad…	Tommy Boy's Onboarding	Archived		OneView®Ad…	Tommy Boy	10/01/2021	⊕ 🗑
168116	Normal	Onboarding	v2 Provider	Leah Sanbor…	BH - Onboarding	Archived		OneView®Ad…	Brandon Hol…	10/04/2021	⊕ 🗑
168138	Normal	Onboarding	v2 Provider	OneView®Ad…	Initial - Onboarding	Archived		OneView®Ad…	Theophine A…	10/04/2021	⊕ 🗑

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* Note: By filtering in the status column to 'Archived', you will have the option to restore or delete any archived tracking.

Actions Key

Green Plus: Restore

Red Trashcan: Hard Delete

***Pro Tip*:** Hard deletes are permanent. If a tracking event is completed or archived, it's best to leave it in place so it remains available for reporting purposes.

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Details

Priority *
Normal

Status *
Pending

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

Due Date
mm/dd/yyyy   📅

Completed Date

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

Tag(s)
...

Type *
Onboarding

Subtype *
Provider

Provider *   👥📁   NPI# 1184838286
Kirk Heath (kirk.heath123@modio.email)   ✕

Dr. Icon: Click this icon to view the provider's credentialing profile.

Folder Icon: Click this icon to view the provider's documents located in their profile.

Tracking Name *
Provider - Onboarding

Share (Read Only):
...

Description

Steps ⑦

0 steps completed in 0 of 15 days

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. Finally, click **Start** to proceed.

Auto-shift Estimated Dates? ☑

Start   Save   Cancel

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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 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.

21

Pro Tip: Click the envelope icon to send a reminder to the assigned team member to complete their step. Automatic reminders aren't sent by default, but this option allows you to send one manually when needed.

24

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.

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① Start - N/A day(s)   New - ☆

Step Name *
[Start]

Assignee * ✉
[Credentialing Requests (credrequests@modiohealth.com)   ✕]

20

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.

Est. Start Date *   Est. Due Date *   Start Date *   Due: 01/03/2020   Completed Date
[01/17/2020]   [01/17/2020]   [01/03/2020] 📅   [01/18/2020] 📅

Step Settings

Auto-start? ☐

Notes - Mc Dreamy, MD - New - State License - CA - California (MD) - G2840400 (12/30/2020) Active   NPI# 1999999991 ⓪

[   ]
                                                                            Ⓖ

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

22

[Start Step] [Add Follow-up Date]   Save Note 💬

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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.

② Request/Retrieve App - 3 day(s)   New - ☆

③ Blank App Received - 5 day(s)   New - ☆

④ App Out to Provider - 2 day(s)   New - ☆

⑤ Signed App Received - 5 day(s)   New - ☆

⑥ Submitted to Entity - 1 day(s)   New - ☆

⑦ Confirm App Rcvd by Entity - 5 day(s)   New - ☆

⑧ Follow w/Entity for Status - 10 day(s)   New -

25

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**.**

💬 Live Help

You'll find Tracking Quicklinks in OneView V1 represented by a **star** icon within the provider's profile under the Healthcare Payor, Licensure, and Facility Affiliations sections. You'll also see the star icon on the team page, on the provider's profile card next to Provider Onboarding.

In V2, Tracking Quicklinks are represented by a **star** icon and can be found in several places: within the Provider Info grid, by right-clicking the provider's name and opening the Provider Profile Card where the star appears next to Provider Onboarding; under the Work Experience tab within the Facility Affiliations grid, and under the Licensure tab for the State, DEA, and State Controlled Substance grids.

*Note: At this time Healthcare Payors are not currently in V2.

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Star Icon Key

☆ New/Initial

⯪ In Progress - Initial or Initial Privileging Subtype

⯪ In Progress - Recredentialing, Reappointemnt, or Renewal Subtype

☆ Completed - Recredentialing, Reappointmnet, or Renwal tracking

Pro tip: If you hover your cursor over the star icon, it will display the tracking subtype it's associated with.

By default the star icon links to the **Initial** subtype for healthcare payors and licenses, and the **Initial Privileging** subtype for facility affiliations. It also links to the **Recredentialing** subtype for healthcare payors, the **Reappointment** subtype for facility affiliations, and the **Renewal** subtype for licenses.

If you have additional subtypes for those tracking types, they won't translate to the star quick link, since the star can only be linked to a limited number of tracking subtypes. You'll still be able to access any tracking events you create for those subtypes from the Tracking Dashboard–they just won't appear through the star icon. If you'd like to change which subtypes the tracking stars are linked to, please reach out to support@modiohealth.com.

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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.

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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 owner/ 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)

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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.

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All   Client A   Demo   gjpdfjgipdf   New Test   New Test Tag   Tag2   Test   Test1   Test2

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due In	Assignee	Provider	Est. Due Date	Actions
412946	Normal	DEA	New	Leah Sanborn	On...	New - DEA - FL - Florida - New - Placeholder - Temp -123456789					
1185982	Normal	Payor	Initial/Link to TIN	Danessa McShane...	Medicare MD - Jamaica Hospital Medical Center (8900 Van Wyck						
1228640	Normal	Onboarding	Provider	Danessa McShane...	Provider - Onboarding						
1246474	Normal	Payor	Initial/Link to TIN	Leah Sanborn	On...	90 Degrees AZ PHO - St Anthony Hospital Lakewood (11600 W 2r					
1231170	Normal	Onboarding	Provider	Leah Sanborn	On...	Provider - Onboarding					
1294250	Normal	CAQH	New	Leah Sanborn	On...	New - CAQH					
1294265	Normal	CAQH	New	Leah Sanborn	On...	New - CAQH					
1219626	Normal	Payor	Initial/Link to TIN	Danessa McShane...	Colorado - 2020 EyeCare - UNC Cancer Hospital (450 W Dr, Chap					
1029598	Escalation	Payor (XCS)	Initial/Link to TIN	Leah Sanborn	On...	Aetna AZ PPO - AdventHealth Avista (100 Health Park Dr, Louisv					
1221521	Escalation	Maintenance (XCS)	CAQH Update & R...	Brandon Holmes	...	CAQH Update & Reattestatio					
1246074	Normal	Payor	Initial/Link to TIN	Leah Sanborn	On...	Aetna AL Preferred - St Anthony Hospital Lakewood (11600 W 2r					
593713	Normal	Onboarding	v2 Provider	Leah Sanborn	On...	Initial - Onboarding					
1240209	Normal	CAQH	New	Leah Sanborn	On...	New - CAQH					
1032958	Normal	Credentialing To Do	Misc	Cierra Barnes	On...	Misc - Credentialing To Do					

Aetna AZ PPO - AdventHealth Avista (100 Health Park Dr, Louisville, CO 80027)
Created by: Leah Sanborn | OneView® Trainer - 06/26/2024 #1029598
Jennifer Abele | NPI# 1073502779

Original Due Date 08/27/2024   Projected Due Date 10/30/2024   3 of 7 steps completed in 57 of 45 days 46 day(s) overdue

1 NEW Request Received   Completed 11 of 1 day(s) - ★
2 PAYOR PROCESS   Completed 45 of 2 day(s) - ★
3 FORM: Application to Provider   Completed 1 of 5 day(s) - ★
   Aetna AZ PPO - AdventHealth Avista (100 Health Park Dr, Louisville, CO 80027)
4 RECEIVE: Application from Provider - 5 work day(s)   In Progress - ★
5 SUBMIT: Application submitted to payor - 1 work day(s)   New - ★
6 FOLLOW-UP: 30 day follow up with payor - 30 work day(s)   New - ★
7 COMPLETE: Confirmation of participation status - 1 work day(s)   New - ★

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Tracking Reports

Type	Name ^		Last edited by	Last edited at	
⊞	Affiliation Payors Tracking Notes		Vincent Tong	10/3/2025	...
⊞	Payors With Tracking Notes		Vincent Tong	10/3/2025	...
⊞	Tracking All Items		Vincent Tong	10/3/2025	...
⊞	Tracking Notes		Vincent Tong	10/3/2025	...
⊞	Tracking Open Items		Vincent Tong	10/3/2025	...
⊞	Tracking Single Team		Vincent Tong	10/3/2025	...

Home
COLLECTIONS ...
Your personal collection
Standard Reports
Standard Reports - Inactive
Tracking Reports
Tracking Reports - Inactive
BROWSE
Models
Databases
Metrics
Trash

Within the Reports Module tab you can access the Tracking reports Folder.

Affiliations & Payors: Includes additional facility notes, showing only the most recently added note.

Payors with Tracking Notes: Displays all recent payor tracking notes for in-progress tracking, across all payors for the entire team.

Tracking All Items: Includes every status, including overdue items, and helps evaluate and adjust completion timelines. Results are broken out by step (for example, a 7-step workflow will appear 7 times).

Tracking Notes: Reports on the most recent note added to each tracking record. Records without notes will not appear.

Tracking Open Items: Shows all pending and in-progress items by tracking record.

Tracking Single Team: Displays tracking for all statuses (including historical records) by tracking record.

Tracking Reports /Inactive Folder: These reports use the same columns as the standard reports. However, the data reflects inactive profiles, whereas the original reports only include active profiles. To capture a complete dataset across all profile statuses—such as for end-of-year productivity reporting—it's important to run both reports.
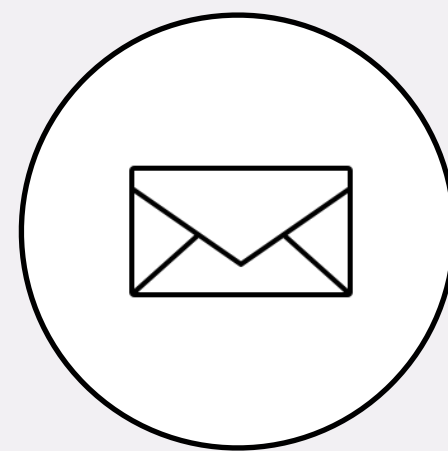
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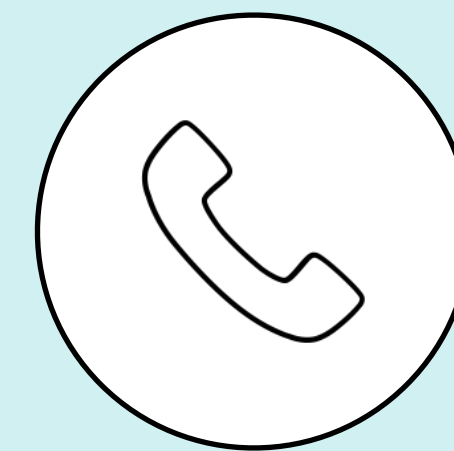# For additional questions or further training, contact the Modio Team:

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