OneView®

Tip Guide: Tracking

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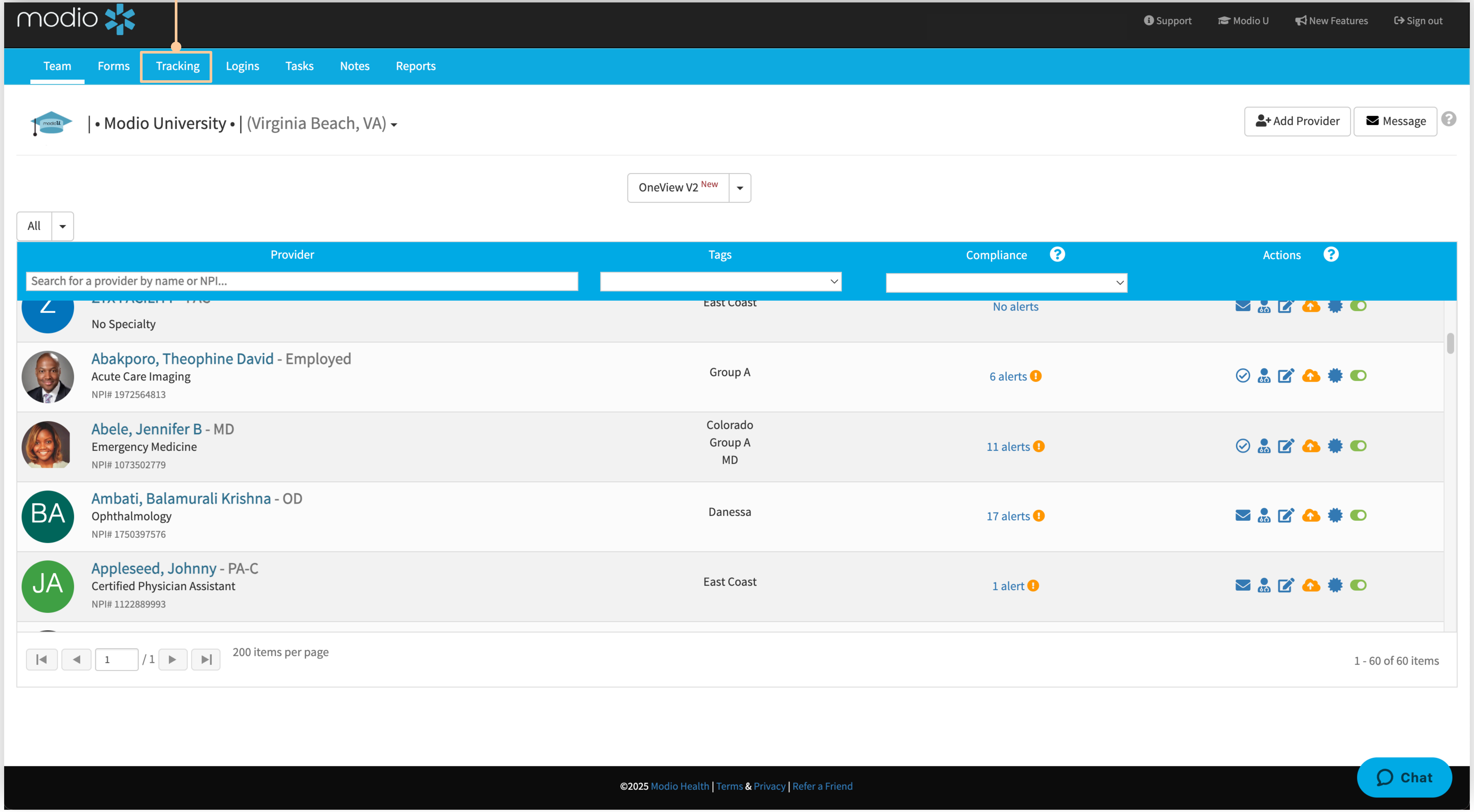
1 Start here



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.

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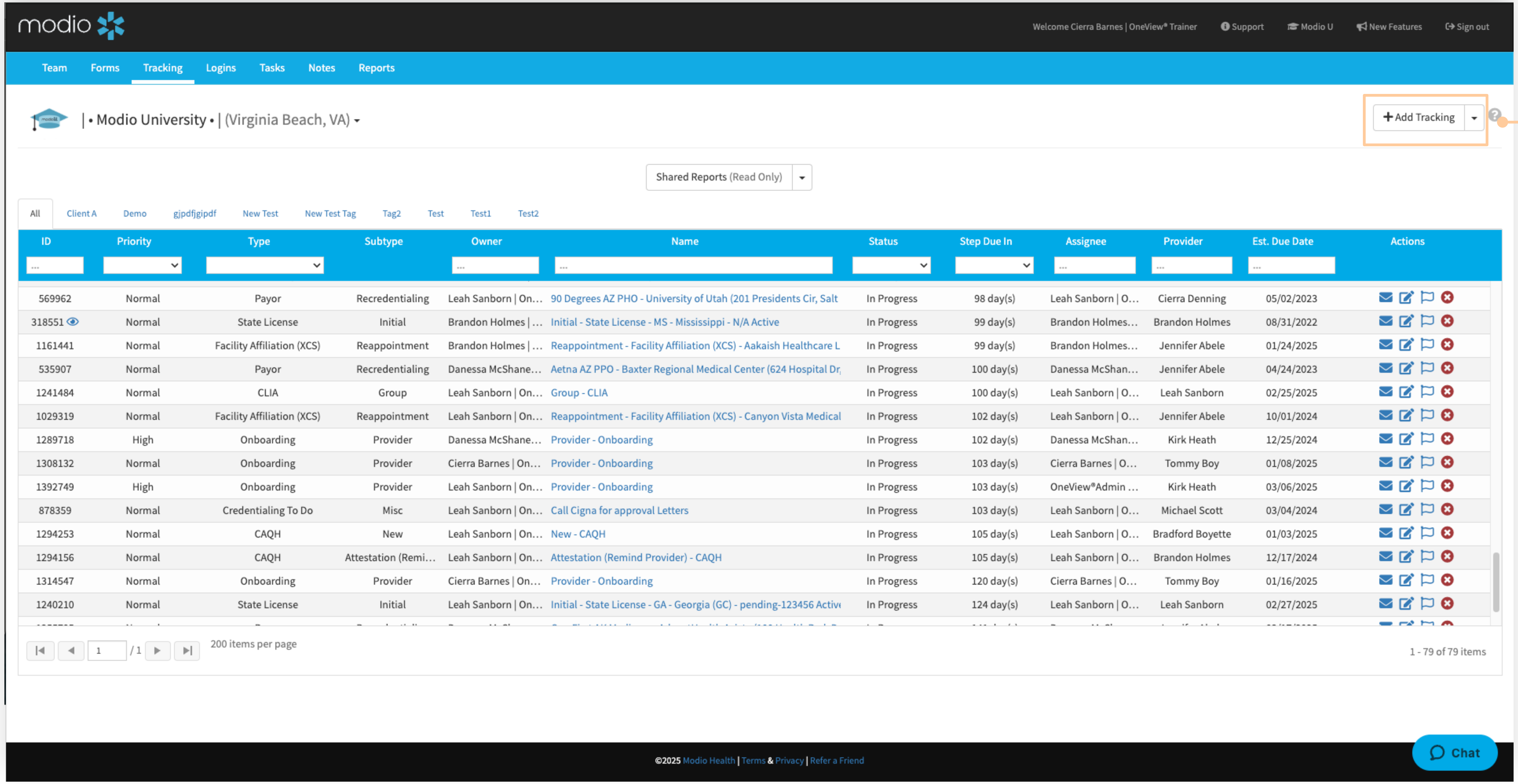

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Add Tracking:

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

Tip Guide: Tracking - Launching a new Tracking workflow

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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.

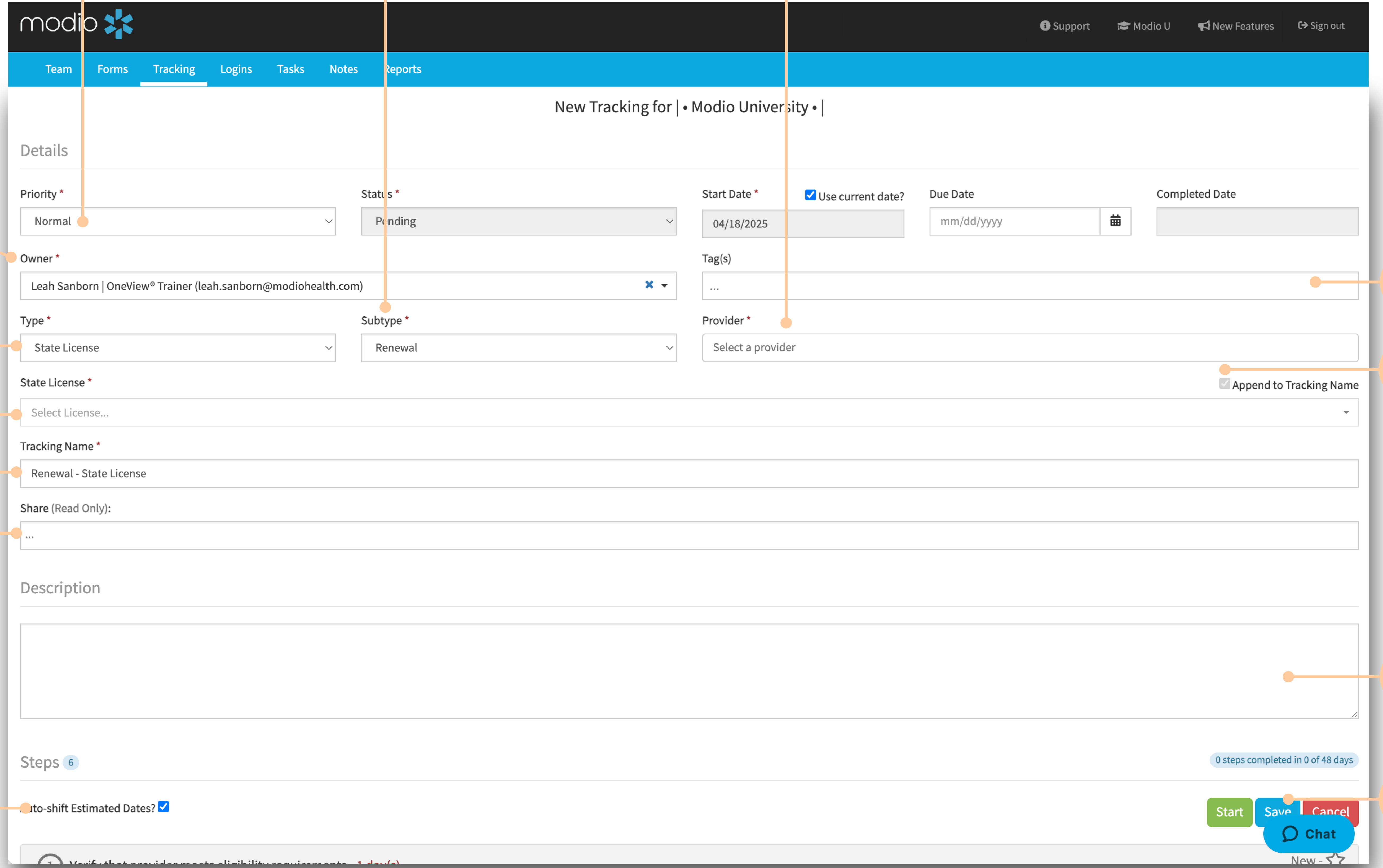
6 **Type:** Depending on the item type you chose, you'll be able to pick an item from the drop-down menu. This could be a facility, a license number, malpractice carrier, or other option. Pick the item that corresponds to the application you are working on.

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.)



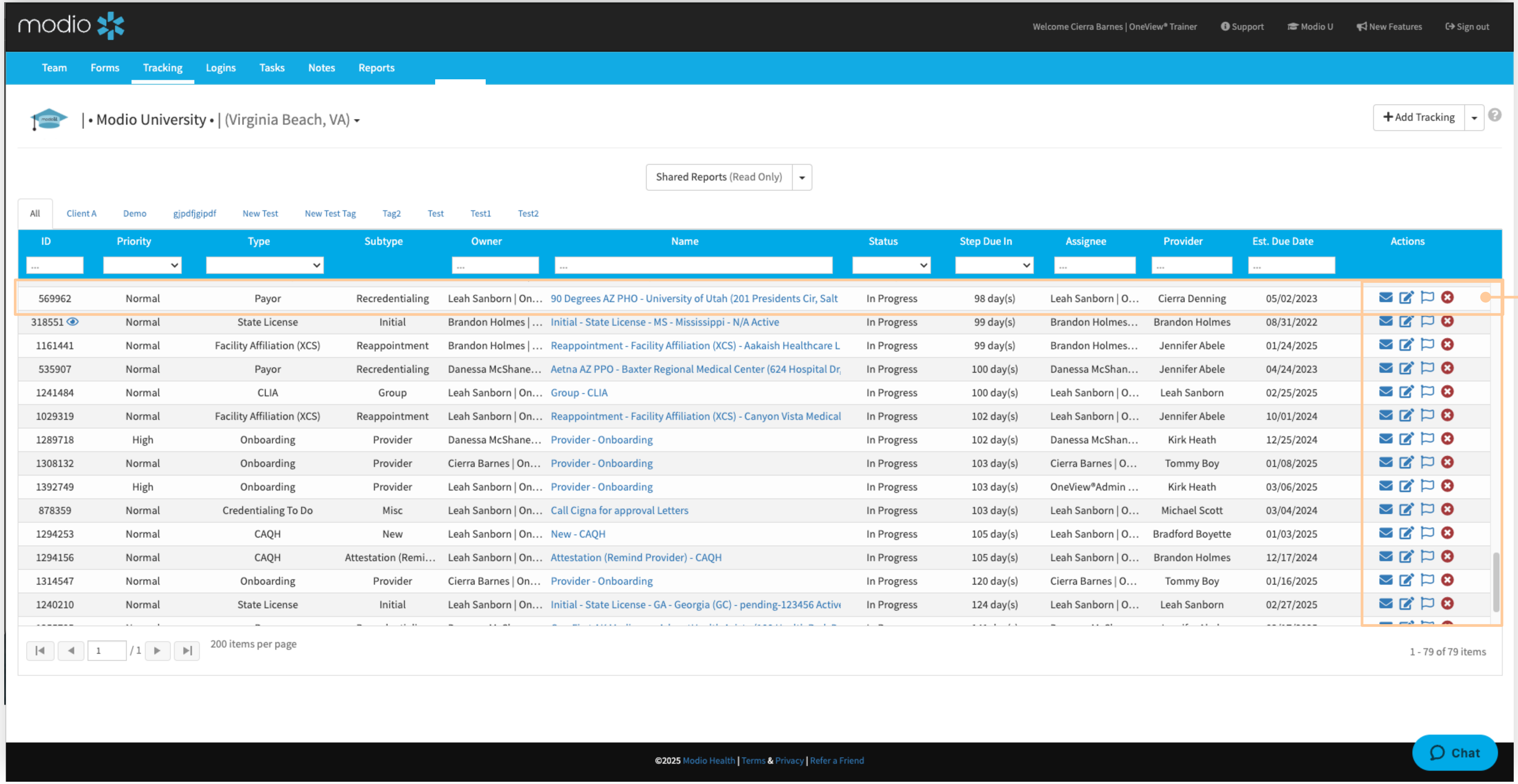
5 **Tag(s):** Add any tags to help with better organizing.

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.

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



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 Active	In Progress	124 day(s)	Leah Sanborn | O…	Leah Sanborn	02/27/2025	

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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**

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

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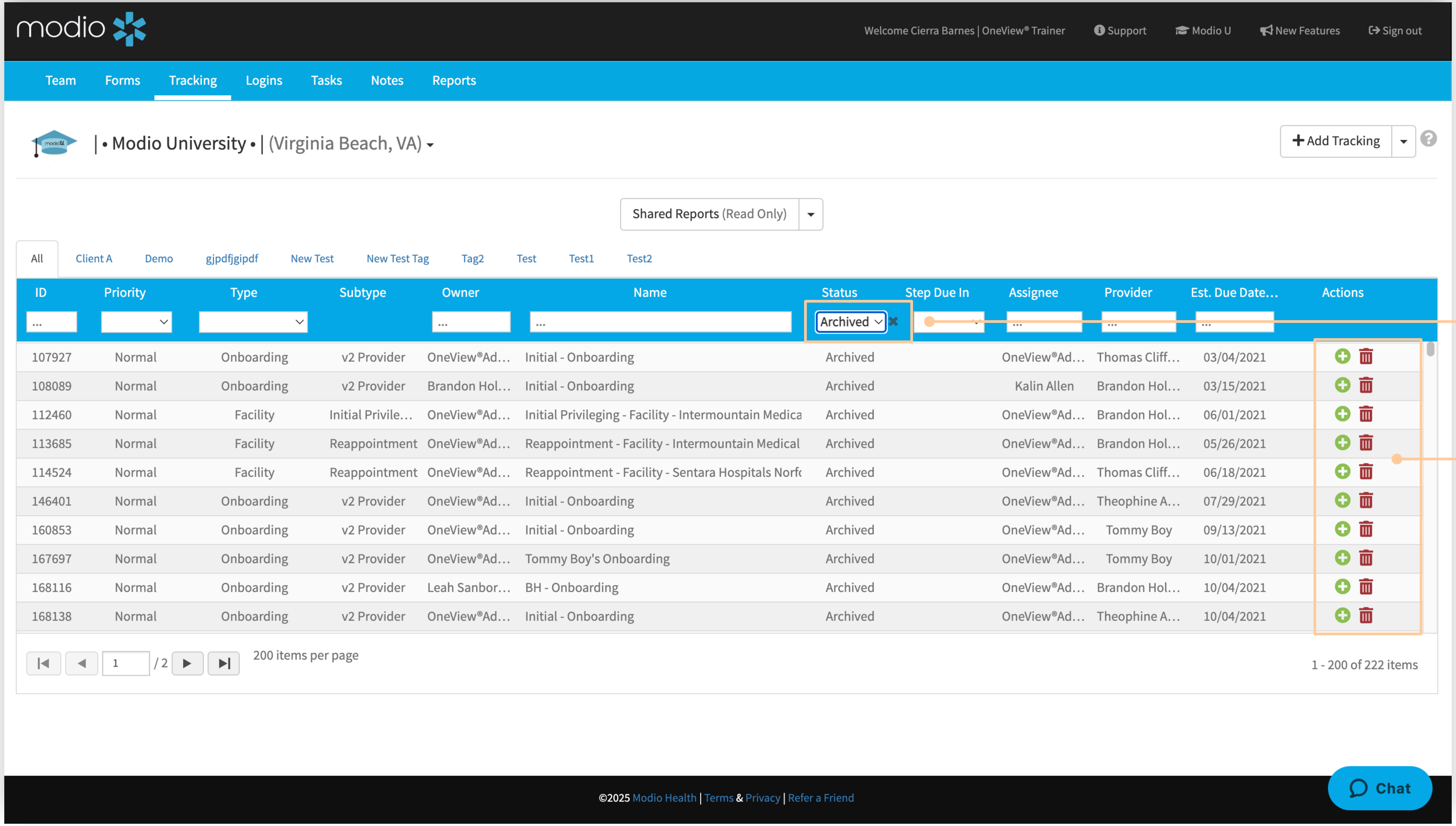

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due In	Assignee	Provider	Est. Due Date…	Actions
107927	Normal	Onboarding	v2 Provider	OneView®Ad…	Initial - Onboarding	Archived		OneView®Ad…	Thomas Cliff…	03/04/2021	
108089	Normal	Onboarding	v2 Provider	Brandon Hol…	Initial - Onboarding	Archived		Kalin 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…	Reappointment - Facility - Intermountain Medical	Archived		OneView®Ad…	Brandon Hol…	05/26/2021	
114524	Normal	Facility	Reappointment	OneView®Ad…	Reappointment - Facility - Sentara Hospitals Norfc	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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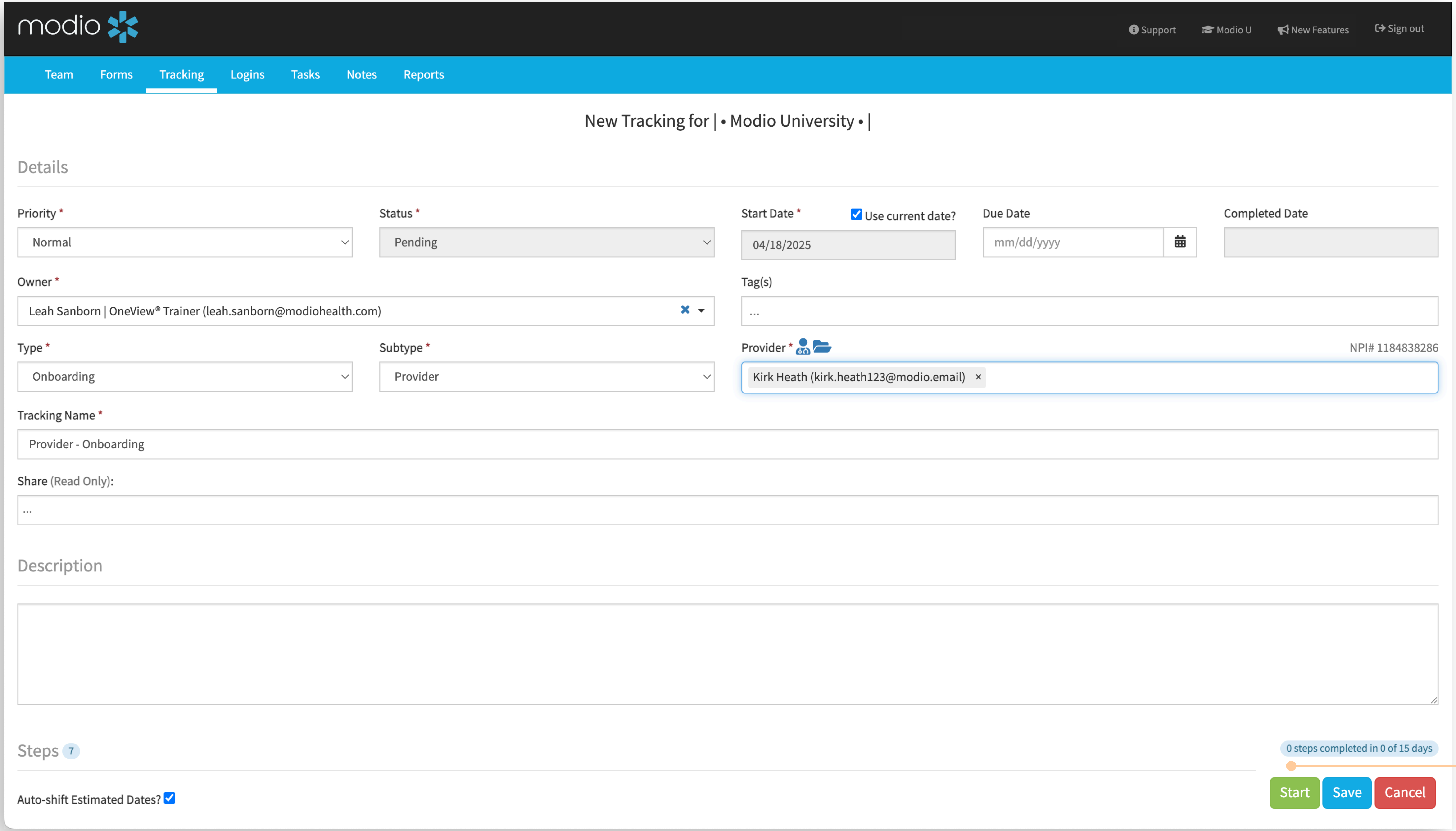
* Note: By filtering in the status column to 'Archived', you will have the option to restore or delete any archived tracking.

Actions Key

Green Plus: Restore

Red Trashcan: Hard Delete

Tip Guide: Tracking - Updating & Starting a Workflow that is in Pending Status



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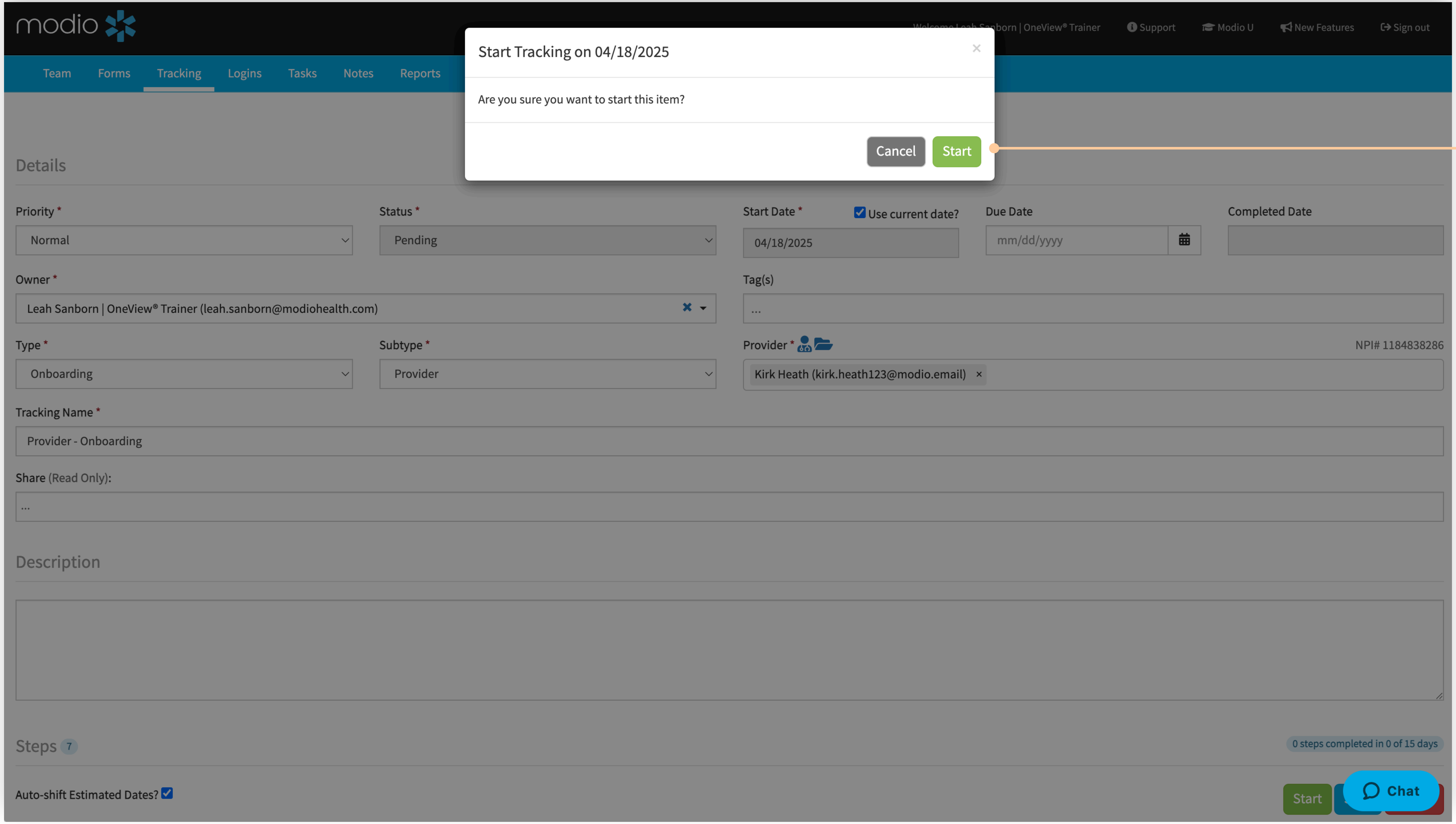
Edit and save any additional details before you click **Start;** these cannot be changed once you begin the tracking process. Finally, click **Start** to proceed.

Tip Guide: Tracking - Starting a Workflow from Pending status



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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

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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.

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

22

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.

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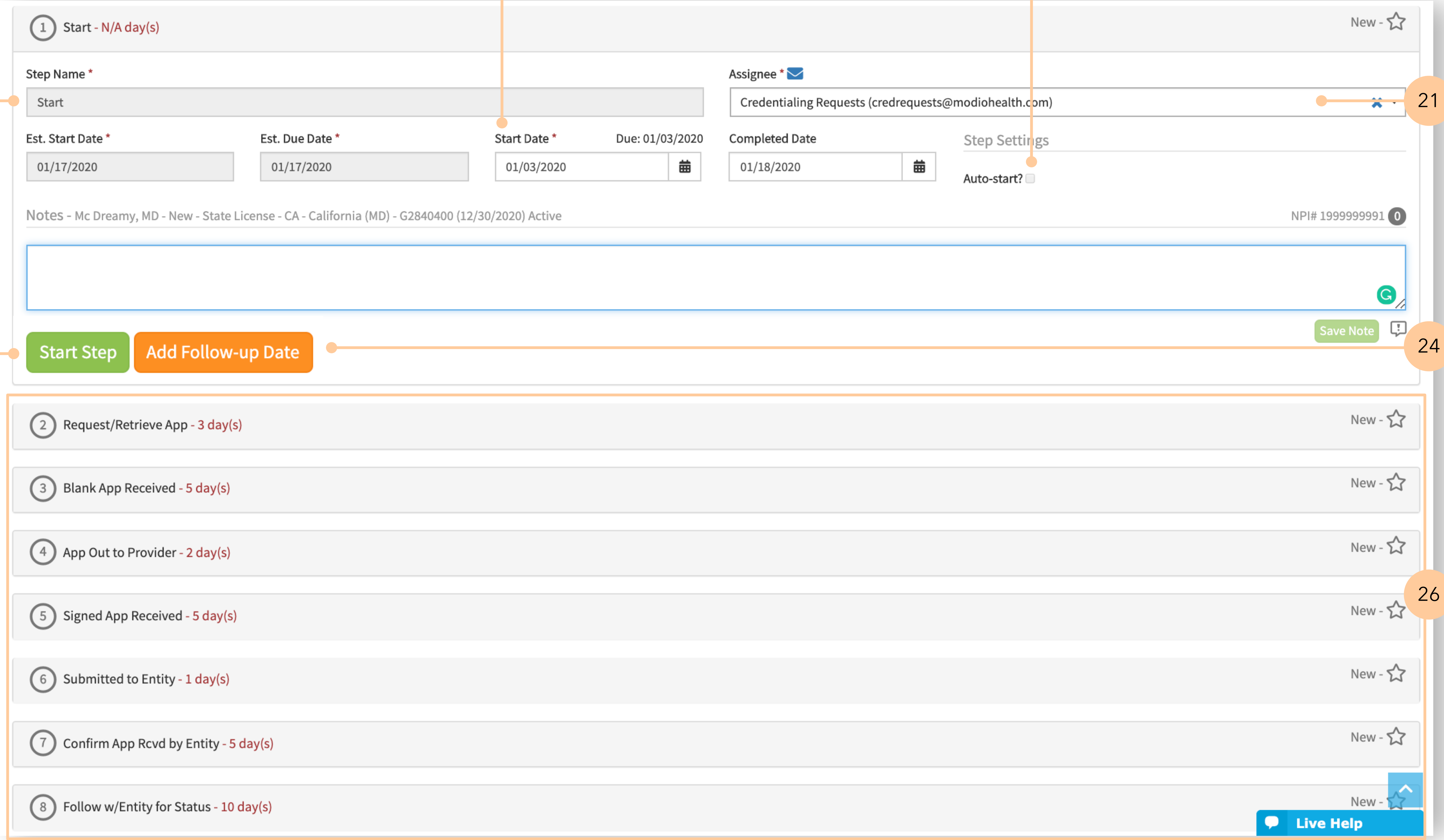
Auto-start: Auto-start is automatically checked. This means the next step will start automatically as soon as the previous step has been completed. Without auto-start, you will need to manually click start on each consecutive step, which is why we set this for you.



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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.

24

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.

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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**.**

Tip Guide: Tracking - Reviewing Tracking Reports

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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 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)

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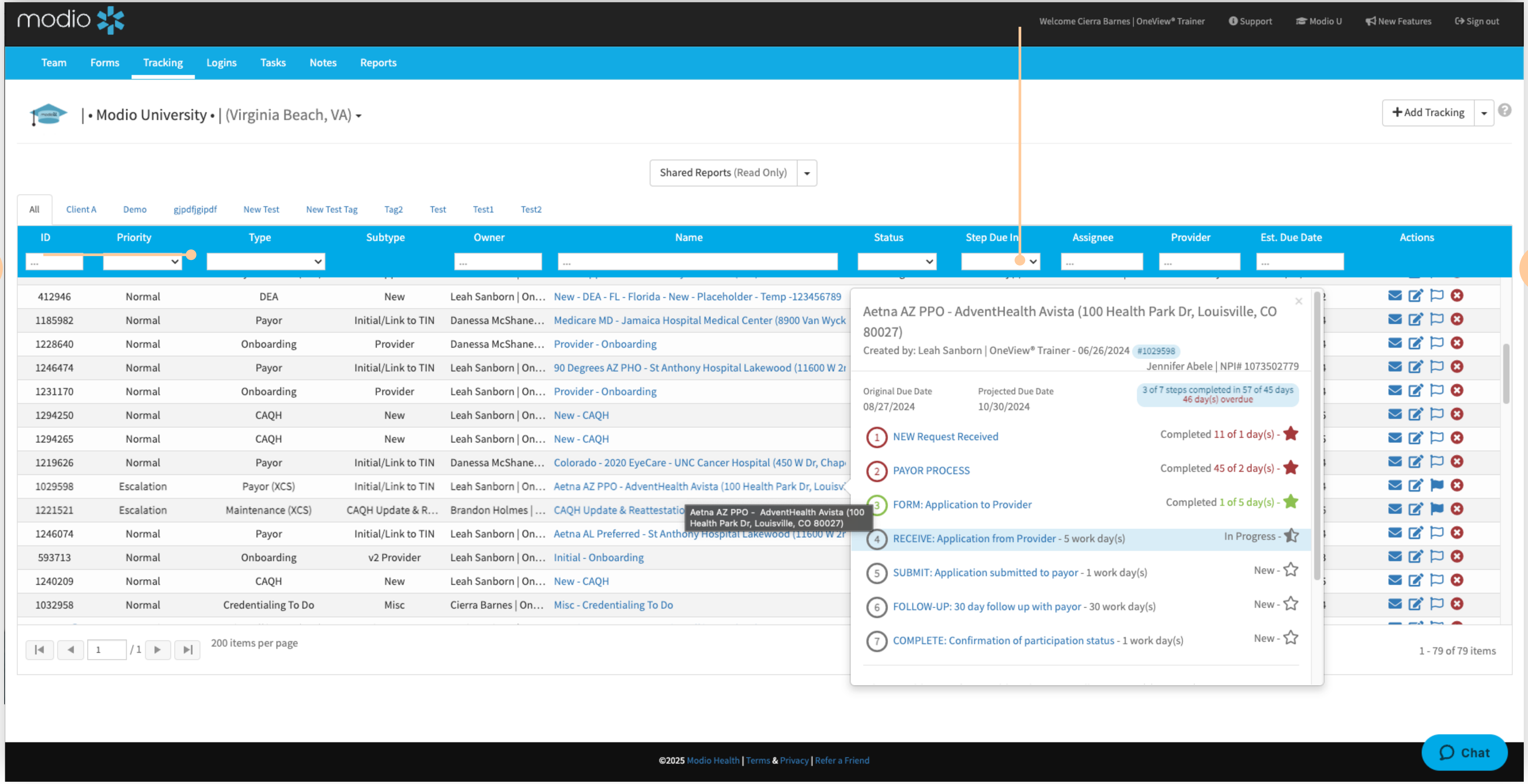

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Archiving Workflows: Click on the **red X** icon to archive workflows.Archive tracking when you no longer need to work on it, it will not appear on the tracking grid unless you manually change the status to All Statuses or Archived. If you need to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

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

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