



OneView[®]

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.

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Modio University (Virginia Beach, VA)

Add ProviderMessage

OneView V2

New

All

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

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Shared Reports (Read Only) ▾

AllClient ADemo gjpdfjgipdfNew TestNew Test TagTag2TestTest1Test2

| 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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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.

Owner: Select who "owns" this task.

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.

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

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

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.

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.)

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New Tracking for | • Modio University • |

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 *

State License

Subtype *

Renewal

Provider *

Select a provider

State License *

Select License...

Append to Tracking Name

☒

Tracking Name *

Renewal - State License

Share (Read Only):

...

Description

Steps 6

0 steps completed in 0 of 48 days

Auto-shift Estimated Dates?

☒

Start

Save

Cancel

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.

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.

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gjpdfjgipdfNew TestNew Test TagTag2TestTest1Test2

| ID | Priority | Type | Subtype | Owner | Name | Status | Step Due In | Assignee | Provider | Est. Due Date | Actions |
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| 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 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 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 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
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| 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 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 1241484 | Normal | CLIA | Group | Leah Sanborn On... | Group - CLIA | In Progress | 100 day(s) | Leah Sanborn O... | Leah Sanborn | 02/25/2025 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 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 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 1289718 | High | Onboarding | Provider | Danessa McShane... | Provider - Onboarding | In Progress | 102 day(s) | Danessa McShan... | Kirk Heath | 12/25/2024 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 1308132 | Normal | Onboarding | Provider | Cierra Barnes On... | Provider - Onboarding | In Progress | 103 day(s) | Cierra Barnes O... | Tommy Boy | 01/08/2025 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 1392749 | High | Onboarding | Provider | Leah Sanborn On... | Provider - Onboarding | In Progress | 103 day(s) | OneView®Admin ... | Kirk Heath | 03/06/2025 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 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 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 1294253 | Normal | CAQH | New | Leah Sanborn On... | New - CAQH | In Progress | 105 day(s) | Leah Sanborn O... | Bradford Boyette | 01/03/2025 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 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 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 1314547 | Normal | Onboarding | Provider | Cierra Barnes On... | Provider - Onboarding | In Progress | 120 day(s) | Cierra Barnes O... | Tommy Boy | 01/16/2025 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |
| 1240210 | Normal | State License | Initial | Leah Sanborn On... | Initial - State License - GA - Georgia (GC) - pending-123456 Activi | In Progress | 124 day(s) | Leah Sanborn O... | Leah Sanborn | 02/27/2025 | <div><div>Email</div><div>Edit</div><div>Escalate</div><div>Archive</div></div> |

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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

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AllClient ADemo gjpdfjgipdfNew TestNew Test TagTag2TestTest1Test2

| 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 | <div>+ 🗑</div> |
| 108089 | Normal | Onboarding | v2 Provider | Brandon Hol... | Initial - Onboarding | Archived | | Kalin Allen | Brandon Hol... | 03/15/2021 | <div>+ 🗑</div> |
| 112460 | Normal | Facility | Initial Privile... | OneView®Ad... | Initial Privileging - Facility - Intermountain Medica | Archived | | OneView®Ad... | Brandon Hol... | 06/01/2021 | <div>+ 🗑</div> |
| 113685 | Normal | Facility | Reappointment | OneView®Ad... | Reappointment - Facility - Intermountain Medical | Archived | | OneView®Ad... | Brandon Hol... | 05/26/2021 | <div>+ 🗑</div> |
| 114524 | Normal | Facility | Reappointment | OneView®Ad... | Reappointment - Facility - Sentara Hospitals Norf | Archived | | OneView®Ad... | Thomas Cliff... | 06/18/2021 | <div>+ 🗑</div> |
| 146401 | Normal | Onboarding | v2 Provider | OneView®Ad... | Initial - Onboarding | Archived | | OneView®Ad... | Theophine A... | 07/29/2021 | <div>+ 🗑</div> |
| 160853 | Normal | Onboarding | v2 Provider | OneView®Ad... | Initial - Onboarding | Archived | | OneView®Ad... | Tommy Boy | 09/13/2021 | <div>+ 🗑</div> |
| 167697 | Normal | Onboarding | v2 Provider | OneView®Ad... | Tommy Boy's Onboarding | Archived | | OneView®Ad... | Tommy Boy | 10/01/2021 | <div>+ 🗑</div> |
| 168116 | Normal | Onboarding | v2 Provider | Leah Sanbor... | BH - Onboarding | Archived | | OneView®Ad... | Brandon Hol... | 10/04/2021 | <div>+ 🗑</div> |
| 168138 | Normal | Onboarding | v2 Provider | OneView®Ad... | Initial - Onboarding | Archived | | OneView®Ad... | Theophine A... | 10/04/2021 | <div>+ 🗑</div> |

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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

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Forms

Tracking

Logins

Tasks

Notes

Reports

New Tracking for | • Modio University • |

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) x

NPI# 1184838286

Tracking Name *

Provider - Onboarding

Share (Read Only):

...

Description

Steps 7

0 steps completed in 0 of 15 days

Start

Save

Cancel

Auto-shift Estimated Dates?

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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.

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Start Tracking on 04/18/2025

Are you sure you want to start this item?

CancelStart

Details

Priority *Normal

Status *Pending

Start Date *04/18/2025

☒ Use current date?

Due Datemm/dd/yyyy

Completed Date

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

Tag(s)...

Provider *Kirk Heath (kirk.heath123@modio.email)

NPI# 1184838286

Type *Onboarding

Subtype *Provider

Tracking Name *Provider - Onboarding

Share (Read Only):

...

Description

Steps 7

0 steps completed in 0 of 15 days

Auto-shift Estimated Dates?☒

StartChat

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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.

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."

1 Start - N/A day(s) New - ☆

Step Name *

Start

Assignee *

Credentialing Requests (credrequests@modiohealth.com)

Est. Start Date *

01/17/2020

Est. Due Date *

01/17/2020

Start Date *

01/03/2020

Due: 01/03/2020

Completed Date

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

Add Follow-up Date

Save Note

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 - ☆

Live Help

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.

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AllClient ADemo gjpdfjgipdfNew TestNew Test TagTag2TestTest1Test2

| 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 | | | | | | |

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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 Date08/27/2024

Projected Due Date10/30/2024

3 of 7 steps completed in 57 of 45 days46 day(s) overdue

1 NEW Request ReceivedCompleted 11 of 1 day(s) -

2 PAYOR PROCESSCompleted 45 of 2 day(s) -

3 FORM: Application to ProviderCompleted 1 of 5 day(s) -

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 -

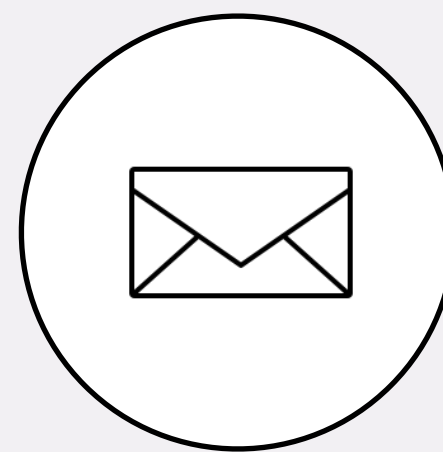
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Archiving Workflows: Click on the **red X** icon to archive workflows. Archive tracking when you no longer need to work on it, it will not appear on the tracking grid unless you manually change the status to All Statuses or Archived. If you need to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

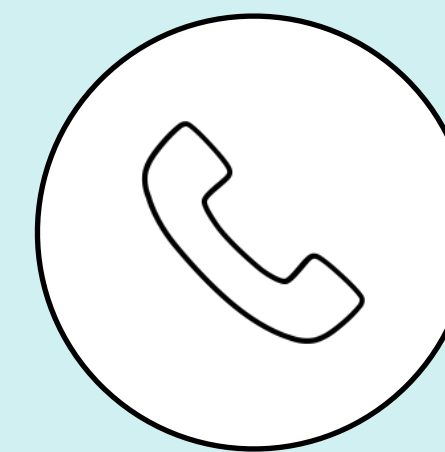
For additional questions or further training,
contact the Modio Team:



Online:
Live Chat Support



Email:
Support@modiohealth.com



Phone:
844.696.6346