Resource Page

The OneView Tracking Guide

What Is Tracking?

Tracking is a customizable workflow management tool designed to simplify and organize recurring credentialing tasks—such as payer enrollment, onboarding, privileging, licensing, and verifications. With Tracking, your team can standardize processes, stay organized, and maintain credentialing tasks seamlessly across the entire provider lifecycle.

By centralizing workflows in one place, Tracking reduces the risk of single points of failure, prevents missed deadlines, and makes it easy to access both current and historical credentialing data for reporting. Optimized use of Tracking helps ensure efficiency, consistency, and peace of mind for your organization.

The Benefits

Why Should I Use This Feature?

- Consistency – Standardize credentialing workflows
- Efficiency – Fewer templates and steps = easier management
- Visibility – Reports highlight statuses and bottlenecks
- Integration – Quick links connect directly to provider profiles
- Scalability – Easy to expand as your organization grows
- Accountability – Assign workflows to the correct team members
- Reporting – View all your workflow data in one place

Reporting

Creating Reports With Tracking

Tracking includes built-in reports to give visibility into progress and bottlenecks:

- Open Items – In-progress or new steps
- All Items – All steps, statuses, and latest notes
- Payors with Tracking Notes – Healthcare payors tied to Tracking
- Affiliations & Payors with Tracking Notes – Expanded view with provider details
- Notes – All notes from all Tracking events

Need a report that you don't see above? Create your own with the OneView reporting tool or request a custom report to be added. Ad-Hoc reporting is available. View the number of tracking workflows that were completed, and view how long they took to complete.

How To Use and Manage Tracking

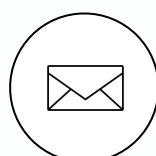| Tracking Templates	Description
Naming Convention	Every tracking workflow must have a unique Type and a Subtype.
Step Design	• Every step must have a name and number of business days to complete • Adding a step description is optional but is recommended. Pro Tip: Avoid using staff names in step descriptions and use rolls or titles instead.
Quick Start Stars	**Quick start tracking from the following sections of a profile:** • Healthcare Payors ☆ • Licenses ☆ • Facility Affiliations ☆ • Onboarding ☆
Making Changes	Email Support@modiohealth.com to request your existing, up to date templates. • The templates will include instructions on how to update. • Return templates back to Modio. • Our Training tream will review your templates and have the changes made to your tracking feature. Primary coordinators need to approve tracking template changes.

Getting Started

Not sure where to begin? Use Modio's ready-made standard templates to quickly implement Tracking for your most common credentialing workflows, then customize as needed for your team.

Have questions or need additional support? Contact our support team:

Online:
Live Chat Support

Email:
support@modiohealth.com