




# OneView<sup>™</sup>

## Provider Onboarding




ONBOARDING: DASHBOARD

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SupportModio UNew FeaturesSettingsServicesSign out

TeamFormsTrackingLoginsTasksNotes

Modio Health QA (San Francisco, CA) ▾

Alerts (30) ▾Add ProviderMessage ?

AllContract EmployeesCritical CareInternal MedicineNewPain Medicine

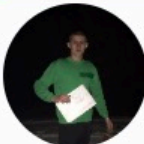
































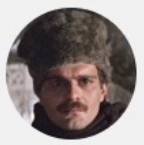









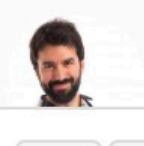










Provider

Tags

Compliance ?

Actions ?

Search provider name, specialty, or NPI...

 <div><b>Mann, Bernie - MD</b> Internal Medicine NPI# 1111111111</div>	Internal Medicine	2 alerts 	<div></div>
 <div><b>Smith, Judd T - MD</b> Acupuncture NPI# 1295705283</div>	Contract Employees Critical Care	1 alert 	<div></div>
 <div><b>Marten, Lily - MD</b> Family Medicine</div>	Internal Medicine	3 alerts 	<div></div>
 <div><b>Zhivago, Yuri - DPM</b> NPI# 1234567890</div>	Internal Medicine	No alerts	<div></div>
 <div><b>No, Julius Dit - OD</b> Cardiology</div>	Pain Medicine	8 alerts 	<div></div>

⏪⏴1/1⏵⏩

200 items per page

1 - 14 of 14 items





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Live Help

Icon Key:

- **New Invitation:**  
Indicates a new provider.  
Click to invite.
- **Accepted Profile:**  
Indicates a provider has  
accepted the invitation and  
created a profile.
- **Incomplete Profile:**  
Indicates provider has  
started their profile.
- **Completed Profile:**  
Indicates provider has  
completed their onboarding.



**ONBOARDING:** Adding Your Provider(s)

**Add Provider:**  
Start here to add a new provider yourself.

**Teams:**  
Select the team you need to add your new provider to.

**Tag(s):**  
Tag your new provider for quick team identification (ie. Internal Medicine).


**Provider Full Name:**  
Enter your provider's first and last name. If the provider's name doesn't show up, select "Don't see profile listed? Click here to skip profile claim."

**Do Not Click** the "notify provider by email" checkbox. The provider profile is not ready to be reviewed at this time.

**Provider Title:**  
Select from the list of professional titles.

**Specialty List:**  
Enter your provider's specialty.

**Provider's Email:**  
Enter your provider's email here. Make sure that you haven't used the address in OneView before - each provider needs a unique email.

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Training & Support Settings Services Sign out

Team Forms Track

Add Provider

Teams

Modio Health QA (San Francisco, CA) X

Tags

...

Provider Full Name \*

Type a first and last name...

Provider Title \*

...

Specialty List \*

...

Provider Email \*

Notify provider by email ☐

Cancel Save

Search provider name, special

NPI# 1295705283

Marten, Lily - MD

Family Medicine

Zhivago, Yuri - D

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Live Help



**ONBOARDING:** Inviting Your Provider(s)


**Message Provider:**  
Start here to invite a provider to register and join your team.

**Tag(s):**  
Tag your new provider for quick identification (i.e. "Internal Medicine").

**Email Providers:**  
Click here to send an email inviting the provider(s) to join your team.

**Template & Attachment:**  
Customize your email and add any attachments (like a welcome packet). Contact your account manager to set up a custom invitation template.

**Email Subject & Message:**  
Enter a desired subject and then add a message to your provider. This area can be customized as well. Contact your Modio rep to learn more.

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Invite to Modio Health (San Francisco, CA)

Email Providers: Tags...

Separate provider email addresses using commas, spaces or the enter/return key

Template & Attachment

Invite Provider

Choose File

No file chosen

Set as default template?

Email Subject

Email Message

CancelSend

New Invitations (2)

Select All

Work Email	Provider Name	Actions
thomas.Lee@modio.email	Thomas Lee	+
Galileo.NY@modio.email	Galileo NY	+

**Default Templates:**  
Click here to save your email subject and message as a default template. If you need to make changes to a template, click on the pen and paper icon.

**New Invitations:**  
Click here to add more providers to the invitation list.

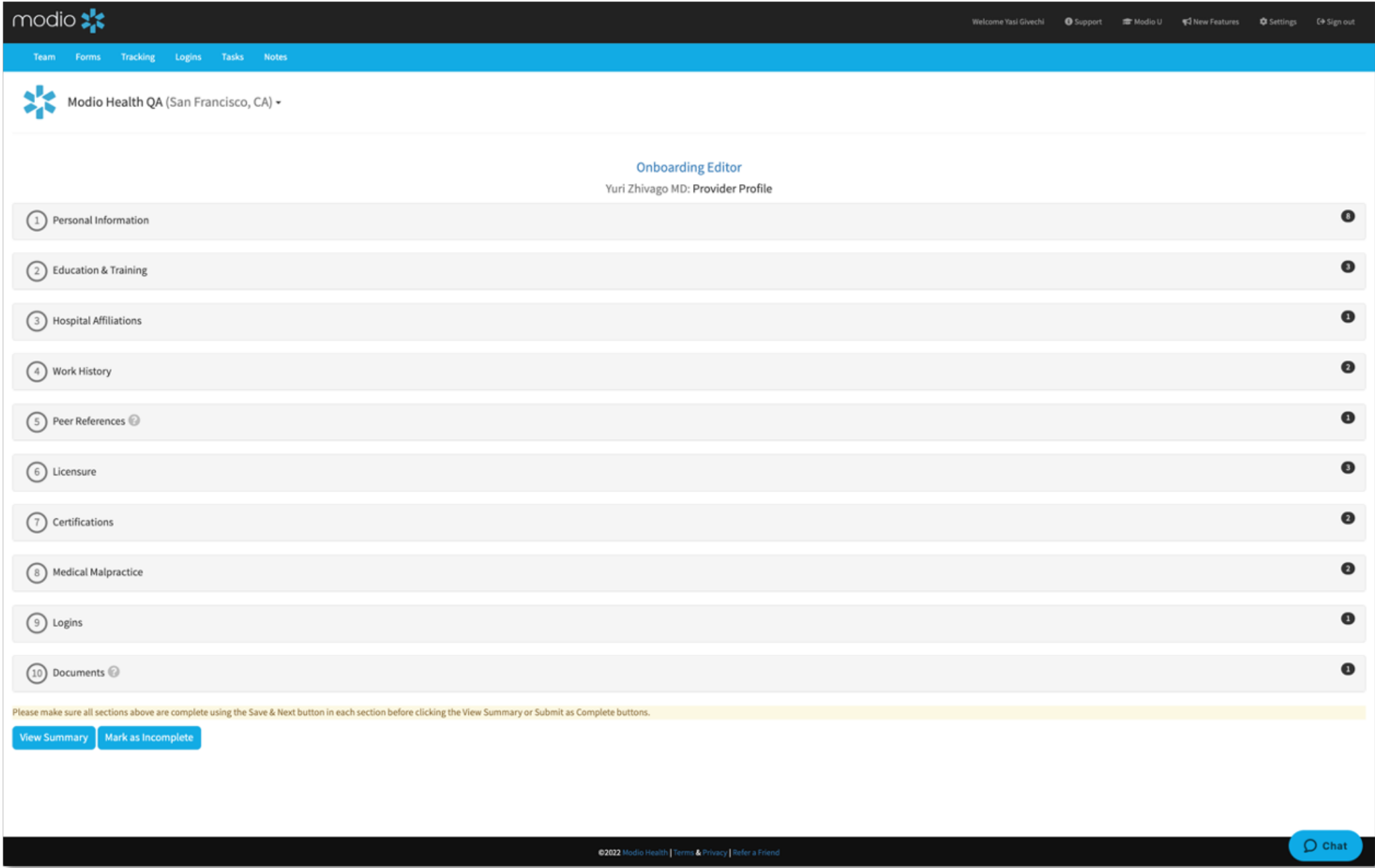
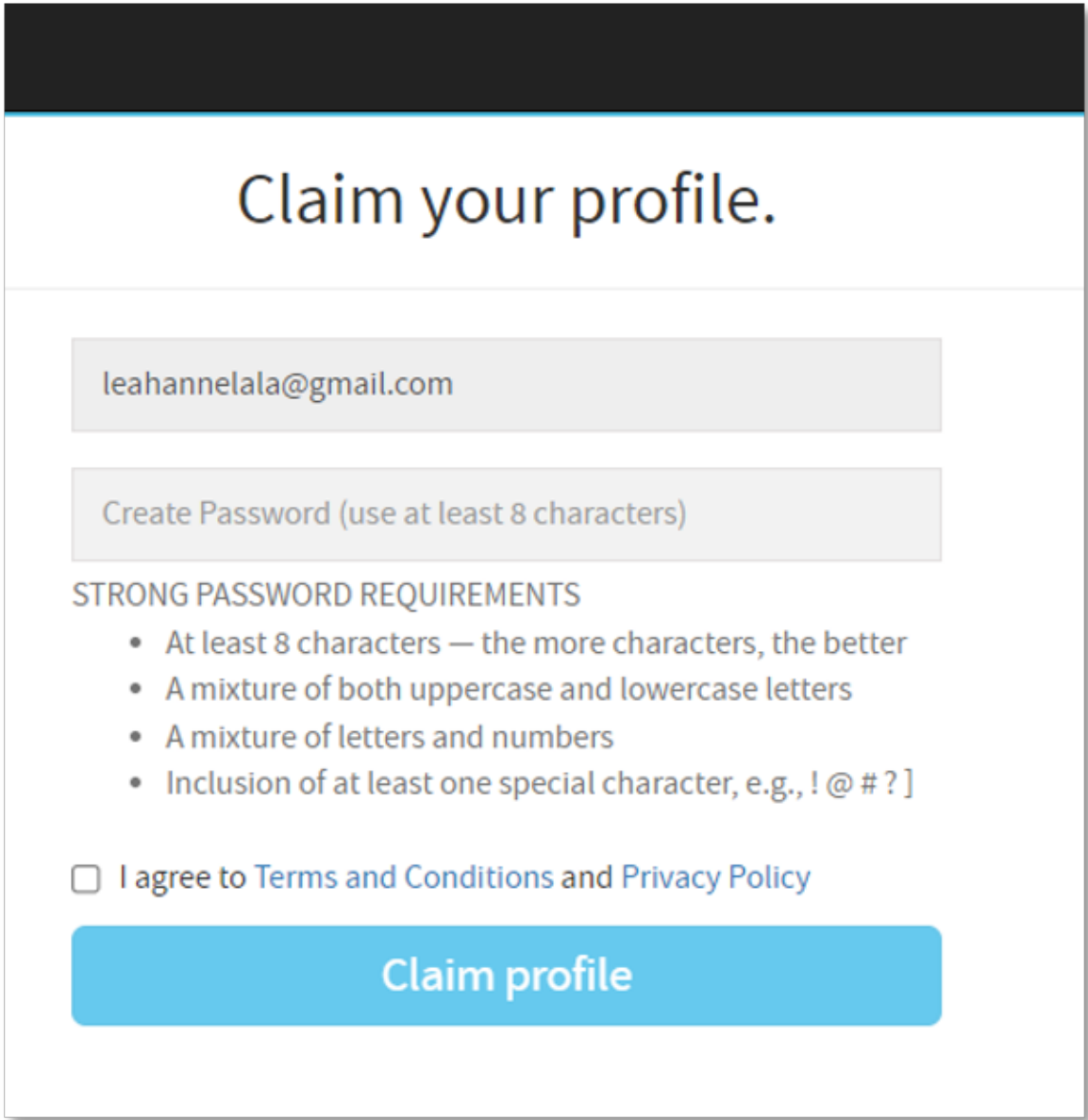
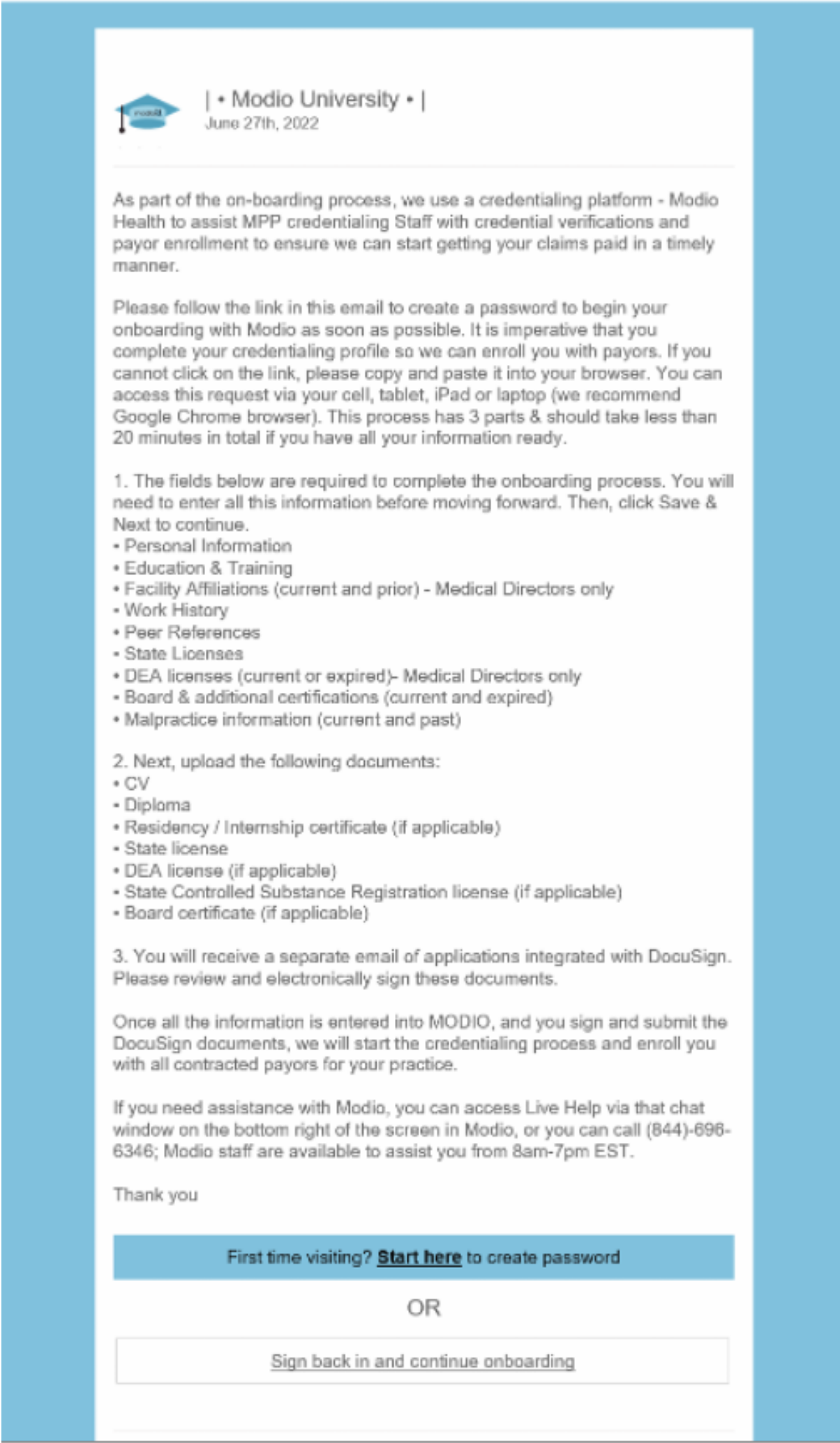


ONBOARDING: Next Steps

1. The provider will receive your message in their email.

2. The provider should click the link in your message, then claim their profile to start the onboarding process. The provider must use the **same email** address at which they received the invite.

3. The provider is guided through the credentialing data sections and prompted to fill out required data. (Talk to your account rep to set up custom requirements for each field.) Any information added during onboarding is automatically copied to the provider’s profile and available for viewing and editing. You can request that your provider upload a set of required or optional documents before completing onboarding (e.g. a CV or color photo).



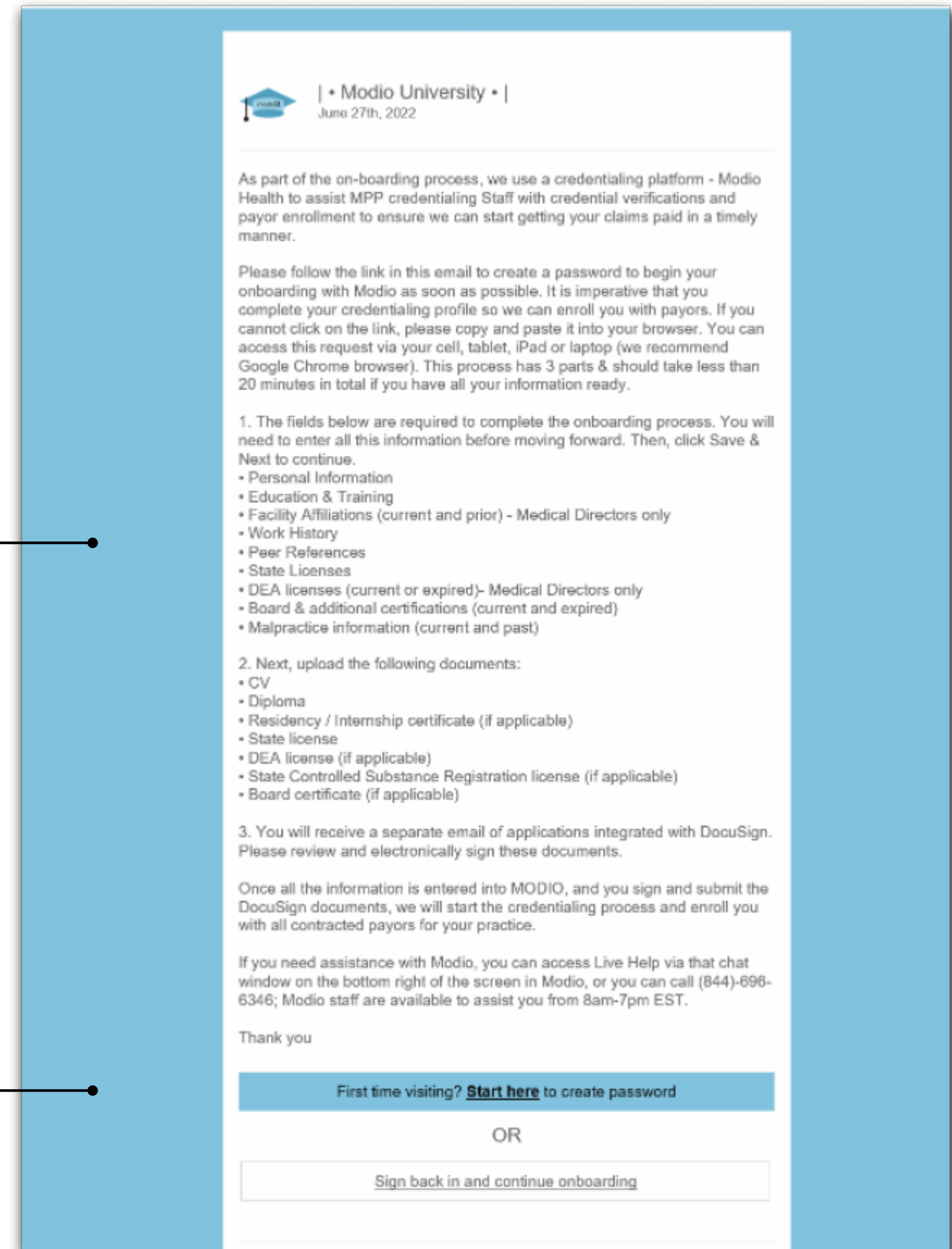


**ONBOARDING:** Step 1 - Welcome Email

Your provider will receive a welcome email in their inbox with a list of action items that require their attention in order to complete their onboarding process.

\*Emails can be customized to list specific steps required in onboarding for your practice. Contact your account manager to set up a custom invitation template.

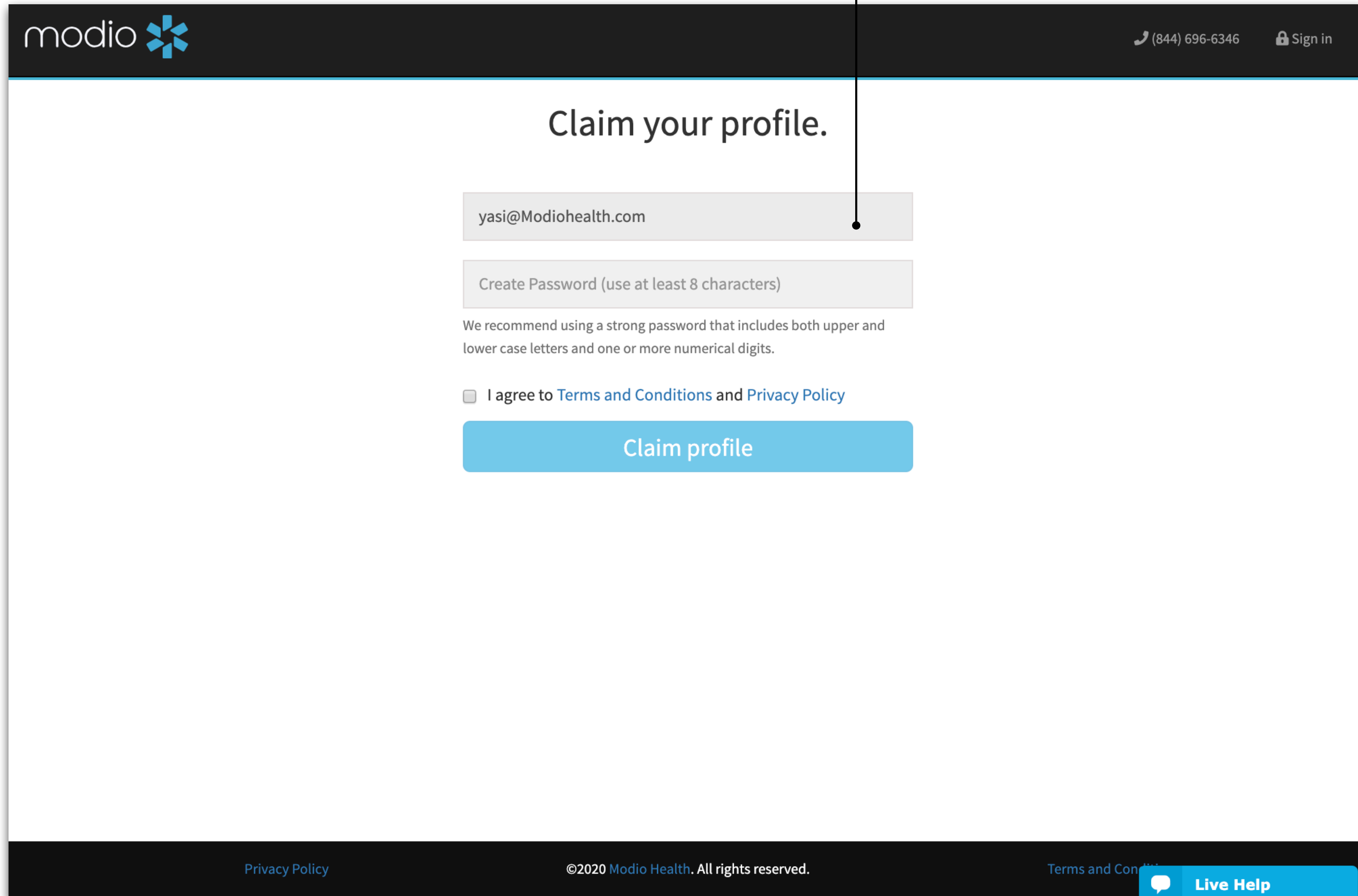
Provider will need to click the link in the email and then start their profile setup process.






## ONBOARDING: Step 2 - Claiming Profile

Providers will next navigate onto the Modio "Claim your provider profile" page and enter their email and create a password.



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(844) 696-6346 Sign in

### Claim your profile.

yasi@Modiohealth.com

Create Password (use at least 8 characters)

We recommend using a strong password that includes both upper and lower case letters and one or more numerical digits.

☐ I agree to [Terms and Conditions](#) and [Privacy Policy](#)

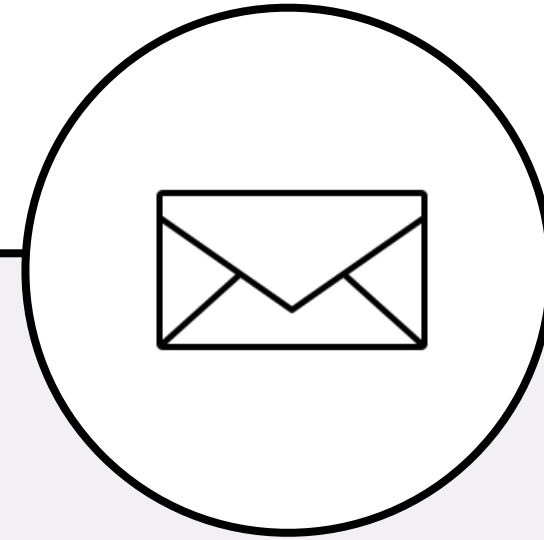
Claim profile

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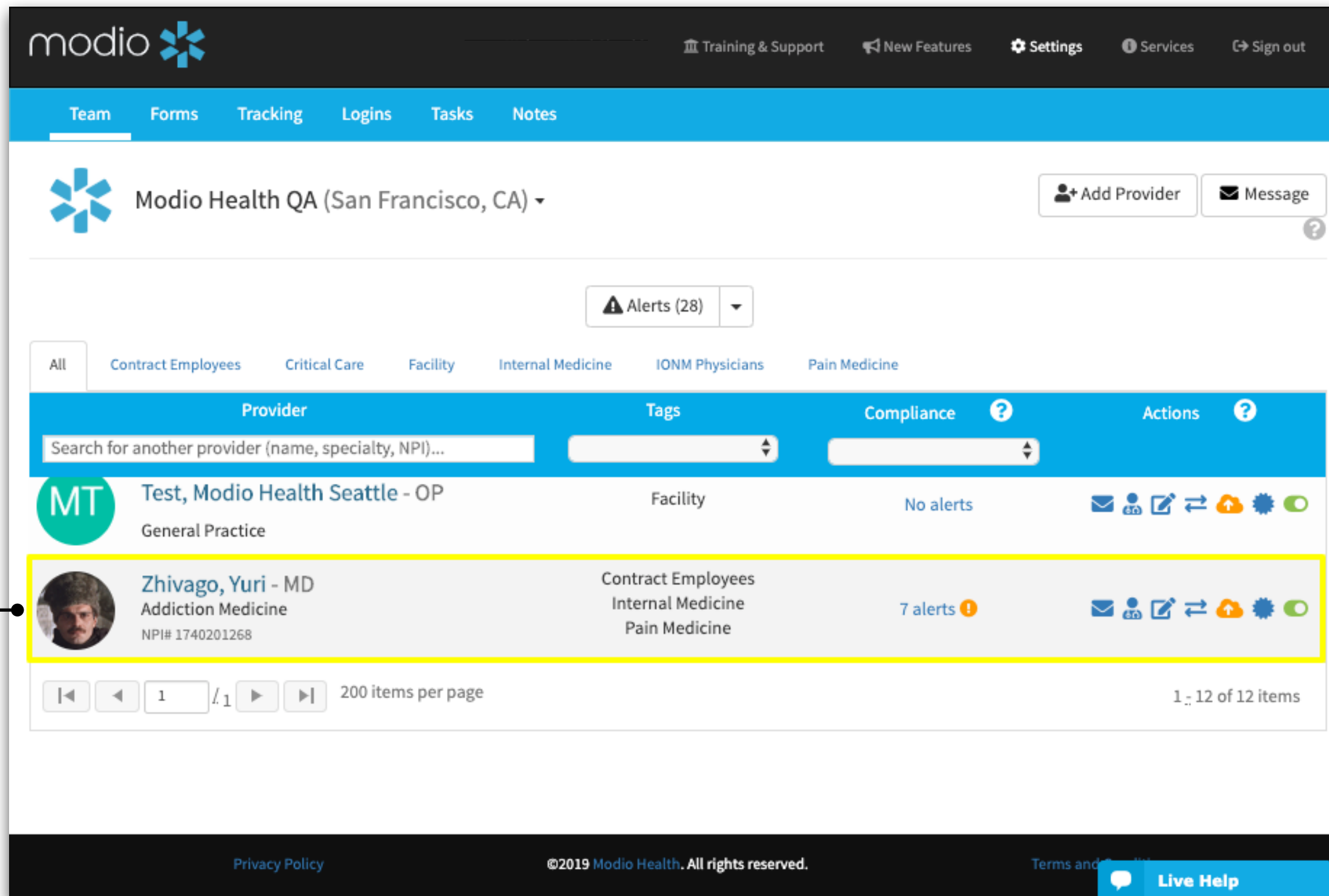






**Configuring Invitations for email  
template and applications.**



**ONBOARDING:** Creating Custom Onboarding Invitations

The screenshot shows the Modio Health QA (San Francisco, CA) team roster. The 'Zhivago, Yuri - MD' provider is highlighted with a yellow box. A line points from this box to the first instruction box.

Modio Health QA (San Francisco, CA) ▾

Alerts (28) ▾

All Contract Employees Critical Care Facility Internal Medicine IONM Physicians Pain Medicine

Provider Tags Compliance ? Actions ?

Search for another provider (name, specialty, NPI)...

MT Test, Modio Health Seattle - OP  
General Practice

Facility No alerts

Zhivago, Yuri - MD  
Addiction Medicine  
NPI# 1740201268

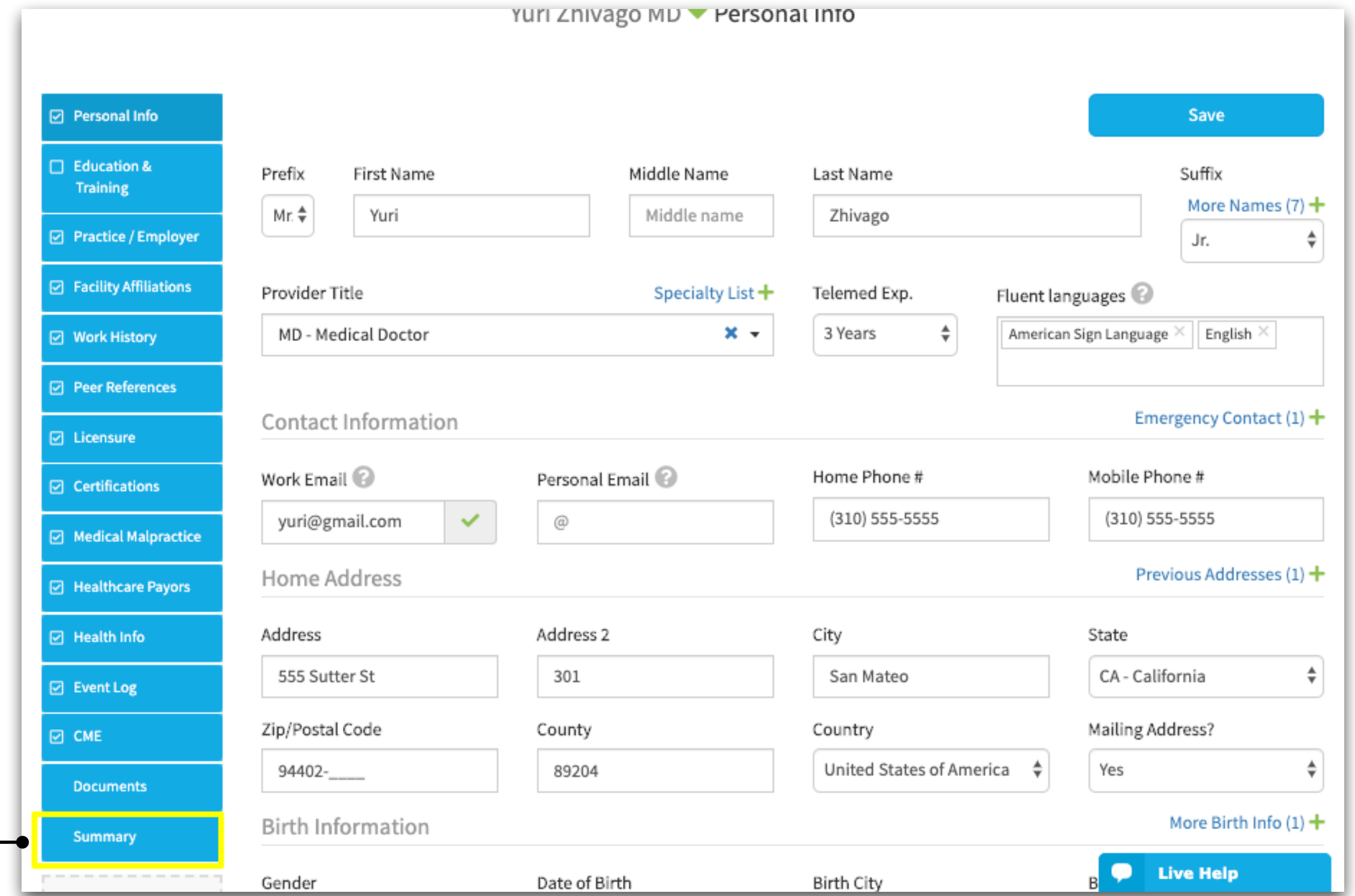
Contract Employees  
Internal Medicine  
Pain Medicine

7 alerts

1 / 1 200 items per page 1 - 12 of 12 items

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1. To create a custom onboarding application (which is attached to the invitation going out to your provider), start by clicking on any provider in your team roster. This will begin the process to create a custom invitation for your entire team.



The screenshot shows the 'Yuri Zhivago MD - Personal Info' form. The 'Summary' tab is highlighted with a yellow box. A line points from this box to the second instruction box.

Yuri Zhivago MD ▾ Personal Info

Save

Personal Info

Education & Training

Practice / Employer

Facility Affiliations

Work History

Peer References

Licensure

Certifications

Medical Malpractice

Healthcare Payors

Health Info

Event Log

CME

Documents

Summary

Prefix First Name Middle Name Last Name Suffix

Mr. Yuri Middle name Zhivago Jr. More Names (7) +

Provider Title Specialty List +

MD - Medical Doctor

Telemed Exp. 3 Years

Fluent languages ?

American Sign Language × English ×

Contact Information Emergency Contact (1) +

Work Email ? Personal Email ? Home Phone # Mobile Phone #

yuri@gmail.com ✓ @ (310) 555-5555 (310) 555-5555

Home Address Previous Addresses (1) +

Address Address 2 City State

555 Sutter St 301 San Mateo CA - California

Zip/Postal Code County Country Mailing Address?

94402-\_\_\_\_ 89204 United States of America Yes

Birth Information More Birth Info (1) +

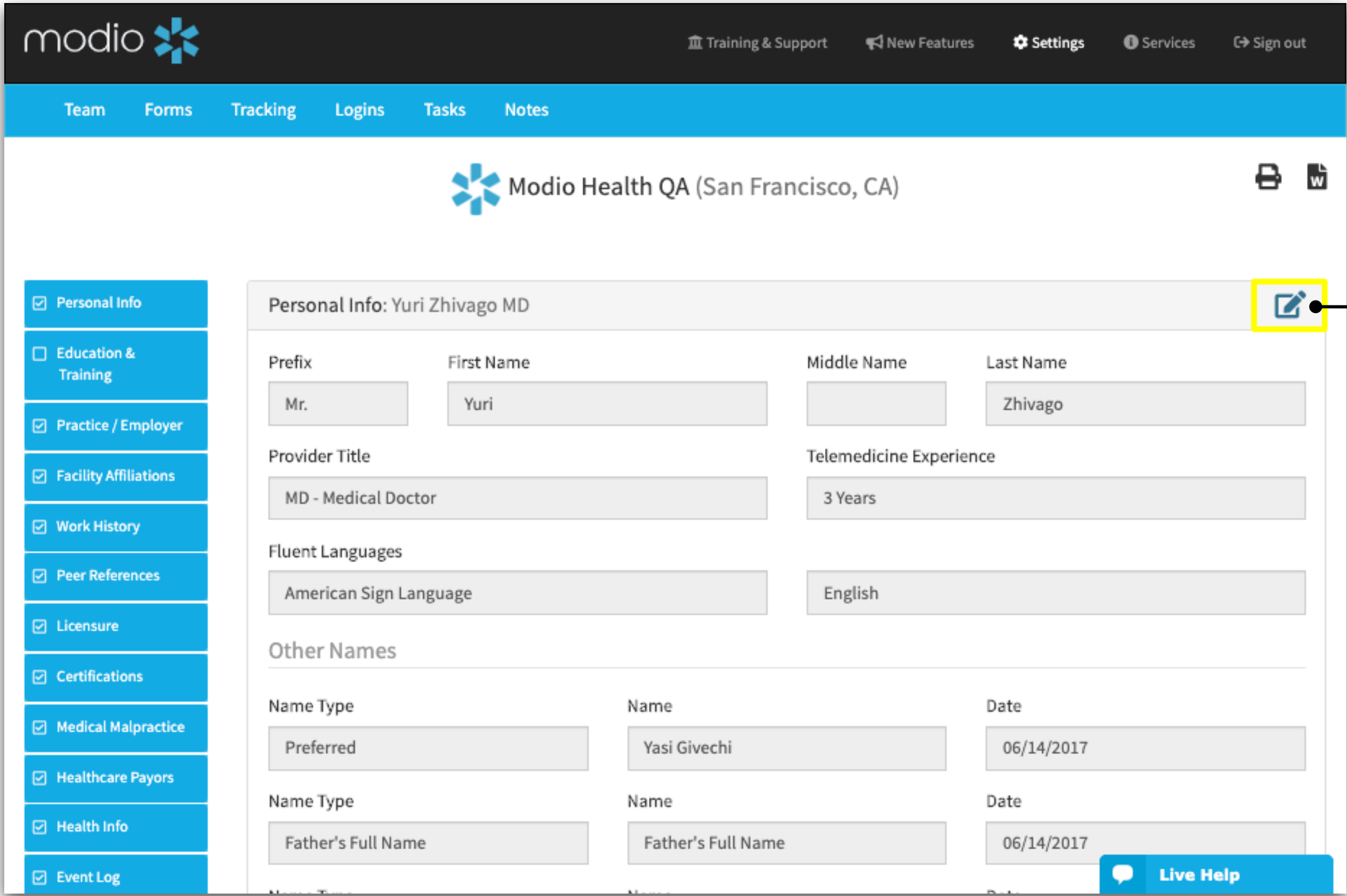
Gender Date of Birth Birth City

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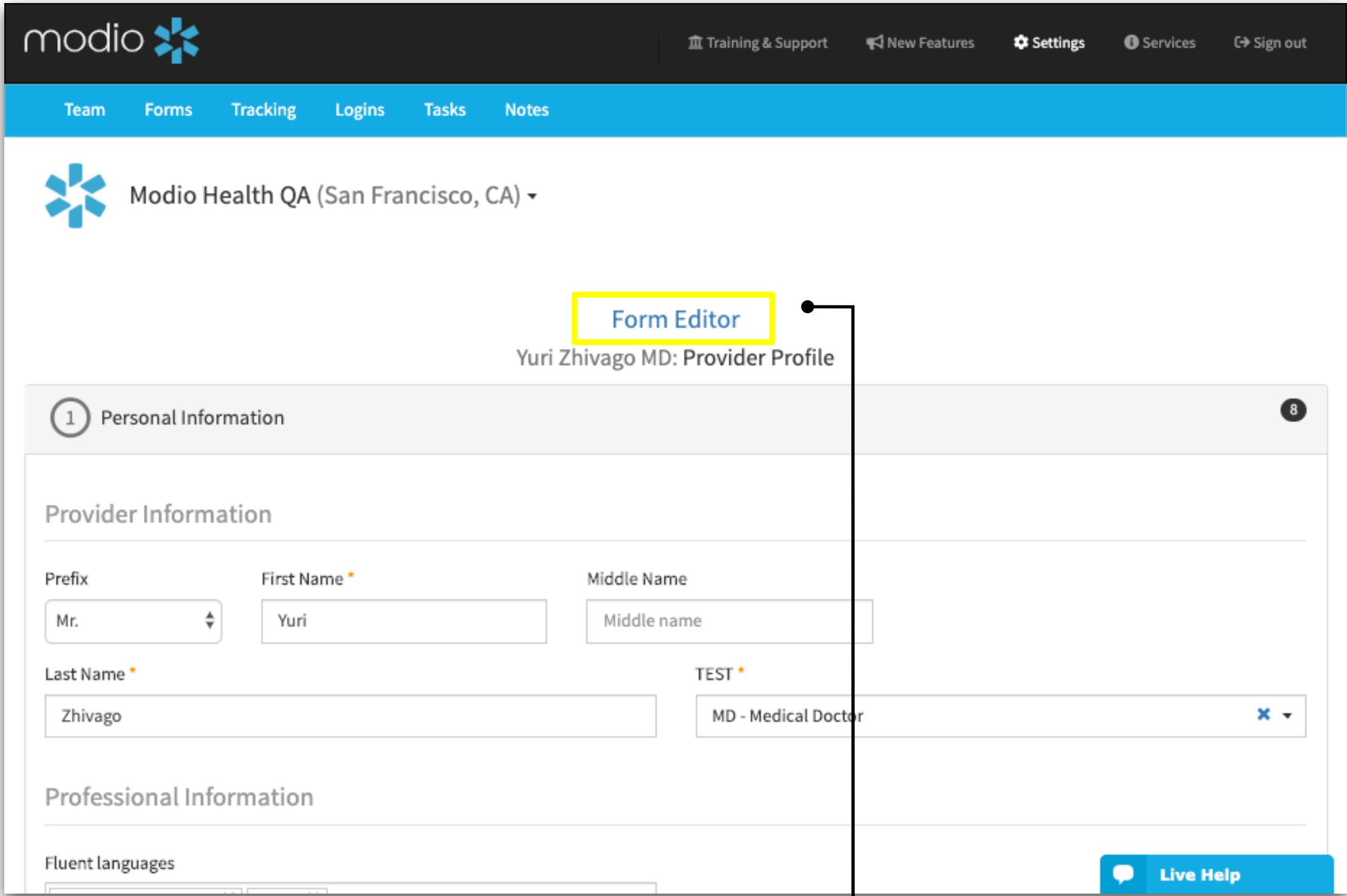
2. Click on the Summary tab.



**ONBOARDING:** Creating Custom Onboarding Invitations



3. Click on the Pencil and Paper "Edit" icon.



4. The **"Form Editor"** link will now appear on the top of the screen. From here, you can tailor your onboarding invitation fields or keep them as is with the default values.



ONBOARDING: Creating Custom Onboarding Invitations

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Team Candidates Jobs Forms Tracking Logins Tasks

Modio Health QA (San Francisco, CA)

Form Viewer

Provider Profile

1 Personal Information

Provider Information

First Name \* Middle Name Last Name \*

Provider Title \*

Prefix

Professional Information

Telemedicine Experience

Fluent languages

Contact Information

Work Email \* Personal Email Home Phone # Mobile Phone

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5. Once the **Form Editor** title changes to **Form Viewer**, you can start tailoring your invitation.

6. Click the paper and pencil edit icon to activate a specific field.

Team Forms Tracking Logins Tasks Notes

Edit Field

Label

Middle Name

Placeholder

Middle name

Enabled? Required? Read only? Order

30

Bootstrap Sizes (min value: 1, max value: 12)

Size lg Size md Size sm Size xs

5 3 12 12

Cancel Save

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**Label:** This can change to your desired field name.

**Placeholder:** This will allow for custom placeholder text for specific instructions in filling a field.

**Enabled:** if checked, this field is visible for your providers. If unchecked, the field won't be visible in the onboarding application and the field will move to the bottom of the section in the Form Editor. If you disable an entire section, such as "1 - Personal Information", the section will move to the bottom of the Form Editor page.

**Required:** if checked, your providers must fill out this field in order to proceed.



**Read-only:** if checked, this field will be visible to your providers but cannot be edited.



ONBOARDING: Form Viewer Icon Key



1

Personal Information





Provider Information



First Name \*





Middle Name






Last Name \*





Provider Title \*






Prefix 






Professional Information





Telemedicine Experience 





Fluent languages 





Contact Information





Work Email \*





Personal Email



Home Phone #




Mobile Phone





Form Section


Form Group


Form Fields


**Edit Icon:** Allows you to edit a specific field title, placeholder text, etc...


**Disable Section:** Allows you hide an entire section in the onboarding form.

**Disable Group:** Allows you hide an entire group within a section.

**Disable Field:** Allows you hide a field within the group.

**Enable Field:** Click here to bring a field back into your onboarding form.

**Hidden Field:** This indicates a hidden item (not visible to providers).

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Training & Support

New Features

Settings

Services

Sign out

Team

Candidates

Jobs

Forms


Tracking

Logins

Tasks

Modio Health QA (San Francisco, CA) ▾

Form Viewer

Provider Profile 

Live Help

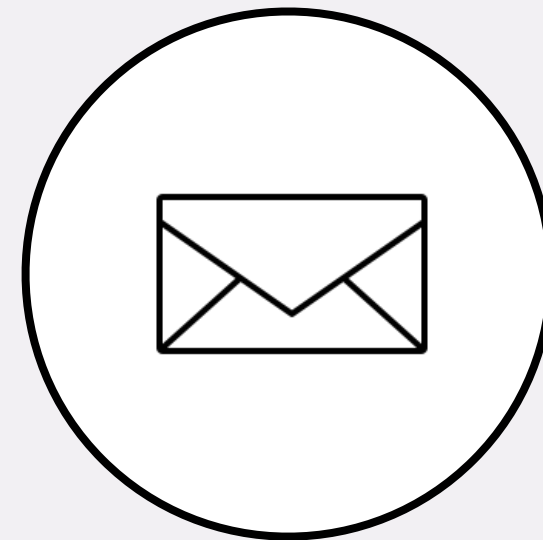


For additional questions or further training,  
contact the Modio Team via:

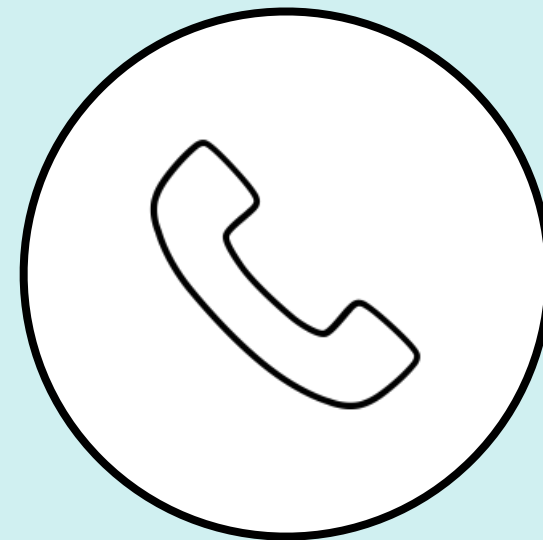
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**Online:**  
Live Chat Support



**Email:**  
[Support@modiohealth.com](mailto:Support@modiohealth.com)



**Phone:**  
844.696.6346