



OneView[™]

Provider Onboarding

ONBOARDING: DASHBOARD

The screenshot shows the Modio dashboard for 'Modio Health QA (San Francisco, CA)'. At the top, there are navigation links for Team, Forms, Tracking, Logins, Tasks, and Notes. Below this is a search bar for provider names, specialties, or NPI numbers. A table lists five providers with columns for Provider, Tags, Compliance, and Actions. The Actions column contains icons representing different onboarding statuses. A callout box on the right explains these icons.

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

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.

The screenshot shows the 'Add Provider' form with the following fields and options:

- Teams:** A dropdown menu with 'Modio Health QA (San Francisco, CA)' selected.
- Tags:** A text input field with three dots indicating a list.
- Provider Full Name *:** A text input field with the placeholder 'Type a first and last name...'.
- Provider Title *:** A dropdown menu with three dots.
- Specialty List *:** A dropdown menu with three dots.
- Provider Email *:** A text input field.
- Notify provider by email:** A checkbox that is currently unchecked.

At the bottom of the form are 'Cancel' and 'Save' buttons. The background shows a mobile app interface with a navigation bar containing 'Team', 'Forms', and 'Track'. Below the navigation bar is a search bar and a list of provider profiles, including 'Marten, Lily - MD Family Medicine' and 'Zhivago, Yuri - DF'. A floating action button with a plus sign and the text '+ Add Provider' is visible in the background.

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.

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). There are message templates available to help you get started. Those templates are located on the ModioU tab next to the Onboarding video.

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.

Invite to Modio Health (San Francisco, CA)

Email Providers:

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

Template & Attachment ✎

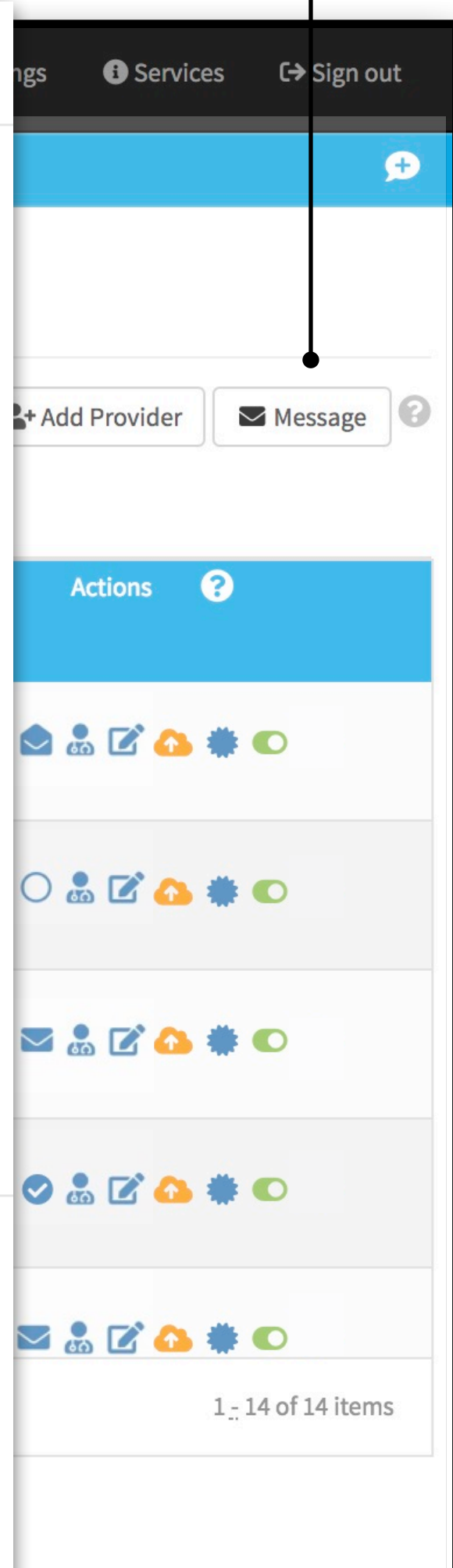
Invite Provider ▼ No file chosen

Email Subject

Email Message

New Invitations (2) Select All

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



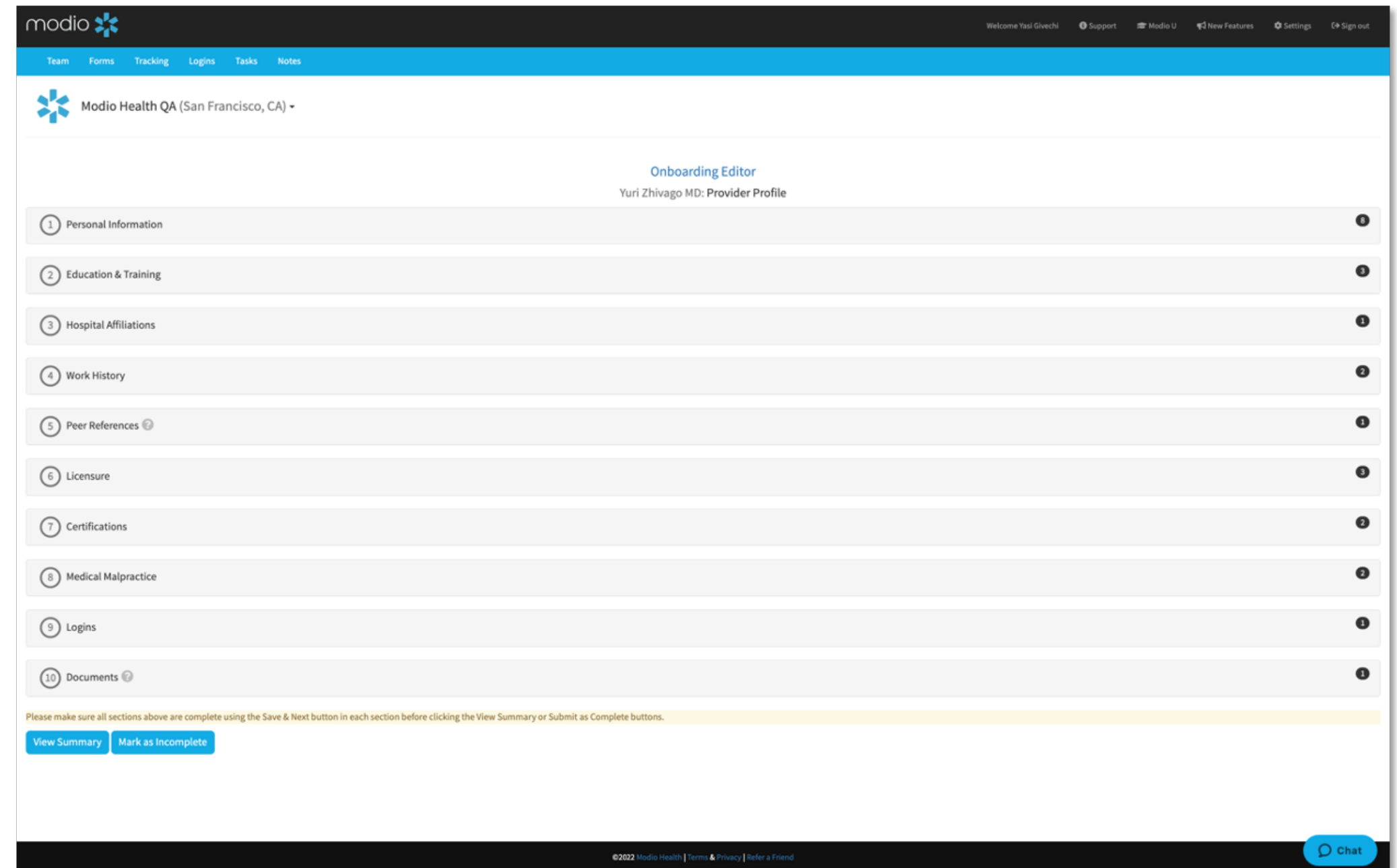
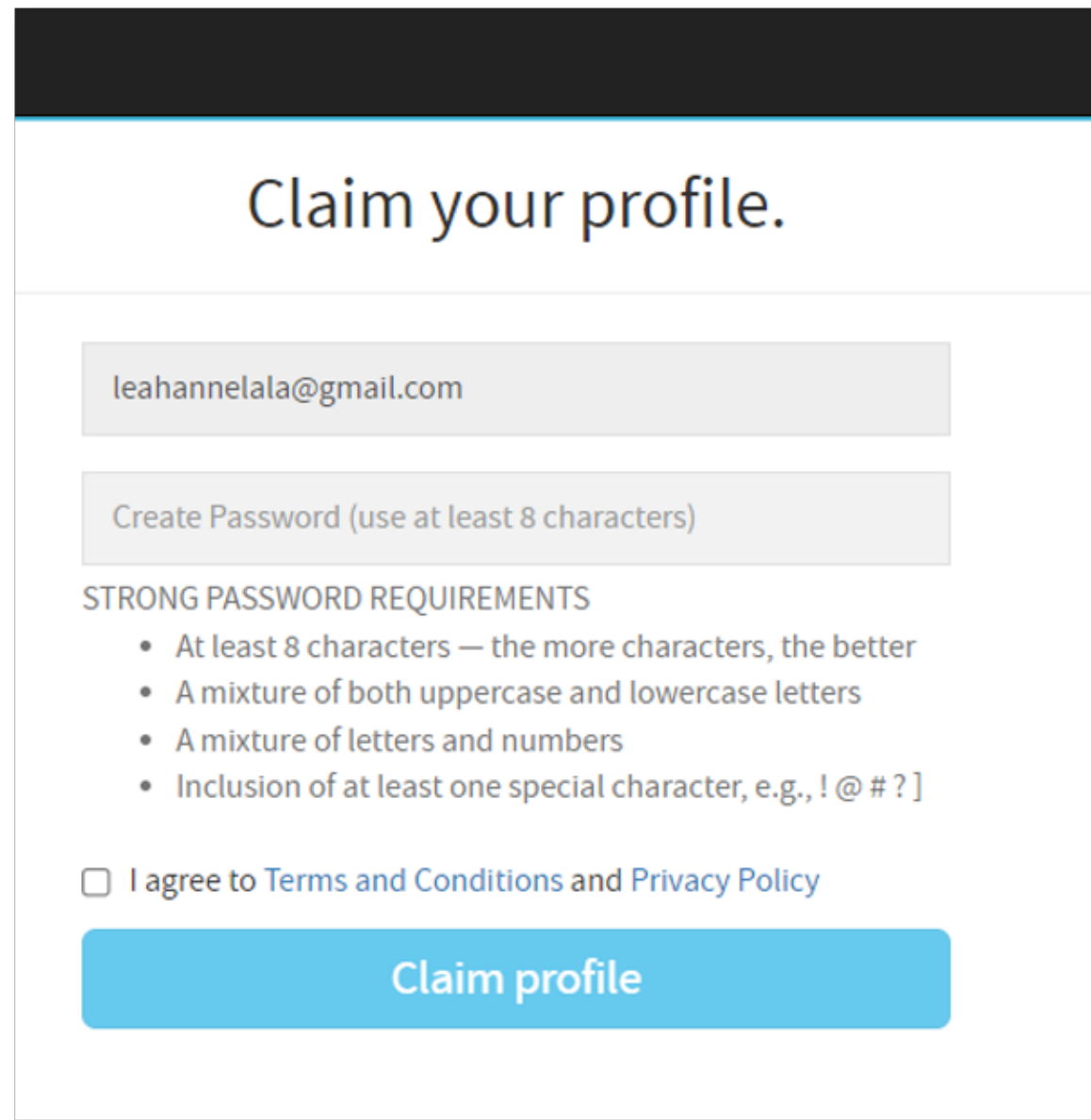
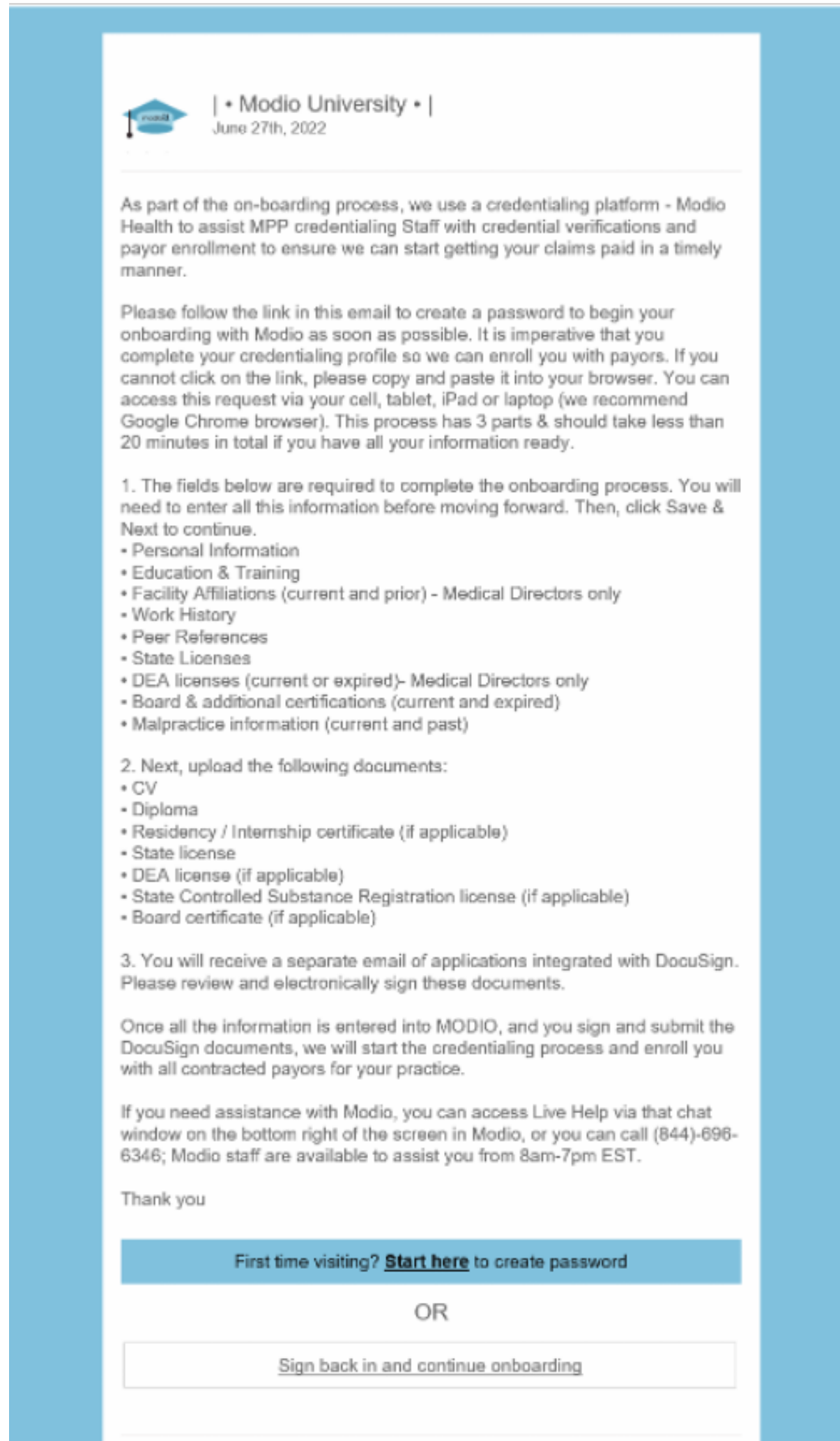
New Invitations:
Click here to add more providers to the invitation list.

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).

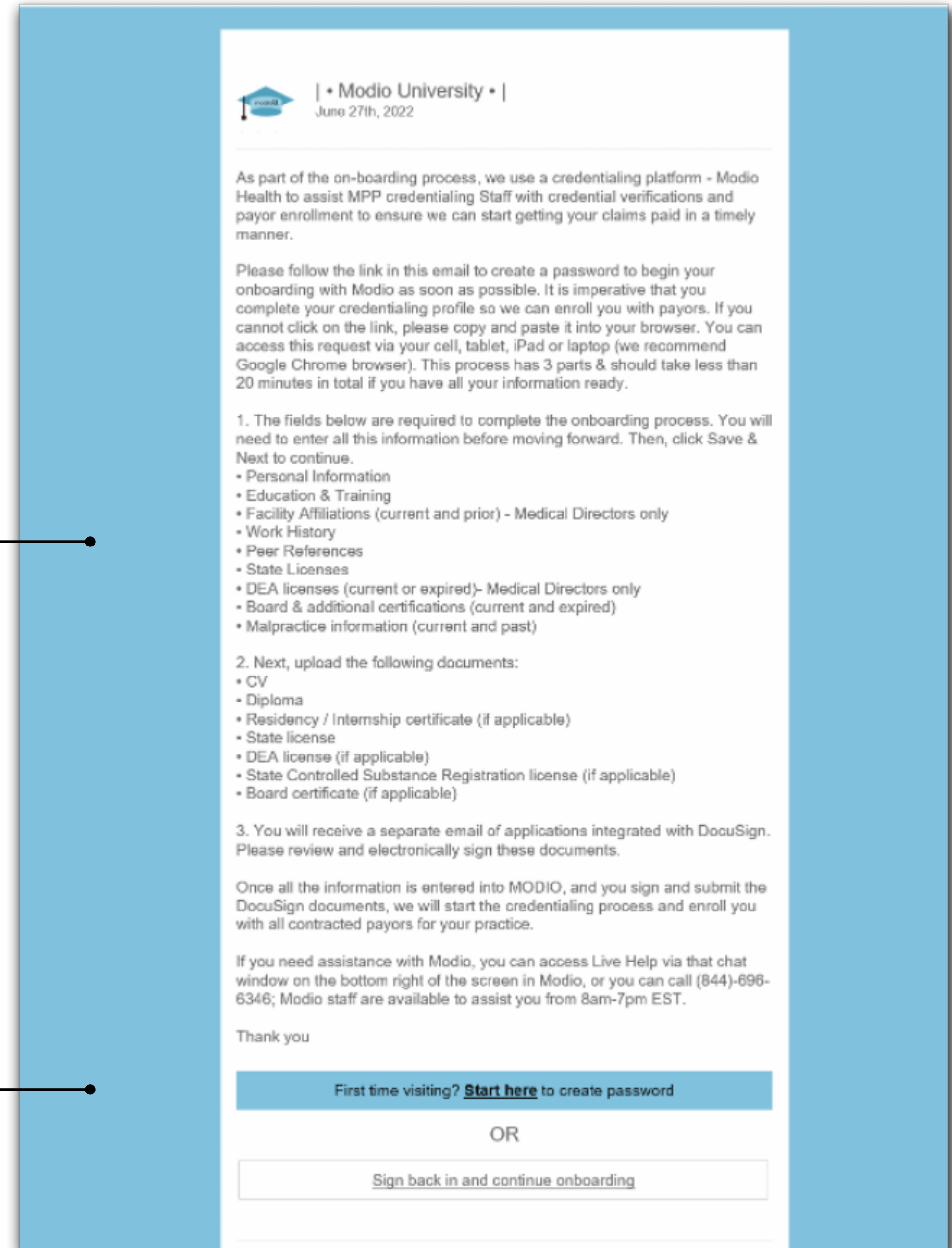


ONBOARDING: Step 1 - Welcome Email

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.

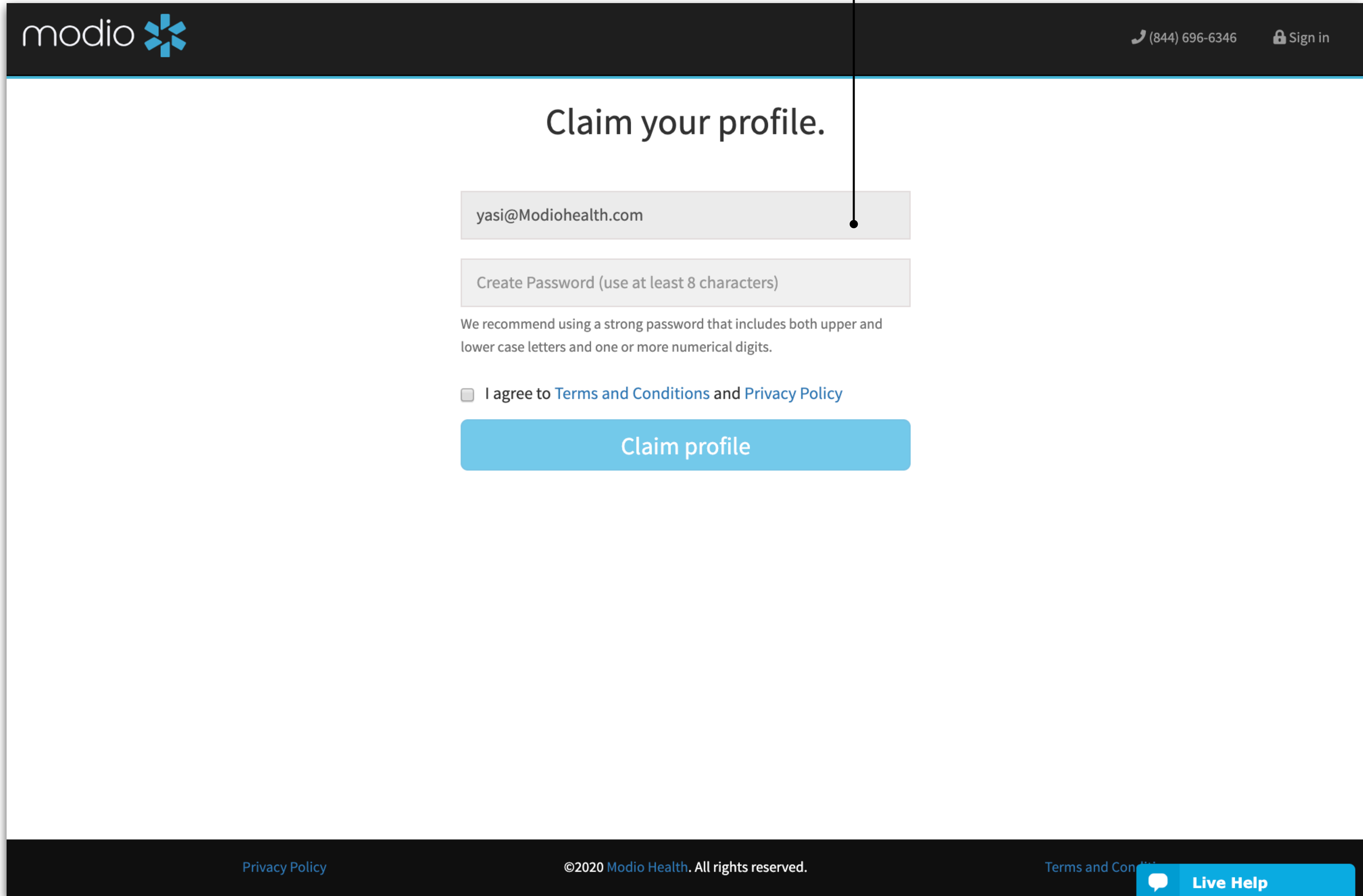
*Emails can be customized to list specific steps required in onboarding for your practice. Contact your account manager to set up a custom invitation template.


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.



modio 

(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

Privacy Policy ©2020 Modio Health. All rights reserved. Terms and Conditions Live Help

ONBOARDING: Step 3 - Completing Onboarding Page

Finally, the provider will be directed to the onboarding page in OneView®.

From here, they will be asked to fill in the following information (unless specified otherwise in your initial email) :

- Personal Information
- Education and Training
- Hospital Affiliations
- Work History
- Peer References
- Licensure
- Certifications
- Medical Malpractice
- Logins
- Documents

modio

Welcome Bernie Mann | (844) 696-6346 | Settings | Help | Sign out

Dashboard | Manage Credentials | Logins | Tasks | CME

Modio Health QA (San Francisco, CA) -

Bernie Mann MD: Provider Profile

1 Personal Information

Provider Information

First Name * Middle Name Last Name *

Bernie Middle name Mann

Provider Title *

MD - Medical Doctor

Professional Information

Fluent languages

Select languages...

Contact Information

Work Email * Personal Email Home Phone # Mobile Phone

yasi.givechi@modiohealth.com @ () ()

Emergency Contact Information

Contact Name Contact Type Email Phone #

Contact name Contact type Email ()

Home Address

Address Address 2 City State

Home address Home address 2 Home city Birth state

Zip Code County Country Mailing Address?

() Home county United States of America

Birth Information

Gender Date of Birth Birth City Birth State

mm/dd/yyyy Birth city Birth state

Birth County Birth Country Country of Citizenship Citizenship Type

Birth county () () ()

Identification

NPI # Driver License or ID # State Issued Expiration Date

1999999991 () () () mm/dd/yyyy

Social Security #

() () ()

Save & Next

2 Education & Training

3 Hospital Affiliations

4 Work History

5 Peer References

6 Licensure

7 Certifications

8 Medical Malpractice

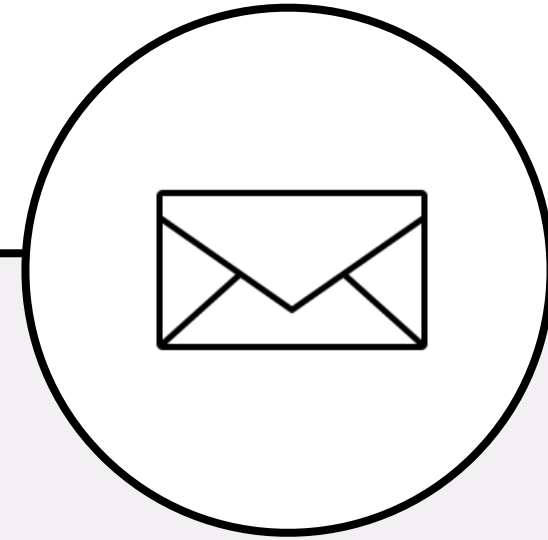
9 Logins

10 Documents

Please make sure all sections above are complete using the Save & Next button in each section before clicking the View Summary or Submit as Complete buttons.

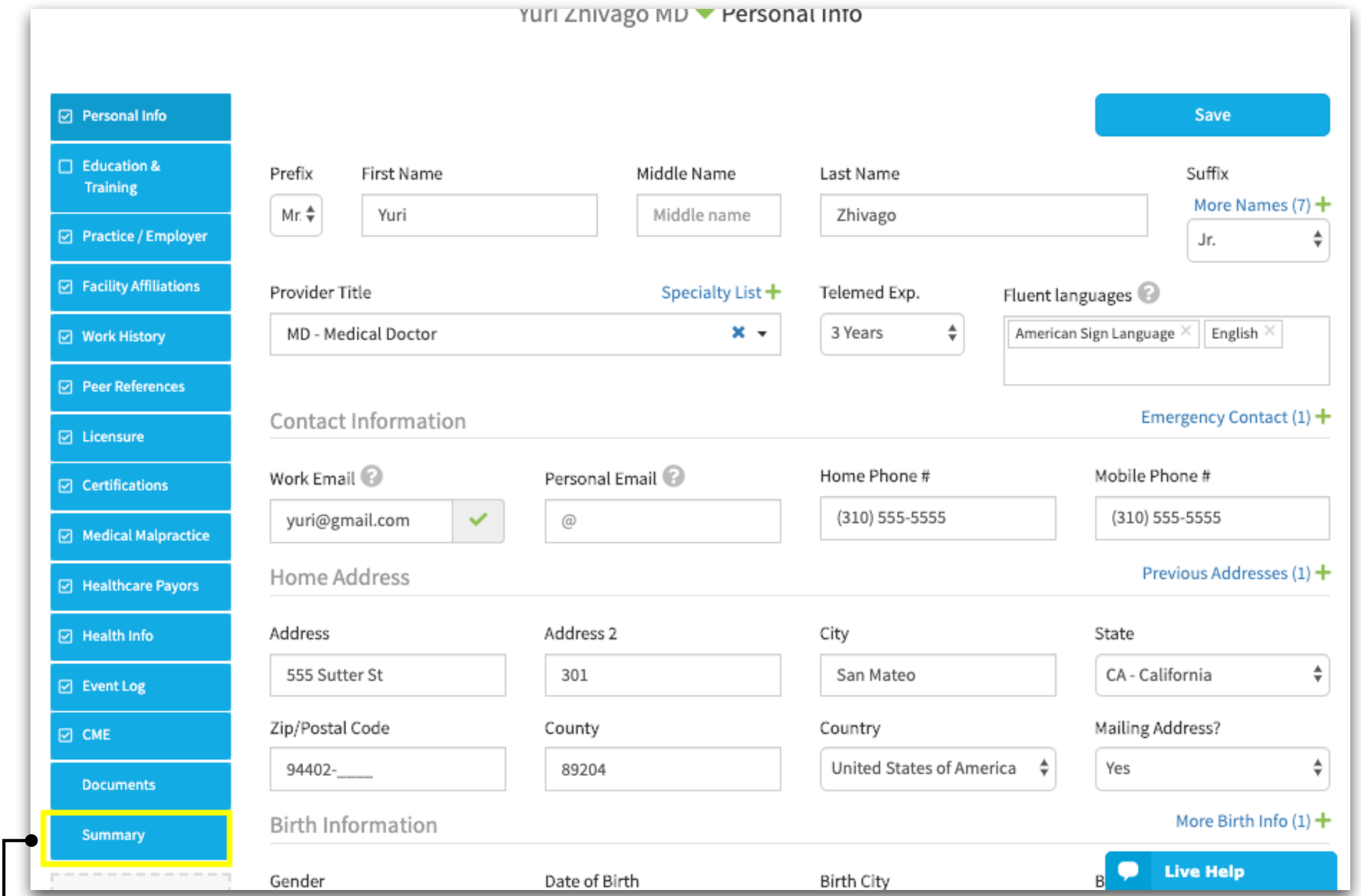
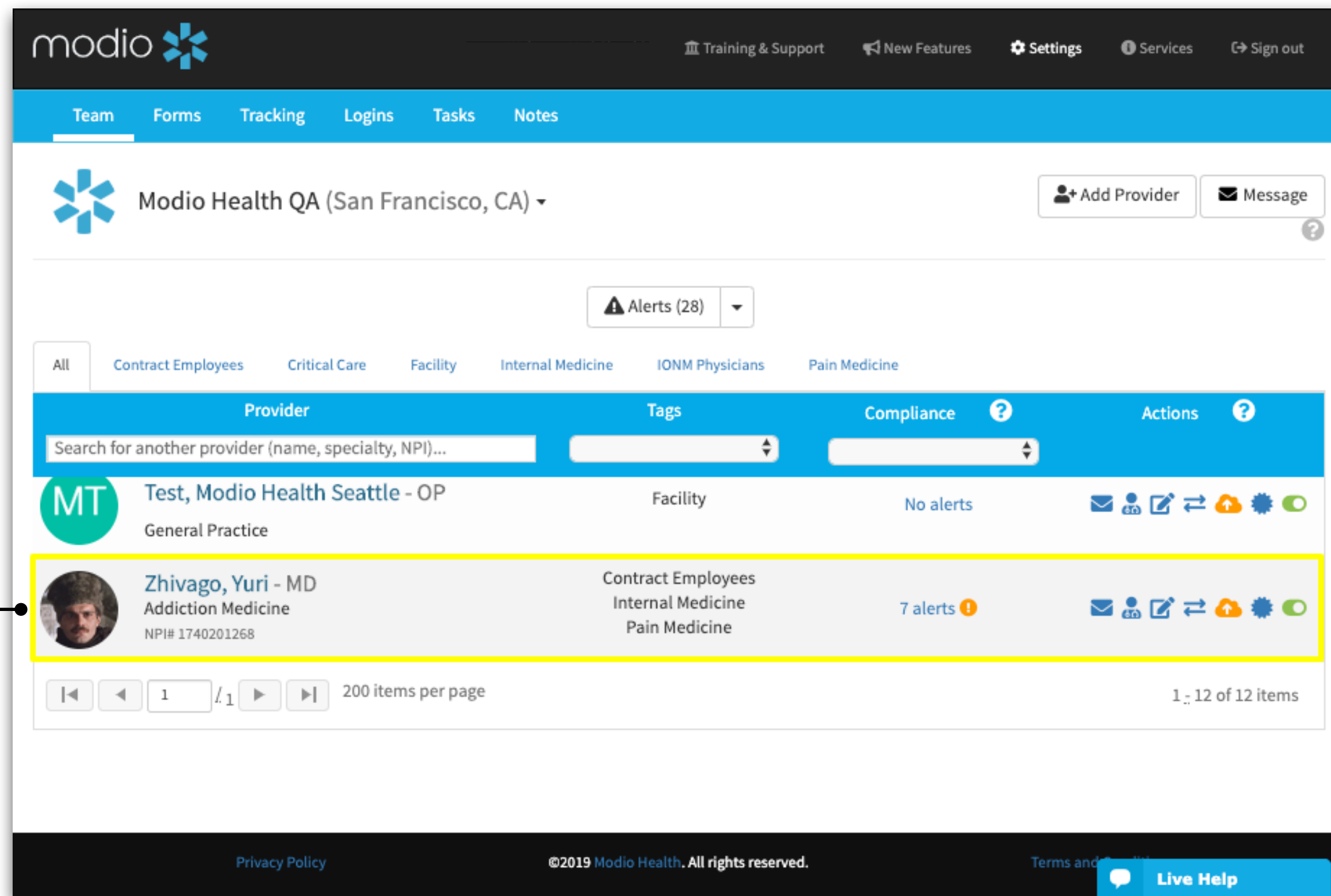
View Summary Submit as Complete

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

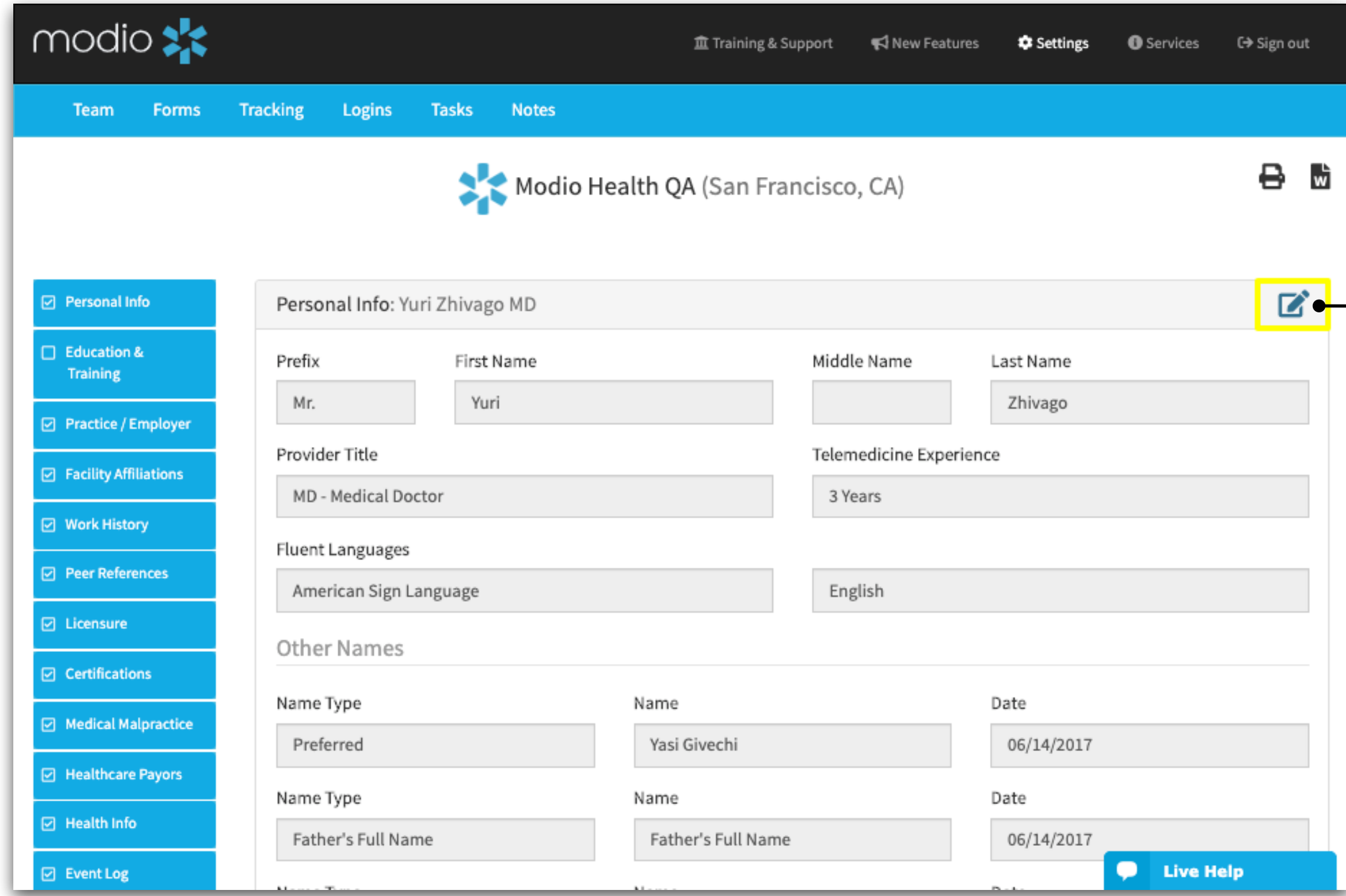
ONBOARDING: Creating Custom Onboarding Invitations



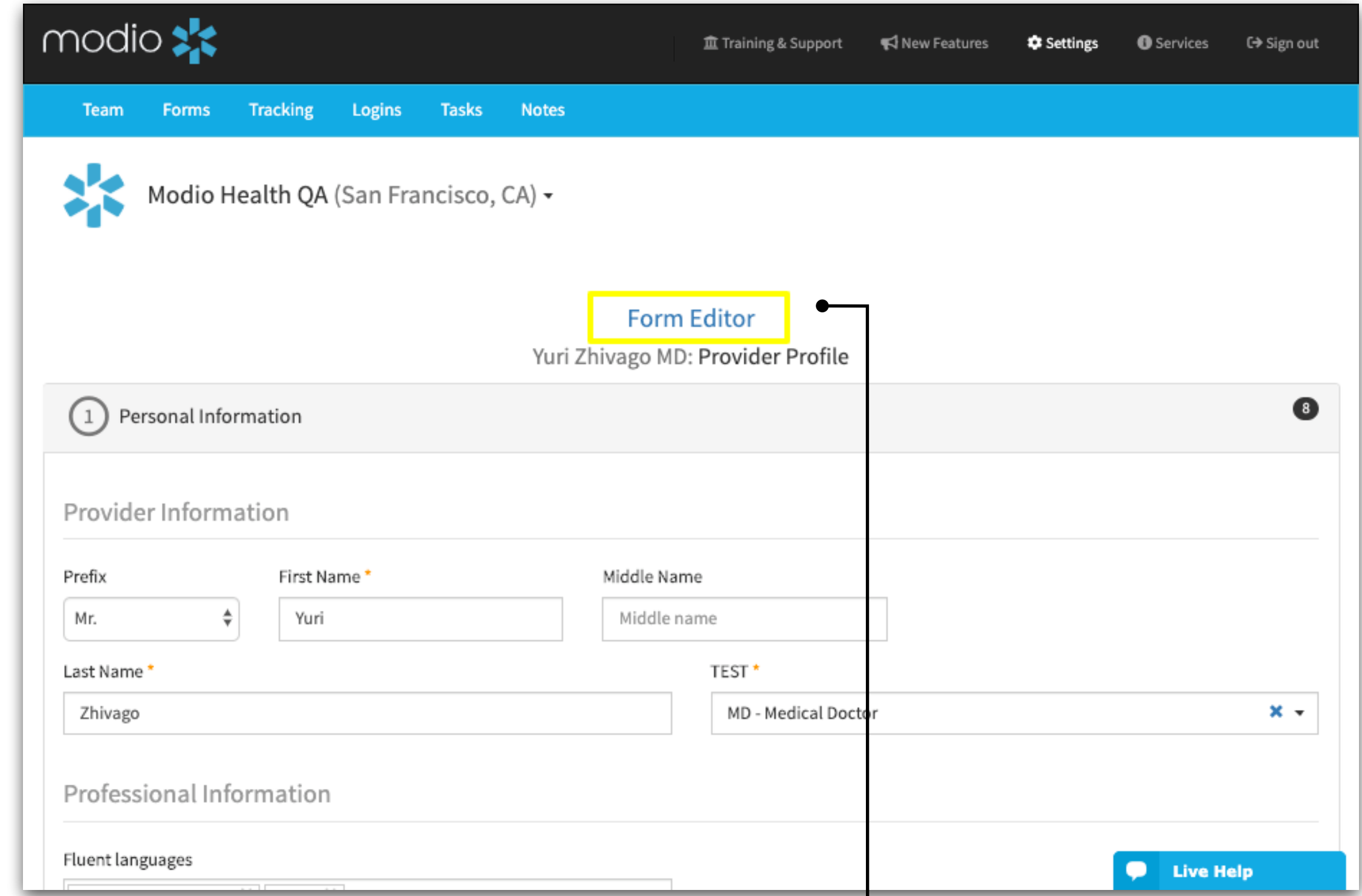
1. To create a custom onboarding application (which is attached to the invitation going out to your provider), start by clicking on any provider in your team roster. This will begin the process to create a custom invitation for your entire team.

2. Click on the Summary tab.

ONBOARDING: Creating Custom Onboarding Invitations

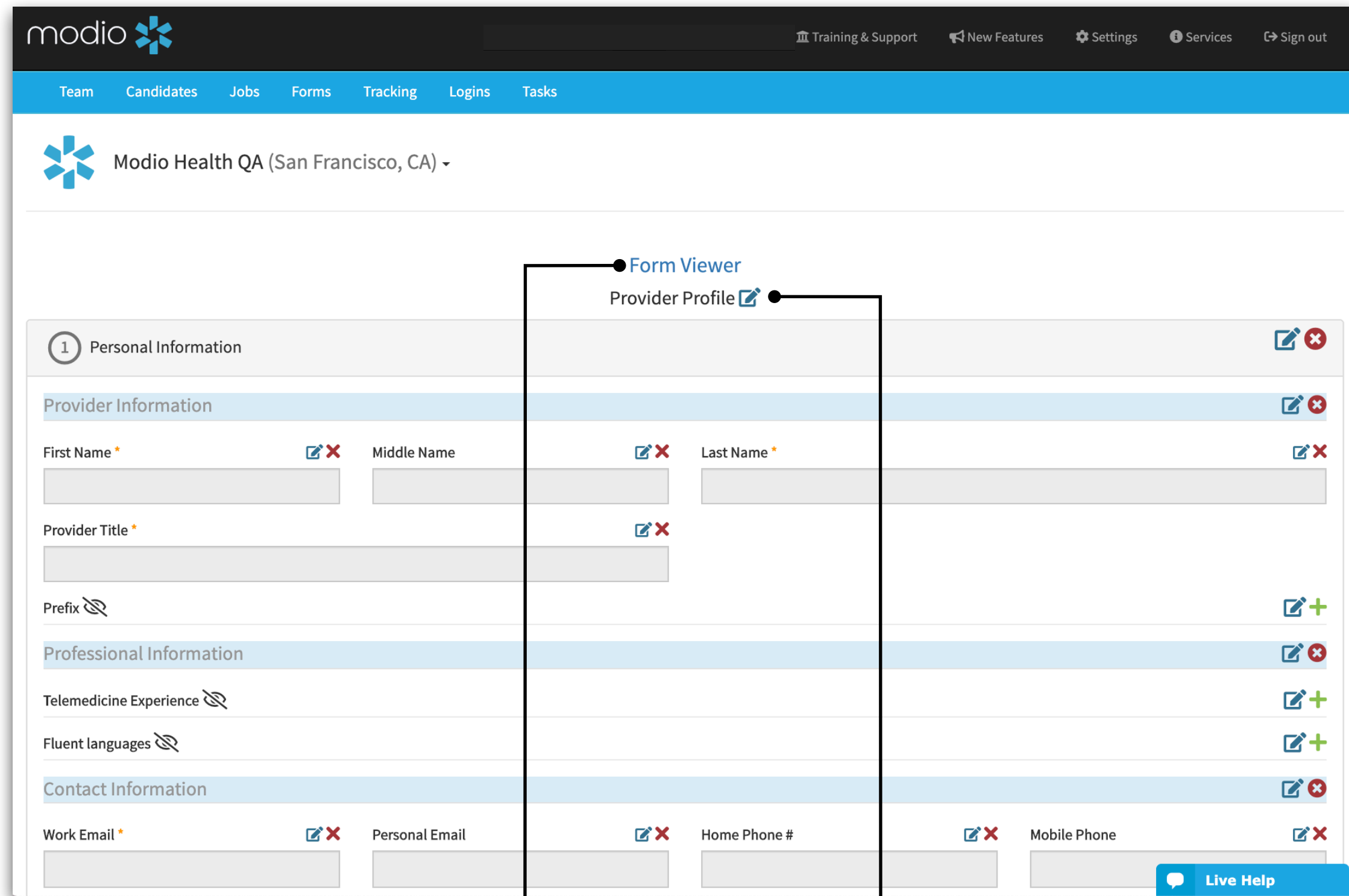


3. Click on the Pencil and Paper "Edit" icon.



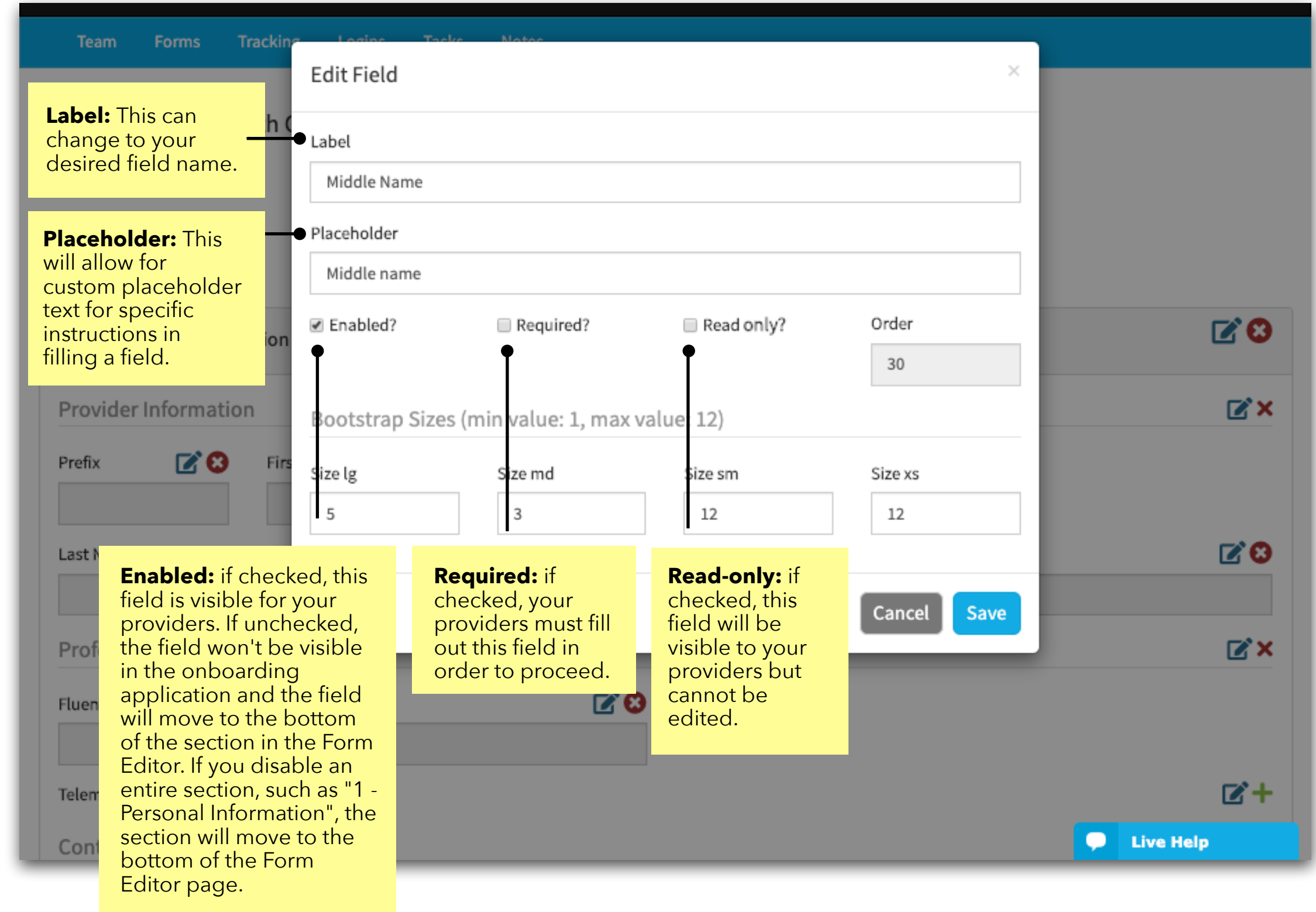
4. The "Form Editor" link will now appear on the top of the screen. From here, you can tailor your onboarding invitation fields or keep them as is with the default values.

ONBOARDING: Creating Custom Onboarding Invitations



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.



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

Form Section

1 Personal Information

Form Group

Provider Information

Form Fields

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

Live Help

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

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

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

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

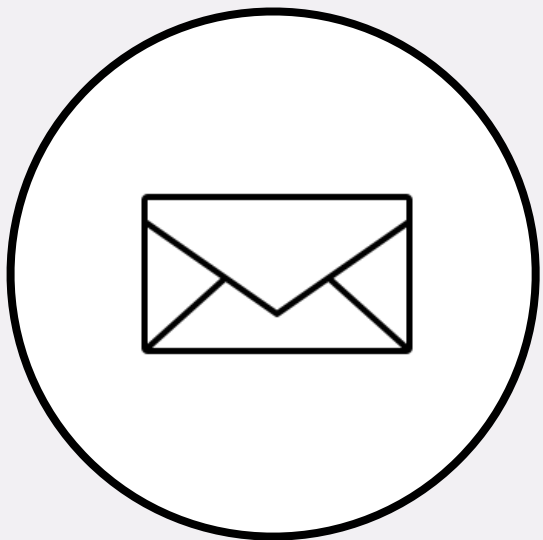
Enable Field: Click here to bring a field back into your onboarding form.

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

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



Online:
Live Chat Support



Email:
Support@modiohealth.com



Phone:
844.696.6346