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Tip Guide: Copy Feature

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**Copy Feature Introduction:**

Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and individual profiles support the copy feature.

The **Copy** feature is available in these three sections:

- Practice/Employer
- Facility Affiliation
- Healthcare Payors




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Yuri Zhivago MD ▼ Healthcare Payors

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- Practice / Employer
- Facility Affiliations
- Work History
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### Healthcare Payors 5

Payor Name	State	Provider #	Effective Date	End Date	Status	Actions
... Envolve - Commercial ☆ CT - 151 - Cheshire (1785 Highland Ave, Cheshire, CT 06410-1272) TIN: 475525260 Group NPI: 1669846465	CT	-	-	05/24/2025	Pending Contract	   
Humana Inc. ☆ CT - 150 - Ansonia (145 Wakelee Ave, Ansonia, CT 06401-1176) TIN: 475525260 Group NPI: 1396119194	CT	-	-	-	Pending	   
☆ CT - 151 - Cheshire (1785 Highland Ave, Cheshire, CT 06410-1272) TIN: 475525260 Group NPI: 1669846465		-	-	-	Pending	   
☆ CT - 154 - Hamden (2165 Dixwell Ave, Hamden, CT 06514-2116) TIN: 475525260 Group NPI: 1033583745		-	-	-	Pending	   
Other United Healthcare (UHC) ☆ Modio Health - OnDemand (2228 W Great Neck Rd, Ste 205, Virginia Beach, VA 23451)		-	-	-	Submitted Application	   
United Healthcare (UHC)		-	-	-	-	   

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**Tip Guide: Copy Feature - Practice/Employer & Facility Affiliations**

**Navigate to the profile you wish to add locations to. Use the copy function to quickly add multiple locations to existing profiles.**

**Step 1** - Select the copy button from the lower right side. The **"Copy to:"** section will auto populate the name of the profile you are currently in. (note - If this section is blank, select "Cancel" and click "Copy" again.)

**Step 2** - You have a choice to select either the "Copy from:" or "Location(s)" section.

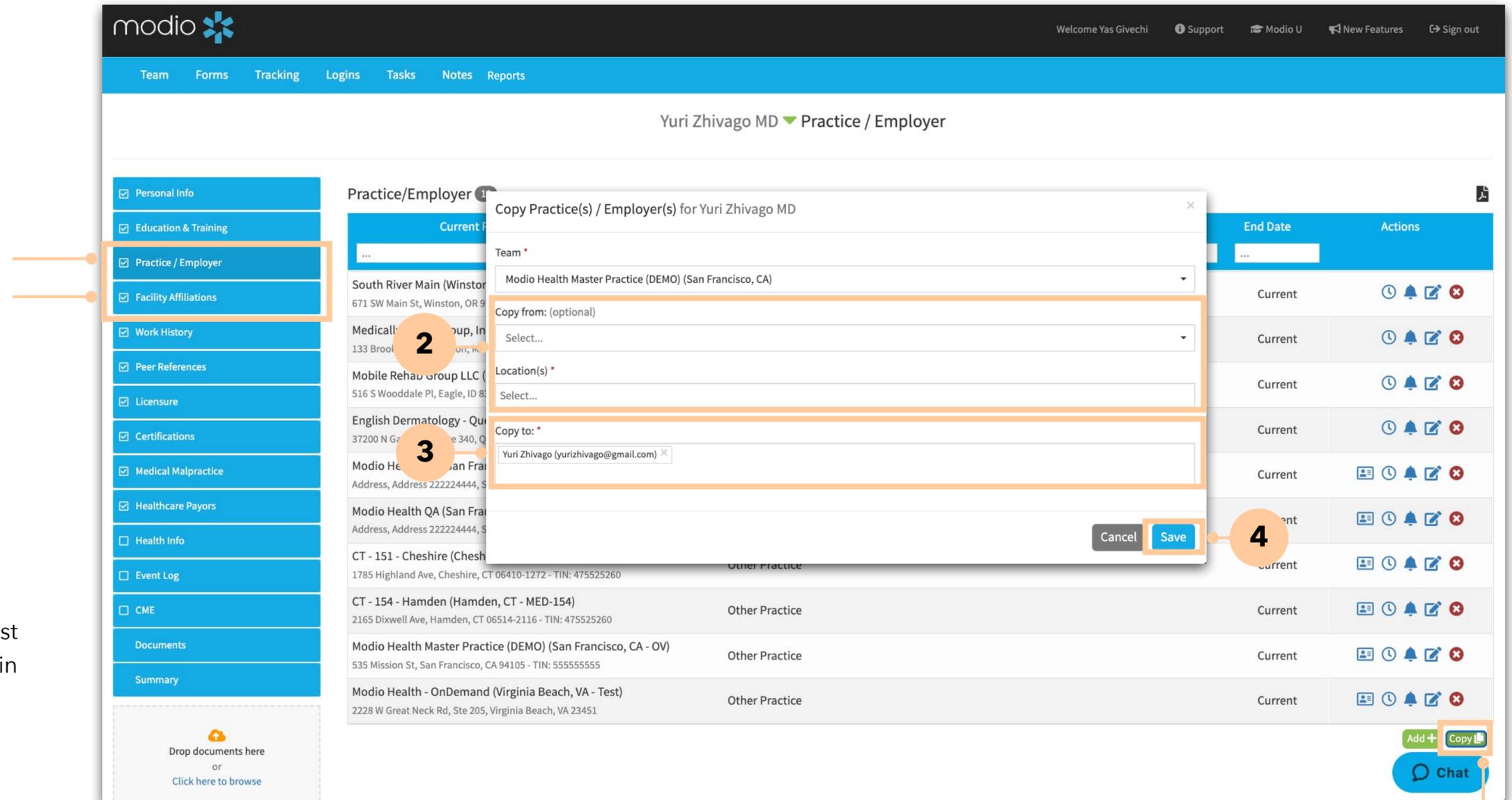
**Step 3** - Review the locations you have selected. Use the small gray "x" to remove any locations that you may not need.

**Step 4** - Click **Save**. The selected locations will now appear in the provider profile.

**KEY**

**Copy from:** This will display a drop down of all other profiles in your team roster. Select a profile from that list and the locations attached to that profile will appear in the location section.

**Locations:** This section will provide a drop down of individual locations that you can chose from. You will have the option to select as many locations from the drop down as you would like.



1

**Start here!**

**Tip Guide: Copy Feature - Copy a group of payors from one profile to another**

Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and individual profiles have the copy feature.

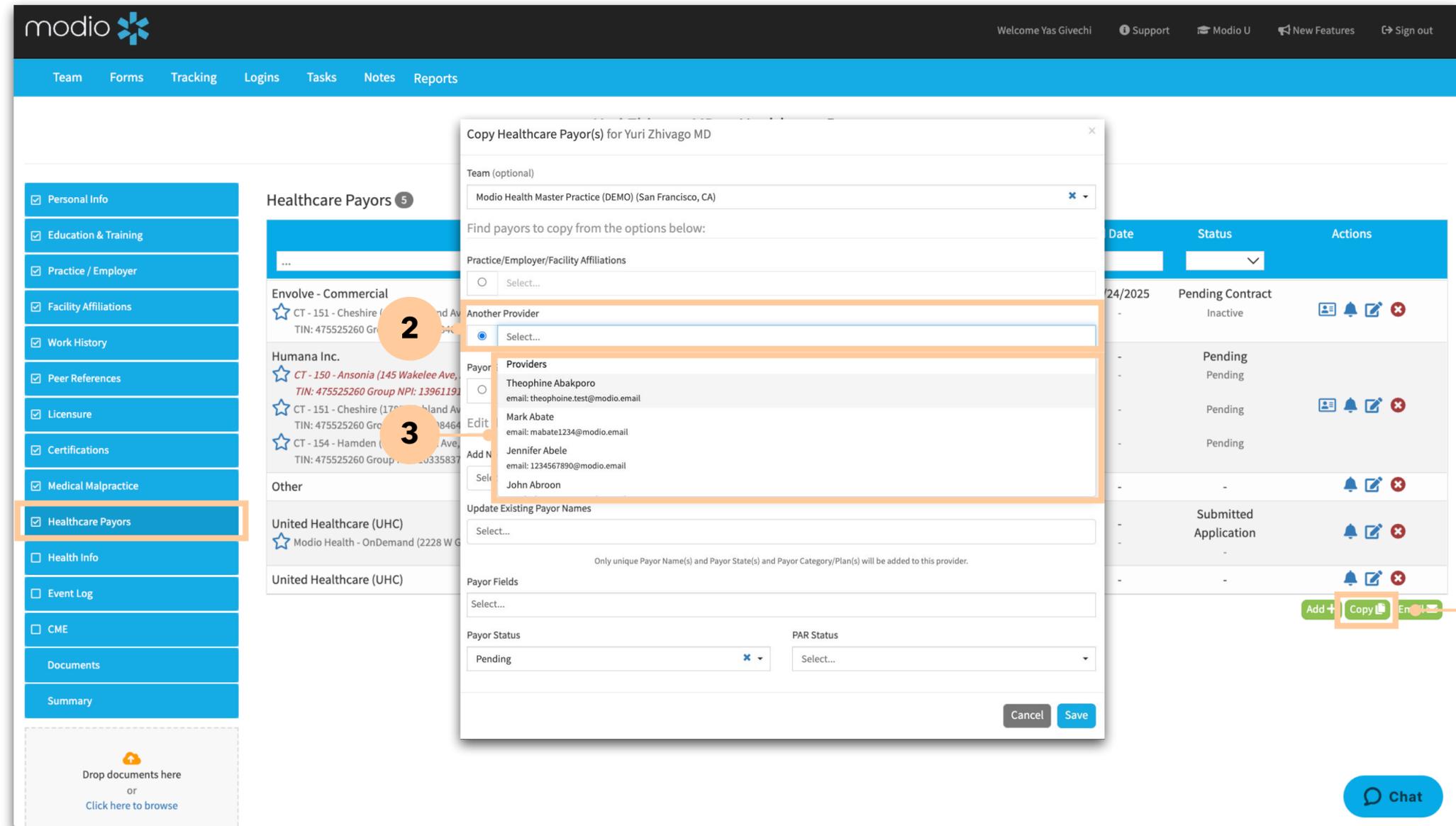
**Step 1** - Click the copy button on the lower right.

**Step 2** - Select the radio button for "Another provider"

**Step 3** - A drop down list of the other providers on your roster will appear. Select the provider or FAC profile that you want to copy.

**Note\* While selecting Copy From**

- "Provider" is the most common use case, there is also an option to select "State"
- or "Practice Employer" the copy feature will function the same if any of the three radio buttons are selected.



The screenshot displays the Modio interface for managing a provider's profile. A modal window titled "Copy Healthcare Payor(s) for Yuri Zhivago MD" is open. The modal includes a "Team (optional)" dropdown set to "Modio Health Master Practice (DEMO) (San Francisco, CA)". Below this, there are radio buttons for "Practice/Employer/Facility Affiliations" and "Another Provider". The "Another Provider" option is selected. A dropdown menu is open, showing a list of providers: Theophine Abakporo (email: theophoine.test@modio.email), Mark Abate (email: mabate1234@modio.email), Jennifer Abele (email: 1234567890@modio.email), and John Abroon. The modal also has fields for "Update Existing Payor Names", "Payor Fields", "Payor Status" (set to Pending), and "PAR Status". At the bottom right of the modal, a "Copy" button is highlighted with an orange box and a "1" in a circle. In the background, the "Healthcare Payors" section of the profile is visible, with a "2" in a circle next to the "Another Provider" radio button and a "3" in a circle next to the provider list dropdown. A "1" in a circle is also present on the right side of the screenshot, pointing to the "Copy" button in the modal.

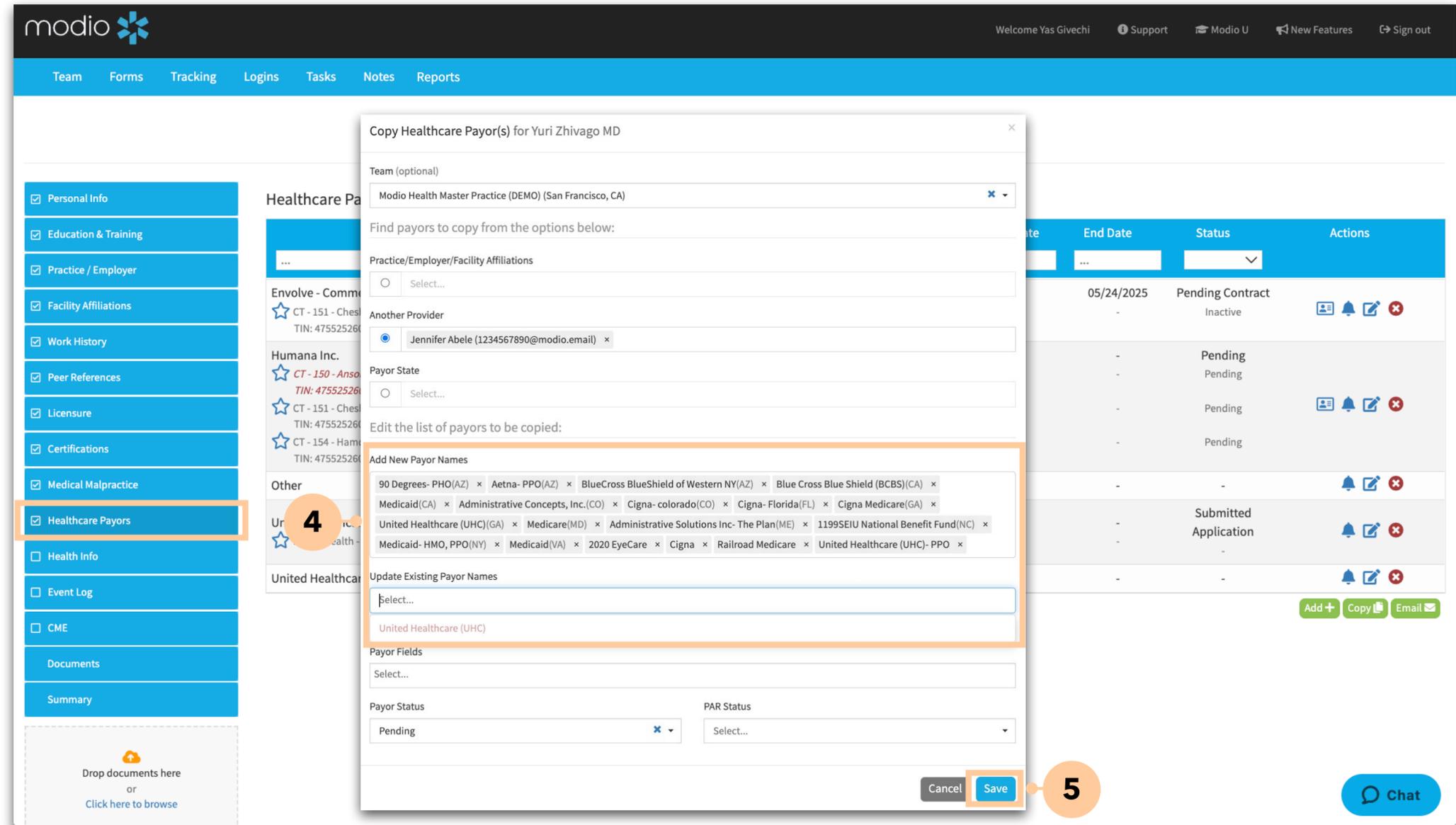
**1**  
Start here!

**Tip Guide: Copy Feature - Copy a group of payors from one profile to another**

Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and provider profiles have the copy feature.

**Step 4** - The payors from the selected profile will appear in the **“Add New Payors Names”** and **“Update Existing Payor names”** Review and remove any payors that you do not need to copy over.

**Step 5** - Click **Save**



The screenshot displays the Modio web interface. A modal window titled "Copy Healthcare Payor(s) for Yuri Zhivago MD" is open. In the modal, the "Add New Payor Names" section is highlighted with an orange box and a circled "4". This section contains a list of payor names that have been copied from another profile, including "90 Degrees- PHO(AZ)", "Aetna- PPO(AZ)", "BlueCross BlueShield of Western NY(AZ)", "Blue Cross Blue Shield (BCBS)(CA)", "Medicaid(CA)", "Administrative Concepts, Inc.(CO)", "Cigna- colorado(CO)", "Cigna- Florida(FL)", "Cigna Medicare(GA)", "United Healthcare (UHC)(GA)", "Medicare(MD)", "Administrative Solutions Inc- The Plan(ME)", "1199SEIU National Benefit Fund(NC)", "Medicaid- HMO, PPO(NY)", "Medicaid(VA)", "2020 EyeCare", "Cigna", "Railroad Medicare", and "United Healthcare (UHC)- PPO". Below this list is an "Update Existing Payor Names" section with a search field containing "United Healthcare (UHC)". At the bottom right of the modal, the "Save" button is highlighted with an orange box and a circled "5". The background shows a profile page for "Yuri Zhivago MD" with a sidebar on the left where "Healthcare Payors" is selected. A table of payors is visible on the right, with columns for "End Date", "Status", and "Actions".

## Tip Guide: Copy Feature - Payors

**Step 2** - Click **"Payor Status"** and select from four different statuses in the drop down. The status selected will apply to all Payors listed above.

2

There are additional time saving options in the Payor Copy feature. Use the information in the screenshot below to save time and ensure accuracy when copying payors to profiles.

**Step 1:** Select the **"Payor Fields"** section. Select **"Payor Contact"** Any contact information saved in the payor profile will copy over.

1

**Step 3:** Select **"Practice Employer/ FacilityAffiliations"** A new field labeled "Practice/ Affiliations Fields" will appear. Use the dropdown to select existing locations to copy over with the selected payors. (The location must live in both the profile you are copying from AND the profile you are currently working in.)

3

**Step 4:** Select **"PAR Status"** and select from PAR or non-PAR. This selection will apply to all Payors listed above.

4

**Step 5:** Click **"Save"** and your payors and payor statuses will be added to your provider profile.

5

## Tip Guide: Copy Feature

### Frequently Asked Questions

**Q: Why are the status options limited when using the Copy function for Payors?**

The current available status list for Payors is extensive, so we want to avoid adding the whole list. Due to the variety of uses and meanings behind statuses, especially across different clients, there is no additional short-list of options that could be added. The current list is designed to suit the needs of every client without causing additional confusion.

Additionally, if we did add all statuses, it could cause issues if matching records already exist. With this simplified list, it's easy to spot duplicate records should something be copied over without needing to be.

**Q: Is there a fast way to copy Practice/Employers to the Work History section?**

While there isn't an easy way to bulk copy all locations at once, you can do so individually via the Edit icon next to the Practice/Employer of choice.

In the window that pops up, there is a field labeled List This Practice/Employer In on the right-hand side. Click that dropdown for the following options:

- a. Practice/Employer Only - This location will only live under Practice/Employer**
- b. Work History Only - This location will move under Work History and fall off Practice Employer**
- c. Practice & Work History - The location information will be copied over to Work History. Selecting this option will create a new field (Reason for Leaving) and a checkbox for updating the Payor Status (which will generate a new field to the right that allows you to choose that Payor Status).**

Once you make your selection, hit Save and those updates will be made.

The List This field also exists in items added to the Work History section. So, if your provider accidentally put a location there that should be under Practice/Employer, you can use the same method to move/add it to where it needs to be.

**Q: Will profile specific information copy from one to the other? For example, items like a start date, end date, provider ID#, credentialing information etc.**

No, profile specific information does not copy when you use the copy feature from one profile to the other.

**Q: What is the best order to copy information from one profile to another?**

The most efficient way to copy information from one profile to another is to ensure that the locations are the same before you copy payors. Using the copy feature for practice employer and/or facility affiliations first to ensure all locations are in place and the same before you copy payors is a best practice.

**Q: Is the copy feature available in v2?**

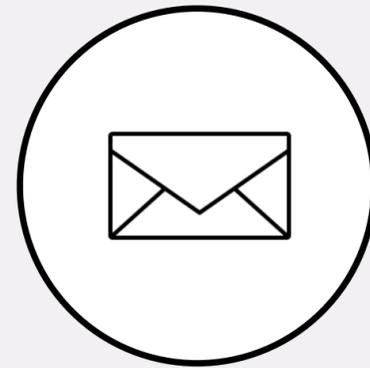
Not yet, the copy feature has not been added to v2 yet. There will be an announcement in the release notes when this happens.

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

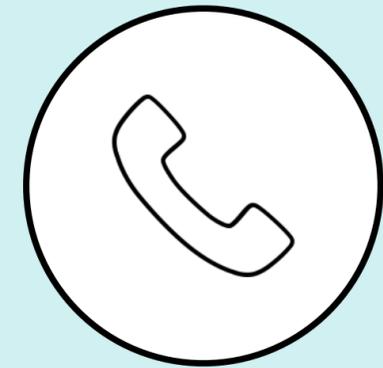
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