OneView®

Tip Guide: OneView Coordinator Start Guide

Your Coordinator Toolbar

Here is a quick introduction to the Coordinator Toolbar. If you are a new user, this next short section will help you get started by showing you some helpful features in the OneView® platform.
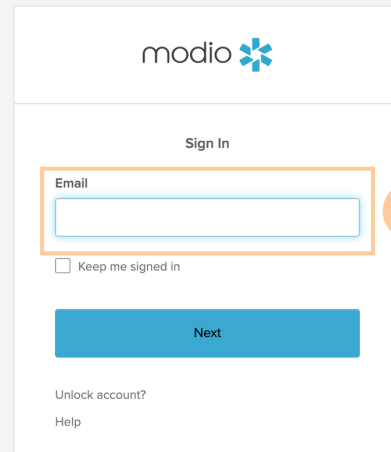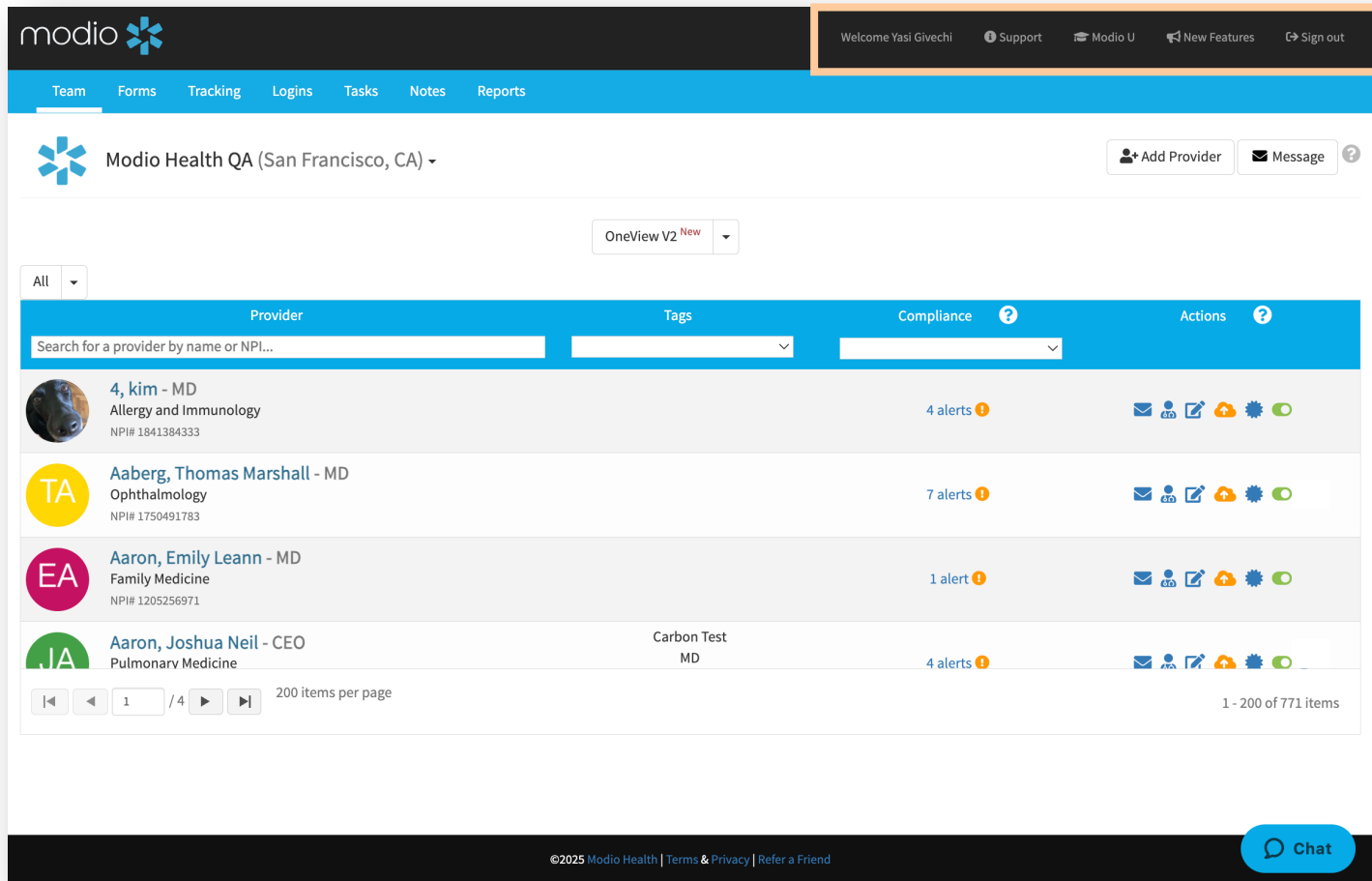
1

(844) 696-6346   Sign in

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HOME   FREE DEMO   PROVIDER CREDENTIALING   ABOUT US   BLOG   CAREERS

CREDENTIALING MADE SIMPLE.

For your entire team. All in one place.
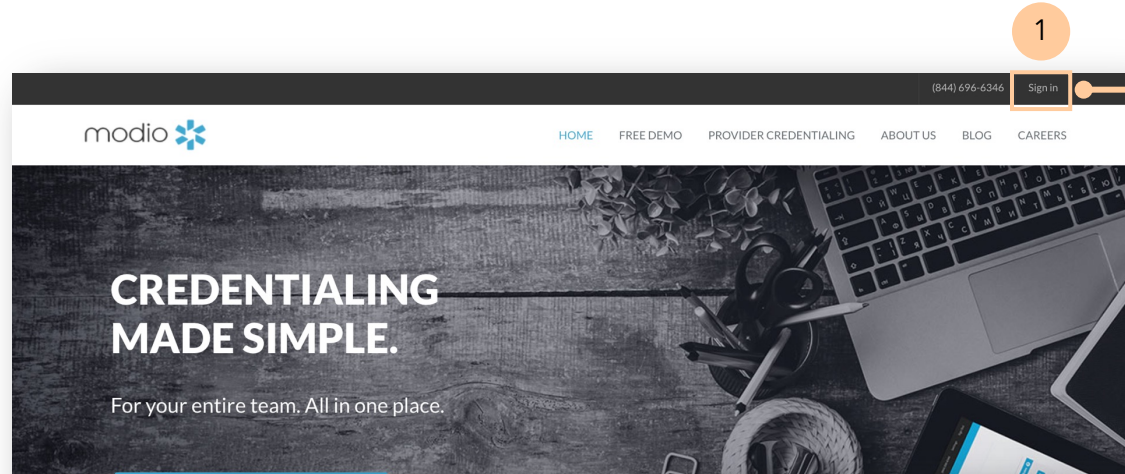
1. Navigate to Modio:

Visit our website at: www.modiohealth.com and click "Sign in", which is located on the top right hand corner.

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Sign In

Email

☐ Keep me signed in

Next

Unlock account?

Help

2

2. Log into OneView:

Enter in your username & password. Contact the Modio Support team if you have not received your login information yet by emailing: Support@modiohealth.com

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Modio OneView Interface

Welcome Yasi Givechi | ⓘ Support | 🎓 Modio U | 📢 New Features | ⟶ Sign out

Team | Forms | Tracking | Logins | Tasks | Notes | Reports

✳ **Modio Health QA** (San Francisco, CA) ▾   👤+ Add Provider | ✉ Message | ⓘ

OneView V2 New ▾

All ▾

Provider	Tags	Compliance ❓	Actions ❓
4, kim - MD Allergy and Immunology NPI# 1841384333		4 alerts ⚠	✉ 👤 ✏ ☁ ✳ ⬤
Aaberg, Thomas Marshall - MD Ophthalmology NPI# 1750491783		7 alerts ⚠	✉ 👤 ✏ ☁ ✳ ⬤
Aaron, Emily Leann - MD Family Medicine NPI# 1205256971		1 alert ⚠	✉ 👤 ✏ ☁ ✳ ⬤
Aaron, Joshua Neil - CEO Pulmonary Medicine	Carbon Test MD	4 alerts ⚠	✉ 👤 ✏ ☁ ✳ ⬤

|◀ ◀ 1 / 4 ▶ ▶| 200 items per page   1 - 200 of 771 items

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💬 Chat

OneView Toolbar Key:

Coordinator indicator: When you are logged in you will see your name displayed here. Your email address is a unique identifier. This means that your email address may not be repeated when creating additional coordinator and provider profiles.

Support: The support tab houses additional tip guides on all the OneView features. Click here to explore those guides and keep checking back in as we update the content frequently. You will also find contact information and other support services.

ModioU: This tab gives you access to a library of pre-recorded videos. There are in-depth videos for your favorite features within OneView. You will also find schedules for our live ModioU courses, along with a link to the course registration page.

New Features: Check out this tab every 2nd or 3rd Thursday of the month for a summary of updates and improvements that have been made to the system over the last two weeks.

Sign out: Remember to sign out of OneView when you are done with your session.

The OneView® Team Dashboard

When you log in, you'll see your Team in the OneView® Provider Dashboard. From here, you will have access to your provider credentialing profiles as well as other OneView® features.

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Team Views:

If you manage multiple teams, click this arrow to switch views.

OneView V2:

Manage compliance and more for your team here.

Add Provider:

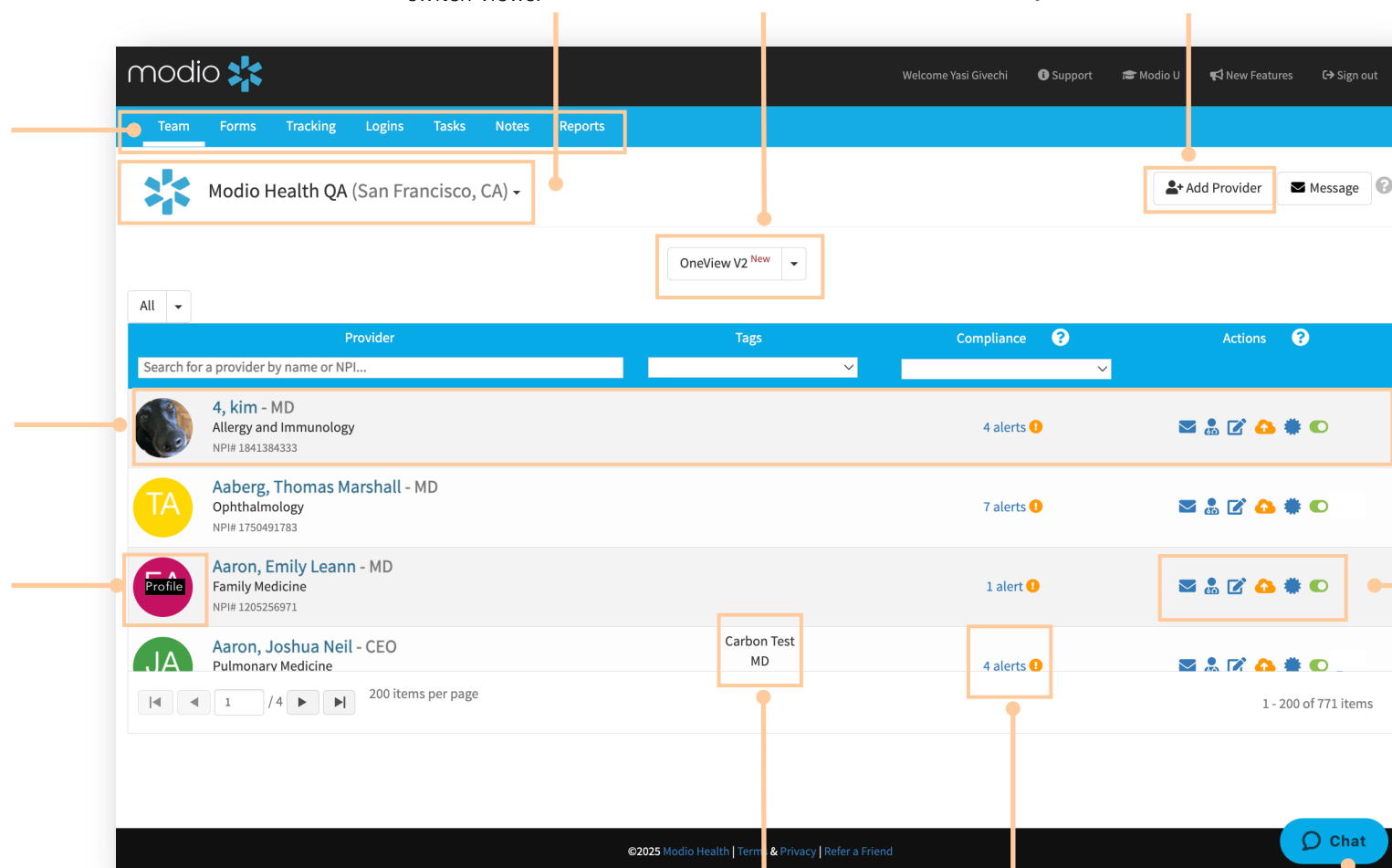Use our 2-step process to add providers to your team roster.

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Welcome Yasi Givechi   ⓘ Support   🎓 Modio U   📢 New Features   ⏻ Sign out

Team   Forms   Tracking   Logins   Tasks   Notes   Reports

Team:

Welcome to your Team Dashboard! See your Team name here and your provider roster below.

✳ Modio Health QA (San Francisco, CA) ▾

👤+ Add Provider   ✉ Message   ❓

OneView V2 ᴺᵉʷ ▾

All ▾

Provider	Tags	Compliance ❓	Actions ❓
Search for a provider by name or NPI...	▾	▾	
4, kim - MD Allergy and Immunology NPI# 1841384333		4 alerts ⚠	✉ 👤 ✏ ☁ ✳ ◉
TA Aaberg, Thomas Marshall - MD Ophthalmology NPI# 1750491783		7 alerts ⚠	✉ 👤 ✏ ☁ ✳ ◉
Profile Aaron, Emily Leann - MD Family Medicine NPI# 1205256971		1 alert ⚠	✉ 👤 ✏ ☁ ✳ ◉
JA Aaron, Joshua Neil - CEO Pulmonary Medicine	Carbon Test MD	4 alerts ⚠	✉ 👤 ✏ ☁ ✳ ◉

|◄ ◄ 1 / 4 ► ►| 200 items per page   1 - 200 of 771 items

Credentialing Profile:

Click your provider's name to open the entire credentialing profile.

Profile Cards:

To view a provider's profile card, hover over the providers initials and click "profile."

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OneView Actions Key:

✉ **New Invitation**
Indicates new provider. Click to invite.

✅ **Accepted Invitation**
Indicates provider has completed registration.

○ **Incomplete Profile**
Indicates provider has started their profile.

✅ **Complete Profile**
Indicates provider has completed their profile.

👤 **Manage Credentials**
Securely manage a provider's credentials.

✏ **Edit**
Edit provider Tag(s), Job Title, Team(s), Specialty List, and Notes.

☁ **Upload Documents**
Securely upload and manage documents.

✳ **CME**
Track provider CME goals and credits.

◉ **Active/Inactive**
Make a provider active or inactive (does not delete credentialing data).

Tags:

Create sub-lists within your provider roster to quickly view or organize the profiles you are working with.
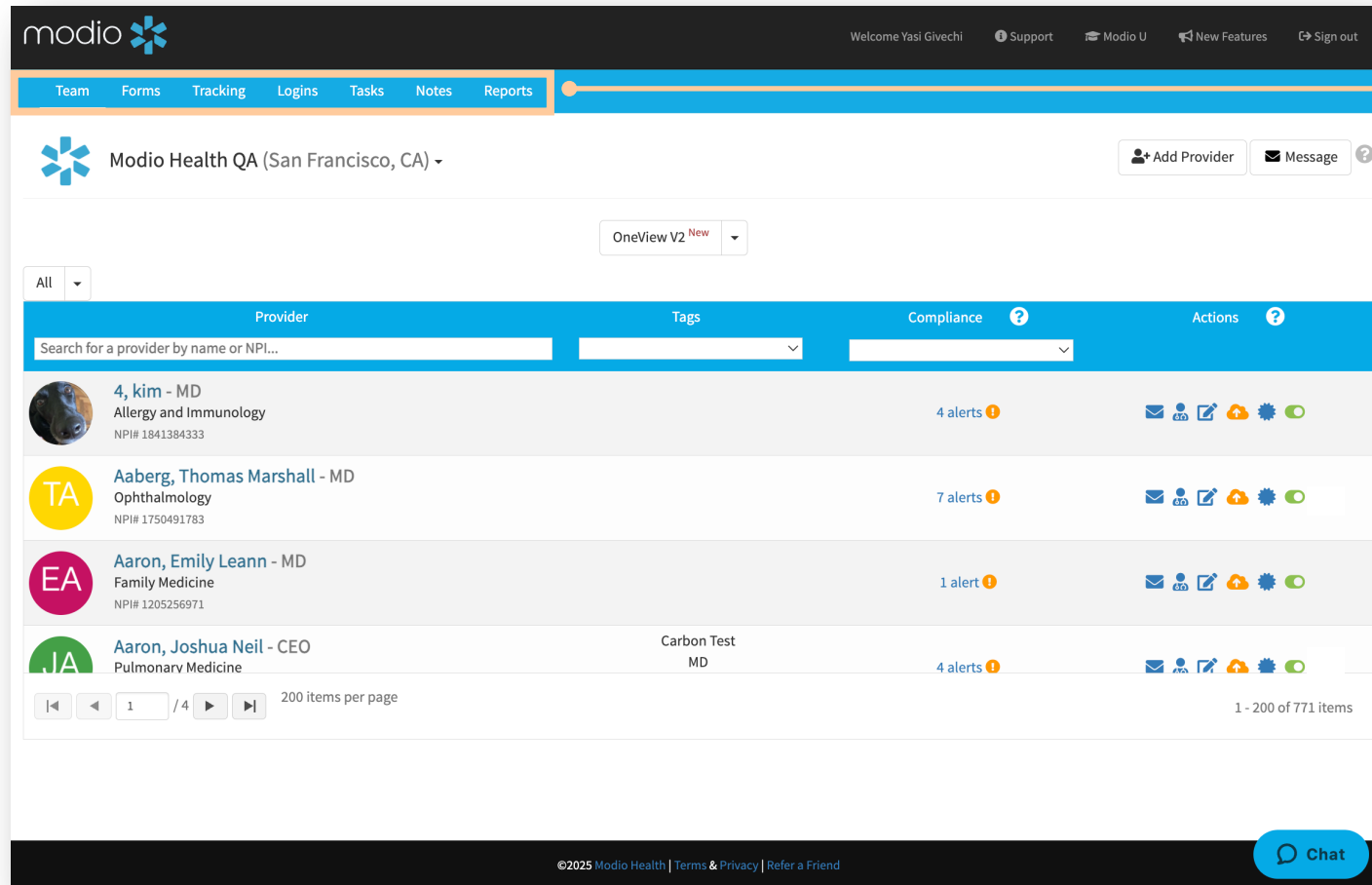
Compliance Issues:

View individual provider alerts here.

Live Chat:

Our live chat support is available from 8 am – 6 pm EST (Mon-Fri).

Team Navigation Bar

Here is an introduction to the 5 core modules
that make up the Team Navigation Bar.

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OneView Dashboard Key:

Teams: Here you will find your home page along with your entire team roster.

Forms: Access all the forms which your organization has submitted to be mapped. Mapped forms which allow you to automatically pull data from your provider's profile and have it pre-populated onto your form/application.

Tracking: A workflow management tool for your coordinators to track all steps and progress while credentialing. Here, everything will be fully customizable to match your exact steps and workflows.

Logins: Securely store usernames and passwords for any website that will be managed on behalf of your organization or providers.

Tasks: This useful feature creates reminder notes or creates basic to-do lists.

Notes: Here you will find an aggregate list of all notes added to any provider, in all sections of their profile, by all users on your team.

Reports: This is the OneView Reports Module. Offering standard reports, customizable reports, graphs, and real-time updates.

Within the screenshot:

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Welcome Yasi Givechi   Support   Modio U   New Features   Sign out

Team Forms Tracking Logins Tasks Notes Reports

Modio Health QA (San Francisco, CA) ▾

👤 Add Provider   ✉ Message

OneView V2 New ▾

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Adding New Providers

Use our 2-step process to quickly add new providers to your Team roster. The add provider feature is available in both v1 and v2.

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Add Provider:

1. Click this button to get started. This button is available from the Team page and the v2 home screen.

Provider Name:

2. Fill in the name field. A dropdown list of potential matches from an existing provider database will appear. After double- checking the NPI and/or license number, select your provider from the list. If your provider is not found, see Slide #13.

Provider Title, Specialty List, Provider Email:

3. Fill in the three remaining required fields: title, specialty, and email. (If you don't have your provider's email, use a placeholder with your provider's name: first.last@modio.email (e.g. john.smith@modio.email).)

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Provider Photo:

Click on this icon to add or edit a photo of your provider.

Provider Search:

Type your new provider's name here to locate them on the provider roster within the team page.

Provider Profile Card:

Click on the provider's initials (or photo, if one has been uploaded) to open the "provider profile card."

Updater Icon:

Use the refresh icon to instantly pull credentialing data from one of the many primary sources we're integrated with. See the next slide (#13) for additional info.

Final Note:

Now that the verified data has been added to your new profile, continue to build out the profile until it is complete per your organization's standards.

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Adding a Provider

Add Provider

Teams

× Physician Management Resources (Needham, MA)

Tags

Provider Name *   ☐ Add a Facility Name instead

Kirk Heath

Kirk Heath   NPI: 1184838286
Surgery
Primary License: NC, License No.: 2015-02245

Heather Kirk   NPI: 1861045304
Behavioral Analyst
Primary License: CT, License No.: 100

Heather Kirk   NPI: 1619688959
Dental Hygienist
Primary License: TX, License No.: 18960

Heather Kirk   NPI: 1316172976
Speech-Language Pathologist

Don't see profile listed? Click here to skip profile claim.

Cancel   Save

Provider Profile

Provider Profile for John Snow, MD — Family Medicine

Notes			
NPI #	1801007265		Updated: 10/07/2020
OIG	Pass	DOB: 01/01/1953	Updated: 01/19/2022
CAQH	12546732	Status: Reattestation Successful	Reattest: 07/07/2021
Home Address			Email: snowdemo@modio.email
Primary Practice	Modio Health Medical		
Primary Affiliation	Sierra Vista Regional Medical Center (San Luis Obispo, CA) 1010 Murray Ave, San Luis Obispo, CA 93405		
Professional School	Eastern Virginia Medical School (Norfolk, VA)		
Graduation Date			
State Licenses	AK 123456		upd. 06/17/2021 (7 months ago)
	RI RN68958	RN	upd. 01/13/2022 (19 days ago)
DEA Licenses			
Controlled Substance			
Board Certifications			
Telemed Exp.			
Provider Onboarding	New Invitation	Sent By: Landon Goodson	Sent Date: 10/21/2020

OK

Tip #1–

Make sure to confirm your provider's **NPI** before adding – the provider database can include duplicate names.

Tip #2–

If your provider has had a name change, try looking under their previous name.

Tip #3 –

If your provider is not listed, click here to skip profile claim. This will create the profile without populating NPI, license number, or other data.

Updater Icon:

After running an updater, all available data from the source will be automatically populated on your provider's profile.

Summary:

- Optimize the Add Provider process by leveraging our integration options
- Our Existing database allows you to pull current information to add to your provider profiles

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1. Notes:

Use the Edit action on the dashboard to update the provider notes displayed here.

2. NPI #:

Click on the NPI updaters button to get NPPES data in seconds. Accept the updates for practice address, state licenses, payors, education and more. The NPPES search will return:

- Current Practice Address – displays practice address
- Current License Info – displays licenses found
- Current Healthcare Payor Info – displays payors found

3. Primary Practice:

Lists primary practice from Practice/ Employer section.

4. Primary Affiliation:

Lists primary affiliation from Hospital Affiliations section.

5.State Licenses:

View the provider's state licenses by state, number and last date updated.

- Primary Source Links – click on the magnification glass to access state primary source sites.
- Info: State abbrev. – number (type), expiration, last updated – use the "update" date value to verify when the data was last verified.

6. DEA Licenses:

Add DEA license(s): click on the updater icon to run a DEA search for:

- Current DEA Info
- Primary Source Verification PDF

7. Controlled Substance License(s):

Lists CSL license(s) from Licensure.

8.Telemedicine Experience:

Optional field found in Personal Info.

Provider Profile for Jennifer Abele, MD — Emergency Medicine

1 Notes		
2 NPI #	1073502779	Updated: 01/22/2025
OIG	Pass	DOB: 01/01/1998	Updated: 04/15/2025
CAQH	785htyt7l	Status: Reattestation Successful	Reattest: 03/11/2025
Home Address	1102 Hollywood Avenue, LA, CA 87889	Mobile: (757) 988-8886	Email: 1234567890@modio.email
3 Primary Practice		
Primary Affiliation		
4 Professional School	Harvard Medical School (Boston, MA)	
Graduation Date		

State Licenses (5)

DC	MD037745	MD	exp. 12/31/2026	upd. 04/11/2025 (a month ago)
CA	A74488	MD		upd. 04/03/2025 (a month ago)
CO	L1234569	RN-eNLC	exp. 12/27/2025	upd. 05/07/2025 (6 days ago)
MD	D0085596	MD	exp. 09/30/2026	upd. 12/31/2024 (4 months ago)
MD	D0085596		exp. 09/30/2026	upd. 04/03/2025 (a month ago)

DEA Licenses (6)

DC	FA4228474	exp. 06/30/2025	upd. 04/30/2025 (13 days ago)
VA	BA7683584	exp. 06/30/2020	upd. 04/30/2025 (13 days ago)

7 Controlled Substance

Board Certifications

American Board of Emergency Medicine	exp. 12/31/2027
Emergency Medicine	
American Board of Preventive Medicine	exp. 06/24/2027
Occupational Medicine	
American Board of Urology	exp. 02/07/2026
Female Pelvic Medicine and Reconstructive Surgery	
Alliance for Physician Certification and Advancement	exp. 02/22/2025
Registered in Musculoskeletal Sonography (MSK)	
American Board of Family Medicine	
Family Medicine	
Undersea and Hyperbaric Medical Society	
Undersea and Hyperbaric Medicine	

8 Telemed Exp.	4 Years
Provider Onboarding	⭐ Complete Profile - Coordinator Completed: 06/03/2022

OK

Common Questions

How do you look up the data from LN?

We look up data from LN using NPI to make sure we are bringing in data for the correct provider. Because of this, when you enter the provider name you will see a list of options with NPI included. We are actually doing a lookup with NPPES on the back end to validate the NPI before using it to look up data with LN. Pretty cool!

What will it look like?

The add provider window will look very similar to how it has in the past. You click the same place, and add the same data. You may notice the background looks a little different. This is because the updated add provider window is hosted on our OneView V2 platform, so you are getting a look at that. When you click save, you will be back on the Team page just as you were before.

How often is LN updated?
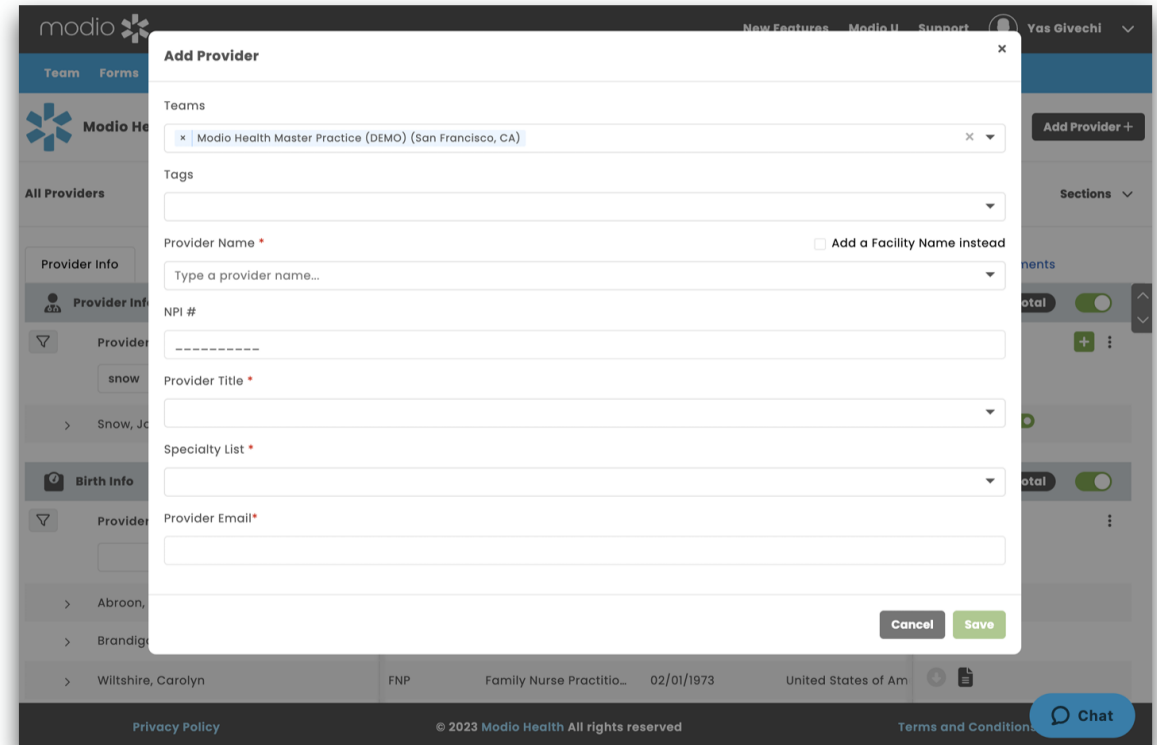
Modio receives continuous updates from LN via an API. Whenever they update their data, it is reflected in OneView. We always use the most up to date data we have from them to look up data for new providers.

Are all provider types included in the LN data?

Not all, provider types are included in LN data. The most common providers with NPis are included: MD, DO, NP and PA.

What fields of data are eligible to come in?

Modio brings in state, DEA and controlled substance licenses and some board certifications from LN. We have found this data from LN to be accurate, but always recommend running Carbon on the licenses that are added. LN is a trusted source, but only the boards (which Carbon is integrated with) are true primary sources.

Tags

Use the v1 Tags feature to customize your team dashboard by creating sub lists within your provider roster.

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Pro Tips:
- •Providers can have more than one tag
- •Use cases: Service locations, Title, Practice type, etc...
- • V1 Tags also apply to v2 Personal info grid. See v2 tip guide for additional information.

Start Here: Click here to access the edit feature. The top section is where you can add and remove tags.
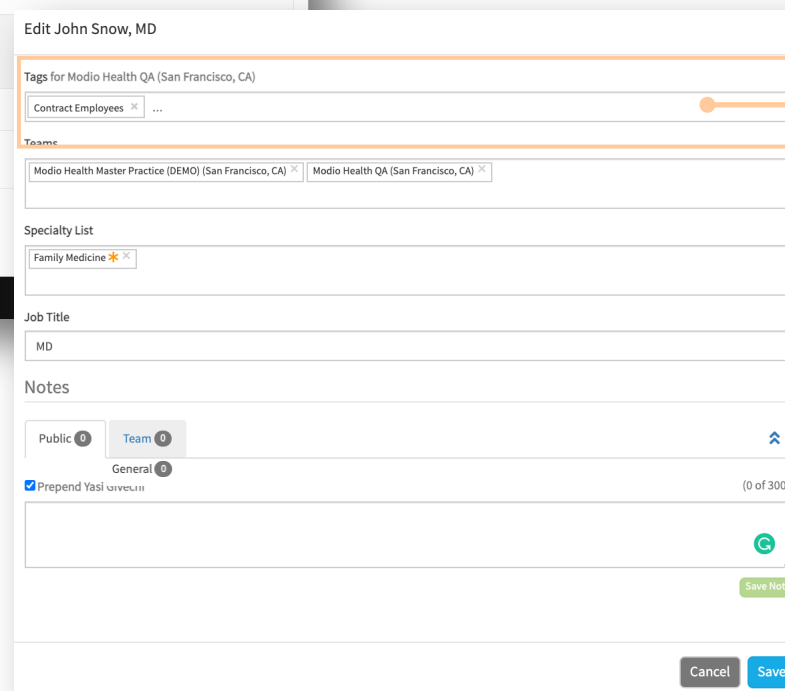
Adding a new Tag:
Enter in your tag and then click the "tab" button on your keyword to create a new tag. This tag will be available to use for any provider on your team.

Removing a Tag:
From the edit popup, select the small gray X on your tag and press save. All tags must be removed from a team in order to disappear from the tags list. Your tag will be removed from that profile. Tags that already exist in your Team can easily be added to additional providers; click into the tag field to view the dropdown list of existing tags.

Tag(s): Add a tag(s) to your provider profiles to create sub-lists within your Team. View the tags in the Tag column of your team dashboard.

Filter: Use the Tags column to filter by a specific tag.

Reports

Quickly run a variety of web and CSV
reports from the reporting dropdown arrow.

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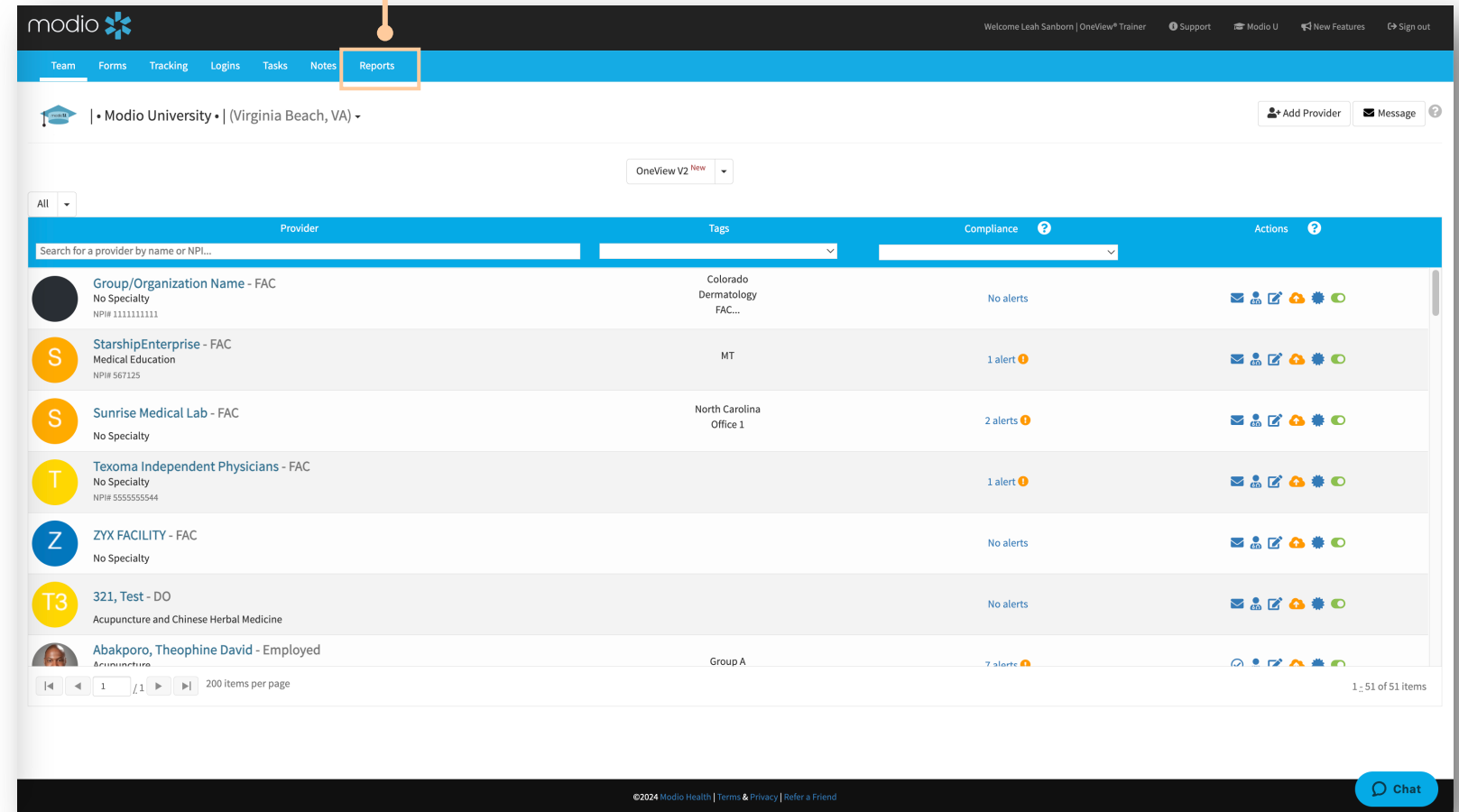
Start Here!

The OneView Reports Module:

Access the Reports Module from the top navigation of OneView. Clicking the Reports Tab will open a new tab on your browser. This new Reporting module will be your best source for Ad-Hoc reporting, introducing new capabilities like column formatting, saving favorites, and new download settings.

Step 1: Select the Reports option from the top navigation toolbar in OneView to open a new tab that holds the entire OneView Reporting Module.

Pro Tip:

Keep both the OneView tab and the Reporting tab open to quickly toggle between the two as needed throughout your day.

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OneView Reporting Module Tour: Now that your have selected the reports tab, the feature will open. As you navigate, you'll notice a wide selection of capabilities within the tool. Here are the features we recommend you learn first.

Your Personal Collection: This section holds any reports that you have saved after applying filters, conditional formatting, custom columns, visualizations and other changes to existing Standard Reports. Personal collection is coordinator based. Only you will be able to access reports saved to your personal collection.

Home: Select "Home" or the blue Modio logo to return to the main reports page.

Standard Reports:

These reports are available to all OneView Coordinators and for all Teams.

Tracking Reports:

These reports are related to the Tracking feature in OneView.

Run a Report:

Select a tile from the Standard Reports quick link or navigate to your Personal Collection to run any available reports.
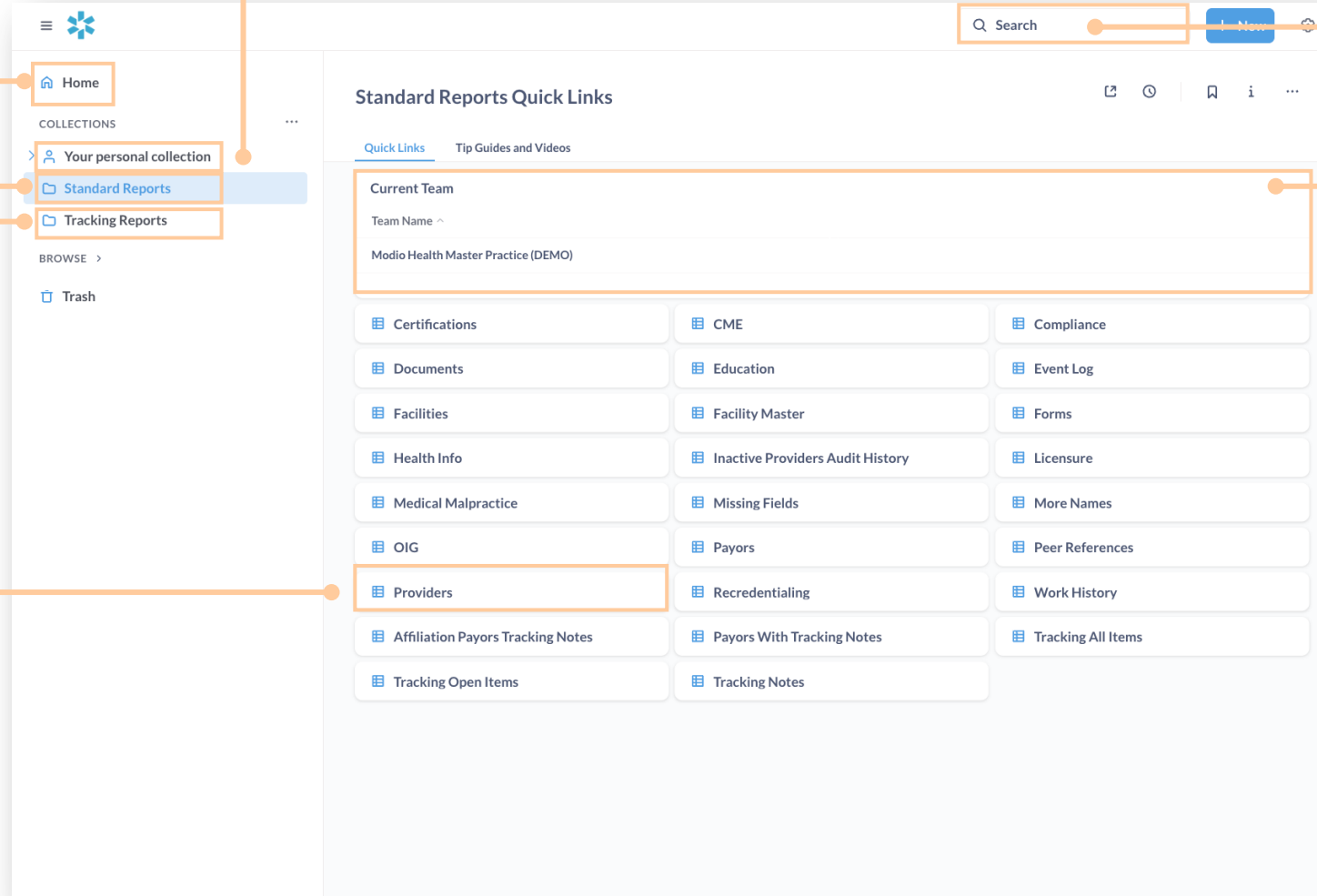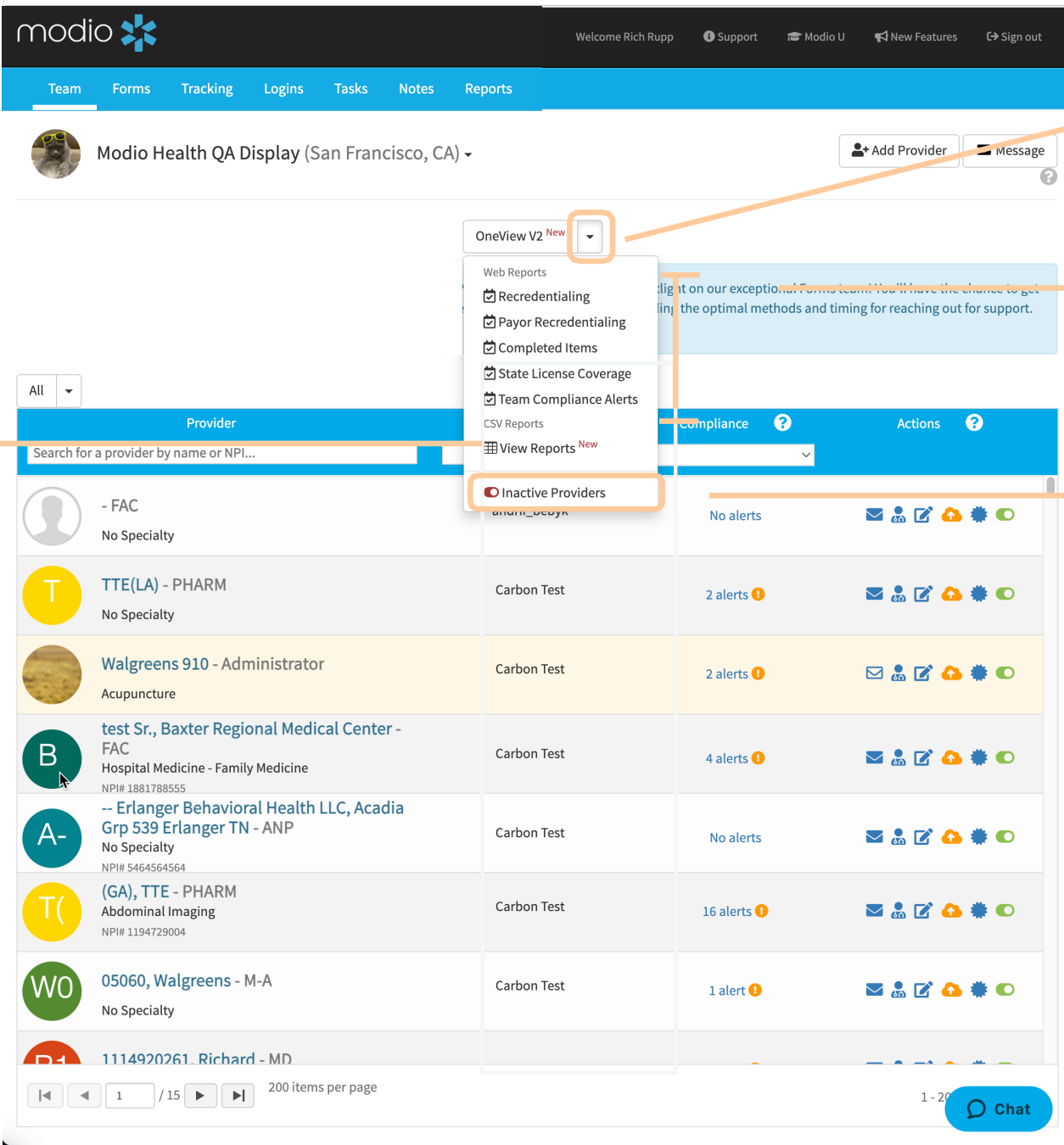
Search:

Find the reports you need with a quick keyword search.

Team Indicator:

The data that queries in your reports will pull directly from the Team name listed here. If you have access to more than one Team, check here to confirm you are running a report with the desired data.

≡ ✳

Q Search

+ New ⚙

🏠 Home

COLLECTIONS ...

👤 Your personal collection

📁 Standard Reports

📁 Tracking Reports

BROWSE >

🗑 Trash

Standard Reports Quick Links

Quick Links   Tip Guides and Videos

Current Team

Team Name ⌃

Modio Health Master Practice (DEMO)

▦ Certifications	▦ CME	▦ Compliance
▦ Documents	▦ Education	▦ Event Log
▦ Facilities	▦ Facility Master	▦ Forms
▦ Health Info	▦ Inactive Providers Audit History	▦ Licensure
▦ Medical Malpractice	▦ Missing Fields	▦ More Names
▦ OIG	▦ Payors	▦ Peer References
▦ Providers	▦ Recredentialing	▦ Work History
▦ Affiliation Payors Tracking Notes	▦ Payors With Tracking Notes	▦ Tracking All Items
▦ Tracking Open Items	▦ Tracking Notes	

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Welcome Rich Rupp | ❶ Support | 🎓 Modio U | 📢 New Features | ⏻ Sign out

Team   Forms   Tracking   Logins   Tasks   Notes   Reports

Modio Health QA Display (San Francisco, CA) ▾

➕ Add Provider   💬 Message

OneView V2 *New* ▾

Web Reports
☑ Recredentialing
☑ Payor Recredentialing
☑ Completed Items
☑ State License Coverage
☑ Team Compliance Alerts
CSV Reports
▦ View Reports *New*
⬤ Inactive Providers

...light on our exceptional Forms team! You'll have the chance to get
...the optimal methods and timing for reaching out for support.

All ▾

Provider		Compliance ❓	Actions ❓
Search for a provider by name or NPI...			
	- FAC No Specialty andril_bebyk	No alerts	✉ 👥 ✏ ☁ ✳ ⬤
T	TTE(LA) - PHARM No Specialty	Carbon Test	2 alerts ⚠	✉ 👥 ✏ ☁ ✳ ⬤
	Walgreens 910 - Administrator Acupuncture	Carbon Test	2 alerts ⚠	✉ 👥 ✏ ☁ ✳ ⬤
B	test Sr., Baxter Regional Medical Center - FAC Hospital Medicine - Family Medicine NPI# 1881788555	Carbon Test	4 alerts ⚠	✉ 👥 ✏ ☁ ✳ ⬤
A-	-- Erlanger Behavioral Health LLC, Acadia Grp 539 Erlanger TN - ANP No Specialty NPI# 5464564564	Carbon Test	No alerts	✉ 👥 ✏ ☁ ✳ ⬤
T(	(GA), TTE - PHARM Abdominal Imaging NPI# 1194729004	Carbon Test	16 alerts ⚠	✉ 👥 ✏ ☁ ✳ ⬤
WO	05060, Walgreens - M-A No Specialty	Carbon Test	1 alert ⚠	✉ 👥 ✏ ☁ ✳ ⬤
R	1114920261, Richard - MD			

|◀ ◀ [1] / 15 ▶ ▶| 200 items per page   1 - 20

💬 Chat

Viewing Reports:

Use the dropdown caret to access your Team reporting options. Select from CSV and Web reports.

Web Reports:

This section of the column stores the web reports. These reports will open a dashboard on your screen where you will view the data within your Team. You will be able to sort and filter each column, but not make edits or changes.

CSV Reports

Click "View Reports" to be redirected to the OneView reports module to view your team's standard reports.

Custom Reports:

If your organization has a reporting need that is not met by an existing report, let our support team know and we can build a custom report just for you.

Inactive Providers List:

Access your list of inactive provider's by selecting the red toggle at the bottom of the reports drop-down list.

Key Takeaway:

All the data in these reports is coming from you provider's profiles. The more data that is housed within your provider profiles, the more robust your reports will be.

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Credentialing Profile Audit

Learn to effectively and efficiently add data to the 13 sections of your provider's credentialing profile. Adding data to create complete profiles will help set your organization up for success.

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Credentialing Sections:

Use our database of facility master records to add locations to your provider credentialing profiles.

The credentialing sections that utilize master record are:

- Education and Training
- Practice/Employer
- Facility Affiliations
- Work History
- Peer Reference

Tip: The required fields are indicated by an orange star. The rest of the fields are optional for you to fill out according to your credentialing needs.

Current Practice/Employer:
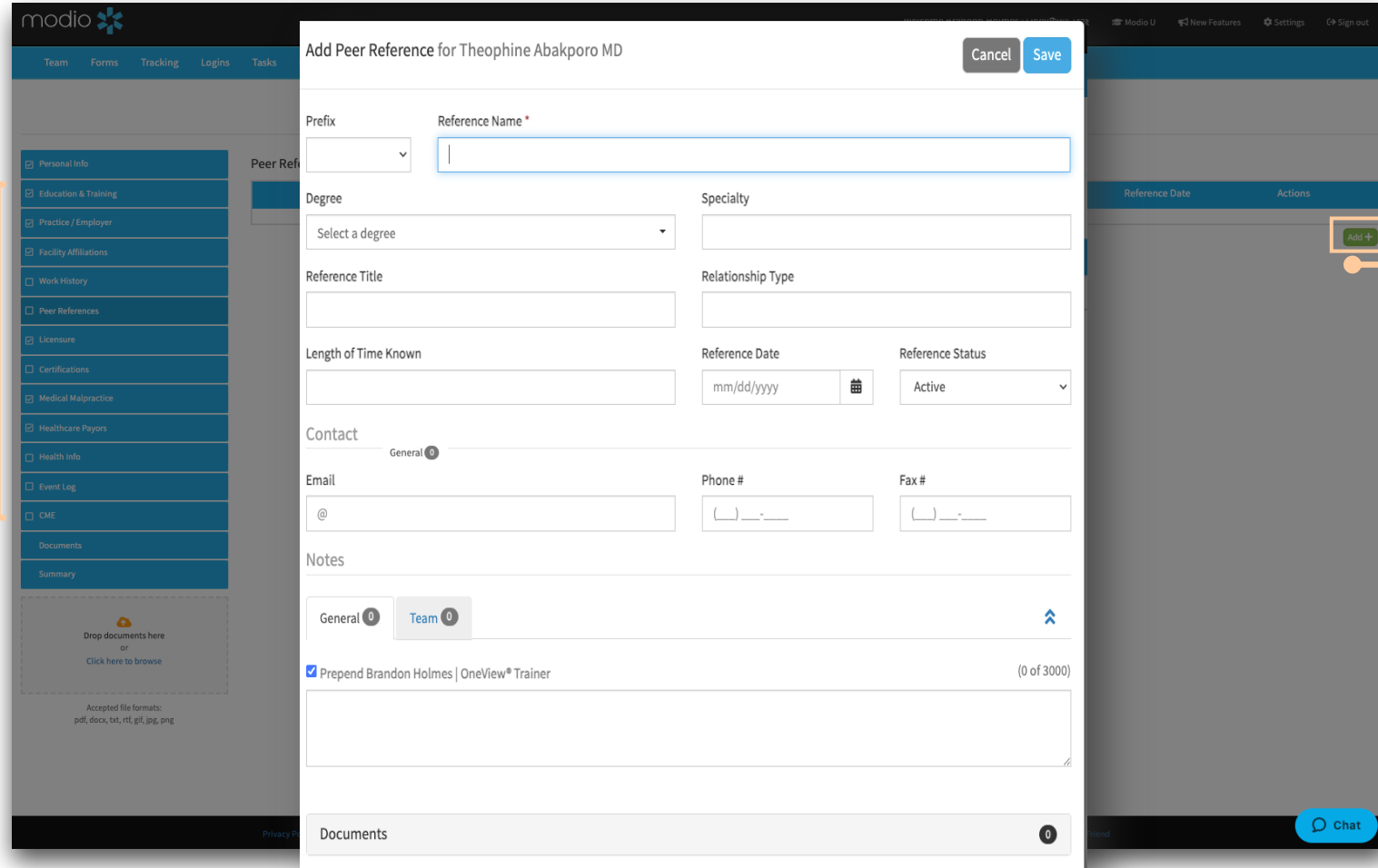
Search for your practice location by address keywords, e.g. "1234 Smith". A dropdown list of potential matches will appear for you to select from. If your address does not generate a match, try to search by name. If the location is still not found, email us at Support@modiohealth.com so that we can create a new record for you. It is required that you include the name and address of the location you wish to add. You may include other optional data like NPI, TIN, and billing address (reach out to our team for a full list of fields).

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Adding Data Tip:

Required fields will be indicated by a red star (*). The rest of the fields are optional for you to fill out according to your organizations credentialing needs. The data that is added to these different sections will all be accessed when using the reports feature as well as the forms module. Complete your credentialing profiles now to set yourself up for success in the future.

Credentialing Sections:

Add data to these sections: accessed when using the reports feature as well as the forms module. Complete your credentialing profiles now to set yourself up for success in the future.

Step 1 - Add +

Use the green add button and a new modal will open for you to add your data.
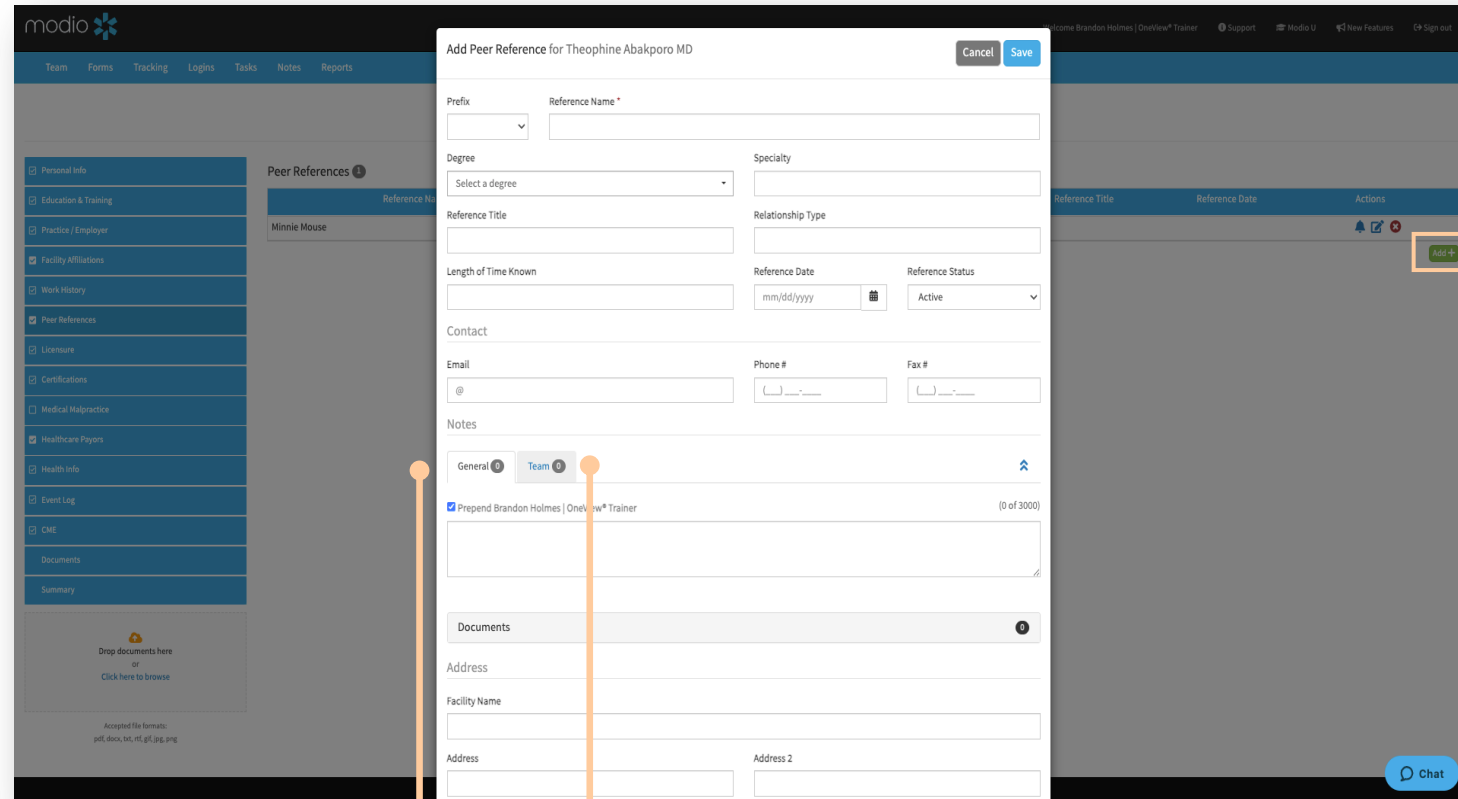
Add Peer Reference for Theophine Abakporo MD

Cancel | Save

Prefix

Reference Name *

Degree
Select a degree

Specialty

Reference Title

Relationship Type

Length of Time Known

Reference Date
mm/dd/yyyy

Reference Status
Active

Contact
General 0

Email
@

Phone #

Fax #

Notes

General 0 | Team 0

☑ Prepend Brandon Holmes | OneView® Trainer   (0 of 3000)

Documents   0

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Credentialing Sections:
All these sections have an option to add free text notes.

Add Notes:

Select the General tab or the Team tab to determine who can see the notes. Once you have added notes to your provider profiles you will be able to use the Notes tab from the Team Navigation Bar to view them.

General Notes:

Everyone on your team will be able to view these notes. This includes your coordinators, read only/full access, and providers that may have access to the platform.

Team Notes:

These notes will be visible to coordinators within the specified team who have full access.

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Documents

Upload, download, and share from the
Documents section in your credentialing profiles.

Completed Forms:

View the forms completed for your providers here.

Upload:

Upload one or more files directly into your provider's file.

Download:

Download a zip file of all documents.

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Email:

Share any document directly with your provider or any coordinator in your team.

Start Here

Drag and Drop:

To upload a single document, simply drag and drop to the platform.

Batch Document Uploading:

Upload multiple files by clicking here.

Modio Platform Screenshot

Welcome Yas Givechi   Support   Modio U   New Features   Sign out

Team | Forms | Tracking | Logins | Tasks | Notes | Reports

Yuri Zhivago MD ▾ Documents

Securely Upload, Download, and Email Documents.

[Upload] [Download] [Email]

Documents ▾   📄 Completed Forms

Left sidebar items:
- ☑ 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

Drop documents here or Click here to browse

Accepted file formats: pdf, docx, txt, rtf, gif, jpg, png

Personal Info (3)

Type	File Name	Date	Permission	Expiration Date	Status	Actions
	...	...		...	Active	
Color Photo	Powell Alisha - Color Photo.jpg	02/14/2018	General		Active	🔔 ✏ ❌
Color Photo	Udall Dana - Color Photo.jpg	02/14/2018	Coordinator Only		Active	🔔 ✏ ❌
Curriculum Vitae (CV)	Analytics Results 1.8-1.14.18.xlsx	02/20/2018	General		Active	🔔 ✏ ❌

Health Info (0)

Malpractice (0)

Education (0)

Miscellaneous (2)

Type	File Name	Date	Permission	Expiration Date	Status	Actions
	...	...		...	Active	
Other Misc	Kick-off graph 2:19:18 .png	02/20/2018	General		Active	🔔 ✏ ❌
Other Misc	macbook.png	10/31/2017	Coordinator Only		Active	💬 Chat

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*For a more detailed guide to Documents, please refer to the Documents Guide in the Support Section

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File Type:
Select the file Type(s) from the drop-down menu if they did not auto populate.

Expiration:
Expiring or expired documents will show up in the Alerts or compliance section.

File Name:

Name your file. OneView will auto-detect the type of documents you upload if they are titled in this format: Provider name, Document type, EXP date. Example: "John Smith NY State License exp 12312022."

Permissions:

General - Visible to the provider and to any coordinators on the team.

Coordinator Only - Visible to only Coordinators on the team.

*For a more detailed guide to Documents, please refer to the Documents Guide in the Support Section

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To avoid manually entering details like your file type and expiration date, you can use our built-in formatting system to have those details grabbed right from your file's original name.

For example, you can name a file like this on your computer: 'John Doe CV EXP 01022022.' When you upload that file to our platform, it will automatically fill in the category and expiration date (Curriculum Vitae expiring on 01/02/2022).

Below is a formatting guide for naming your files:

1) First Name Last Name Document Type EXP MMDDYYYY. (MMDDYY is also acceptable.)

2) You can separate each word with a space, or any punctuation in this list:

• period (.)
• underscore (_)
• hyphen (-)
• plus (+)

Use the guide to the right to help you name your files appropriately. Following these guides will help organize both your computer files and your Modio files.

Document Type	Possible Names	Example (First Name Last Name Document Name EXP MMDDYYYY)
Curriculum Vitae (CV)	cv, resume, vitae	Jane Doe CV EXP 01022022
Color Photo	photo, image	Jane Doe Photo EXP 01022022
PPD Test Results	ppd	Jane Doe PPD EXP 01022022
Certificate of Insurance (COI)	coi, insurance	Jane Doe COI EXP 01022022
ECFMG Certificate	ecfmg	Jane Doe ECFMG EXP 01022022
MD Diploma	diploma, school	Jane Doe Diploma EXP 01022022
Residency, Internship, Fellowship Certificates	residen, resident, residency, intern, fellow	Jane Doe Residency EXP 01022022
Social Security Card	ssn, social	Jane Doe SSN EXP 01022022
Immunization Information	immun, flu	Jane Doe Immun EXP 01022022
Case Logs	case, logs	Jane Doe Case EXP 01022022
Board Certification Certificate(s)	board, abms	Jane Doe ABMS EXP 01022022
NPDB Self-Query	npdb	Jane Doe NPDB EXP 01022022
Facility Applications	app	Jane Doe App EXP 01022022
Facility Attestations	attest	Jane Doe Attestation EXP 01022022
Payor Contracts	payor, medicare, medicaid, aetna, etc. (get payor list)	Jane Doe Payor EXP 01022022
Driver License Copy	dl, driver	Jane Doe DL EXP 01022022
Passport Copy	passport	Jane Doe Passport EXP 01022022
DD214	dd214	Jane Doe dd214 EXP 01022022
State Controlled Substance Document	csl	Jane Doe CSL EXP 01022022
DEA	dea	Jane Doe DEAl EXP 01022022
State Medical License	license	Jane Doe License EXP 01022022
Other Certs (ATLS, BLS, PALS etc)	atls, acls, arls, bls, pals, nals, nccpa, also, corec, cpr, nrp	Jane Doe ATLS EXP 01022022
Exam Scores	score, usmle	Jane Doe Score EXP 01022022
Malpractice Case Response	malpractice, mal practice	Jane Doe Malpractice EXP 01022022
Tax Documents	tax, w9, w-9	Jane Doe Tax EXP 01022022
Delineation of Privileges (DOP)	dop, privilege	Jane Doe DOP EXP 01022022
Reference Letters	peer, refer	Jane Doe Peer EXP 01022022
Modio Health	admin	Jane Doe Admin EXP 01022022
Background Check	bgc, background	Jane Doe Background EXP 01022022
CME	cme	Jane Doe CME EXP 01022022
AMA Profile	ama profile	Jane Doe AMA Profile EXP 01022022
Facility Contracts	contract	Jane Doe Contract EXP 01022022
Other	"unknown"	Jane Doe Unknown EXP 01022022

*For a more detailed guide to Documents, please refer to the Documents Guide in the Support Section

Modio University
& Support Page

Take advantage of a wide arrange of Tip Guides,
Live Trainings, and other OneView resources.

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Next Steps: Continue to check the Support page and the ModioU page for additional training materials and live training opportunities.

Support:

The support tab houses additional tip guides on all the OneView features. Click here to explore those guides and keep checking back in as we update the content frequently. You will also find contact information and other support services.

Modio U:

This tab gives you access to a library of pre-recorded videos. There are in-depth videos for your favorite features within OneView. You will also find schedules for our live ModioU courses, along with a link to the course registration page.

This tip guide was designed as a high-level overview of the OneView dashboard and covers all topics that are detailed in the OneView 101 Training Course. You can view more in-depth tip guides for each section of OneView on the Support page or by clicking the links on the table of contents.

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

Online:
Live Chat Support

Email:
support@modiohealth.com

Phone:
844.696.6346

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