



## TIP GUIDE: LOGINS

**Getting Started:** Use the Logins feature to store Usernames and Passwords for any accounts your organization manage for your providers or your team. This feature will help your team stay organized by keeping all logins in one place.

**Who can access Logins:**

- Available to Full-Access Coordinators by Team.
- Visible to Providers who have access to their own profile through the Onboarding feature.

**Team Logins:**

- Logins are Team level - Profiles that live on more than 1 team will have different lists of Logins by Team.
- Logins are encrypted fields withing OneView - audits are in place for any coordinators who access logins.
- Stay organized by storing all provider and coordinator usernames and passwords in one single secure location



**Efficiency Tips:**

1. Update your Onboarding invite to request Login Details directly from your provider. When the provider enters their usernames and password from the Onboarding invite, the data will automatically be added to the Logins dashboard.
2. Store your team's shared passwords in the logins tab. If you currently use a shared spreadsheet, enter those login details here. If your team has an FAC profile, you can use that as the Account Owner.
3. Use the notes section in Logins to add additional information for your team to view.

OneView: Tip Guide - Login Dashboard

Use the Logins tab to store usernames & passwords for any accounts that you manage for your providers and your team. Logins is a Team level feature and is available to all full access coordinators on your team. Providers can only see logins that they own (including logins you create for the provider).

**Filter Boxes:**  
Each blank box at the top of each column works as a filter. Use them to apply different filters. Use more than one filter at a time to quickly locate the Logins you are looking for.

**Account Owner:**  
Type in the providers or coordinators name to filter and find that users credentials. The name listed in this column should be whomever the Username and Password belongs to

**Important:** Logins is a Team level feature and all accounts that are stored here will be accessible by all full access coordinators on your Team.

**Logins:** Use to this tab to start adding Logins and view any existing entries.

**Type:** Each Site is associated with a Type. Quickly filter by the login type here.

**Add Login:** Manually add login credentials by clicking "Add Login" or by clicking the green plus sign in the right-hand corner of the grid.

modio

New Features

Modio U

Support

Danessa McShane | OneView\* Trainer

Team

Forms

Tracking

Logins

Tasks

Notes

Reports

| • Modio University • | (Virginia Beach, VA) ▾

Add Login +

Logins

35 Total

Account Owner

Role

State

Type

Site Name

Tags

Last Updated

Holmes, Brandon - MD

Provider

US

Personal Information

National Plan & Provider Enumeration System (NPPES)

06/19/2025

Boy, Tommy - NP

Provider

US

Healthcare Payors

Medicare Provider Enrollment, Chain, and Ownership System (P...

06/19/2025

Abakporo, Theophine - MD

Provider

NY

Prescription Monitoring Programs

New York State Heath Commerce System Prescription Monitorin...

06/19/2025

Boy, Tommy - NP

Provider

US

Personal Information

National Plan & Provider Enumeration System (NPPES)

06/19/2025

Sanborn, Leah - MD

Provider

NY

Prescription Monitoring Programs

New York State Heath Commerce System Prescription Monitorin...

06/19/2025

| OneView\* Trainer, Leah Sanborn

Coordinator

US

Healthcare Payors

Medicare Provider Enrollment, Chain, and Ownership System (P...

06/19/2025

Boy, Tommy - NP

Provider

US

Healthcare Payors

CAQH ProView Provider Sign In

06/19/2025

| OneView\* Trainer, Leah Sanborn

Coordinator

US

Healthcare Payors

CAQH ProView Participating Organization Sign In

06/19/2025

| OneView\* Trainer, Brandon Holmes

Coordinator

US

Healthcare Payors

Medicare Provider Enrollment, Chain, and Ownership System (P...

06/19/2025

Clifford, Thomas - MD

Provider

US

Healthcare Payors

CAQH ProView Practice Manager Sign In

06/19/2025

Boy, Tommy - NP

Provider

MA

General

Blue Cross Blue Shield Massachusetts Provider Central

06/19/2025

Abakporo, Theophine - MD

Provider

US

General

CAQH EnrollHub

06/19/2025

Abele, Jennifer - MD

Provider

US

Healthcare Payors

CAQH ProView Participating Organization Sign In

06/19/2025

Group/Organization Name - FAC

Facility

US

Healthcare Payors

CAQH ProView Provider Sign In

06/19/2025

| OneView\* Trainer, Cierra Barnes

Coordinator

US

Healthcare Payors

Medicare Provider Enrollment, Chain, and Ownership System (P...

06/19/2025

Cierra Denning, OneView\*Admin |

Coordinator

US

Healthcare Payors

Medicare Provider Enrollment, Chain, and Ownership System (P...

06/19/2025

Privacy Policy

© 2025 Modio Health All rights reserved

Terms and Conditions

Chat

# OneView: Tip Guide - Adding Logins

Securely store provider or coordinator login information for any site such as CAQH, PECOS, and more.

**Account Owner:** Choose an Account Owner from the drop-down list. The login credentials (username/password) should match the owner you are adding.

**Site Name:** Type within the free text field to search for the site you wish to add. This will pull a list of potential matches for you to select from. If you picked a website, the URL (address) will be auto- filled in the Site URL and Registration URL fields

**Username & Password:** Enter in the appropriate Username and Password. These fields will be encrypted once you click Save.

**Notes:** Add Notes as needed. This section will be encrypted once you click "Add Login"

**Efficiency Tip:** Update your Onboarding Invitation to include Logins. As your provider fills them out, they will appear in this section.

The screenshot displays the 'Add Login' modal in the Modio OneView\* Trainer application. The modal is overlaid on a background showing a list of users and their roles. The modal is divided into two main sections: 'Site Information' and 'Secure Information'.

**Site Information Section:**

- Account Owner\***: A dropdown menu with the placeholder text 'Type to search Provider or Coordinator Names'.
- Site Name\***: A text input field with the placeholder text 'Type to search'.
- Site URL\***: A text input field.
- Registration URL**: A text input field.
- Tag(s)**: A dropdown menu with the placeholder text 'Type to search or add a Tag'.

**Secure Information Section:**

- Username\***: A text input field with a character count of '(4 of 250)'. The value 'test' is entered.
- Password\***: A text input field with a character count of '(8 of 250)'. The value 'test1234' is entered. There is a toggle icon to the right of the field.
- Notes**: A text area with a character count of '(0 of 2000)'. The placeholder text 'Example: Security Questions' is visible.

At the bottom of the modal, there are two buttons: 'Cancel' and 'Add Login'.

The background interface shows a list of users with columns for 'Account Owner', 'Role', and 'Last Updated'. The 'Add Login' button is visible in the top right corner of the background interface.

**Start Here - Add Login:**  
Start Here by clicking "Add Login."

### Site Name & Registration URL:

If you picked a website, the URL (address) will be auto-filled in the Site URL and Registration URL fields. If you picked a custom website, enter the URL for the site here. (Examples are "http://yourwebsitename.com" and "http://yourwebsitename.com/signup".)

\*If the website can't be found within our dropdown, please enter the URL for the site in the "Site URL and Registration URL" fields. Please then send this information to [support@modiohealth.com](mailto:support@modiohealth.com)

**Eye Icon:** Click on the eye icon to view or hide the password you just added.

**Add Login:** Once you're done entering the username and password. Click the "Add Login" button to save it.



OneView Tip Guide - Login Features: Accessing and Viewing Saved Logins



View and manage existing Logins for your providers and your team.

modio

New FeaturesModio USupportDanessa McShane | OneView® Trainer

TeamFormsTrackingLoginsTasksNotesReports

Modio University • (Virginia Beach, VA)

Add Login +

Logins

35 Total

Account Owner

Role

State

Type

Site Name

Tags

<input type="checkbox"/>						
<input type="checkbox"/>	Holmes, Brandon - MD	Provider	US	Personal Information	National Plan & Provider Enumeration System (NPPES)	
<input type="checkbox"/>	Boy, Tommy - NP	Provider	US	Healthcare Payors	Medicare Provider Enrollment, Chain, and Ownership System ...	
<input type="checkbox"/>	Abakporo, Theophine - MD	Provider	NY	Prescription Monitoring Programs	New York State Heath Commerce System Prescription Monitorin...	
<input type="checkbox"/>	Boy, Tommy - NP	Provider	US	Personal Information	National Plan & Provider Enumeration System (NPPES)	
<input type="checkbox"/>	Sanborn, Leah - MD	Provider	NY	Prescription Monitoring Programs	New York State Heath Commerce System Prescription Monitorin...	
<input type="checkbox"/>	OneView® Trainer, Leah Sanborn	Coordinator	US	Healthcare Payors	Medicare Provider Enrollment, Chain, and Ownership System (P...	
<input type="checkbox"/>	Boy, Tommy - NP	Provider	US	Healthcare Payors	CAQH ProView Provider Sign In	
<input type="checkbox"/>	OneView® Trainer, Leah Sanborn	Coordinator	US	Healthcare Payors	CAQH ProView Participating Organization Sign In	
<input type="checkbox"/>	OneView® Trainer, Brandon Holmes	Coordinator	US	Healthcare Payors	Medicare Provider Enrollment, Chain, and Ownership System (P...	
<input type="checkbox"/>	Clifford, Thomas - MD	Provider	US	Healthcare Payors	CAQH ProView Practice Manager Sign In	
<input type="checkbox"/>	Boy, Tommy - NP	Provider	MA	General	Blue Cross Blue Shield Massachusetts Provider Central	
<input type="checkbox"/>	Abakporo, Theophine - MD	Provider	US	General	CAQH EnrollHub	
<input type="checkbox"/>	Abele, Jennifer - MD	Provider	US	Healthcare Payors	CAQH ProView Participating Organization Sign In	
<input type="checkbox"/>	Group/Organization Name - FAC	Facility	US	Healthcare Payors	CAQH ProView Provider Sign In	
<input type="checkbox"/>	OneView® Trainer, Cierra Barnes	Coordinator	US	Healthcare Payors	Medicare Provider Enrollment, Chain, and Ownership System (P...	
<input type="checkbox"/>	Cierra Denning, OneView®Admin	Coordinator	US	Healthcare Payors	Medicare Provider Enrollment, Chain, and Ownership System (P...	
<input type="checkbox"/>	Holmes, Brandon	Coordinator	US	Healthcare Payors	Medicare Provider Enrollment, Chain, and Ownership System (P...	
<input type="checkbox"/>	OneView® Trainer, Cierra Barnes	Coordinator	US	Healthcare Payors	CAQH ProView Provider Sign In	
<input type="checkbox"/>	Azura Giles, OneView®Admin	Coordinator	US	Healthcare Payors	CAQH ProView Provider Sign In	

Side Panel

Medicare Provider Enrollment, Chain, and Ownership System (PECOS)

Login Details

Last Updated: Thu Jun 19, 2025

Healthcare Payors

Medicare Provider Enrollment, Chain, and Ownership System (PECOS)

Account Owner

Boy, Tommy NP - Provider

Site URL

https://pecos.cms.hhs.gov/

Registration URL

https://pecos.cms.hhs.gov/pecos/PecosIACConfirm.do?transferReason=CreateLogi n

Secure Information

Hide

Username

admin@modiohealth.com

Password

B84g63rpI7Te

Notes

test

Cancel

Save Changes

Tags

Add tag(s)

Privacy Policy

© 2025 Modio Health All rights reserved

Terms and Conditions

Chat

**Editing Logins:** To view an existing login, click the Side Panel icon in the Actions column.

**Visiting a Saved Site:** Click on the link to be directed to the website of the stored Login.

**Eye Icon to View Passwords and Notes:** Click on the hide icon in the Secure Information box to gain access to a saved username, password, and notes. Click on the fields to make your edits. Once you've made your changes, click the "Save Changes" button to save your edits.


**Note:** Each time a user decrypts a Login, Modio stores that information for auditing/compliance.

**Last Updated:** View the last updated date to see when the last login was last updated.

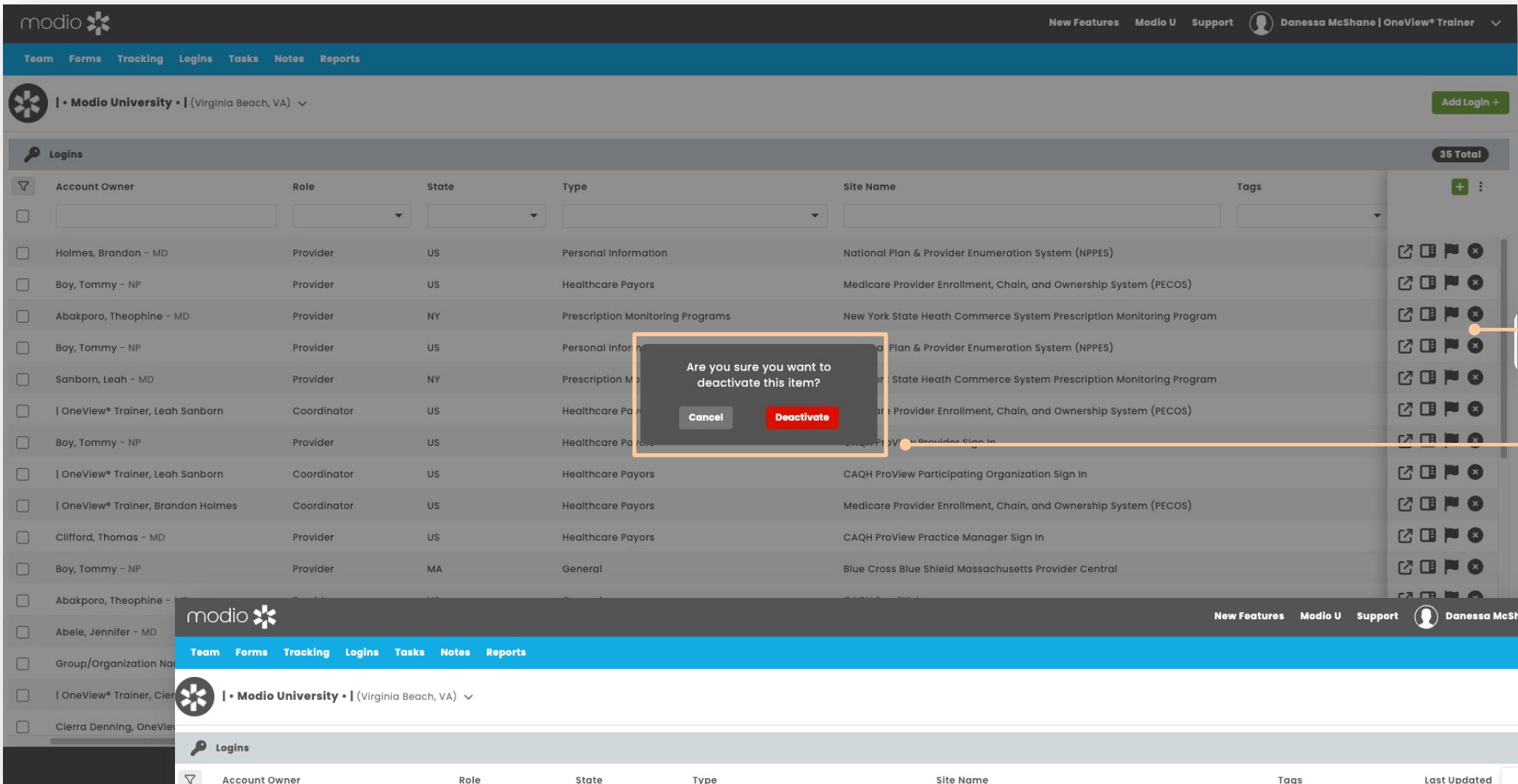
**Site Quick Link:** Quickly open the site you need to access by clicking here.

**Copy Icon:** Click the copy icons to copy and paste usernames and passwords into the website you opened with the grey arrow icon, and then log in.

**Tags:** Add tags for any usernames and passwords you are creating

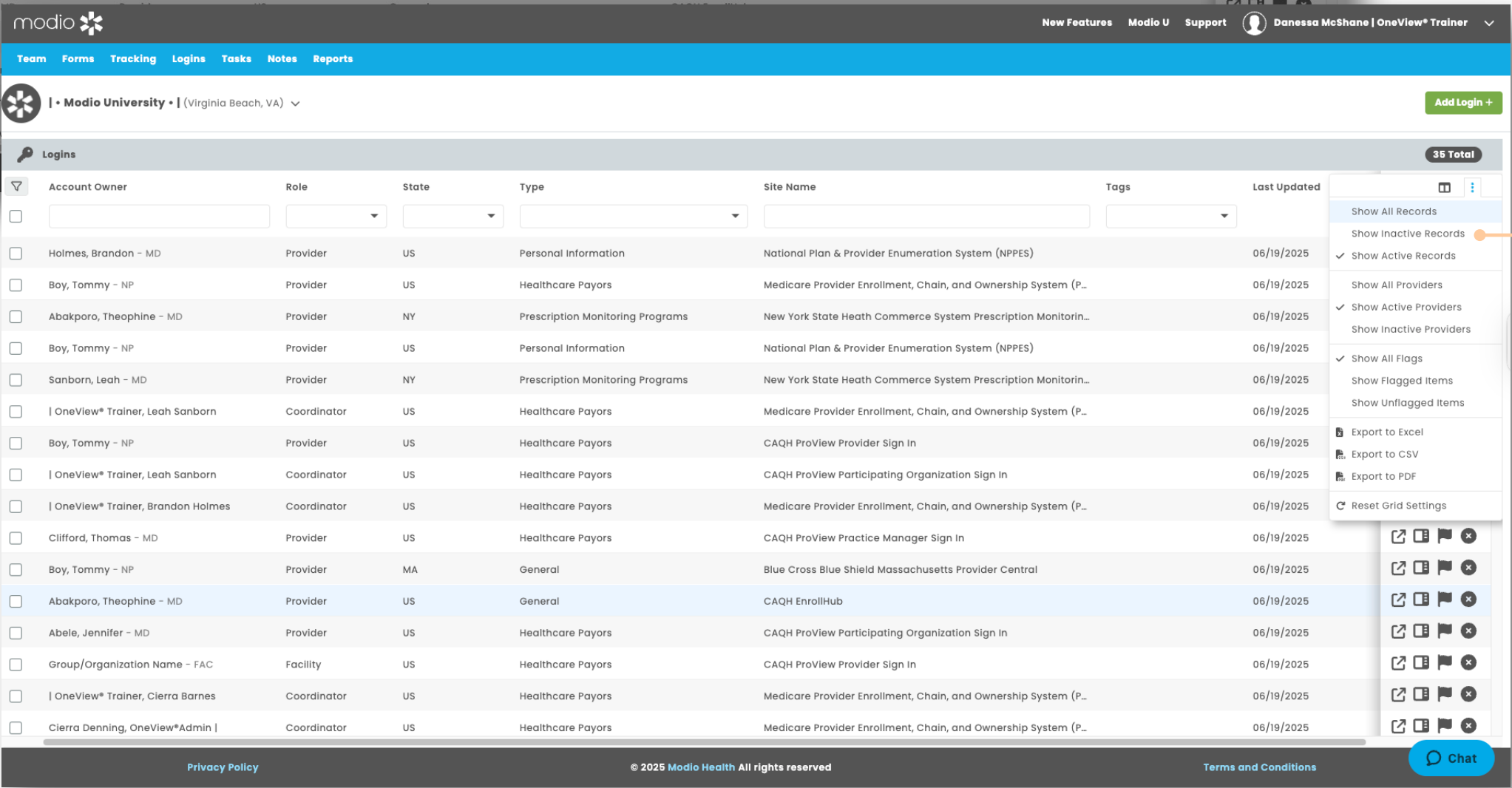
1. Select the  icon to open the side panel.
2. Click on the current account owner.
3. Select the grey "x" to remove.
4. Use completion matching to select a new Account Owner from the dropdown.

**Important:** The Username and Password in the entry should belong to the Account Owner. Changing the Account Owner should be followed by reviewing the Username and Password in the existing entry for accuracy.



**Grey X icon:** Click on the grey X icon under the actions item column to deactivate a login record.

After clicking the grey x there will be a pop-up that appears, asking if you'd like to **deactivate** the record or hit cancel.



**Inactive Records:** Click on the three-dot icon and filter your grid to "Show Inactive Records."

1

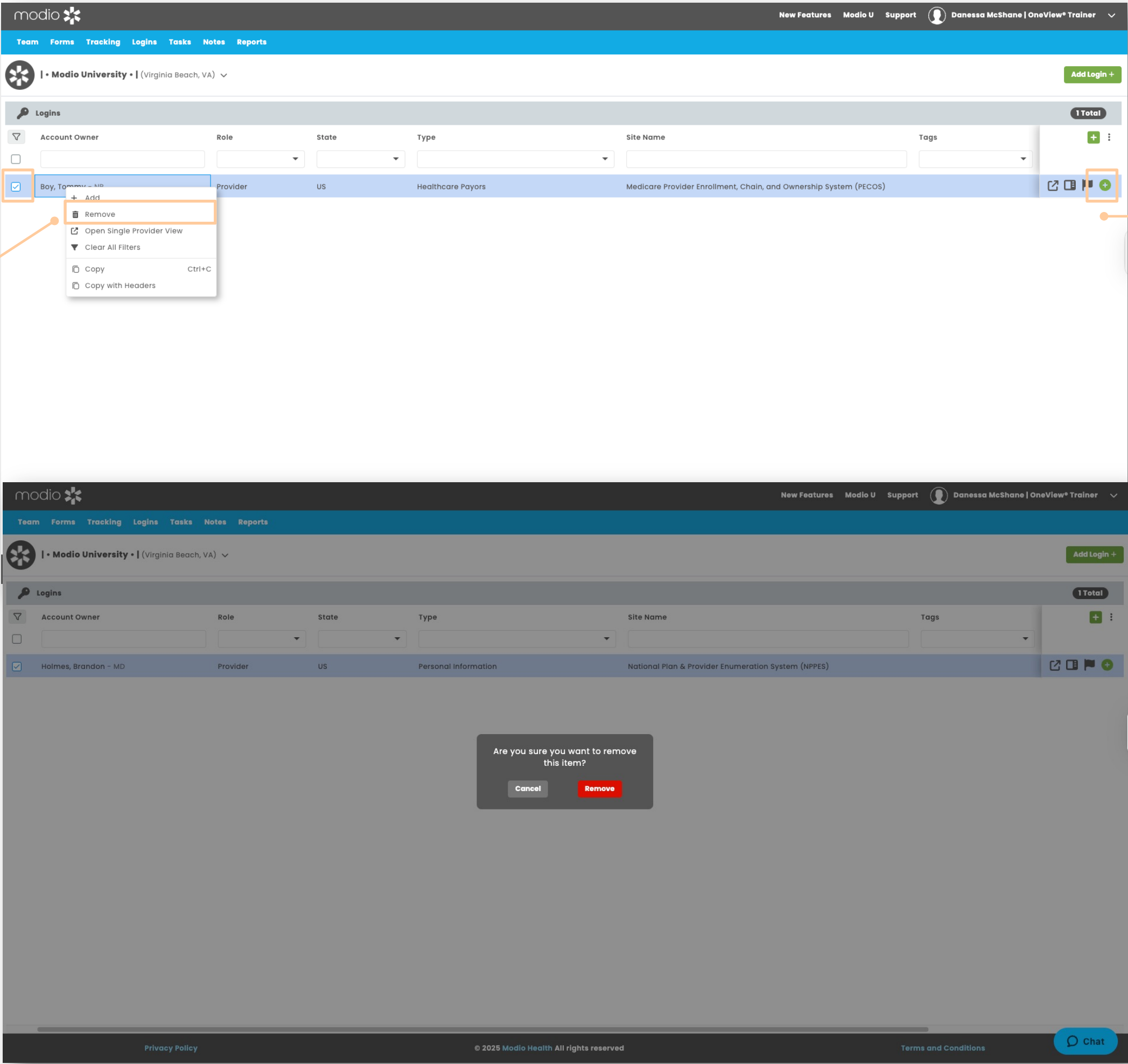
Once you've switched to view the inactive records. Click on the empty box to left of the provider's name, to select the record.

2

Once you've switched to view the inactive records. Click on the empty box , left of the provider's name, to select the record.

3

**Restoring a deactivated Login:**  
To restore the deactivated login record, click the green plus sign icon under the Actions item column.



The screenshot displays the modio OneView interface for managing logins. The top navigation bar includes links for Team, Forms, Tracking, Logins, Tasks, Notes, and Reports. The user is logged in as Danessa McShane, a OneView\* Trainer. The main content area shows the 'Logins' section for 'Modio University' (Virginia Beach, VA). A table lists login records with columns: Account Owner, Role, State, Type, Site Name, and Tags. The first record, 'Boy, Tom', is selected, and a context menu is open, showing options: Remove, Open Single Provider View, Clear All Filters, Copy (Ctrl+C), and Copy with Headers. The second record, 'Holmes, Brandon - MD', is also shown. A modal dialog is displayed in the center, asking 'Are you sure you want to remove this item?' with 'Cancel' and 'Remove' buttons.



## **Frequently Asked Questions & Efficiency Tips**

### **Q: Can I run a report or download all stored information from the Logins tab?**

There is a Logins report available by request. Since the Logins report contains sensitive data, clients do not have access to run it themselves. If you would like a copy of the report, please email [Support@ModioHealth.com](mailto:Support@ModioHealth.com) and our team will be happy to assist.

### **Q: What if I need to change the Username or Password of a Login that I have already added?**

1. Start by clicking the "Side Panel" icon for the Login entry you wish to modify.
2. A pop-up from the right-hand side will appear, displaying the encrypted username and password.
3. Click the "Show" icon to view these credentials, and click on the fields to make any edits
4. Make any necessary changes to the fields.
5. After making changes, remember to click "Save Changes" to save the updated credentials, as the system won't automatically save this modification.

NOTE: Each time a user decrypts a Login, Modio stores that information for auditing/compliance and tracking purposes.

### **Q: Can Providers enter their own Usernames & Passwords?**

Yes! Your organization can use the Onboarding feature to request logins directly from your provider. See the Onboarding tip guide for additional information.

### **Q: I can't find the site I need in the logins site list - how do I add the username and password?**

If the site you need isn't listed, please email **Support@modiohealth.com** with the full site URL and the site name. Our support team will review and add it promptly. We expand our site list based on client requests, so feel free to send us any login portals you'd like to see included.

There is an option to manually add your logins information: Select Add Login, manually type in the site name, and Copy/Paste the full URL starting with http://. Then, enter the Username and Password and select Add Login.

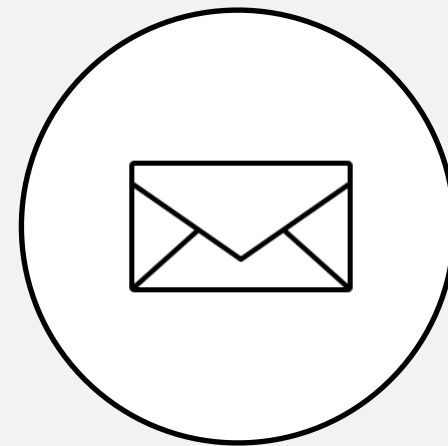
**Please note:** Manually entering usernames and passwords will have downstream effects on Onboarding templates, any missing items reports, and searches. Best practice is to enter and save logins under a site available in the dropdown and request any new sites to be added by Support.

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

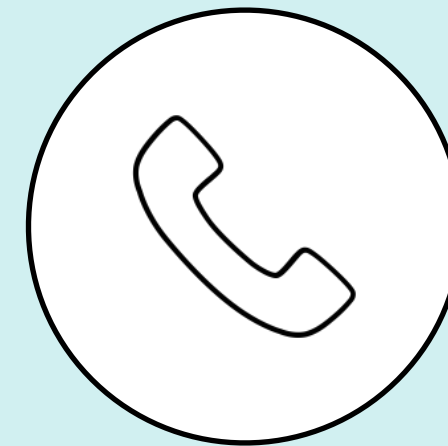
---



**Online:**  
Live Chat Support



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



**Phone:**  
844.696.6346