OneView®

Tip Guide: Provider Onboarding

INTRODUCTION

The provider onboarding feature is a customizable way to quickly gather data and complete your Teams provider profiles. Once sent, the onboarding invitation will welcome your new provider to your organization and prompt them create a OneView® login. From there they will be prompted to fill in requested data that will be automatically added to their profile.

TABLE OF CONTENTS

PART 1

SENDING THE ONBOARDING MESSAGE

Start here

Add Provider:

Select the Add Provider button in either V1 or V2

Step 1 : **Adding Your Provider(s) to your team roster. Your profile must be added with a valid email address before sending the Onboarding invite. Follow your add provider workflow by selecting "Add Provider" and filling in the 4 required fields.**

Note: If you have multiple teams, you can assign the provider to any team where their profile should be visible. Additionally, you may add or manage tags in this section.

Provider Full Name or NPI:

Enter your provider's first and last name or their NPI. If there is not a match in the dropdown, select "Don't see profile listed? Click here to skip profile claim."

Provider Title:

Select from the list of professional titles.

Specialty List:

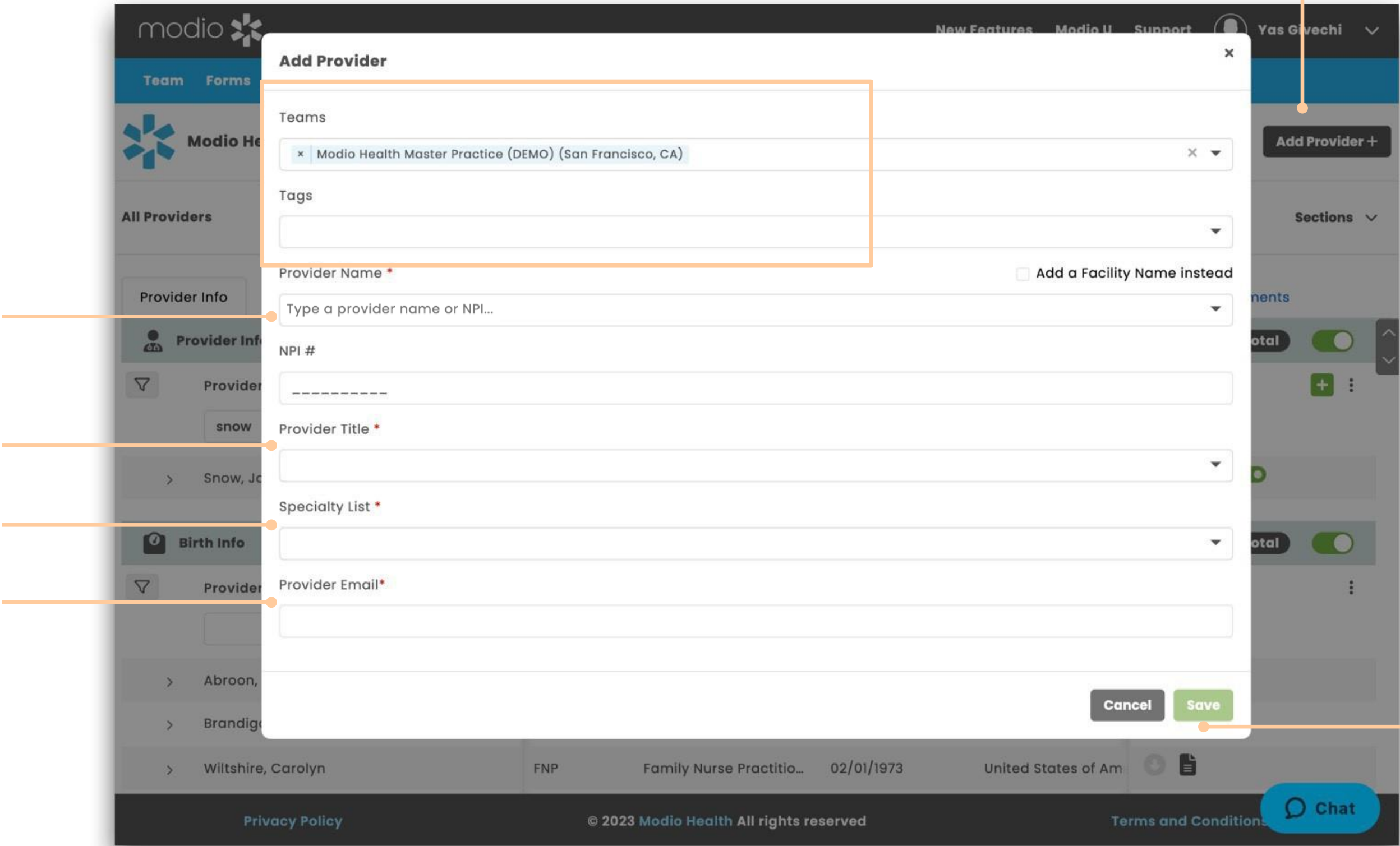Enter you providers specialty or specialties.

Provider's Email:

Enter your provider's email. Use an email that you would use to contact your provider. This email is linked to the onboarding invitation.

Click Save:

This will add the provider profile to your Team roster.

4

V1

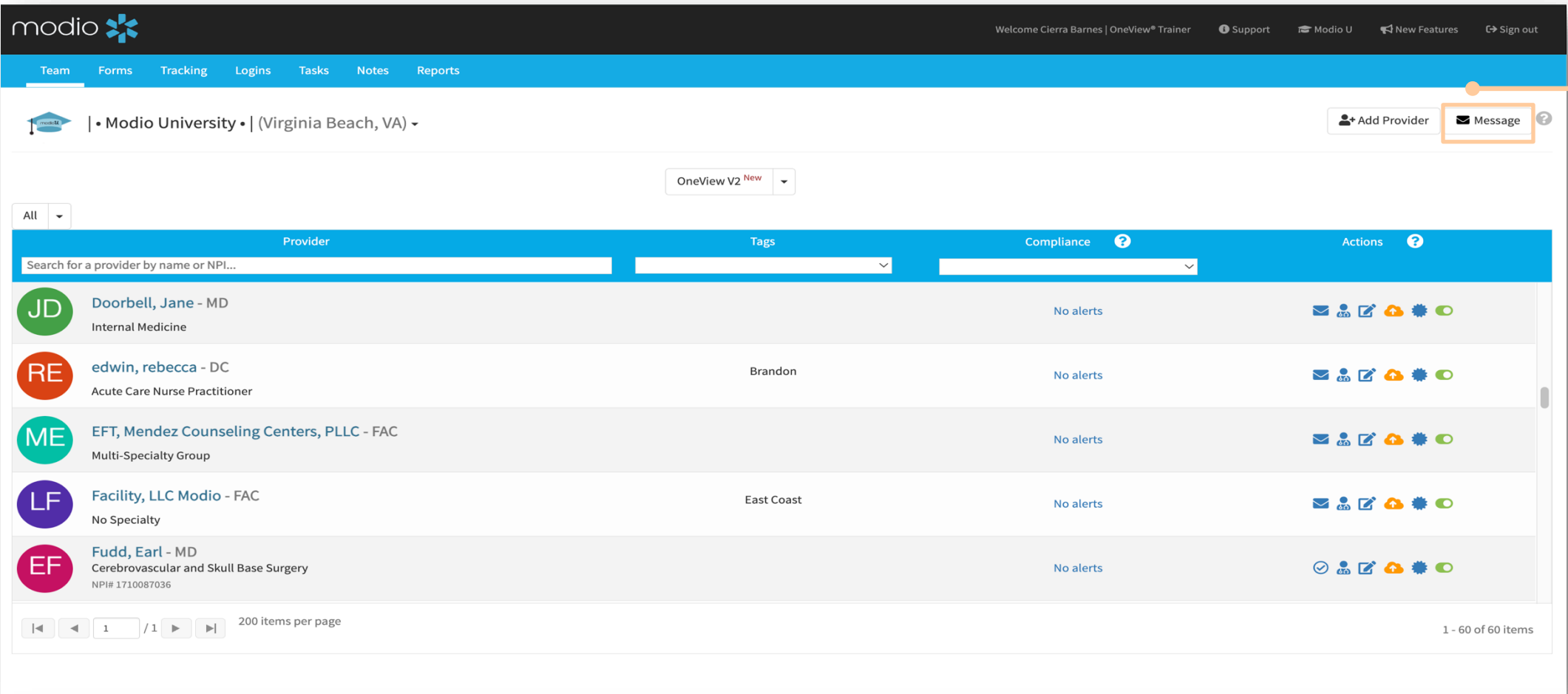Message Provider in V1:

1. Click the Message button

Step 2- Inviting Your Provider(s). Now that your providers are added to your Team roster, you are ready to send the Onboarding Invite. The Onboarding invite may be sent from both V1 and V2

V2

Message Provider in V2:

1. Navigate to the Provider Info grid within the Provider Info Tab.
2. Find the provider you wish to send the Onboarding invite.
3. Right click on the Provider's name.
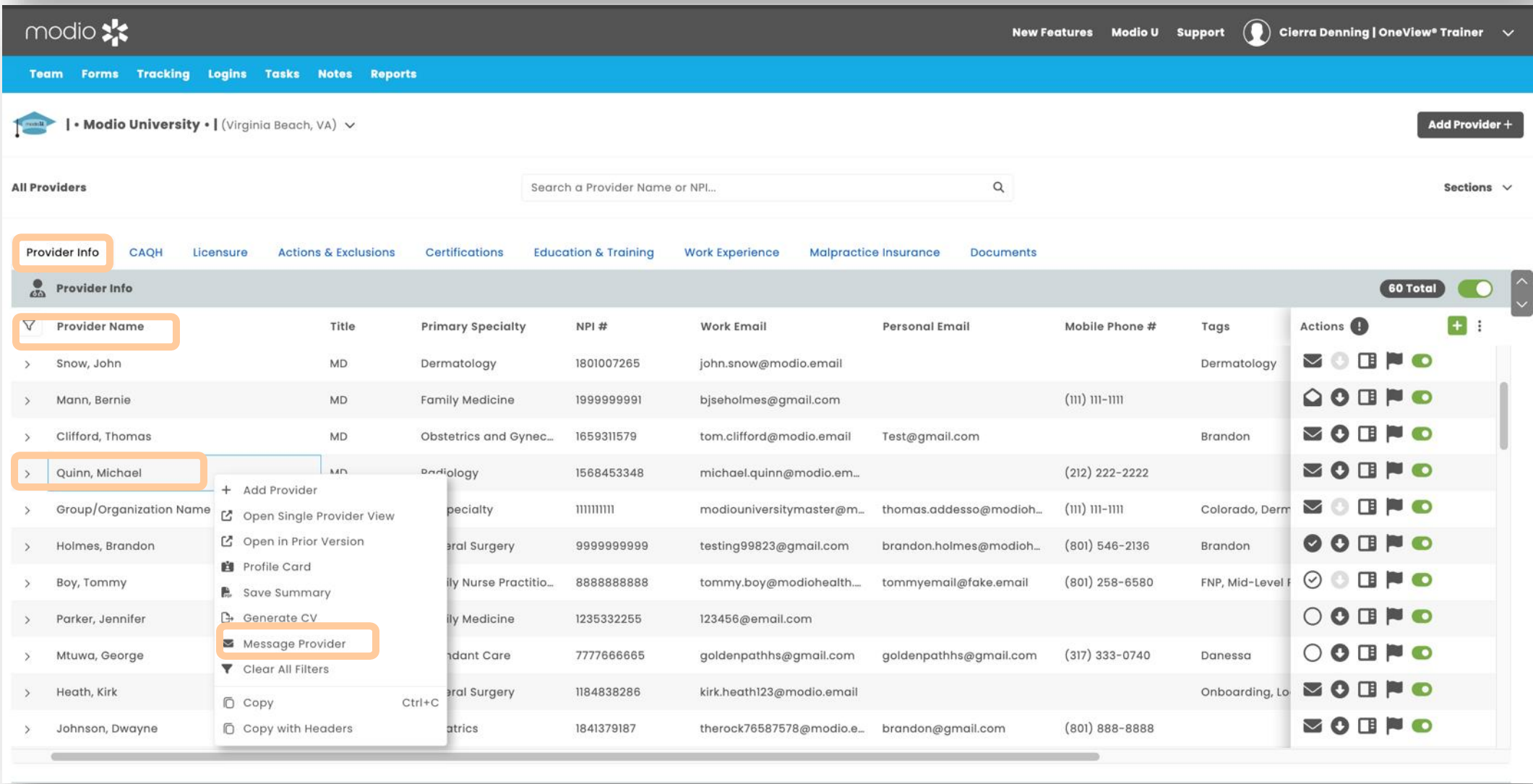4. Select Message Provider.

*If you cannot locate the Personal Info grid in V2 remember to check your grid settings and toggle on that grid as needed.

5

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Edit Icon:

Use this to make and save edits and changes to your Onboarding invite Subject and Message section.

Step 3 – Filling out the Onboarding send invite.

Tag(s):

Quickly add a specific group of providers by selecting the corresponding Tag. These Tags are pulling from your Team page in V1 and the Provider Info grid located in the Provider info tab in V2.

Email Providers:

As you click the closed envelop icon, you will see your providers emails appear here. All email address changes must be done through the personal info section of your profiles.

Email Subject & Message:

Enter a desired subject and then add a message to your provider. This area can be customized as well. There are message templates available to help you get started. Those templates are located on the ModioU tab next to the Onboarding video.

Attachment:

Optional feature to add three attachments. (like a welcome packet). Attachments will be sent as Read Only files and are not intended to be filled out, signed or returned.

Email a Copy:

This field is available when sending a single invite at a time. The email will be delivered to the coordinator email of the signed in user. If this option is checked but no providers are added, the coordinator can send the invite to themselves to test.
The onboarding link will be hidden since the request is not tied to a specific provider.
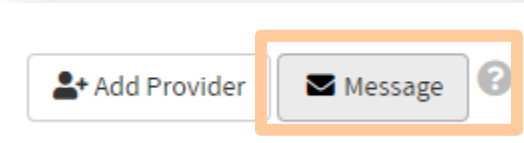
Send:

Click send once you have set up your subject, message and selected providers to receive the invite.

New Invitations:

Click the Envelop Icon to add provider emails to the invitation list. If an email address is red that indicates an invalid email address. Update the email in personal info section in the field labeled "Work Email" .

6

6

Add Provider   **✉ Message**   ?
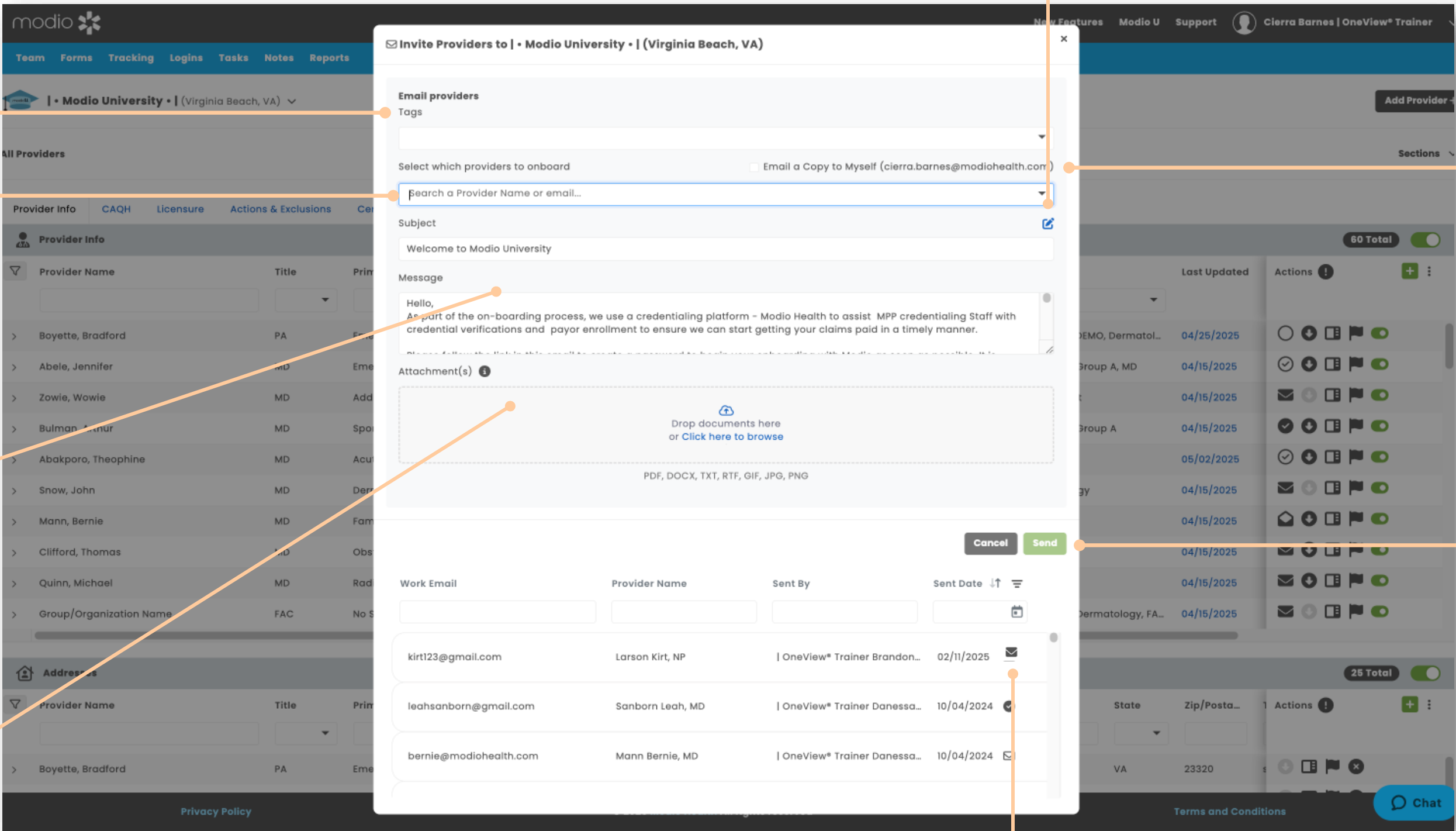
1. Next to add provider click the message button. This will allow you to both send your invites as well as customize the message for your team. The message is a team-level feature as you can only have one per team.

✉ Invite Providers to | • Modio University • | (Virginia Beach, VA)   ✕

Email providers
Tags

Select which providers to onboard   ☐ Email a Copy to Myself (azure.giles@modiohealth.com)

Search a Provider Name or email...

Subject   ✎

Message

Attachment

Choose File   No file chosen

Cancel   Send

Work Email   Provider Name   Sent By   Sent Date ↕ ⚏

2. Select the editor button to open the template and add your subject and message.

✉ Invite Providers to | • Modio University • | (Virginia Beach, VA)   ✕

Editing Email providers
Subject

Welcome to Modio!

Message

As part of the on-boarding process, we use a credentialing platform - Modio Health to assist MPP credentialing Staff with credential verifications and payor enrollment to ensure we can start getting your claims paid in a timely manner.

Please follow the link in this email to create a password to begin your onboarding with Modio as soon as possible. It is imperative that you complete your credentialing profile so we can enroll you with payors. If you cannot click on the link, please copy and paste it into your browser. You can access this request via your cell, tablet, iPad or laptop (we recommend Google Chrome browser). This process has 3 parts & should take less than 20 minutes in total if you have all your information ready.

1.   The fields below are Important to complete the onboarding process. You will need to enter all this information before moving forward. Then, click Save & Next to continue.
•   Personal Info

Cancel   Save

3. Type a subject and message or copy it from another source. Be sure to hit save before leaving the screen.

✉ Invite Providers to | • Modio University • | (Virginia Beach, VA)   ✕

Email providers
Tags

Select which providers to onboard   ☐ Email a Copy to Myself (azure.giles@modiohealth.com)

Search a Provider Name or email...

Subject   ✎

Welcome to Modio!

Message

As part of the on-boarding process, we use a credentialing platform - Modio Health to assist MPP credentialing Staff with credential verifications and payor enrollment to ensure we can start getting your claims paid in a timely manner.

Please follow the link in this email to create a password to begin your onboarding with Modio as soon as possible. It is

Attachment

Choose File   No file chosen

Cancel   Send

4. You may modify the invitation at any time by following this process again.

7

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).
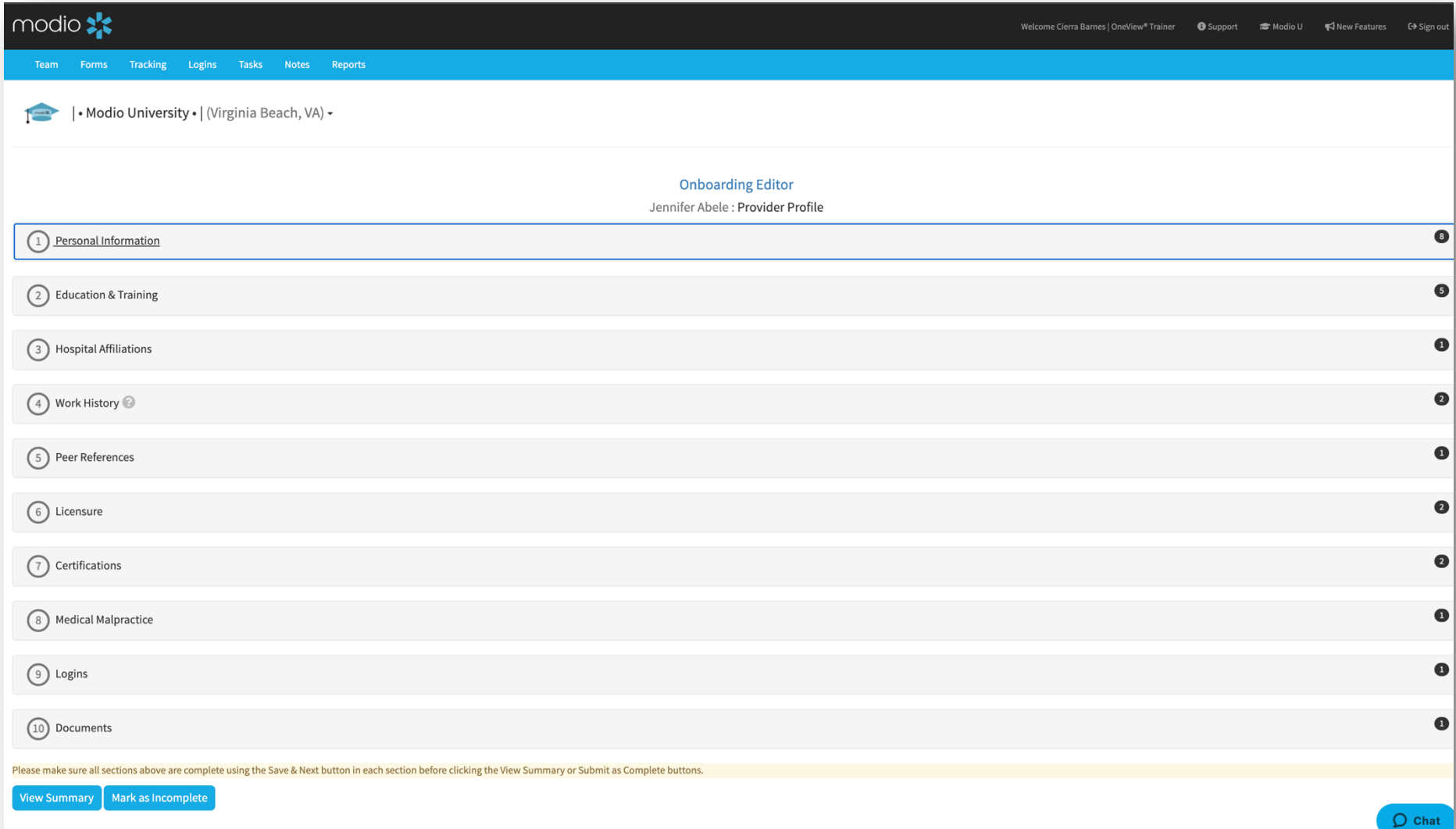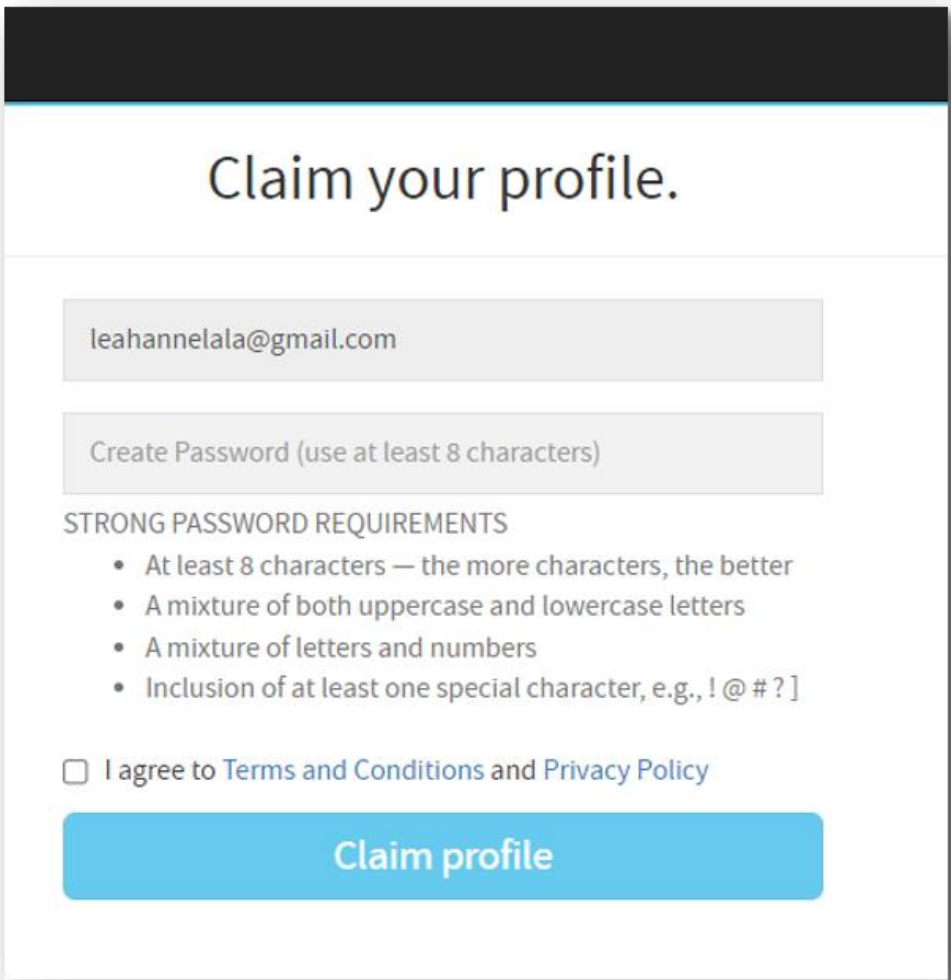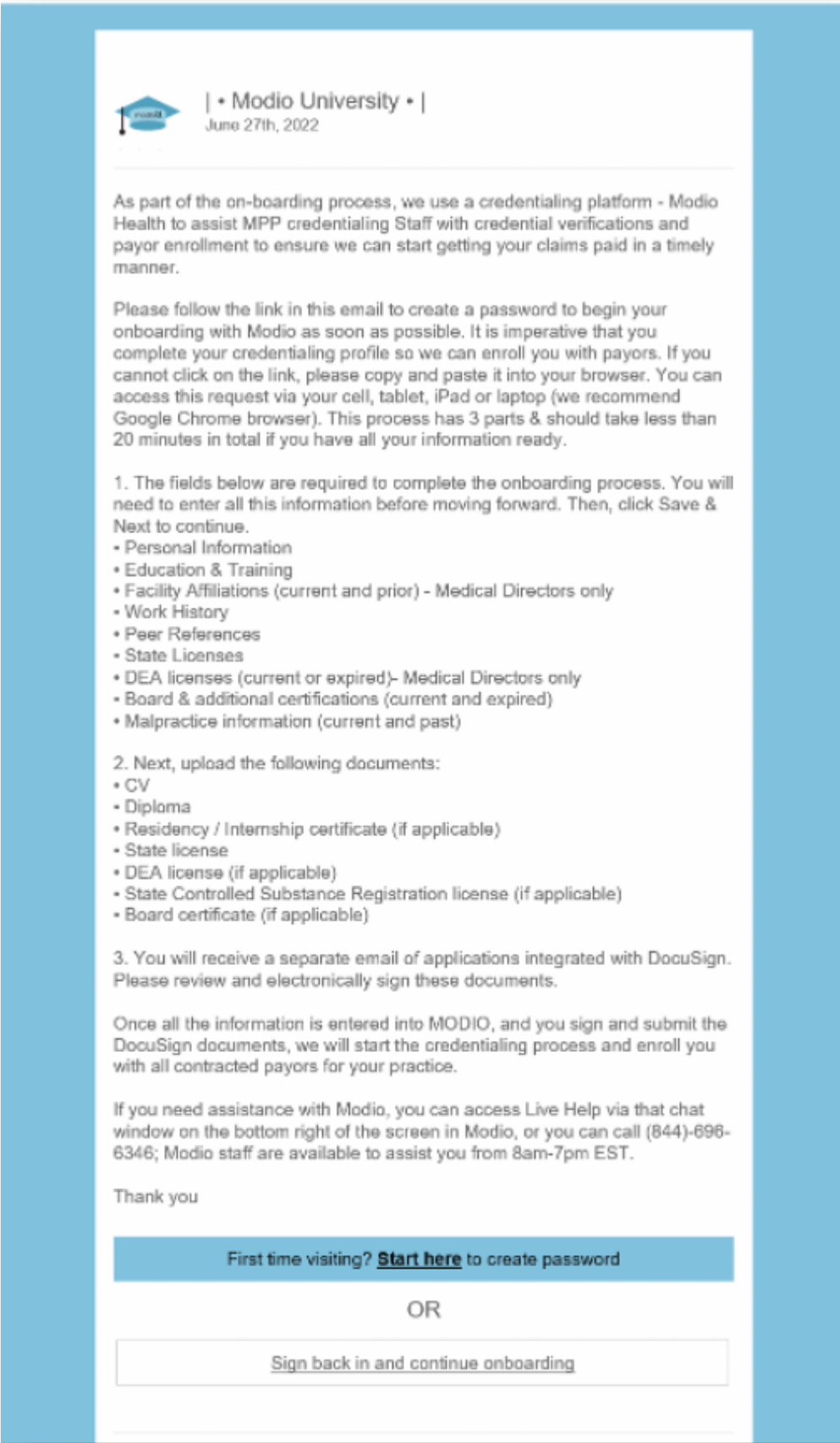
*View the Provider Onboarding Tip Guide for an in-depth look at your Providers workflow and best practices to successfully navigate the Onboarding process.

8

The envelope icons will update in real time as your provider moves through the onboarding process. See the icon key below to interpret what stage of onboarding your providers are currently in.

Icon Key

New Invitation
Indicates a new provider. Click to invite.

Sent Invitation
Indicates an invite has been sent but not started.

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.

Completed Profile
Indicates a coordinator has completed onboarding for this provider.

Refer to the action items to remain informed about the Provider's progress with onboarding.

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The envelope icons will update in real time as your provider moves through the onboarding process. See the icon key below to interpret what stage of onboarding your providers are currently in.

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| New Features | Modio U | Support | 👤 **Yasi Givechi** ⌄ |

Team   Forms   Tracking   Logins   Tasks   Notes   Reports

✳ **Modio Health Master Practice (DEMO)** (San Francisco, CA) ⌄   **Add Provider +**

| Provider Info | CAQH | Licensure | Actions & Exclusions | Certifications | Education & Training | Work Experience | Malpractice Insurance | Documents |

👥 Provider Info   137 Total 🟢

	Provider Name	Title	Primary Specialty	NPI #	Work Email	Personal Email	Mobile Phone #	Tags
>	Goldman, Gary	MD	Anesthesiology	1982610416	drgarygoldman@gmail.co...	drgarygoldman@gmail.co...	(925) 683-9211	
>	Clifford, Thomas	MD	General Surgery	1659311579	tom@modiohealth.com	tcliffordmd@gmail.com		MEC Review
>	Zydron, Courtney	MD	Emergency Medicine		courtneyzydron@gmail.com	courtneyzzz1@gmail.com		MEC Review
>	Manke, Chad	MD	Orthopedic Surgery	1114965159	mankec@atlanticortho.com	cmanke@msn.com		Onboarding
>	Briggs, Jonathan	MD	Hospital Medicine - In...	1194798553	jbriggs8272@gmail.com	mp5588md@gmail.com	(757) 641-4798	MEC Review
>	Mendelson, Moss	MD	Emergency Medicine	1023047925	mhmendel@sentara.com		(757) 636-1968	Emergency Medicine
>	Boyette, Bradford	PA	Emergency Medicine	1316987241	bradboyette22@gmail.com	bb@modio.com	(757) 472-2186	Emergency Medicine
>	Cofer, Mary	SA	Ancillary Staff	1619262649	mary.visvardis@amerisurg...	mary.visvardis@amerisurg...	(757) 572-4886	
>	Hubbard, Brian	MD	Family Medicine	1447284476	briandemo@modio.email			
>	Patel, Dharmesh	MD	Family Medicine	1922111061	pateldharmesh@modio.e...			
>	Pliskin, Marc	DO	Urology	1174569362	pliskinmarc@modio.email			
>	Lamprecht, Derek	DO	Orthopedic Surgery	1325178656	lamprechtderek@modio.e...			

⚖ Birth Info   136 Total 🟢

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Icon Key

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Indicates a new provider. Click to invite.

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✅ **Completed Profile**
Indicates provider has completed their onboarding.

✅ **Completed Profile**
Indicates a coordinator has completed onboarding for this provider.

Refer to the action items to remain informed about the Provider's progress with onboarding.

From your Reports tab, run the standard report titled "Providers"

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The **"Providers"** report has a column dedicated to onboarding statuses.

Use this **"Onboarding"** column to quickly filter and sort by the current status your providers are in throughout the onboarding process.

☰ ✳	Started from Providers						Search	+ New	⚙

OneView DW / **Providers**   Filter Summarize Show Editor ⟳ ⧉ Save

Provider ID	Created	Onboarding	Onboarding Completed	...ags	Job Title	Last Name	Suffix	First Name	Middle Name	Provider Type	+
340009	8/16/2021			...lorado, Master Lists, Master Payor List	MD	Sanborn		Leah		MD	1234
63729	10/15/2018			...lorado, Group A, MD		Abele		Jennifer	B	MD	1073
299754	3/12/2021			...P, Mid-Level Provider		Boy		Tommy		NP	8888
443466	7/18/2022			...astic Surgery, Virginia Beach	Pediatric Surgeon	Scott		Michael		MD	5689
158129	12/12/2019			...roup A	Employed	Abakporo		Theophine	David	MD	1972
481117	11/1/2022					Giles		Azure	V	MD	1234
453725	8/12/2022					Fudd		Earl		MD	1710
678564	4/18/2024					Lee		Danessa		MD	
452000	8/8/2022			...Dermatology	MD	Denning		Cierra		MD	1234
113614	8/9/2019			...lorado, Group A		Bulman	IV	Arthur		MD	1111
250066	11/6/2020	Complete Profile	5/22/2024	...randon		Holmes		Brandon		MD	9999
487670	11/29/2022	Incomplete Profile				Smith		Christine		MD	1111
560611	7/12/2023	New Invitation				Kahlo		Frida		LPATA	
709326	7/9/2024	New Invitation				WI		Advent		FAC	
634057	12/6/2023	New Invitation				Lewis		Cody		MD	
611846	10/2/2023	New Invitation				Holmes		Brandon		MD	
70309	1/2/2019	New Invitation		West Coast		Zowie		Wowie		MD	1234
324763	6/24/2021	Incomplete Profile		Danessa		Mtuwa		George	R	WAIV - Waiver	7777
2175	6/3/2016	Incomplete Profile		Colorado, DEMO, Dermatology, Mid Le...		Boyette		Bradford	Newton	PA	1316
612302	10/3/2023	New Invitation		East Coast		XYZ		Test Provider		MD	9871

Filter popup:

Is ⌄

🔍 Search the list

☐ Select all
☐ Complete Profile
☐ Complete Profile (no account)
☐ Incomplete Profile
☐ New Invitation

Add filter

Visualization ⚙   ▦ ▤   Showing 60 rows ⚡ 13.5s

12

PART 2

CUSTOMIZING THE ONBOARDING TEMPLATE

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Follow these 4 steps to access and edit the Onboarding Template.

1

Click on any provider's name to open their profile.

2

Select Summary

3

Select the "Edit Icon"

4

"Onboarding Editor"

link will now appear on the top of the screen. Click the "Onboarding Editor" link to tailor your onboarding invitation fields or keep them as is with the default values.

14

Accessing the profile card:

- V1- Hover of the initials or profile photo. Click "profile"

- V2 – Provider Info tab, right click on the name, select Profile Card.

Note: You can conveniently access the onboarding editor by selecting "Provider Info" within the profile cards in both V1 and V2.

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Your onboarding template can be edited to meet your organizations needs. Add the sections you want your providers to fill out. Remove the sections or fields that you don't need or that your coordinators will fill in for your providers.
Once the Onboarding Editor title changes to Onboarding Viewer, you can start customizing your invitation. Use this to toggle back and forth from the Edit view to the Provider view to review how your changes will look to the provider.

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Team   Forms   Tracking   Logins   Tasks   Notes   Reports

Welcome Yas Givechi   Support   Modio U   New Features   Sign out

✳ Modio Health QA Displ (San Francisco, CA) ▾

Onboarding Viewer
Provider Profile 📝

① Personal Information

Sections:
There are 10 different sections to modify

Group:
Each section has a group level highlighted in blue.

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

Onboarding Fields

Provider Information

RHC Name	Middle Name

Last Name *	Provider Title *

Prefix 🚫

Professional Information

Telemedicine Experience	Fluent languages

Contact Information

Work Email *	Personal Email	Home Phone #

Mobile Phone	Pager #

Emergency Contact Information

Contact Name	Contact Type	Email	Phone #

Home Address

Address	Address 2	City	State

💬 Chat

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.

16

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Your onboarding template can be edited to meet your organizations needs. Add the sections you want your providers to fill out. Remove the sections or fields that you don't need or that your coordinators will fill in for your providers.

Label:
Indicates the field this is connected to in the provider's profile.

Placeholder:
Add a custom placeholder text for specific instructions in filling a field.

Click the paper and pencil edit icon to activate a specific field. Each individual field has an edit icon.

Each section also has an edit icon and a red "x". Use the red "x" to remove the corresponding section from your providers invite if that data is not needed for your organizations credentialing needs.

Important - Required Field:
A required field will be highlighted in red if a provider selects "Save & Next" before filling out required fields. That section will stay open and remind the provider to fill in any required fields. Important*
The provider will have the option to continue to other sections before filling out all required fields.

Edit Field

Label
Provider Title

Placeholder
Provider title

☑ Enabled?   ☑ Required?   ☐ Read-only?   Order
50

Cancel   Save

① Personal Information

Provider Information

RHC Name

Middle Name

Last Name *

Provider Title *

Prefix

Professional Information

Telemedicine Experience

Fluent languages

Contact Information

Work Email *

Personal Email

Home Phone #

Mobile Phone

Pager #

Chat

Enabled:
if checked, this field is visible for your providers. If unchecked, the field won't be visible.

Required:
If checked, your providers must fill out this field in order to click Save and Next.

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

17

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New Features   Modio U   Support   Cierra Barnes | OneView® Trainer

Team   Forms   Tracking   Logins   Tasks   Notes   Reports

| • Modio University • | (Virginia Beach, VA) ⌄   Add Provider +

All Providers   Search a Provider Name or NPI...   Sections ⌄

Provider Info   CAQH   Licensure   Actions & Exclusions   Certifications   Education & Training   Work Experience   Malpractice Insurance   Documents

Provider Info   1 Total 🔵

▽   Provider Name   Title   Primary Specialty   NPI #   Work Email   Personal Email   Mobile Ph...

leah sanbo ✕   [ ] ⌄   [ ] ⌄   [ ]   [ ]   [ ]   [ ]

Actions ⚠   + ⋮

⌄   Sanborn, Leah   MD   Epidemiology   1234567890 leahsanborn@gmail.com

✓ ⬇ ▣ 🚩 🔵

Provider Info for Leah Sanborn MD

Notes 4   Documents 0   Tags 3

Teams 2

Provider Access

Read Only   ▲
Full Access
Read Only

✕ ∞ OV®OPs ∞ (Virginia Beach, VA)
✕ | • Modio University • | (Virginia Beach, VA)

PROVIDER NAME

Prefix   First Name   Middle Name   Last Name *   Suffix   Pronouns
Dr. ✕ ⌄   Leah   [ ]   Sanborn   Select Suffix ⌄   Select Pronoun Types▾

TYPE, SPECIALTY & CLASSIFICATIONS

Provider Title *   Specialty List *   Classifications
MD - Medical Doctor ✕ ⌄   Epidemiology ✳ ✕ Art Therapy ✕ 1 more... ⌄   Select Provider Classification(s)... ⌄

Taxonomy Codes 🔍   Clinical Services   Marital Status
Select Taxonomy Code(s)... ⌄ Select Clinical Service(s)... ⌄   Select Marital Status ⌄

Telemed Exp.   Fluent languages ⓘ
5+ Years ✕ ⌄   Bengali ✕ English ✕ 1 more... Creole French; Patwa ▾

CMS Medicare Specialty Codes🔍 CMS Code: CMS Desc – Taxonomy Desc (Taxonomy Code)
Select Medicare Specialty Code(s)... ⌄

CONTACT INFO

Work Email   Personal Email   Mobile Phone #   Mobile Phone Carrier Name

Cancel

Provider Access: enables you to establish the permission level for the provider's profile.

Full Access: Permits the provider to view and make necessary changes to their profile.

Read Only: Allows the provider to view the data in their profile without the ability to make any modifications.

Note: This change is only permissible in V2, and the option will be available in the side panel after the provider has successfully completed the registration process.

💬 Chat

PART 3

FREQUENTLY ASKED QUESTIONS

Frequently Asked Questions

There is an additional Onboarding tip guide on the support page created specifically for providers. Review that guide for an overview of your providers workflow or send it to your providers as a guide while they are working through the onboarding process.

Q: Why are there are two different links in the email that the provider receives?
The first link is to claim the profile. The second on it to continue the application (log in again) We recommend that your provider save this email so they can easily log into their profile in the future.

Q: What if my providers email is incorrect when I select the message button?
Any provider email that needs to be updated MUST be done through the personal info section in the Work Email field. Additionally, the provider must NOT change their email when they claim their profile.

Q: My provider signed out of the onboarding invitation before completing, how can they get back in?
The provider can re-open the link in the original email they received (it will not expire). If they do not have the email, you can copy the link from the providers "Onboarding Viewer" section to the invitation and paste it within an email to the provider outside of the platform. They will be prompted to log in and continue filling out their profile.

Q: My provider says they didn't receive the invitation what should I do?
Encourage them to check their spam folder or their junk folder. Additionally, your IT team may need to whitelist or add the email to the safe sender list within your organization.

Q: I sent out invitations but forgot to make an item required.
Can I edit invitations that were already sent out? Yes,any changes made to the invitation or "Editor" sections will apply to invitations already sent if the provider has not completed filling out the sections that were changed.

Q: Can I have more than one onboarding template within my team?
No, each team is limited to one onboarding template . The onboarding template is a "Team Level" feature.This means that once you update it, it will apply to all providers on your team. You will only need to set up the Onboarding template once for you team.

Q: I added SSN and Driver's license to the invitation, why can I not see them within Onboarding Viewer?
These are encrypted fields within the profile, your providers will see these fields if you have enabled them within your invitation.

Q: There is an option to attach a document to the Onboarding feature, how many can I attach and is this the same as sending a form?
You can attach THREE documents to the Onboarding invite. Any documents that you send through onboarding will not be integrated with DocuSign. If you attach documents to the onboarding invite it should not be intended to be signed or filled out – it should be a read only, or information documents only.

Q: If I select the "Email Copy to Myself" option when sending one invite at a time, will my provider be able to reply directly to me from the email invite.
Yes! This is a new addition to our onboarding invite. If you include yourself when sending the invite, the provider will have the option to reply to by email.

20

Frequently Asked Questions

Q: Can I have more than one custom email invite for my team?

Onboarding is a team-level feature, allowing one email per team. It's recommended to use a generic email for key areas and provide specific details in a separate welcome letter as necessary, using the attachment section.

Q: Should we send the Onboarding Invitation to our current providers, or limit it to new providers as they join our group?

This decision should be made by your organization. However, sending it to all providers ensures access to their profiles. If the profile is complete, it allows for easy verification of accuracy.

Q: My provider has misplaced the original email with sign-in instructions and needs to log back in. Is there a link I can share with them?

Yes, you can find it at http://www.modiohealth.com/physicians/#/signin. This information is also available in the Provider's Guide to Onboarding tip guide on the support page.

Q: Once my provider creates an account, will they be able to view the entire Team of provider profiles?

No, the provider is limited to viewing their data only. View the Provider Onboarding tip guide for a deep dive into what your provider can and can not view.

Q: My provider has created and account and completed their profile – is there a way for me to change their access to Read Only so they do not continue to make edit data in their profile?

Yes! Navigate to v2, open the Provider Info grid, Open the side panel, Select the Team tab, and there is an option to change your providers access.

Q: I marked a field as required but when my provider completed the onboarding invite, I noticed that field had not been filled out. Are providers able to skip required fields?

A required field will be highlighted in red if a provider selects "Save & Next" before filling out required fields. That section will stay open and remind the provider to fill in any required fields. The provider will have the option to continue to other sections before filling out all required fields.
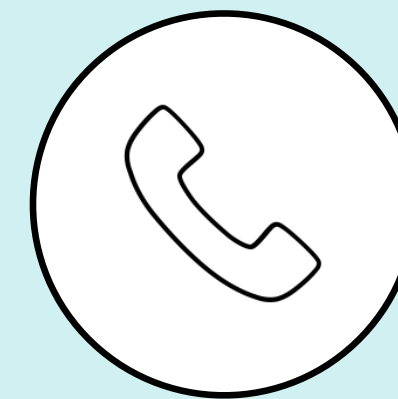
For additional questions or further training,
contact the Modio Team via:

_____

Online:
Chat Support
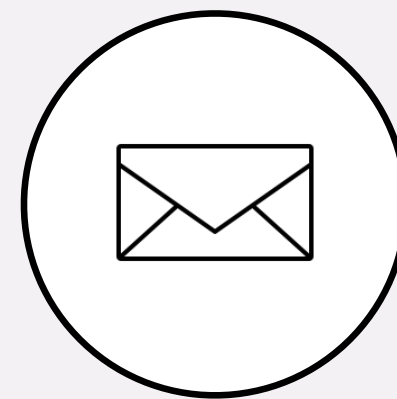
Email:
support@modiohealth.com

Phone:
844.696.6346

22