OneView®

TIP GUIDE :TRACKING

Use Tracking to keep an eye on provider management workflows, from licensure applications to payor enrollment. Tracking provides a step-by-step view of your most important credentialing processes. You can assign tracking ownership to different users on your team, export excel reports to check on workflow progress, and communicate with your team through dated, timestamped notes. You can also set turnaround times on individual steps, and add customized follow up dates as needed. Any note in tracking can be flagged as important so you can easily identify on reports what needs to be escalated or prioritized. Note that tracking does not complete or submit applications on behalf of your provider; it's purpose is to serve as an internal tool to stay organized and on top of credentialing work your team needs to complete.

Start here **1**

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Support   Modio U   New Features   Settings   Services   Sign out

Team   Forms   **Tracking**   Logins   Tasks   Notes

✳ **Modio Health QA** (San Francisco, CA) ▾ 🔧

Add Provider   Message

⚠ Alerts (38) ▾

All   Contract Employees   Critical Care   Internal Medicine   IONM Physicians   Pain Medicine

Provider	Tags	Compliance ❓	Actions ❓
Search for another provider (name, specialty, NPI)...	▾	▾	
NPI# 1982811964			
Smith, Judd T - MD Acupuncture NPI# 1295705283	Contract Employees Critical Care	3 alerts ⚠	✉ 👤 ✏ ☁ ✳ ◑ 🔧
Snow, John - MD Family Medicine NPI# 1801007265	Contract Employees	No alerts	✉ 👤 ✏ ☁ ✳ ◑ 🔧
Zhivago, Yuri - MD Addiction Medicine NPI# 1740201268	Contract Employees Internal Medicine Pain Medicine	8 alerts ⚠	○ 👤 ✏ ☁ ✳ ◑ 🔧

|◀ ◀ 1 / 1 ▶ ▶| 200 items per page   1 - 15 of 15 items

2

The Tracking dashboard

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2 **Add Tracking:** Click here to start tracking a new workflow. If Tracking hasn't been set up for your team yet, contact your Account Manager.

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ⓘ Support   🎓 Modio U   📢 New Features   ⚙ Settings   🚢 Services   ↪ Sign out

Team   Forms   **Tracking**   Logins   Tasks   Notes

✳ **Modio Health QA** (San Francisco, CA) ▾   🔧

➕ Add Tracking ▾ ❓

| All | 1/10 | 10/12 | CAQH: NEW | test | Test 1/16 | Test 11/1 | Test 3/14 | Test 9.27 |

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due I...	Assignee	Provider	Est. Due Da...	Actions
...	⬍	⬍		...	...	⬍	⬍	...	...	...	
49481	Normal	State License	New	Credentiali...	New - State License - CA - California (MD) - G	Pending			Mc Dreamy	03/16/2020	✉ ✎ ⚑ ❌
601	Normal	Facility Affiliation	Initial	Naomi Lam	Initial - Facility Affiliation	In Progress	N/A	Sue Barton	Julius No	12/19/2017	✉ ✎ ⚑ ❌
293	Normal	Malpractice	Renewal	Naomi Lam	Renewal - Malpractice Insurance	In Progress	New	Naomi Lam	Julius No	12/20/2017	✉ ✎ ⚑ ❌
2525	Normal	Payor	Initial	Sue Barton	Initial - Payor - Sentara Princess Anne Hospi	In Progress	New	Sue Barton	Kirk Heath	09/04/2018	✉ ✎ ⚑ ❌
4724	Normal	State License	Renewal	Sue Barton	Renewal - State License - VA - Virginia (MD) -	In Progress	New	Sue Barton	Kirk Heath	09/04/2018	✉ ✎ ⚑ ❌
5837	Normal	Provider App	Review	Sue Barton	Review - Provider Application Practice/Emp	In Progress	New	Sue Barton	Kirk Heath	09/05/2018	✉ ✎ ⚑ ❌
9009	Normal	Payor	Initial	Sue Barton	Initial - Payor - Emergency Physicians of Tid	In Progress	New	Sue Barton	Bradford B...	08/09/2019	✉ ✎ ⚑ ❌
15860	Escalation	CAQH	Reattestation	Yasi Givechi	Reattestation - CAQH	In Progress	New	Yasi Givechi	Yuri Zhivago	01/23/2019	✉ ✎ ⚑ ❌
19514	Normal	State License	New	Richard Rupp	New - State License - CA - California (MD) - 1	In Progress	New	Richard R...	Yuri Zhivago	04/16/2019	✉ ✎ ⚑ ❌

⏮ ◀ 1 / 1 ▶ ⏭   200 items per page   1 - 16 of 16 items

Launching a new Tracking workflow.

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Subtype: If applicable, pick the subtype for the application (typically either "New" or "Renewal").

7

Provider: Select the provider this task relates to.

8

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🛈 Support   🎓 Modio U   📢 New Features   ⚙ Settings   ☁ Services   🢅 Sign out

Team   Forms   **Tracking**   Logins   Tasks   Notes   💬

New Tracking for Modio Health QA

Details

Priority: Choose a priority and start date for the tracking report.

3

Priority *   Start Date *   ☑ Use current date?   Completed Date   Status *
Normal ⇅   01/17/2020   Pending ⇅

Owner: Select who "owns" this task.

4

Owner *   Tag(s)
Yasi Givechi (reports@modiohealth.com) ✕ ▾   ...

Tag(s): Add any tags to help with better organizing.

5

Type: Depending on the item type you chose, you'll be able to pick an item from the drop-down menu. This could be a facility, a license number, malpractice carrier, or other option. Pick the item that corresponds to the application you are working on.

6

Type *   Subtype *   Provider * 👥📁   NPI# 1740201268
Provider Application Practice/Employer ⇅   New   ⇅   Yuri Zhivago (yuri.zhivago@modio.email) ✕

Append to Tracking Name: If checked, the practice/employer will be added to the Tracking Name.

10

9

Practice/Employer * 👥📁   TIN# 555555555 ☑ Append to Tracking Name   Tracking Name *
Modio Health QA (San Francisco, CA) ✳   ✕ ▾   New - Provider Application Practice/Employer - Modio Health QA (San Francisco, CA)

Practice/Employer: Select the practice or employer this tracking event is required for.

Tracking Name: Edit the tracking name if desired. (optional).

11

Share (Read Only):
Modio Health Master Practice (DEMO) (San Francisco, CA) ✳ ✕

12

Share: if you have multiple facilities, you can share this tracking event but it will only appear in a "Read Only" view. This means the tracking event is locked in their view.

Description: Add a description to your workflow.

Description

13

Enter the description here.

Date auto-shift: The box for Auto-shift Estimated Dates is automatically checked. This means the estimated start and due dates correspond to the number of estimated days it will take to complete each step. (For example, if the default for step 1 is 3 estimated days beginning on Jan 1 and due on Jan 3, and you change the estimated days to 5, the due date will automatically change to Jan 5.)

Steps 9   0 steps completed in 0 of 21 days

14

Auto-shift Estimated Dates? ☑   Start Save Cancel
💬 **Live Help**

15

Save: Once you have set up tracking, click Save. The tracking item will be saved as "Pending." When you are ready, click Start and tracking will be moved to "In Progress" status.

Updating/Completing an Application or Workflow

16 On the Tracking dashboard, click edit to view or change an existing application. Applications that have been saved but not started have the status **"Pending."**

Actions Key

Edit Tracking item

Escalate Tracking item

Archive Tracking item

Email Tracking Item

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Updating/Completing an Application or Workflow

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| Support | Modio U | New Features | Settings | Services | Sign out |

Team **Forms** **Tracking** **Logins** **Tasks** **Notes**

Edit Tracking #49481 for Modio Health QA

Created by: Credentialing Requests - 01/13/2020   Last updated: 01/17/2020

Details

Priority *
Normal

Start Date *   ☑ Use current date?
01/17/2020

Completed Date

Status *
Pending

Owner *
Credentialing Requests (credrequests@modiohealth.com) ✖ ▾

Tag(s)
...

Type *
State License

Subtype *
New

Provider * 👤📁   NPI# 1999999991
Mc Dreamy (ygivechi@gmail.com) ✖

State License * 👤📁
CA - California (MD) - G2840400 (12/30/2020) Active ✖ ▾

Tracking Name *
New - State License - CA - California (MD) - G2840400 (12/30/2020) Active

Share (Read Only):
...

Description

Per client 1/13, this is is low priority. Start this once licenses for Drs. A and B have been submitted.

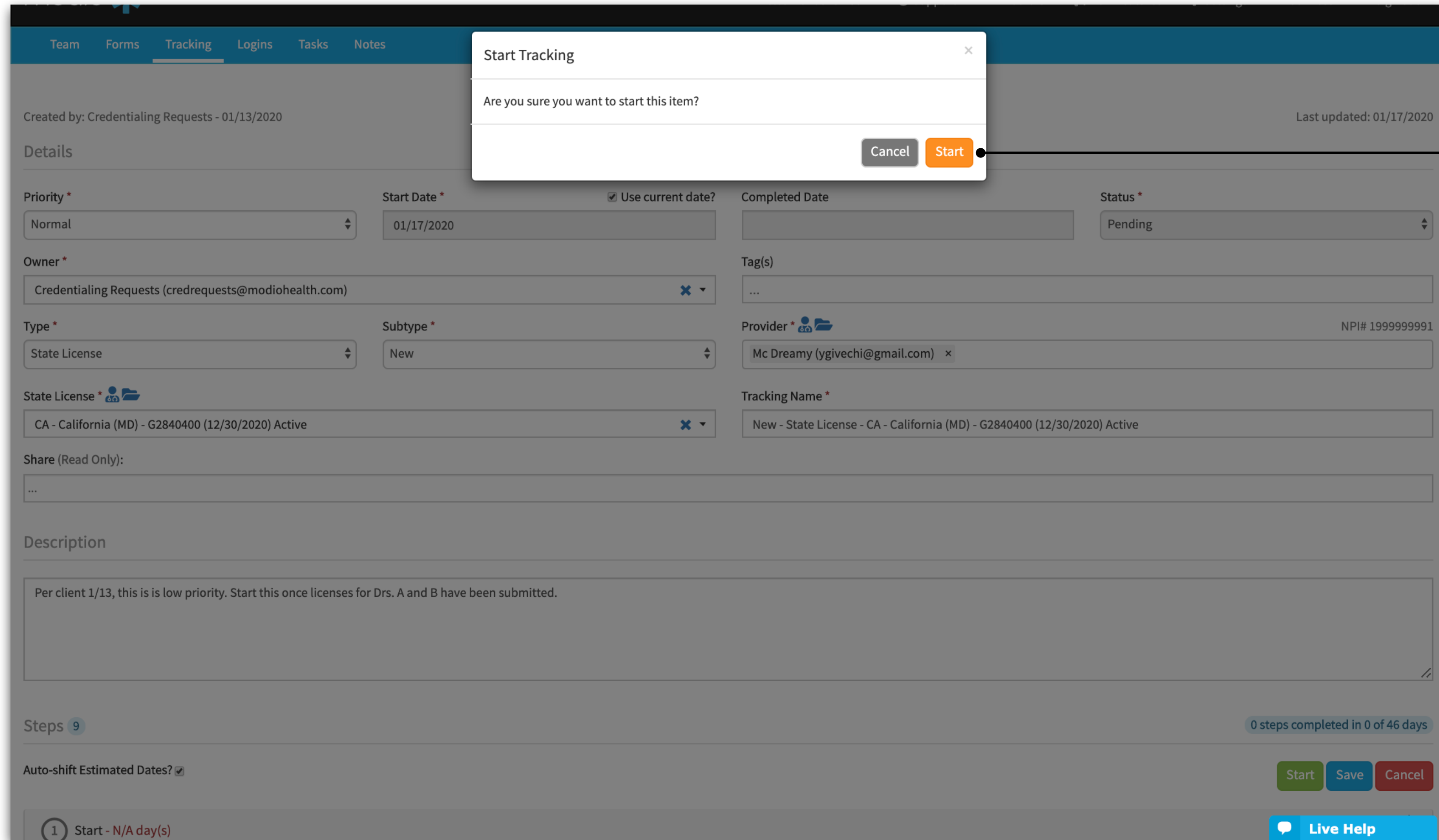### Steps ⑨   0 steps completed in 0 of 46 days

Auto-shift Estimated Dates? ☑

[Start] [Save] [Cancel]

💬 **Live Help**

17 Edit and save any additional details before you click Start; these cannot be changed once you begin the tracking process. Finally, click **Start** to proceed.

6

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Updating/Completing an Application or Workflow

Team   Forms   Tracking   Logins   Tasks   Notes

Start Tracking   ✕

Are you sure you want to start this item?

Cancel   Start

Created by: Credentialing Requests - 01/13/2020   Last updated: 01/17/2020

Details

18 — Edit and save any additional details before you click Start; some of these (start date, status, Type and Subtype) cannot be changed once you begin the tracking process.

Priority *	Start Date *	☑ Use current date?	Completed Date	Status *
Normal	01/17/2020			Pending

Owner *   Tag(s)

Credentialing Requests (credrequests@modiohealth.com)   ✕ ▾   ...

Type *	Subtype *	Provider * 👥📁	NPI# 1999999991
State License	New	Mc Dreamy (ygivechi@gmail.com) ✕	

State License * 👥📁   Tracking Name *

CA - California (MD) - G2840400 (12/30/2020) Active   ✕ ▾   New - State License - CA - California (MD) - G2840400 (12/30/2020) Active

Share (Read Only):

...

Description

Per client 1/13, this is is low priority. Start this once licenses for Drs. A and B have been submitted.

Steps 9   0 steps completed in 0 of 46 days

Auto-shift Estimated Dates? ☑   Start   Save   Cancel

① Start - N/A day(s)   💬 Live Help

7

Updating/Completing an Application or Workflow

Step Name: Each application type has a default set of steps with an estimated timeline. We will work with you to customize these for your organization. For each step, you can specify the name, estimated days, and start/due dates for each step to fit your needs.

Start Date: Edit the "Actual Start Date" on step 1 with when you started working on the task referenced in the step, then add any notes and click Start.

Complete Step: When the step is complete, fill out the "**Completed Date**" and any **notes**, then click **Complete.**

Assigned To: Each step is automatically assigned to the tracking Owner you designated. At the step level, you can reassign each step as needed by entering the name of another team member under Assignee. You can assign steps to different people within the same application.

Auto-start: Auto-start is automatically checked. This means the next step will start automatically as soon as the previous step has been completed. Without auto-start, you will need to manually click start on each consecutive step, which is why we set this for you.

Continuing Steps: Repeat for each step until you reach the end of the designated steps. You can leave the tracking report and come back to it at any time - your progress will be saved, and you'll see the status on the tracking report set as "In Progress.

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① Start - N/A day(s)   New - ☆

Step Name *   (19)   **Assignee** * ✉   (20)
Start   Credentialing Requests (credrequests@mo...ohealth.com) ✕

Est. Start Date *   **Est. Due Date** *   **Start Date** *   Due: 01/03/2020   **Completed Date**   **Step Settings**
01/17/2020   (21)   01/17/2020   01/03/2020   📅   01/18/2020   📅   Auto-start? •   (22)

Notes - Mc Dreamy, MD - New - State License - CA - California (MD) - G2840400 (12/30/2020) Active   NPI# 1999999991 ⓪

[   ]
                                                                                                    G

Start Step   Complete Step   (23)   Save Note 🗨

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② Request/Retrieve App - 3 day(s)   New - ☆

③ Blank App Received - 5 day(s)   New - ☆

④ App Out to Provider - 2 day(s)   New - ☆

⑤ Signed App Received - 5 day(s)   New - ☆

⑥ Submitted to Entity - 1 day(s)   New - ☆

⑦ Confirm App Rcvd by Entity - 5 day(s)   New - ☆

⑧ Follow w/Entity for Status - 10 day(s)   New - ☆

💬 Live Help

(24)

Reviewing Tracking Reports

Workflow Summary: To view a summary of a tracking report, hover over the name of the report. A step-by-step status update will appear. If you scroll to the bottom of this window, you will see the most recent report on this tracking item.

25

Filtering: After you create your first tracking report, you can return to the Tracking tab at any time to view, edit, and sort through your team's tracking reports. Use the filter feature to sort through applications by type, name, priority, status, or creator/ assignee/ provider name. You can also click on the header for each section to sort alphabetically, in date order or in numerical order (depending on the field values)

26

27

Archiving Workflows: Click on the red X icon to archive workflows.Archive tracking when you no longer need to work on it, it will not appear on the tracking grid unless you manually change the status to All Statuses or Archived. If you need to restore an archived tracking, you can do so. You can also permanently delete Archived tracking if you never need to access it again.
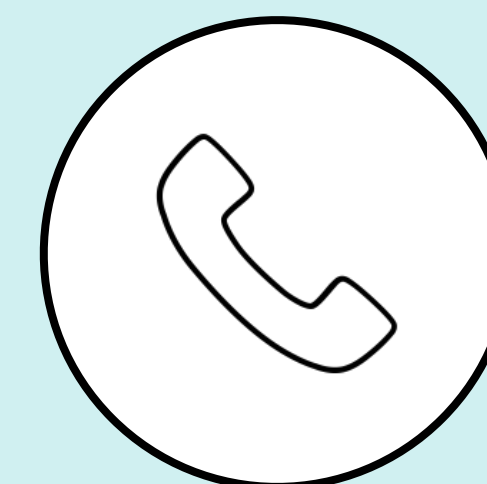
9

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

Online:
Live Chat Support
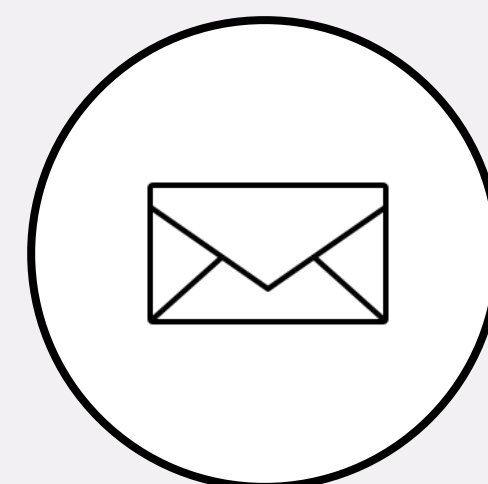
Email:
updates@modiohealth.com

Phone:
844.696.6346