




## 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

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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

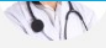
Provider

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

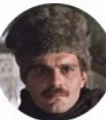
Family Medicine

NPI# 1801007265

Contract Employees

No alerts





Zhivago, Yuri - MD

Addiction Medicine








NPI# 1740201268

Contract Employees

Internal Medicine

Pain Medicine

8 alerts



⏪

⏴

1

/ 1

⏵

⏩

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Live Help

The Tracking dashboard

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**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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SupportModio UNew FeaturesSettingsServicesSign out

TeamFormsTrackingLoginsTasksNotes

Modio Health QA (San Francisco, CA)

+ Add Tracking

All1/1010/12CAQH: NEWtestTest 1/16Test 11/1Test 3/14Test 9.27

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due I...	Assignee	Provider	Est. Due Da...	Actions
49481	Normal	State License	New	Credentia...	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

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200 items per page

1 - 16 of 16 items

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Live Help

Launching a new Tracking workflow.

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

**Owner:** Select who “owns” this task.

**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.

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

**Description:** Add a description to your workflow.

**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.)

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

**Provider:** Select the provider this task relates to.

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

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

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

**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.

**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.

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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**

3

Priority \*

Normal

4

Owner \*

Yasi Givechi (reports@modiohealth.com)

6

Type \*

Provider Application Practice/Employer

7

Subtype \*

New

8

Provider \*

Yuri Zhivago (yuri.zhivago@modio.email) x

5

Tag(s)

9

Practice/Employer \*

Modio Health QA (San Francisco, CA) \*

10

Append to Tracking Name

☒

11

Tracking Name \*

New - Provider Application Practice/Employer - Modio Health QA (San Francisco, CA)

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Share (Read Only):

Modio Health Master Practice (DEMO) (San Francisco, CA) \*

13

Description

Enter the description here.

14

Steps 9

Auto-shift Estimated Dates? ☒

15

Start Save Cancel

Live Help

0 steps completed in 0 of 21 days



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."





































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TeamFormsTrackingLoginsTasksNotes

Modio Health QA (San Francisco, CA) + Add Tracking ?

All1/1010/12CAQH: NEWtestTest 1/16Test 11/1Test 3/14Test 9.27

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due I...	Assignee	Provider	Est. Due Da...	Actions
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293	Normal	Malpractice	Renewal	Naomi Lam	Renewal - Malpractice Insurance	In Progress	New	Naomi Lam	Julius No	12/20/2017	   
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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

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Live Help


Actions Key

 Edit Tracking item

 Escalate Tracking item

 Archive Tracking item

 Archive Tracking item

 Email Tracking Item

Updating/Completing an Application or Workflow

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TeamFormsTrackingLoginsTasksNotes

Edit Tracking #49481 for Modio Health QA

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

Details

Priority \*

Normal

Start Date \*

01/17/2020

Use current date?

Completed Date

Status \*

Pending

Owner \*

Credentialing Requests (credrequests@modiohealth.com)

Tag(s)

...

Type \*

State License

Subtype \*

New

Provider \*

Mc Dreamy (ygivechi@gmail.com)

NPI# 1999999991

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 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?

StartSaveCancel

Live Help

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.

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Updating/Completing an Application or Workflow

TeamFormsTrackingLoginsTasksNotes

Created by: Credentialing Requests - 01/13/2020

Last updated: 01/17/2020

Details

Priority \*

Normal

Start Date \*

01/17/2020

☒ Use current date?

Completed Date

Status \*

Pending

Owner \*

Credentialing Requests (credrequests@modiohealth.com)

Tag(s)

...

Type \*

State License

Subtype \*

New

Provider \*

Mc Dreamy (ygivechi@gmail.com)

NPI# 1999999991

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 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

Start Tracking

Are you sure you want to start this item?

Cancel

Start

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.

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**.

Click here to **Add a follow up date**. A new modal will appear asking for the follow up date and the reason. This will be recorded in the notes, and then the due date adjusts automatically.

**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.”

1 Start - N/A day(s) New - ☆

Step Name \*

Start

Assignee \*

Credentiaing Requests (credrequests@modiohealth.com)

Est. Start Date \*

01/17/2020

Est. Due Date \*

01/17/2020

Start Date \*

01/03/2020

Due: 01/03/2020

Completed Date

01/18/2020

Step Settings

Auto-start? ☒

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

Start Step

Add Follow-up Date

Save Note

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

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Reviewing Tracking Reports

**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)

**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.

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Modio Health QA (San Francisco, CA)

All1/1010/12CAQH: NEWtestTest 1/16Test 11/1Test 3/14Test 9.27

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2525	Normal	Payor	Initial	Sue Barton	Initial - Payor - Sentara Princess Anne
4724	Normal	State License	Renewal	Sue Barton	Renewal - State License - VA - Virginia
5837	Normal	Provider App	Review	Sue Barton	Review - Provider Application Practice
9009	Normal	Payor	Initial	Sue Barton	Initial - Payor - Emergency Physicians
15860	Escalation	CAQH	Reattestation	Yasi Givechi	Reattestation - CAQH
19514	Normal	State License	New	Richard Rupp	New - State License - CA - California
22125	Normal	Payor	Initial	Naomi Lam	Medicaid CA - California Pacific Medical
24702	Normal	CAQH	New	Yasi Givechi	New - CAQH
43697	Normal	Payor	Initial	Marie Robertson	Blue Shield of California CA Test Plan - Blue Shield -
46665	Escalation	Provider App	New	Cindy Adams	New - Provider Application Practice/Employer - Med
49481	Normal	State License	New	Credentialing ...	New - State License - CA - California (MD) - G284040C
50016	Normal	Facility Affiliation	Initial	Naomi Lam	Initial - Facility Affiliation - Modio Health QA (San Fra

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Renewal - Malpractice Insurance

Created by: Naomi Lam - 11/01/2017 #293

Julius No | NPI# 1982811964

Original Due Date12/20/2017

Projected Due Date02/28/2020

2 of 7 steps completed in 133 of 36 days572 day(s) overdue

1 Renewal Request ReceivedCompleted 1 of 3 day(s)

2 App Out to ProviderCompleted 132 of 2 day(s)

3 Signed App Received - 5 work day(s)New

4 Submitted to Entity - 1 work day(s)New

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

6 Follow w/Entity for Status - 10 work day(s)New

7 Approved Certificate Received - 10 work day(s)New

Carrier Producer Name

28

19/2017

20/2017

04/2018

04/2018

05/2018

09/2019

23/2019

16/2019

09/2019

08/2019

02/27/2020

01/10/2020

03/20/2020

05/18/2020

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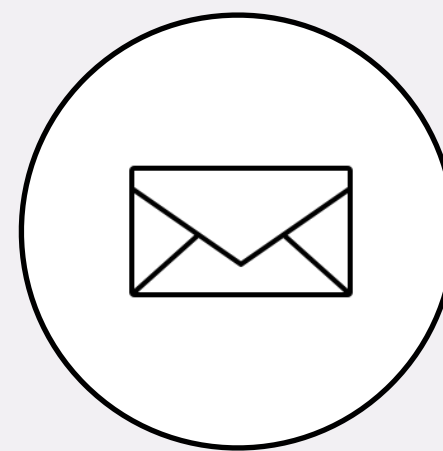
**Archiving Workflows:** Click on the red X icon to archive workflows. Archive tracking when you no longer need to work on it, it will not appear on the tracking grid unless you manually change the status to All Statuses or Archived. If you need to restore an archived tracking, you can do so. You can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

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

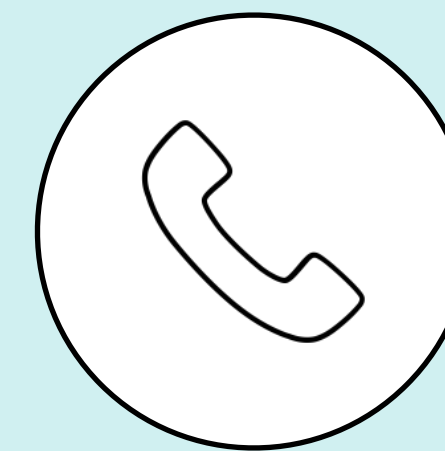
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Live Chat Support



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



**Phone:**  
844.696.6346