



**OneView**<sup>®</sup>

**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

The screenshot shows the Modio Tracking interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below this, the organization name 'Modio Health QA (San Francisco, CA)' is displayed, along with 'Add Provider' and 'Message' buttons. An 'Alerts (38)' notification is visible. The main content area features a table of providers with columns for 'Provider', 'Tags', 'Compliance', and 'Actions'. The table lists three providers: Judd T. Smith (Acupuncture, 3 alerts), John Snow (Family Medicine, No alerts), and Yuri Zhivago (Addiction Medicine, 8 alerts). A pagination bar at the bottom indicates '200 items per page' and '1 - 15 of 15 items'. The footer contains 'Privacy Policy', '©2020 Modio Health. All rights reserved.', 'Terms and Conditions', and a 'Live Help' button.

Provider	Tags	Compliance	Actions
  <b>Smith, Judd T - MD</b> Acupuncture NPI# 1295705283	Contract Employees Critical Care	3 alerts	
 <b>Snow, John - MD</b> Family Medicine NPI# 1801007265	Contract Employees	No alerts	
 <b>Zhivago, Yuri - MD</b> Addiction Medicine NPI# 1740201268	Contract Employees Internal Medicine Pain Medicine	8 alerts	

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.

The screenshot shows the Modio Tracking dashboard for 'Modio Health QA (San Francisco, CA)'. At the top, there is a navigation bar with 'Team', 'Forms', 'Tracking' (selected), 'Logins', 'Tasks', and 'Notes'. A '+ Add Tracking' button is visible in the top right. Below the navigation, there are filters for 'All', '1/10', '10/12', 'CAQH: NEW', 'test', 'Test 1/16', 'Test 11/1', 'Test 3/14', and 'Test 9.27'. The main content is a table with the following columns: ID, Priority, Type, Subtype, Owner, Name, Status, Step Due I..., Assignee, Provider, Est. Due Da..., and Actions. The table contains 10 rows of tracking items. At the bottom, there is a pagination control showing '1' of 1 page, '200 items per page', and '1 - 16 of 16 items'. The footer includes 'Privacy Policy', '©2020 Modio Health. All rights reserved.', 'Terms and Conditions', and a 'Live Help' button.

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	[Email] [Edit] [Flag] [Close]
601	Normal	Facility Affiliation	Initial	Naomi Lam	Initial - Facility Affiliation	In Progress	N/A	Sue Barton	Julius No	12/19/2017	[Email] [Edit] [Flag] [Close]
293	Normal	Malpractice	Renewal	Naomi Lam	Renewal - Malpractice Insurance	In Progress	New	Naomi Lam	Julius No	12/20/2017	[Email] [Edit] [Flag] [Close]
2525	Normal	Payor	Initial	Sue Barton	Initial - Payor - Sentara Princess Anne Hospi	In Progress	New	Sue Barton	Kirk Heath	09/04/2018	[Email] [Edit] [Flag] [Close]
4724	Normal	State License	Renewal	Sue Barton	Renewal - State License - VA - Virginia (MD) -	In Progress	New	Sue Barton	Kirk Heath	09/04/2018	[Email] [Edit] [Flag] [Close]
5837	Normal	Provider App	Review	Sue Barton	Review - Provider Application Practice/Emp	In Progress	New	Sue Barton	Kirk Heath	09/05/2018	[Email] [Edit] [Flag] [Close]
9009	Normal	Payor	Initial	Sue Barton	Initial - Payor - Emergency Physicians of Tid	In Progress	New	Sue Barton	Bradford B...	08/09/2019	[Email] [Edit] [Flag] [Close]
15860	Escalation	CAQH	Reattestation	Yasi Givechi	Reattestation - CAQH	In Progress	New	Yasi Givechi	Yuri Zhivago	01/23/2019	[Email] [Edit] [Flag] [Close]
19514	Normal	State License	New	Richard Rupp	New - State License - CA - California (MD) - 1	In Progress	New	Richard R...	Yuri Zhivago	04/16/2019	[Email] [Edit] [Flag] [Close]

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.)

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

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

The screenshot shows the 'New Tracking for Modio Health QA' form in the Modio application. The form is divided into several sections: Details, Share (Read Only), Description, and Steps. Callouts 1 through 15 point to specific fields and controls:

- 1: Priority dropdown (set to Normal)
- 2: Start Date field (01/17/2020)
- 3: Use current date? checkbox (checked)
- 4: Completed Date field
- 5: Status dropdown (set to Pending)
- 6: Owner dropdown (set to Yasi Givechi)
- 7: Type dropdown (set to Provider Application Practice/Employer)
- 8: Subtype dropdown (set to New)
- 9: Practice/Employer dropdown (set to Modio Health QA)
- 10: Append to Tracking Name checkbox (checked)
- 11: Tracking Name field (New - Provider Application Practice/Employer - Modio Health QA)
- 12: Share (Read Only) field (Modio Health Master Practice (DEMO))
- 13: Description text area (Enter the description here)
- 14: Auto-shift Estimated Dates? checkbox (checked)
- 15: Start, Save, and Cancel buttons at the bottom right.

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

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

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

**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.

**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

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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."

The screenshot shows the Modio Tracking dashboard for 'Modio Health QA (San Francisco, CA)'. The dashboard includes a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below the navigation is a header for the organization and a '+ Add Tracking' button. A table of tracking items is displayed with the following columns: ID, Priority, Type, Subtype, Owner, Name, Status, Step Due I..., Assignee, Provider, Est. Due Da..., and Actions. The table contains several rows of data, including items with statuses like 'Pending' and 'In Progress'. At the bottom of the table, there are pagination controls showing '1' of '1' items and '200 items per page'. The footer includes links for 'Privacy Policy', '©2020 Modio Health. All rights reserved.', 'Terms and Conditions', and a 'Live Help' button.

**Actions Key**

- Edit Tracking item
- Escalate Tracking item
- Archive Tracking item
- Email Tracking Item

modio 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**

<b>Priority *</b> Normal	<b>Start Date *</b> 01/17/2020 <input checked="" type="checkbox"/> Use current date?	<b>Completed Date</b>	<b>Status *</b> Pending
<b>Owner *</b> Credentialing Requests (credrequests@modiohealth.com)	<b>Tag(s)</b> ...		
<b>Type *</b> State License	<b>Subtype *</b> New	<b>Provider *</b> Mc Dreamy (ygivechi@gmail.com) <span>NPI# 1999999991</span>	
<b>State License *</b> CA - California (MD) - G2840400 (12/30/2020) Active	<b>Tracking Name *</b> 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** **Live Help**

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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.

Updating/Completing an Application or Workflow

The screenshot shows a web application interface for tracking a task. At the top, there is a navigation bar with tabs for Team, Forms, Tracking, Logins, Tasks, and Notes. The 'Tracking' tab is active. Below the navigation bar, the page displays details for a tracking item. A modal dialog box titled 'Start Tracking' is open in the center, asking 'Are you sure you want to start this item?' with 'Cancel' and 'Start' buttons. The background form includes fields for Priority (Normal), Start Date (01/17/2020), Owner (Credentiaing Requests), Type (State License), Subtype (New), Provider (Mc Dreamy), and Tracking Name. A 'Start' button is visible at the bottom right of the form. A yellow callout box on the right points to the 'Start' button in the dialog.

**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."

The screenshot shows a workflow tracking interface with the following elements and callouts:

- 19:** Points to the 'Step Name' field containing 'Start'.
- 20:** Points to the 'Assignee' dropdown menu showing 'Credentialing Requests (credrequests@modiohealth.com)'.
- 21:** Points to the 'Start Date' field containing '01/03/2020'.
- 22:** Points to the 'Auto-start?' checkbox, which is checked.
- 23:** Points to the 'Start Step' and 'Add Follow-up Date' buttons.
- 24:** Points to the 'Request/Retrieve App - 3 day(s)' step in the list below.
- 25:** Points to the bottom right corner of the interface, including a 'Live Help' button.

The interface also displays a list of steps with their names and estimated durations:

- 1 Start - N/A day(s)
- 2 Request/Retrieve App - 3 day(s)
- 3 Blank App Received - 5 day(s)
- 4 App Out to Provider - 2 day(s)
- 5 Signed App Received - 5 day(s)
- 6 Submitted to Entity - 1 day(s)
- 7 Confirm App Rcvd by Entity - 5 day(s)
- 8 Follow w/Entity for Status - 10 day(s)

**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.

**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)

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Modio Health QA (San Francisco, CA) -

Team Forms Tracking Logins Tasks Notes

CAQH: NEW test Test 1/16 Test 11/1 Test 3/14 Test 9.27

ID	Priority	Type	Subtype	Owner	Name
601	Normal	Facility Affiliation	Initial	Naomi Lam	Initial - Facility Affiliation
293	Normal	Malpractice	Renewal	Naomi Lam	Renewal - Malpractice Insurance
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 Physician
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 Me
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

Renewal - Malpractice Insurance  
Created by: Naomi Lam - 11/01/2017 #293 Julius No | NPI# 1982811964

Original Due Date: 12/20/2017 | Projected Due Date: 02/28/2020  
2 of 7 steps completed in 133 of 36 days  
572 day(s) overdue

- 1 Renewal Request Received - Completed 1 of 3 day(s)
- 2 App Out to Provider - Completed 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

Due Date ...	Actions
19/2017	[Email] [Edit] [Flag] [X]
20/2017	[Email] [Edit] [Flag] [X]
04/2018	[Email] [Edit] [Flag] [X]
04/2018	[Email] [Edit] [Flag] [X]
05/2018	[Email] [Edit] [Flag] [X]
09/2019	[Email] [Edit] [Flag] [X]
23/2019	[Email] [Edit] [Flag] [X]
16/2019	[Email] [Edit] [Flag] [X]
09/2019	[Email] [Edit] [Flag] [X]
08/2019	[Email] [Edit] [Flag] [X]
02/27/2020	[Email] [Edit] [Flag] [X]
01/10/2020	[Email] [Edit] [Flag] [X]
03/20/2020	[Email] [Edit] [Flag] [X]
05/18/2020	[Email] [Edit] [Flag] [X]

1 17 of 17 items

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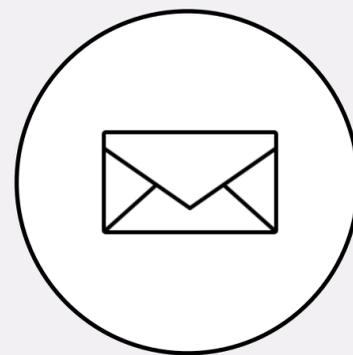
**Archiving Workflows:** Click on the red X icon to archive workflows. Archive tracking when you no longer need to work on it, it will not appear on the tracking grid unless you manually change the status to All Statuses or Archived. If you need to restore an archived tracking, you can do so. You can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

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

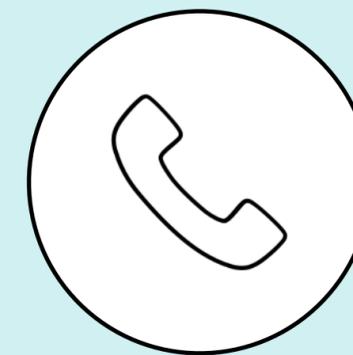
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