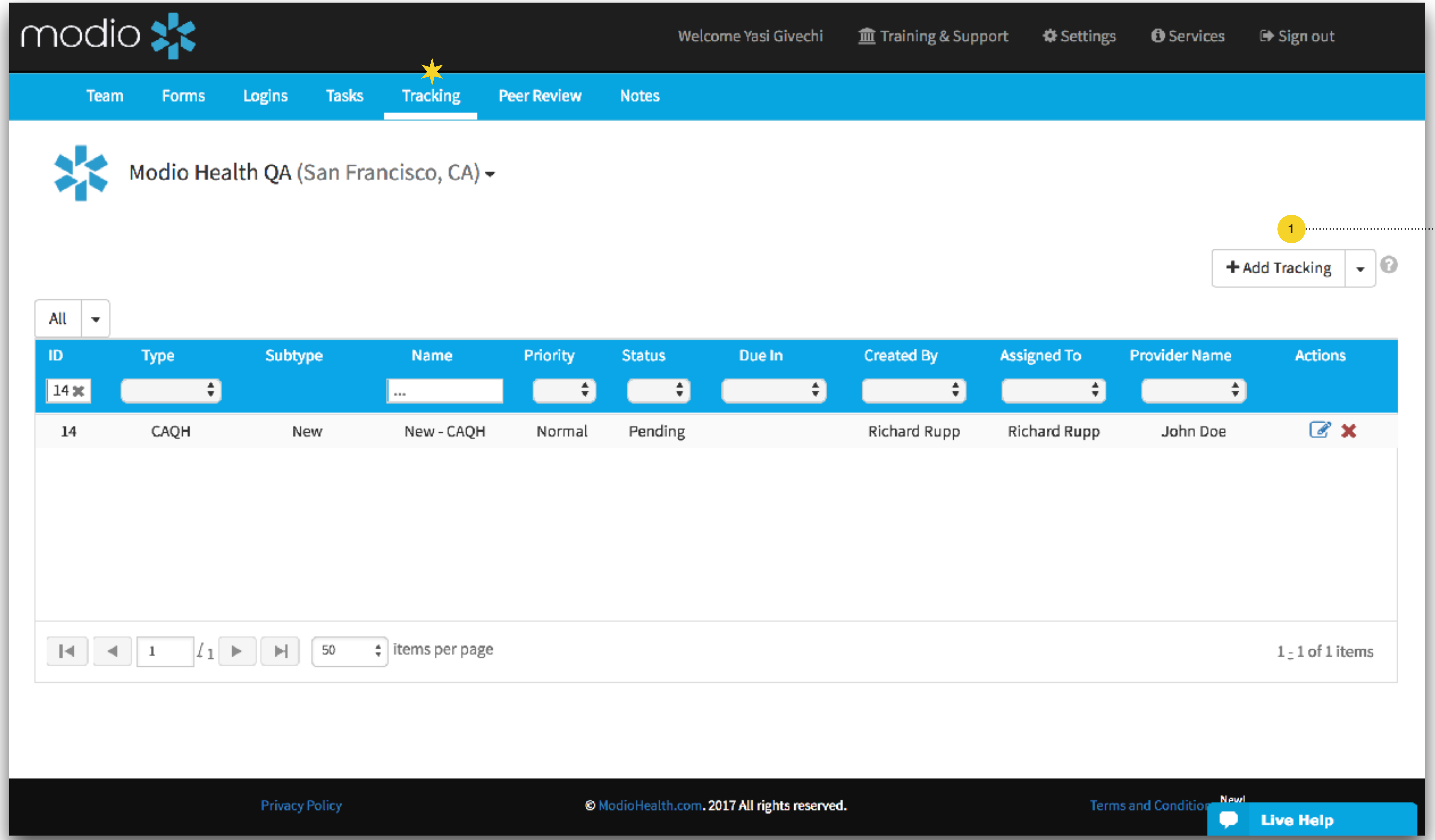
OneView

Tip Guide : Tracking

TRACKING

Use Tracking to keep an eye on provider application and workflows, from licensure renewals to CAQH enrollment. Tracking provides a step-by-step view of your most important credentialing processes. You can assign tracking steps to different users on your team, download reports to check on workflow progress, and communicate with your team through timestamped notes. Note that tracking does not complete or submit applications on behalf of your provider and should only be used as an organizational tool.



1 **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.

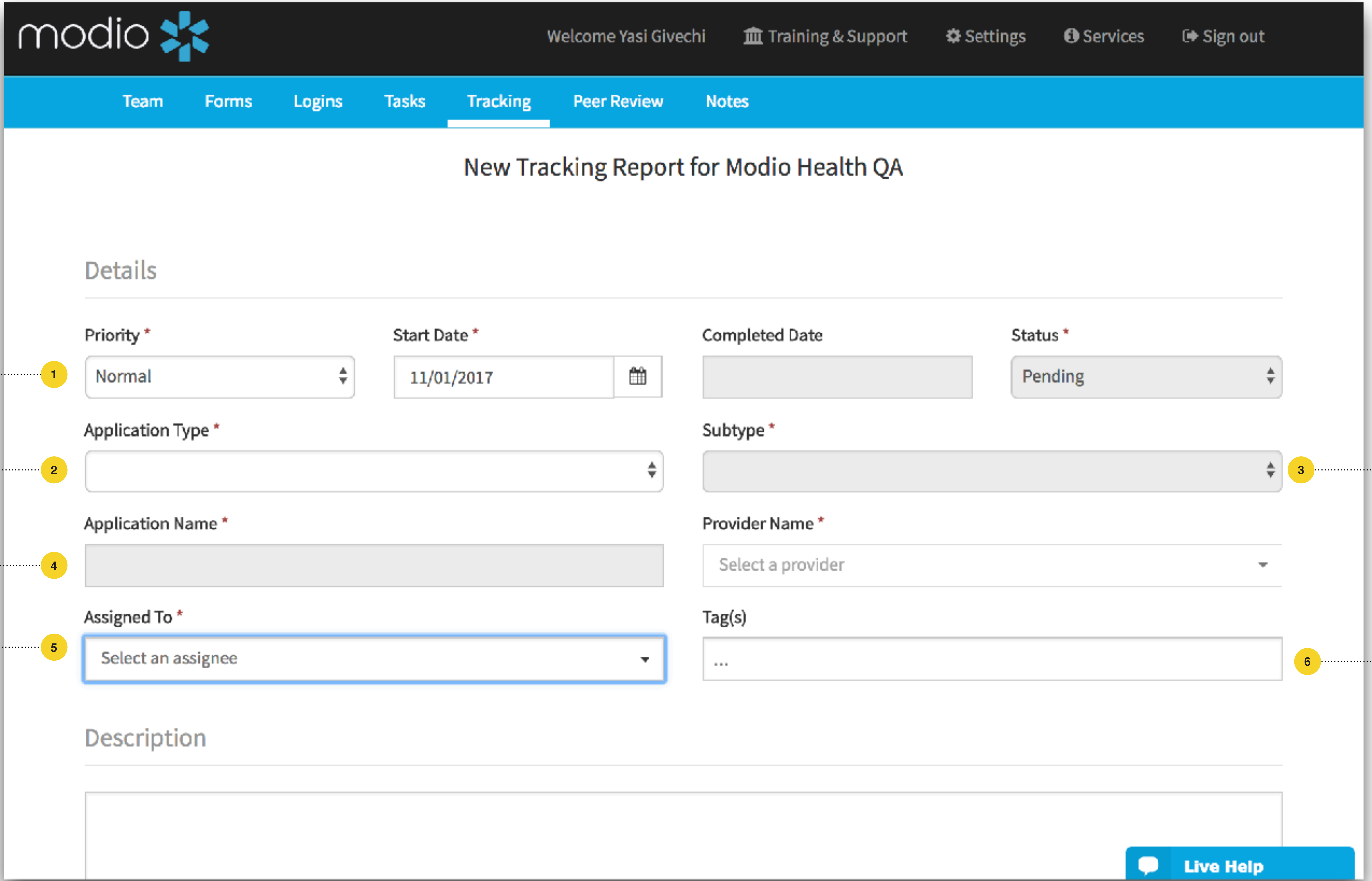
NEW APPLICATIONS & WORKFLOW TRACKING

Priority:
Choose a priority and start date for the application.

Application Type:
Pick the application type from the drop-down menu.

Application Name:
Edit the application name if needed, and select a provider from the drop-down menu.

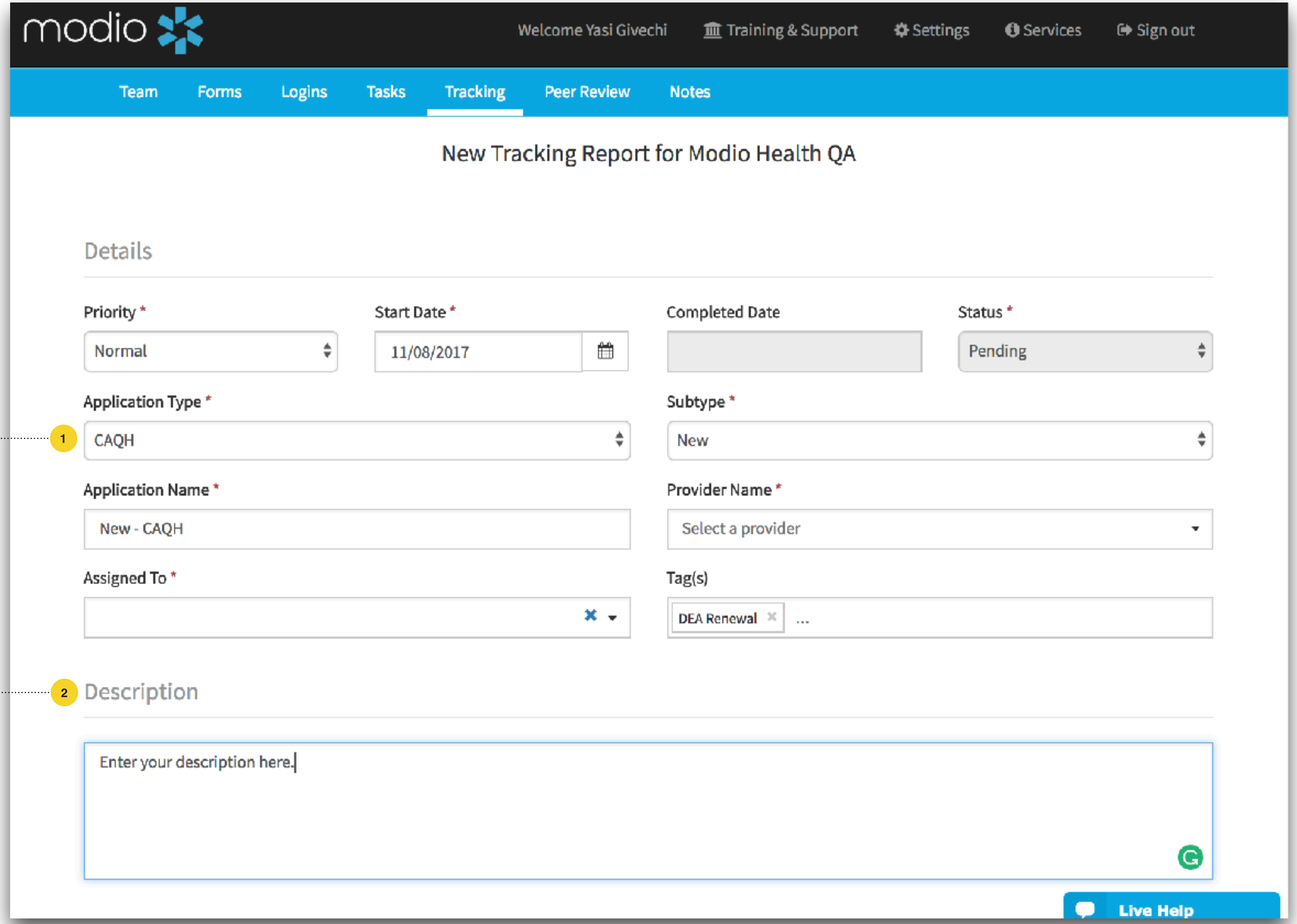
Assign To:
Choose an Assignee from the coordinators on your team. The assignee is the person who should follow through on the application's progress and complete the steps as necessary.



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

Tag(s):
Add any tags for organization.

SELECTING FIELDS



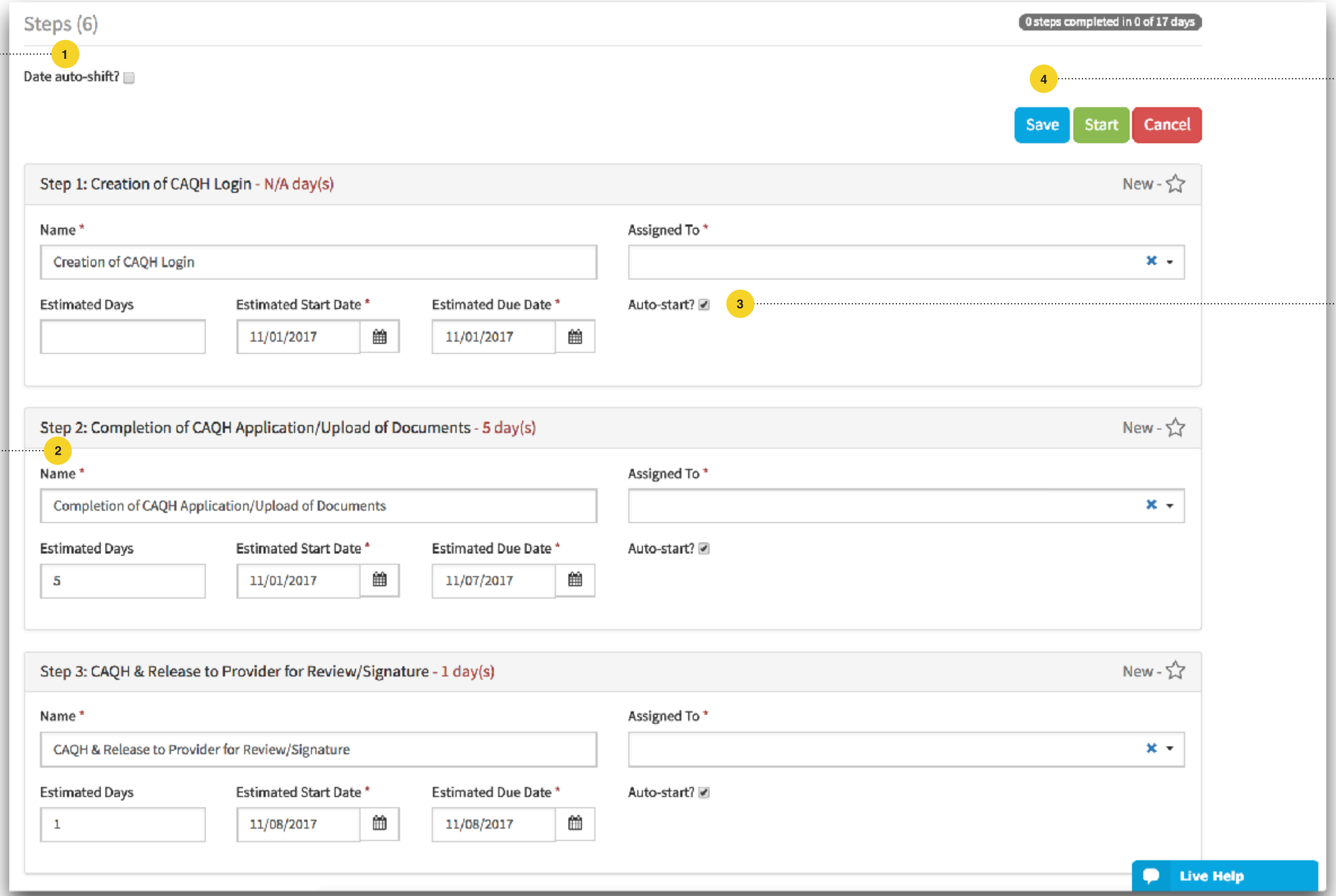
1 **Application Type:**
Depending on the application type you chose, you'll be able to pick an item from the drop-down menu. This could be a facility, a license number, malpractice carrier, or other option. Pick the item that corresponds to the application you are working on.

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

TRACKING STEPS

Date auto-shift:
Check the box for Date auto-shift if you want the estimated start and due dates to 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 check the Date auto-shift box and change the estimated days to 5, the due date will automatically change to Jan 5.)

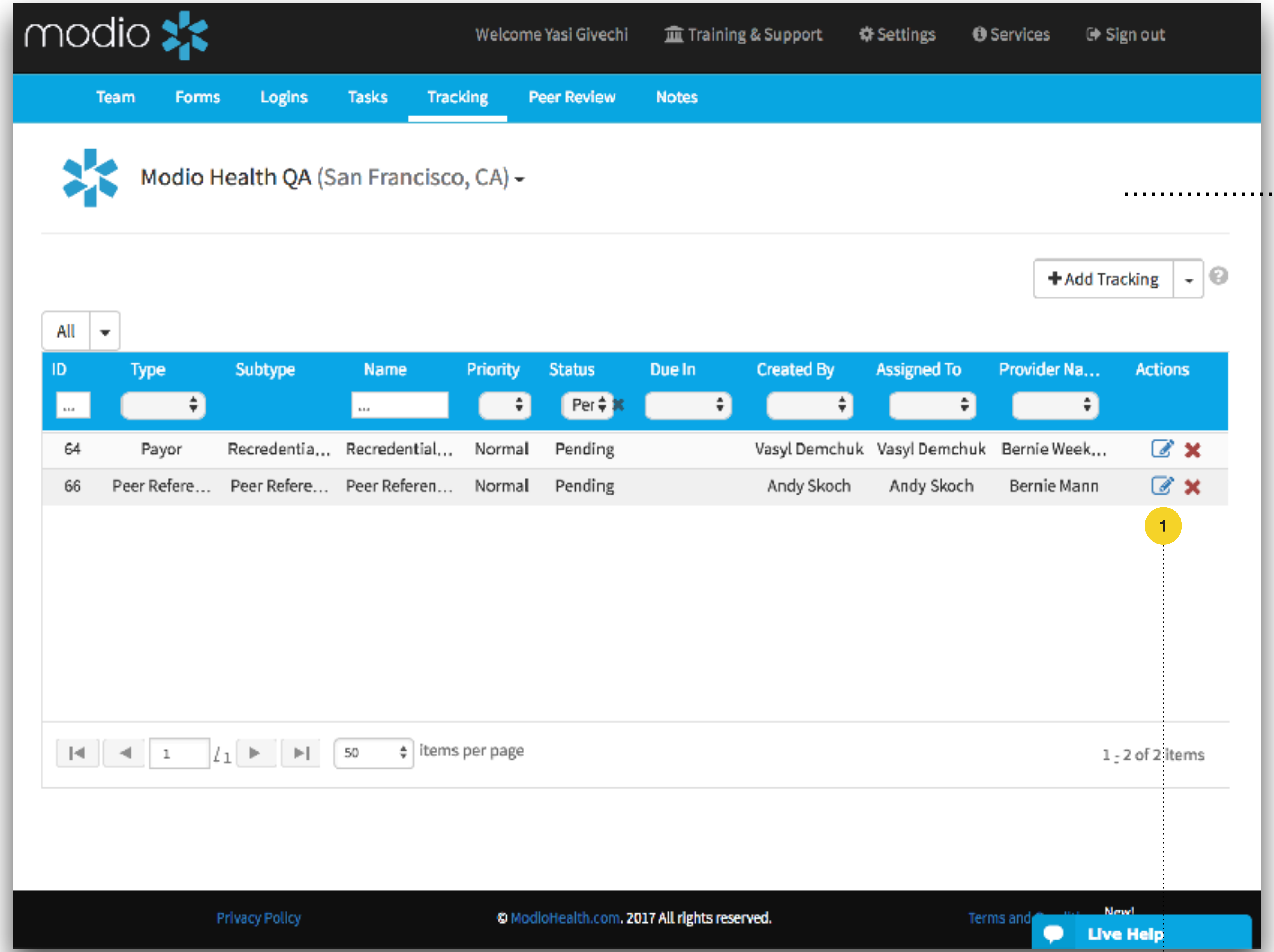
Name:
Each application type has a default set of steps with an estimated timeline. You can edit the name, estimated days, and start/due dates for each step to fit your needs.

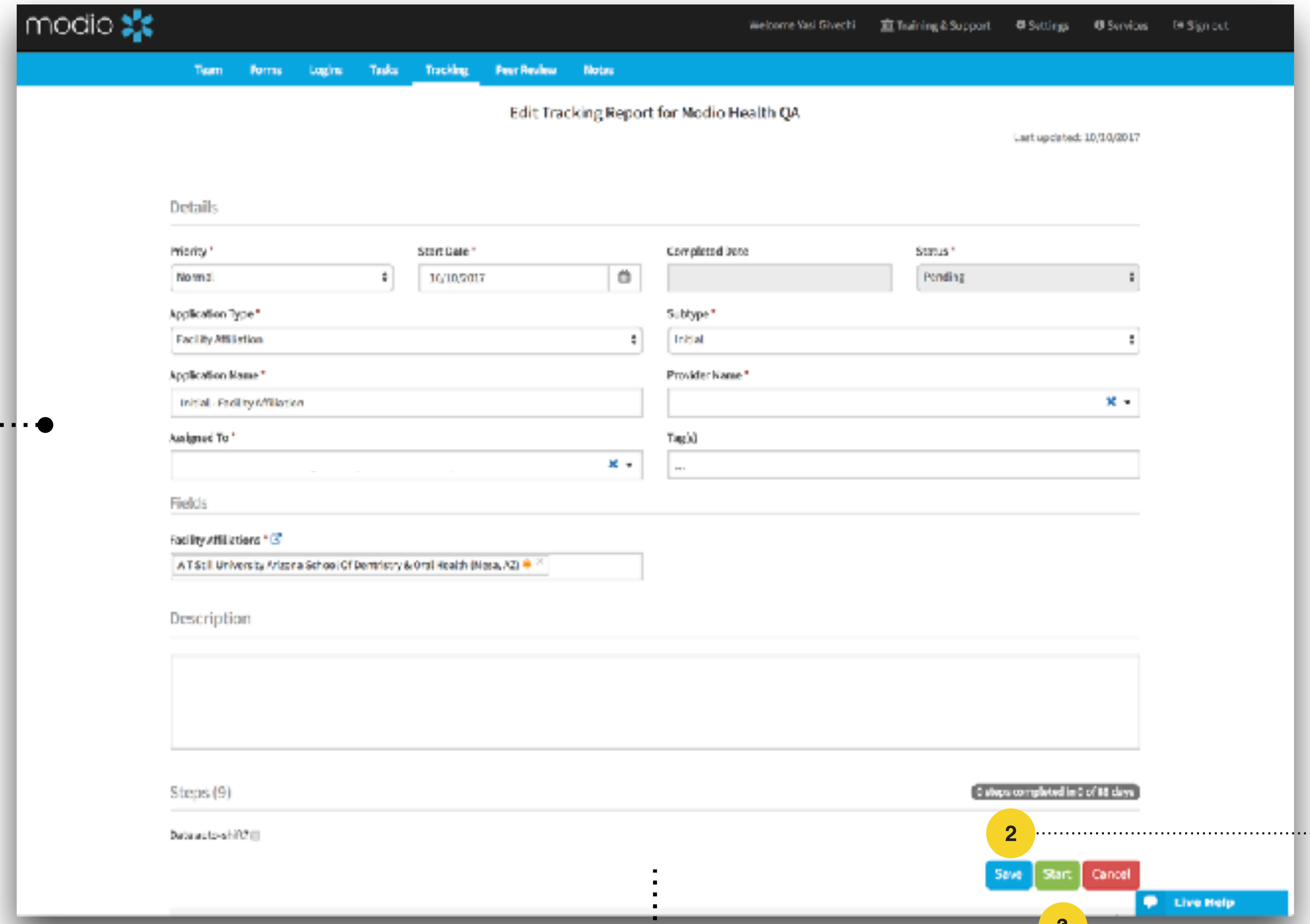


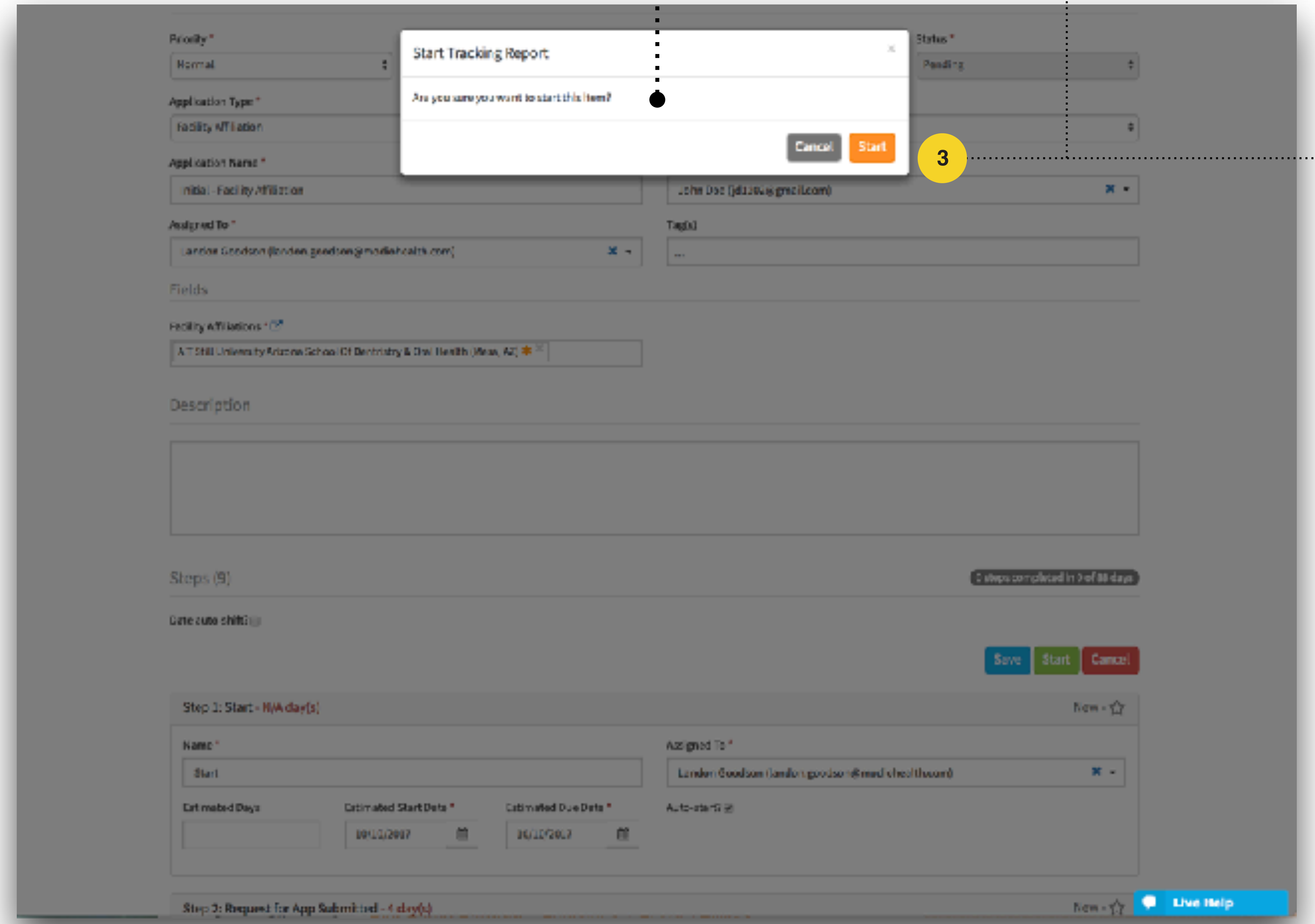
Save:
Once you have edited the steps to your liking, click Save. The application is now ready to be started.

Auto-start:
Check the box for Auto-start if you want the next step to 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.

COMPLETING AN APPLICATION OR WORKFLOW







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

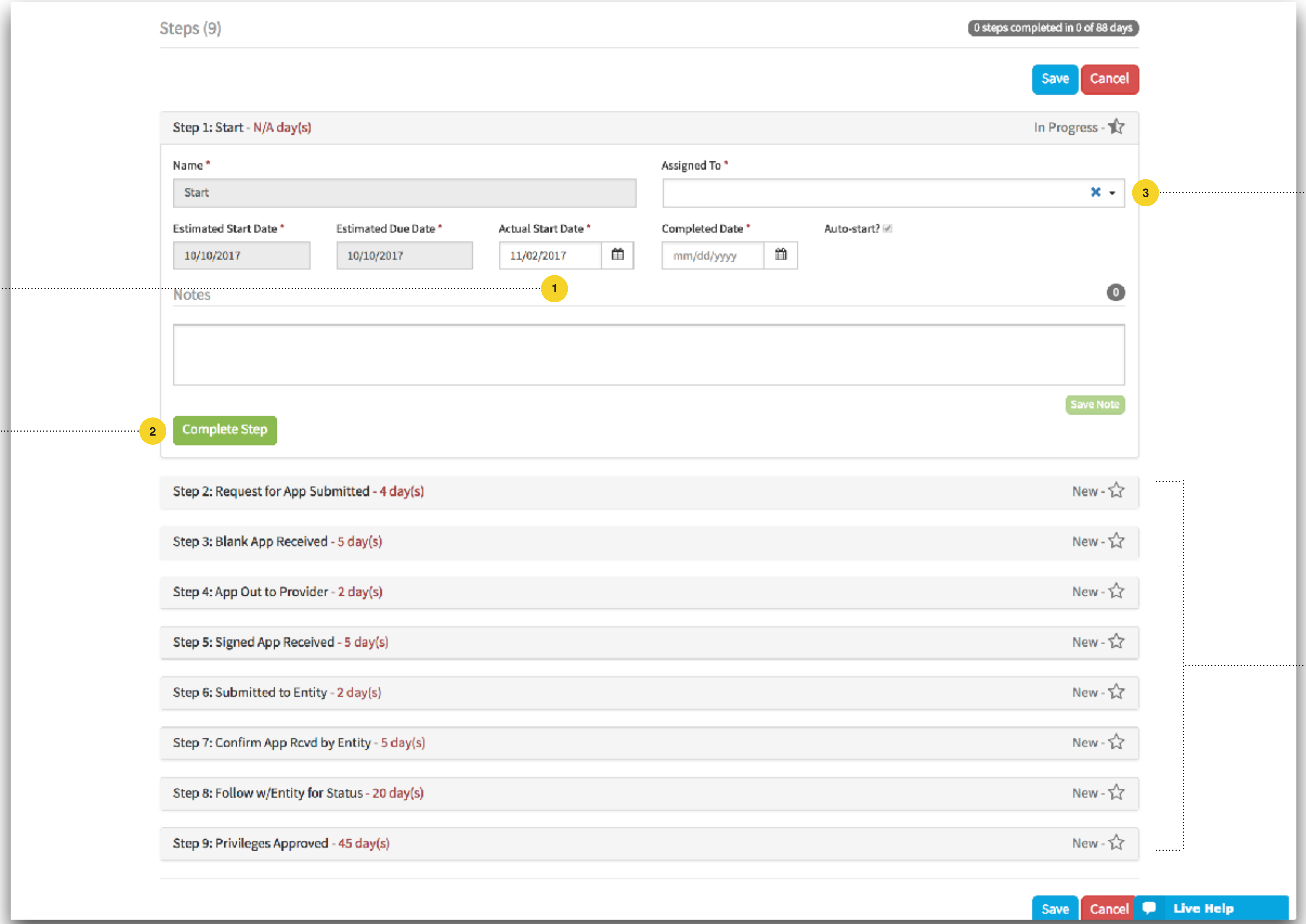
2 Edit and save any additional details before you click Start; **these cannot be changed once you begin the tracking process.**

3 Click Start to begin the tracking process.

COMPLETING AN APPLICATION OR WORKFLOW continued

Start Date:
Edit the "Actual Start Date" on step 1, 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:
Assign each step to a person on your team. You can assign steps to different people within the same application.

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

REVIEWING TEAM APPLICATIONS & WORKFLOWS

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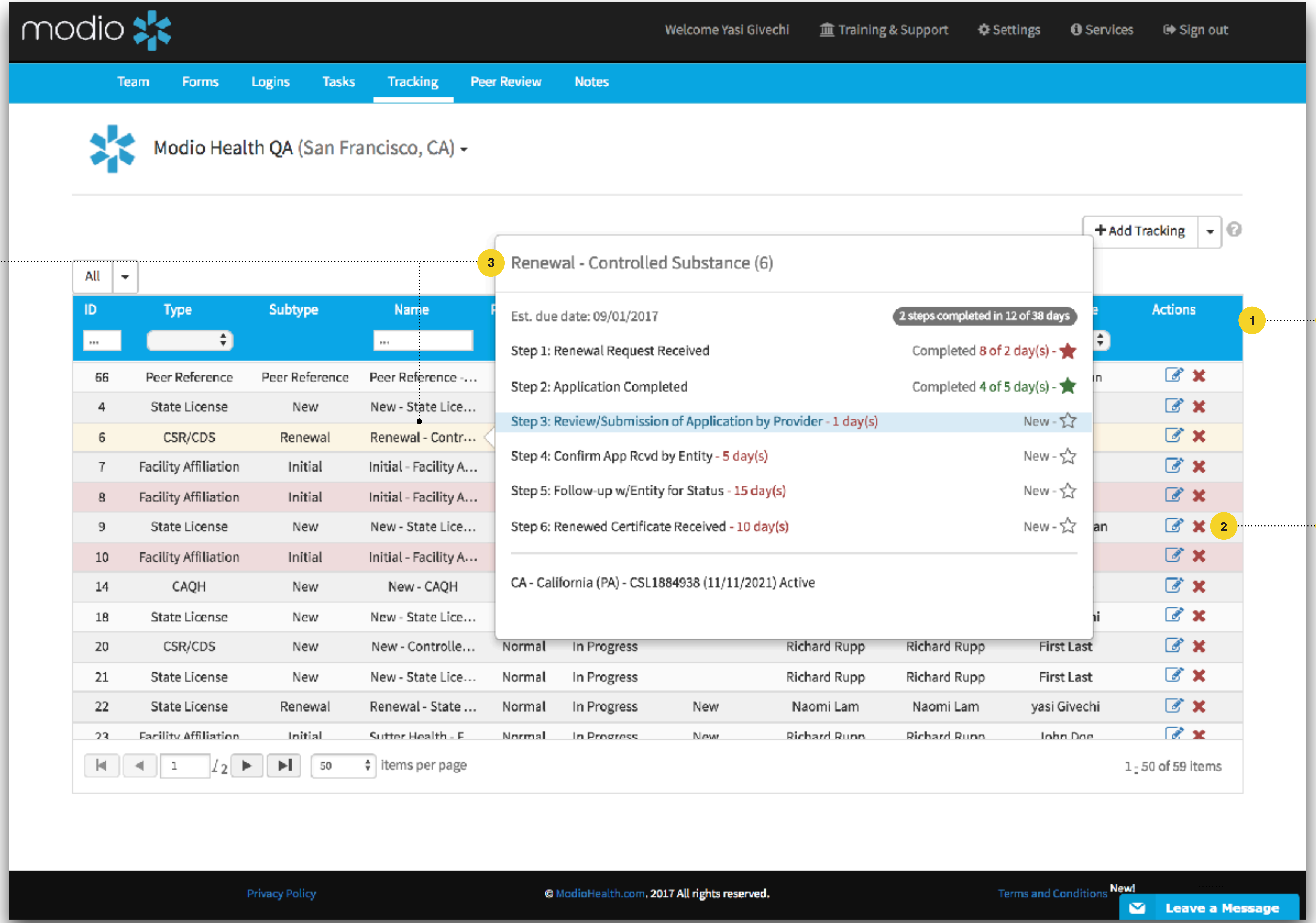
Workflow Summary:
To view a summary of a particular workflow, hover over the name of the workflow. A step-by-step status update will appear.



Filtering:
After you create your first workflow tracker, you can return to the Tracking tab at any time to view, edit, and sort through your team's trackers. Use the filter feature to sort through applications by type, name, priority, status, or creator/assignee/provider name.

Archiving Workflows:
Click here to archive workflows. Only archive workflows that you no longer need to access; you can't view a workflow after it has been archived.
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Please call us if you have comments or feedback.

Online: Sign in to chat live
Call us: 844.696.6346
Email us: support@modiohealth.com

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