

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.



/elcome Yasi Givechi	🏛 Training & Suppor	t 💠 Settings	O Services	🕩 Sign out		
			+ A	1 dd Tracking 👻 🕜	1	Add Tracking: Click here to start track new workflow. If Track been set up for your te contact your Account N
Due In	Created By	Assigned To	Provider Name	Actions		
	Richard Rupp	Richard Rupp	John Doe	Z ×		
				1 <u>-</u> 1 of 1 items		
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NEW APPLICATIONS & WORKFLOW TRACKING

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		Team	Forms	Logins	Tasks	Tracking	Peer R
						New Tra	cking I
		Details					
Priority: Choose a priority and start 1 date for the application.		Priority *		\$	Start D 11/0	oate * 1/2017	
Application Type: Pick the application type 2 from the drop-down menu.	2	Application T	ype *				
Application Name: Edit the application name if needed, and select a	4	Application N	ame *				
down menu.	F	Assigned To *					
Assign Io: Choose an Assignee from the coordinators on your	3	Select an a	ssignee				
team. The assignee is the person who should follow through on the application's progress and complete the steps as necessary.		Descriptio	on				







SELECTING FIELDS

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you chose, you'll be able to pick an item from the drop-down menu. This	Application N	ame *					Provider Name *			
could be a facility, a license number, malpractice carrier, or other option.	New - CAQH	ł					Select a provider			-
Pick the item that corresponds to the application you are working on.	Assigned To *						Tag(s)			
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TRACKING STEPS

Date auto-shift:	Steps (6)		
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	Date auto-shift?		
complete each step. (For example, if the default for step 1 is 3 estimated days	Step 1: Creation of CAQH	Login - N/A day(s)	
beginning on Jan 1 and due on	Name *		
auto-shift box and change the	Creation of CAQH Login		
date will automatically change	Estimated Days	Estimated Start Date *	Estimated Due Date *
to Jan 5.)		11/01/2017	11/01/2017
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.	2 Name * Completion of CAQH Appli Estimated Days	Estimated Start Date	Estimated Due Date *
	Step 3: CAOH & Release t	o Provider for Review/Signatu	ire - 1 day(s)
	Now at		
	CAOH & Release to Provide	er for Review/Signature	
	Estimated Dave	Estimated Start Data *	Estimated Due Date *
	1	11/08/2017 m	11/08/2017





COMPLETING AN APPLICATION OR WORKFLOW

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an existing application. Applications that have not been started have the status "Pending."

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to begin

COMPLETING AN APPLICATION OR WORKFLOW continued

		Steps (9)	0 steps completed in 0 of 88 days
			Save Cancel
		Step 1: Start - N/A day(s)	In Progress - 1
		Name* Assigned To*	
		Start	Assigned Io: Assign each step to a
Start Date:		Estimated Start Date* Estimated Due Date* Actual Start Date* Completed Date* Auto-start?	on your team. You ca
Edit the "Actual Start Date" on step 1, then add any notes		10/10/2017 II/02/2017 II mm/dd/yyyy II	within the same appl
and click Start.	1	Notes	0
Complete Step: When the step is complete, fill out the "Completed Date" and any notes, then click	2	Complete Step	Save Note
Complete.		Step 2: Request for App Submitted - 4 day(s)	New - 📩
		Step 3: Blank App Received - 5 day(s)	New - X
		Step 4: App Out to Provider - 2 day(s)	New-☆ Continuing Steps: Repeat for each step
		Step 5: Signed App Received - 5 day(s)	New - ☆ reach the end of the designated steps. Yo
		Step 6: Submitted to Entity - 2 day(s)	New-☆
		Step 7: Confirm App Rovd by Entity - 5 day(s)	New-☆ you'll see the status Progress.
		Step 8: Follow w/Entity for Status - 20 day(s)	New - 🏠
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REVIEWING TEAM APPLICATIONS & WORKFLOWS



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.

3

Te	eam Forms	Logins Tasks	Tracking Pe	er Review	Notes					
	Modio Heal	th QA (San Fr	ancisco, CA) -							
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ID	Туре	Subtype	Name	F Est. due	date: 09/01/2017			2 steps completed in	n 12 of 38 days 🧧	Actions
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Filtering:

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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.

2 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.







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

