



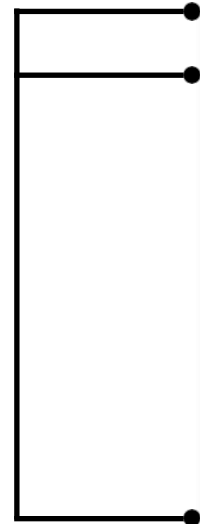
OneView[®]

Tip Guide: Copy Feature

Introduction: Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and individual profiles support the copy feature.

The Copy Feature is available in these three sections:

- Practice/Employer
- Facility Affiliation
- Healthcare Payors



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Yuri Zhivago MD Healthcare Payors

Healthcare Payors 5

Payor Name	State	Provider #	Effective Date	End Date	Status	Actions
Envolv - Commercial CT - 151 - Cheshire (1785 Highland Ave, Cheshire, CT 06410-1272) TIN: 475525260 Group NPI: 1669846465	CT	-	-	05/24/2025	Pending Contract Inactive	
Humana Inc. CT - 150 - Ansonia (145 Wakelee Ave, Ansonia, CT 06401-1176) TIN: 475525260 Group NPI: 1396119194	CT	-	-	-	Pending Pending	
CT - 151 - Cheshire (1785 Highland Ave, Cheshire, CT 06410-1272) TIN: 475525260 Group NPI: 1669846465		-	-	-	Pending	
CT - 154 - Hamden (2165 Dixwell Ave, Hamden, CT 06514-2116) TIN: 475525260 Group NPI: 1033583745		-	-	-	Pending	
Other		-	-	-	-	
United Healthcare (UHC) Modio Health - OnDemand (2228 W Great Neck Rd, Ste 205, Virginia Beach, VA 23451)		-	-	-	Submitted Application	
United Healthcare (UHC)		-	-	-	-	

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Chat

Tip Guide: Copy Feature Practice/Employer & Facility Affiliations

Navigate to the profile you wish to add locations to. Use the copy function to quickly add multiple locations to existing profiles.

The screenshot shows the Modio web interface for a provider profile. The left sidebar contains navigation tabs: Personal Info, Education & Training, Practice / Employer (highlighted with a yellow circle '2'), Facility Affiliations, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Healthcare Payors, Health Info, Event Log, CME, Documents, and Summary. The main content area displays the 'Practice/Employer' section for 'Yuri Zhivago MD'. A modal window is open, titled 'Copy Practice(s) / Employer(s) for Yuri Zhivago MD'. The modal contains a 'Team' dropdown menu, a 'Copy from: (optional)' dropdown menu, a 'Location(s)' dropdown menu, and a 'Copy to:' text field containing 'Yuri Zhivago (yurizhivago@gmail.com)'. A 'Save' button is highlighted with a yellow circle '4'. In the bottom right corner of the main interface, a 'Copy' button is highlighted with a yellow circle '1'. A 'Chat' button is also visible.

Step 1 - Select the copy button from the lower right side. The **"Copy to:"** section will auto populate the name of the profile you are currently in. (note - If this section is blank, select "Cancel" and click "Copy" again.)

Step 2 - You have a choice to select either the "Copy from:" or "Location(s)" section.

Step 3 - Review the locations you have selected. Use the small gray **"x"** to remove any locations that you may not need.

Step 4 - Click **Save**. The selected locations will now appear in the provider profile.

KEY:

Copy from: This will display a drop down of all other profiles in your team roster. Select a profile from that list and the locations attached to that profile will appear in the location section.

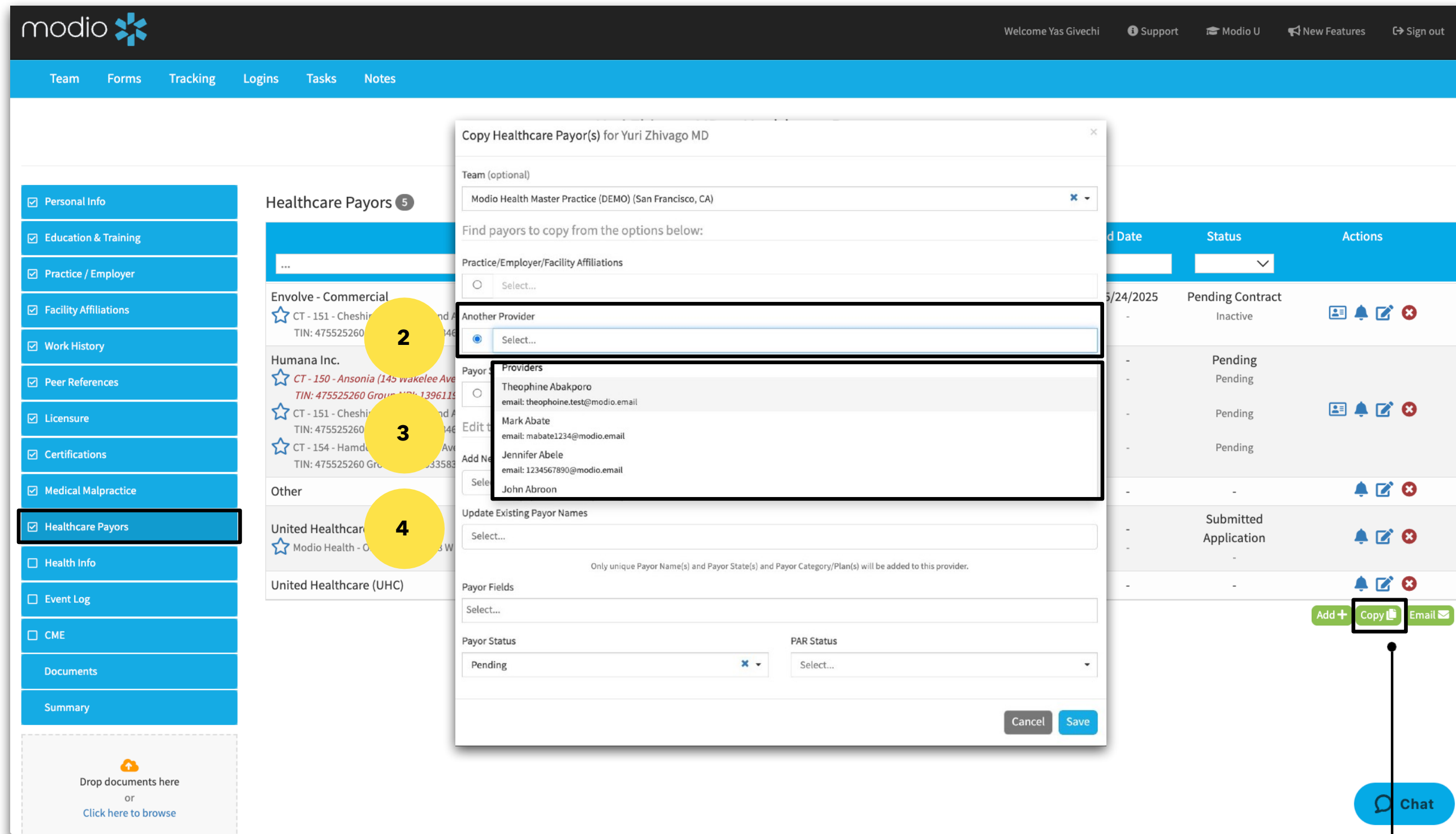
Locations: This section will provide a drop down of individual locations that you can chose from. You will have the option to select as many locations from the drop down as you would like.

Start here!



Tip Guide: Copy Feature Copy a group of payors from one profile to another

Introduction: Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and individual profiles have the copy feature.



Step 1 -Click the copy button on the lower right.

Step 2 -Select the radio button for "Another provider"

Step 3 -A drop down list of the other providers on your roster will appear. Select the provider or FAC profile that you want to copy.

Step 4 -The payors from the selected profile will appear in the **"Add New Payors Names"** and **"Update Existing Payor names"** Review and remove any payors that you do not need to copy over.

Note - While selecting Copy From "Provider" is the most common use case, there is also an option to select "State" or "Practice Employer" the copy feature will function the same if any of the tree radio buttons are selected.*

Start here!



Tip Guide: Copy Feature Copy a group of payors from one profile to another

Introduction: Use the copy feature to quickly and accurately add Locations and Payors from one profile to another. Both, FAC profiles and provider profiles have the copy feature.

The screenshot displays the Modio web application interface. A modal dialog titled "Copy Healthcare Payor(s) for Yuri Zhivago MD" is open. The dialog includes a "Team (optional)" dropdown set to "Modio Health Master Practice (DEMO) (San Francisco, CA)". Below this, it prompts to "Find payors to copy from the options below:" and lists "Practice/Employer/Facility Affiliations" and "Another Provider" (Jennifer Abele). The "Payor State" is set to "Select...". A section titled "Edit the list of payors to be copied:" contains two sub-sections: "Add New Payor Names" (highlighted with a yellow circle and the number 4) and "Update Existing Payor Names". The "Add New Payor Names" section lists various payors such as "90 Degrees- PHO(AZ)", "Aetna- PPO(AZ)", "BlueCross BlueShield of Western NY(AZ)", "Blue Cross Blue Shield (BCBS)(CA)", "Medicaid(CA)", "Administrative Concepts, Inc.(CO)", "Cigna- colorado(CO)", "Cigna- Florida(FL)", "Cigna Medicare(GA)", "United Healthcare (UHC)(GA)", "Medicare(MD)", "Administrative Solutions Inc- The Plan(ME)", "1199SEIU National Benefit Fund(NC)", "Medicaid- HMO, PPO(NY)", "Medicaid(VA)", "2020 EyeCare", "Cigna", "Railroad Medicare", and "United Healthcare (UHC)- PPO". The "Update Existing Payor Names" section has a "Select..." dropdown with "United Healthcare (UHC)" selected. Below these sections are "Payor Fields" (Select...), "Payor Status" (Pending), and "PAR Status" (Select...). At the bottom right of the dialog, the "Save" button is highlighted with a yellow circle and the number 5. The background shows a profile page for "Yuri Zhivago MD" with a sidebar menu where "Healthcare Payors" is selected. A table of payors is visible with columns for "End Date", "Status", and "Actions".

Step 4 - The payors from the selected profile will appear in the "Add New Payors Names" and "Update Existing Payor names" Review and remove any payors that you do not need to copy over.

Step 5 - Click **Save**

Tip Guide: Copy Feature Payors

There are additional time saving options in the Payor Copy feature. Use the information in the screenshot below to save time and ensure accuracy when copying payors to profiles.

Step 2: Click **"Payor Status"** and select from four different statuses in the drop down. The status selected will apply to all Payors listed above.

Step 1: Select the **"Payor Fields"** section. **Select "Payor Contact"** Any contact information saved in the payor profile will copy over.

Step 3: Select **"Practice Employer/ FacilityAffiliations"** A new field labeled "Practice/Affiliations Fields" will appear. Use the dropdown to select existing locations to copy over with the selected payors. (The location must live in both the profile you are copying from AND the profile you are currently working in.)

Step 4: Select **"PAR Status"** and select from PAR or non-PAR. This selection will apply to all Payors listed above.

Step 5: Click **"Save"** and your payors and payor statuses will be added to your provider profile.

Q - Why are the status options limited when using the Copy function for Payors?

The current available status list for Payors is extensive, so we want to avoid adding the whole list. Due to the variety of uses and meanings behind statuses, especially across different clients, there is no additional short-list of options that could be added. The current list is designed to suit the needs of every client without causing additional confusion.

Additionally, if we did add all statuses, it could cause issues if matching records already exist. With this simplified list, it's easy to spot duplicate records should something be copied over without needing to be.

Q - Is there a fast way to copy Practice/Employers to the Work History section?

While there isn't an easy way to bulk copy all locations at once, you can do so individually via the **Edit** icon next to the **Practice/Employer** of choice.

In the window that pops up, there is a field labeled **List This Practice/Employer In** on the right-hand side. Click that dropdown for the following options:

- a. Practice/Employer Only** - This location will only live under **Practice/Employer**
- b. Work History Only** - This location will move under **Work History** and fall off **Practice Employer**
- c. Practice & Work History** - The location information will be copied over to **Work History**. Selecting this option will create a new field (**Reason for Leaving**) and a checkbox for updating the **Payor Status** (which will generate a new field to the right that allows you to choose that **Payor Status**).

Once you make your selection, hit **Save** and those updates will be made.

The **List This** field also exists in items added to the **Work History** section. So, if your provider accidentally put a location there that should be under **Practice/Employer**, you can use the same method to move/add it to where it needs to be.

Q - Will profile specific information copy from one to the other? For example, items like a start date, end date, provider ID#, credentialing information etc.

No, profile specific information does not copy when you use the copy feature from one profile to the other.

Q - What is the best order to copy information from one profile to another?

The most efficient way to copy information from one profile to another is to ensure that the locations are the same before you copy payors. Using the copy feature for practice employer and/or facility affiliations first to ensure all locations are in place and the same before you copy payors is a best practice.

Q - Is the copy feature available in v2?

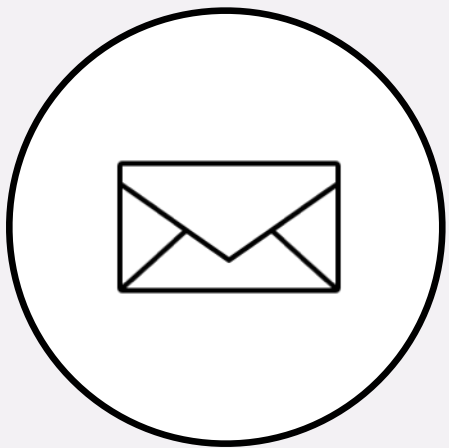
Not yet, the copy feature has not been added to v2 yet. There will be an announcement in the release notes when this happens.

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



Online:

Live Chat Support



Email:

Support@modiohealth.com



Phone:

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