



**OneView**<sup>®</sup>

**Tip Guide: Provider Onboarding**

## INTRODUCTION

The provider onboarding feature is a customizable way to quickly gather data and complete your Teams provider profiles. Once sent, the onboarding invitation will welcome your new provider to your organization and prompt them create a OneView<sup>®</sup> login. From there they will be prompted to fill in requested data that will be automatically added to their profile.

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## **PART 1**

### SENDING THE ONBOARDING MESSAGE

**Tip Guide: Provider Onboarding** Sending The Onboarding Message

**Step 1** : Adding Your Provider(s) to your team roster. Your profile must be added with a valid email address before sending the Onboarding invite.

**Start here**

**Add Provider:**

Select the Add Provider button in either V1 or V2

Follow your add provider workflow by selecting **"Add Provider"** and filling in the 4 required fields.

**Provider Full Name or NPI:**

Enter your provider's first and last name or their NPI. If there is not a match in the dropdown, select "Don't see profile listed? Click here to skip profile claim."

**Provider Title:**

Select from the list of professional titles.

**Specialty List:**

Enter you providers specialty or specialties.

**Provider's Email:**

Enter your provider's email. Use an email that you would use to contact your provider. This email is linked to the onboarding invitation.

**Note:** If you have multiple teams, you can assign the provider to any team where their profile should be visible. Additionally, you may add or manage tags in this section.

**Click Save:** This will add the provider profile to your Team roster.

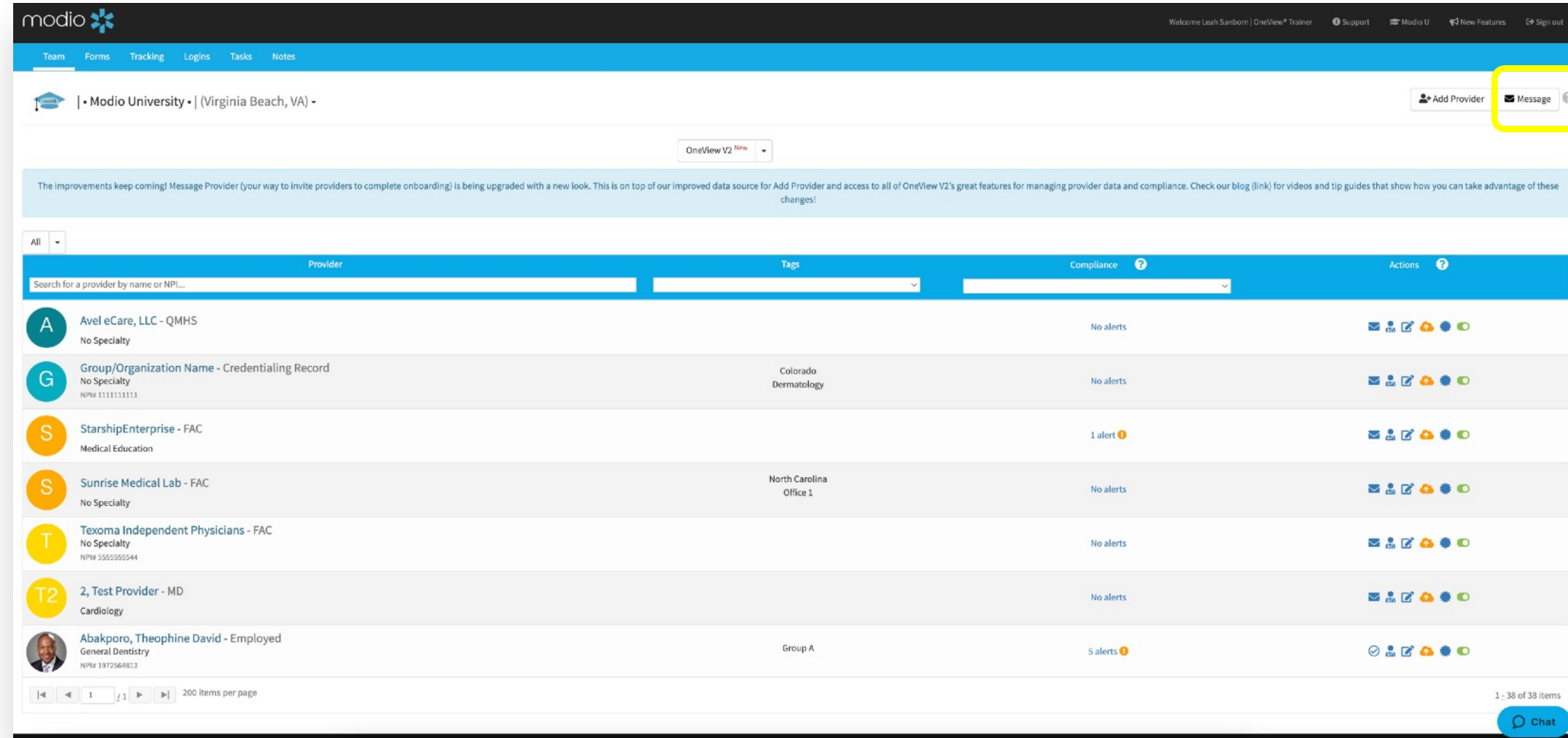
**Tip Guide: Provider Onboarding** Sending The Onboarding Message

**Step 2-** Inviting Your Provider(s). Now that your providers are added to your Team roster, you are ready to send the Onboarding Invite. The Onboarding invite may be sent from both V1 and V2



**Message Provider in V1:**

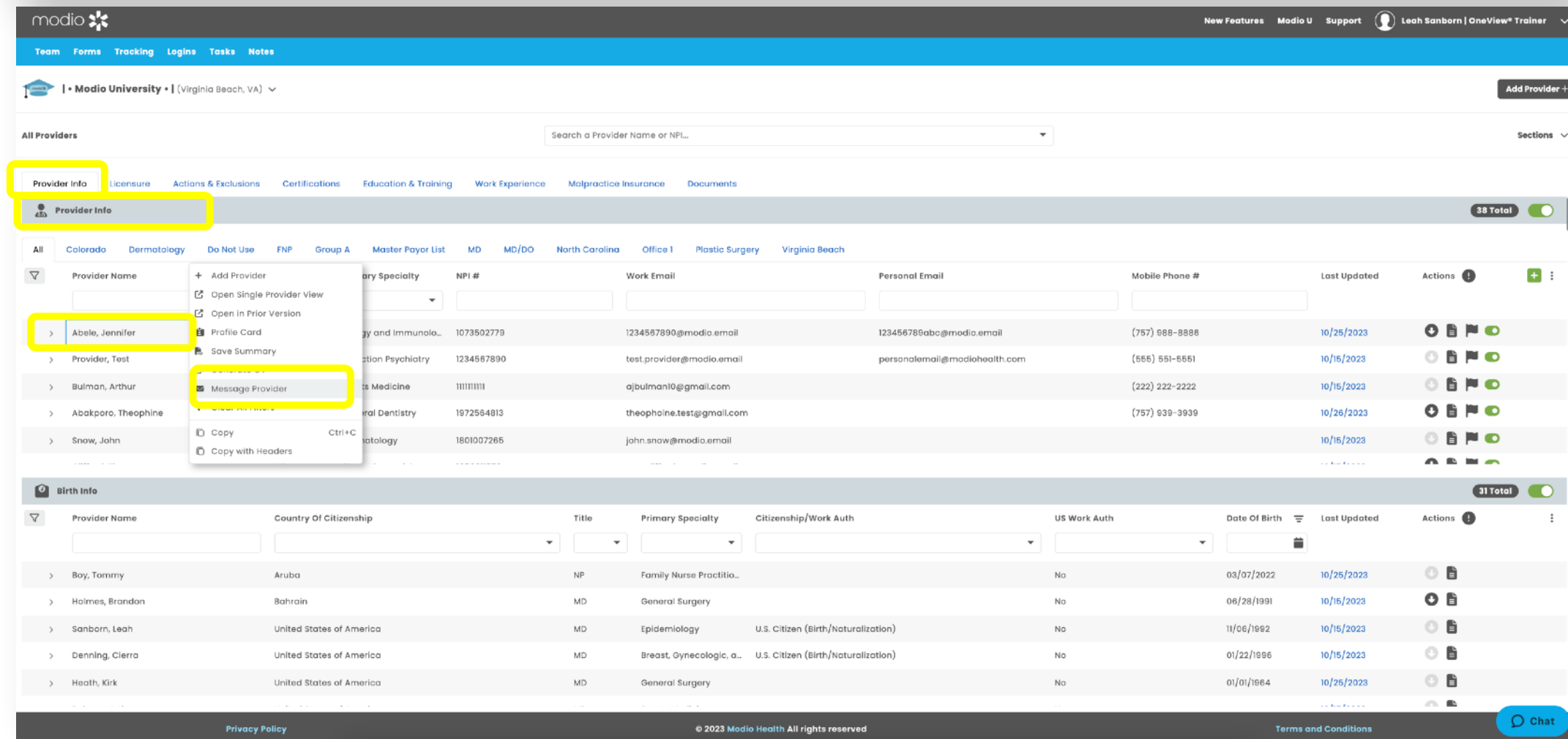
1. Click the Message button



**Message Provider in V2:**

1. Navigate to the Provider Info grid within the Provider Info Tab.
2. Find the provider you wish to send the Onboarding invite.
3. Right click on the Provider's name.
4. Select Message Provider.

\*If you cannot locate the Personal Info grid in V2 remember to check your grid settings and toggle on that grid as needed.



**Tip Guide: Provider Onboarding** Sending The Onboarding Message

**Step 3** - Filling out the Onboarding send invite.

**Tag(s):**

Quickly add a specific group of providers by selecting the corresponding Tag. These Tags are pulling from your Team page in V1 and the Provider Info grid located in the Provider info tab in V2.

**Email Providers:**

As you click the closed envelop icon, you will see your providers emails appear here. All email address changes must be done through the personal info section of your profiles.

**Email Subject & Message:**

Enter a desired subject and then add a message to your provider. This area can be customized as well. There are message templates available to help you get started. Those templates are located on the ModioU tab next to the Onboarding video.

**Attachment:**

Optional feature to add one attachment. (like a welcome packet). Attachments will be sent as Read: Only files and are not intended to be filled out, signed or returned.

**Edit Icon:**

Use this to make and save edits and changes to your Onboarding invite Subject and Message section.

**Email a Copy:**

This field is available when sending a single invite at a time. The email will be delivered to the coordinator email of the signed in user. If this option is checked but no providers are added, the coordinator can send the invite to themselves to test. The onboarding link will be hidden since the request is not tied to a specific provider.

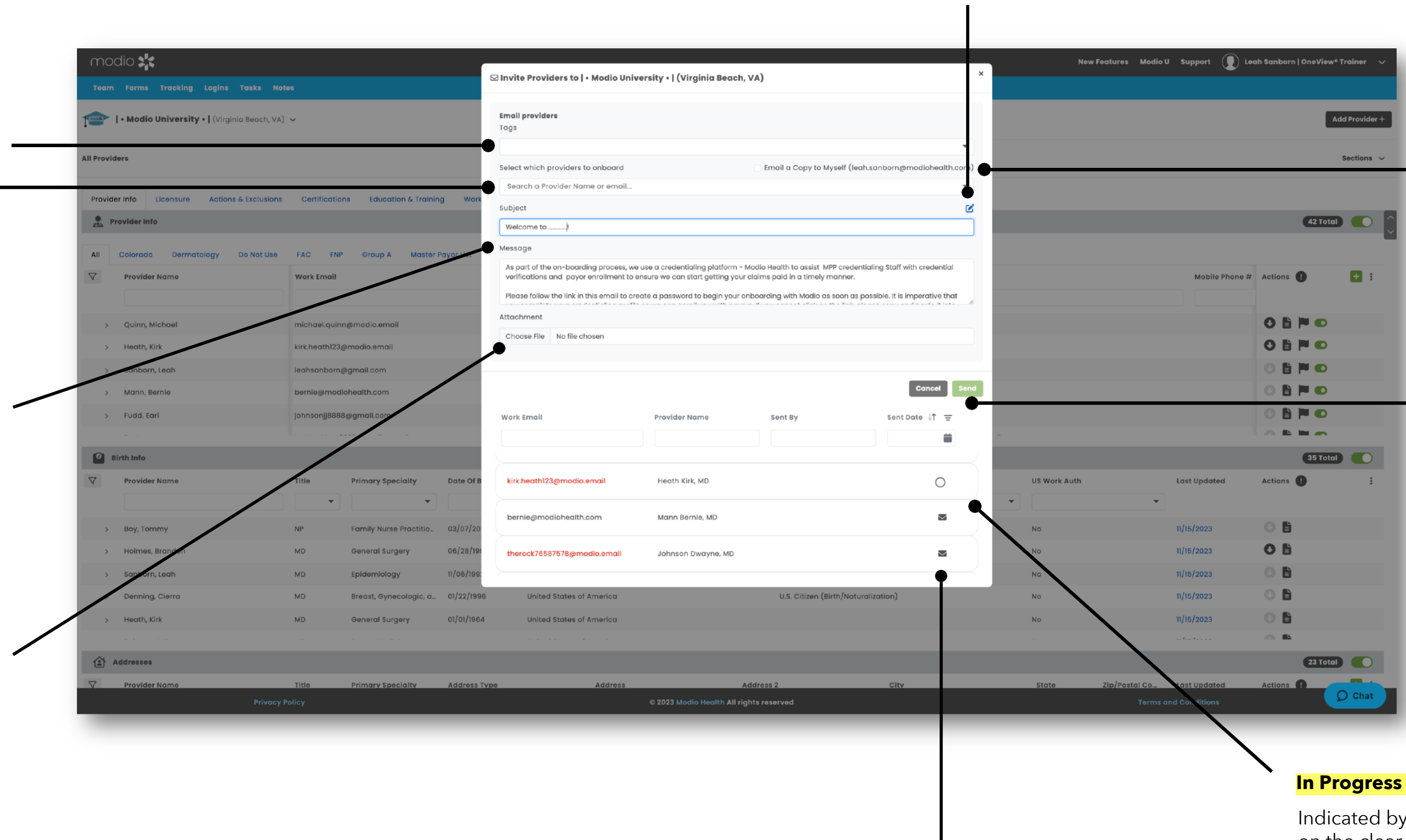
**Send:**

Click send once you have set up your subject, message and selected providers to receive the invite.

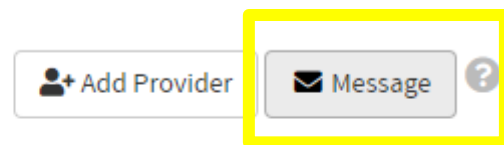
**In Progress Invitations:**

Indicated by the clear circle icon. Click on the clear circle to open a new tab and view that providers progress in filling out the onboarding invite.

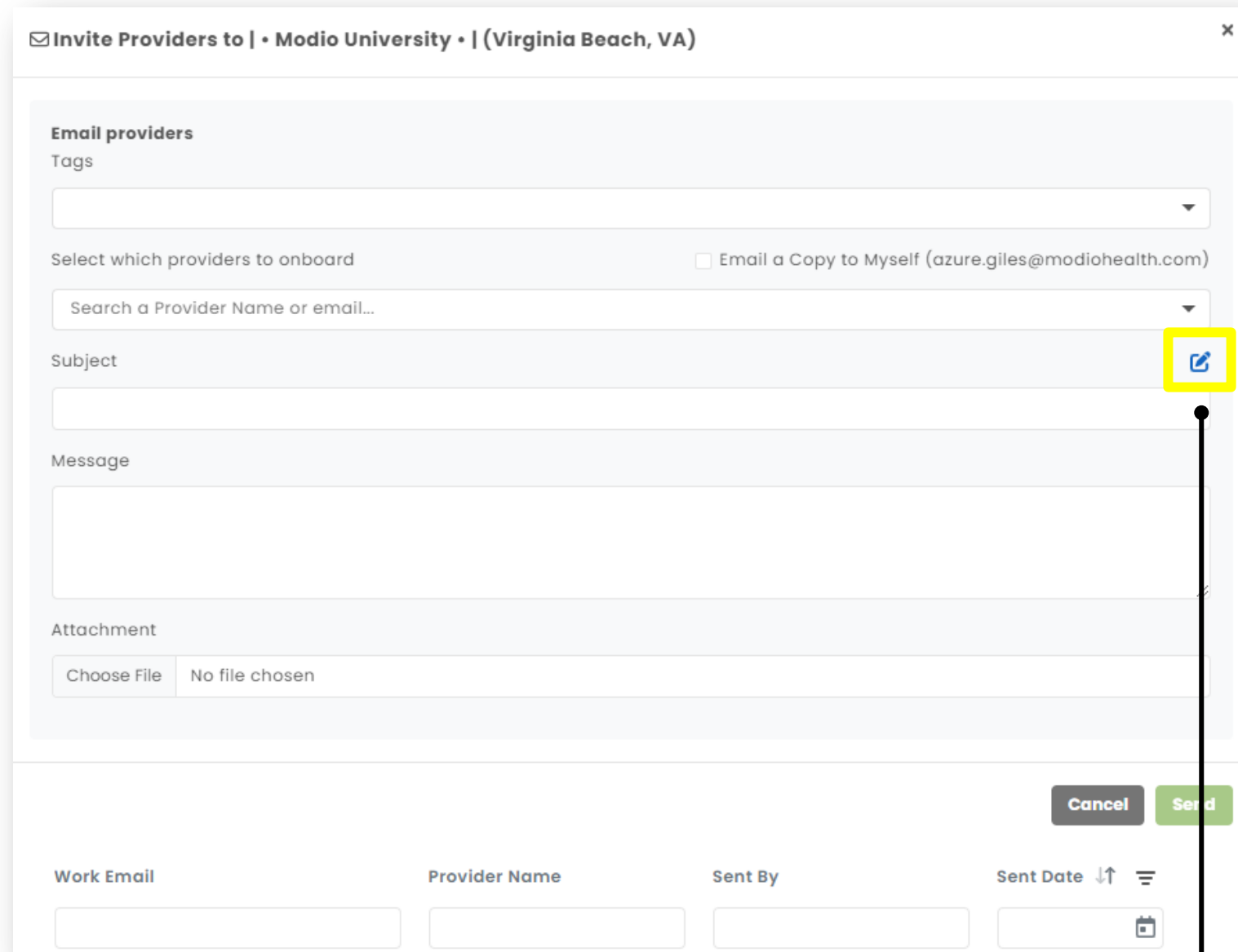
**New Invitations:** Click the Envelop Icon to add provider emails to the invitation list. If an email address is red and missing a green plus sign - that indicates an invalid email address. Update the email in personal info section in the field labeled "Work Email".



## Tip Guide: Onboarding in V2 Customize the Email invite



1. Next to add provider click the message button. This will allow you to both send your invites as well as customize the message for your team. The message is a team-level feature as you can only have one per team.



Invite Providers to | • Modio University • | (Virginia Beach, VA)

**Email providers**

Tags

Select which providers to onboard  Email a Copy to Myself (azure.giles@modiohealth.com)

Search a Provider Name or email...

Subject

Message

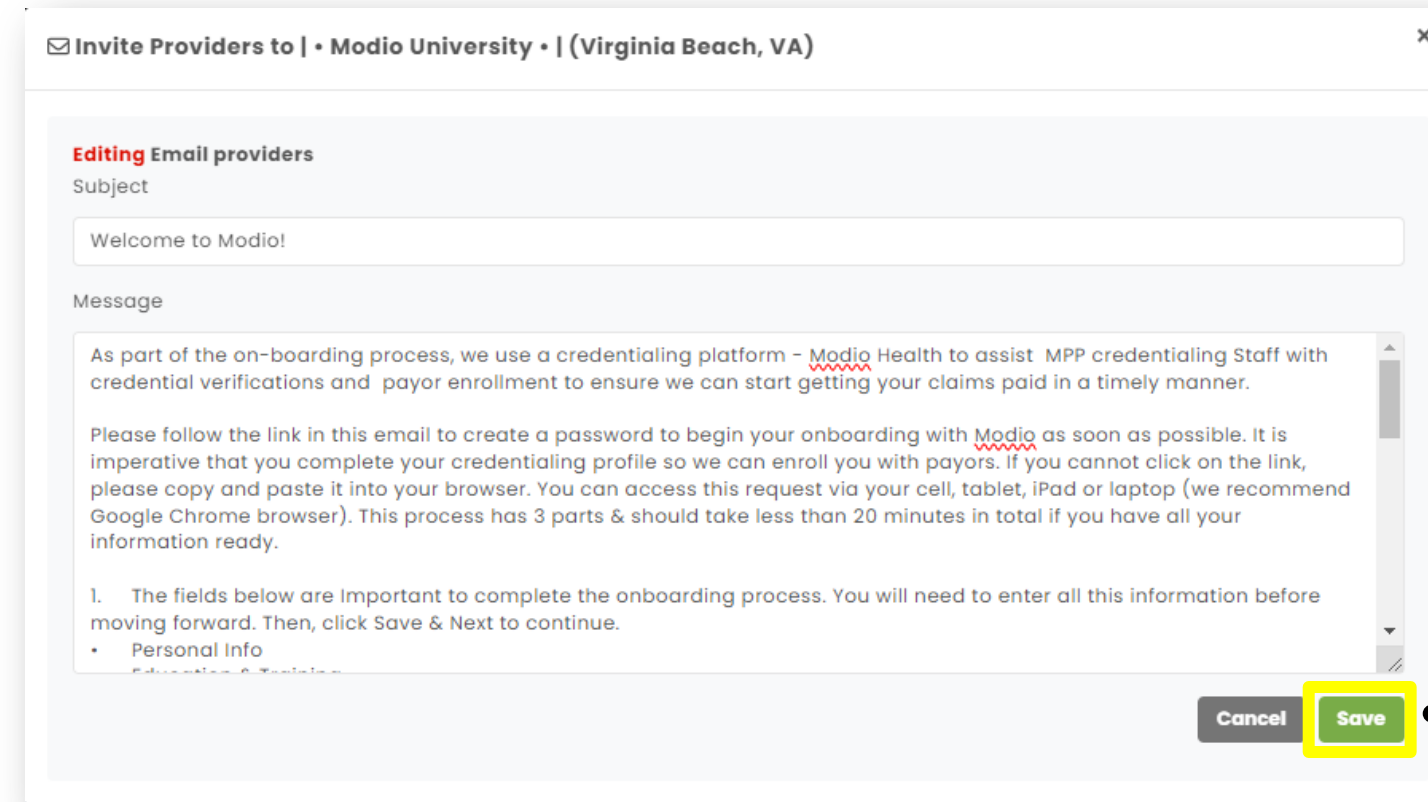
Attachment

Choose File No file chosen

Cancel Send

Work Email Provider Name Sent By Sent Date

2. Select the editor button to open the template and add your subject and message.



Invite Providers to | • Modio University • | (Virginia Beach, VA)

**Editing Email providers**

Subject

Welcome to Modio!

Message

As part of the on-boarding process, we use a credentialing platform - Modio Health to assist MPP credentialing Staff with credential verifications and payor enrollment to ensure we can start getting your claims paid in a timely manner.

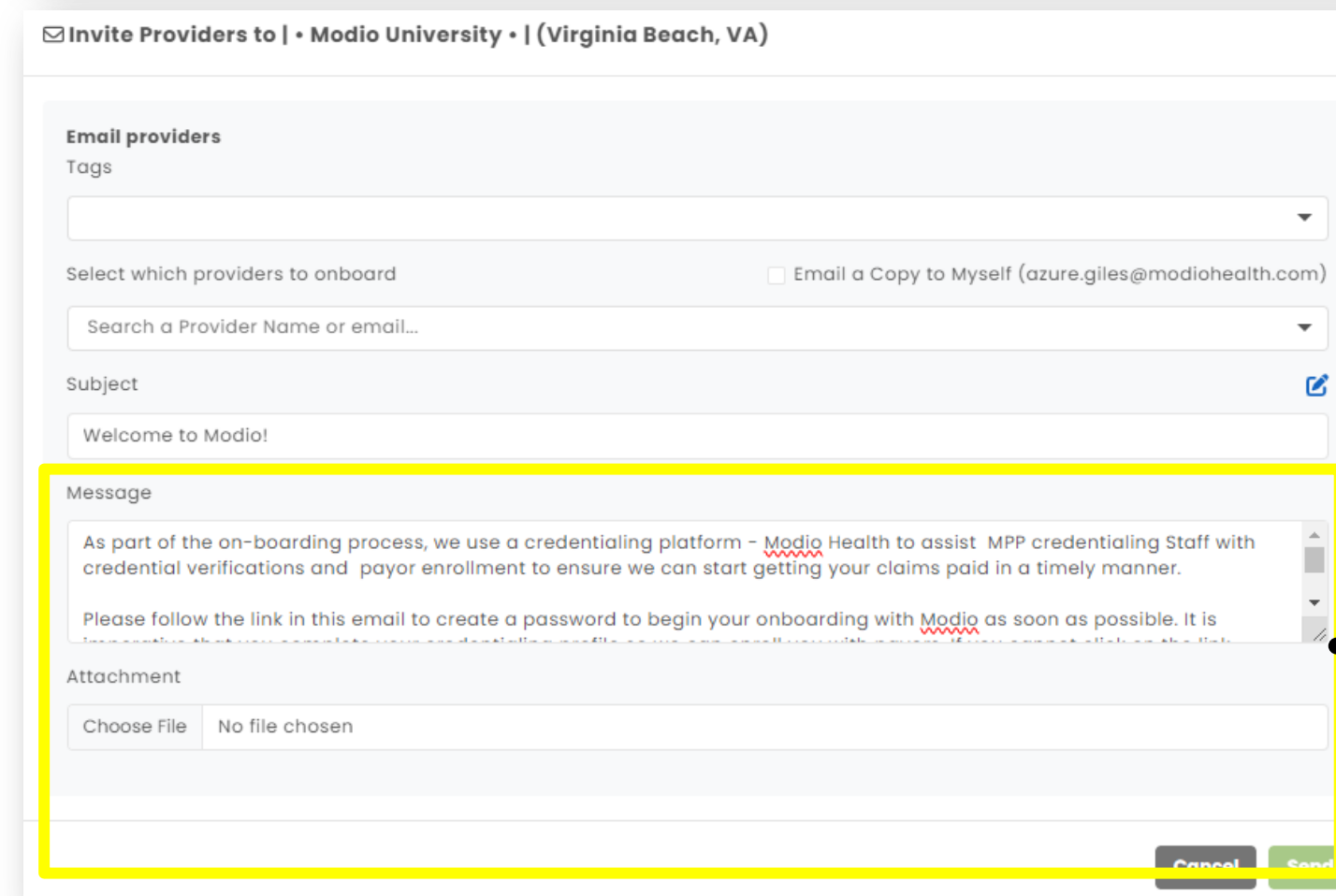
Please follow the link in this email to create a password to begin your onboarding with Modio as soon as possible. It is imperative that you complete your credentialing profile so we can enroll you with payors. If you cannot click on the link, please copy and paste it into your browser. You can access this request via your cell, tablet, iPad or laptop (we recommend Google Chrome browser). This process has 3 parts & should take less than 20 minutes in total if you have all your information ready.

- The fields below are important to complete the onboarding process. You will need to enter all this information before moving forward. Then, click Save & Next to continue.

- Personal Info

Cancel Save

3. Type a subject and message or copy it from another source. Be sure to hit save before leaving the screen.



Invite Providers to | • Modio University • | (Virginia Beach, VA)

**Email providers**

Tags

Select which providers to onboard  Email a Copy to Myself (azure.giles@modiohealth.com)

Search a Provider Name or email...

Subject

Welcome to Modio!

Message

As part of the on-boarding process, we use a credentialing platform - Modio Health to assist MPP credentialing Staff with credential verifications and payor enrollment to ensure we can start getting your claims paid in a timely manner.

Please follow the link in this email to create a password to begin your onboarding with Modio as soon as possible. It is imperative that you complete your credentialing profile so we can enroll you with payors. If you cannot click on the link, please copy and paste it into your browser. You can access this request via your cell, tablet, iPad or laptop (we recommend Google Chrome browser). This process has 3 parts & should take less than 20 minutes in total if you have all your information ready.

Attachment

Choose File No file chosen

Cancel Send

4. You may modify the invitation at any time by following this process again.

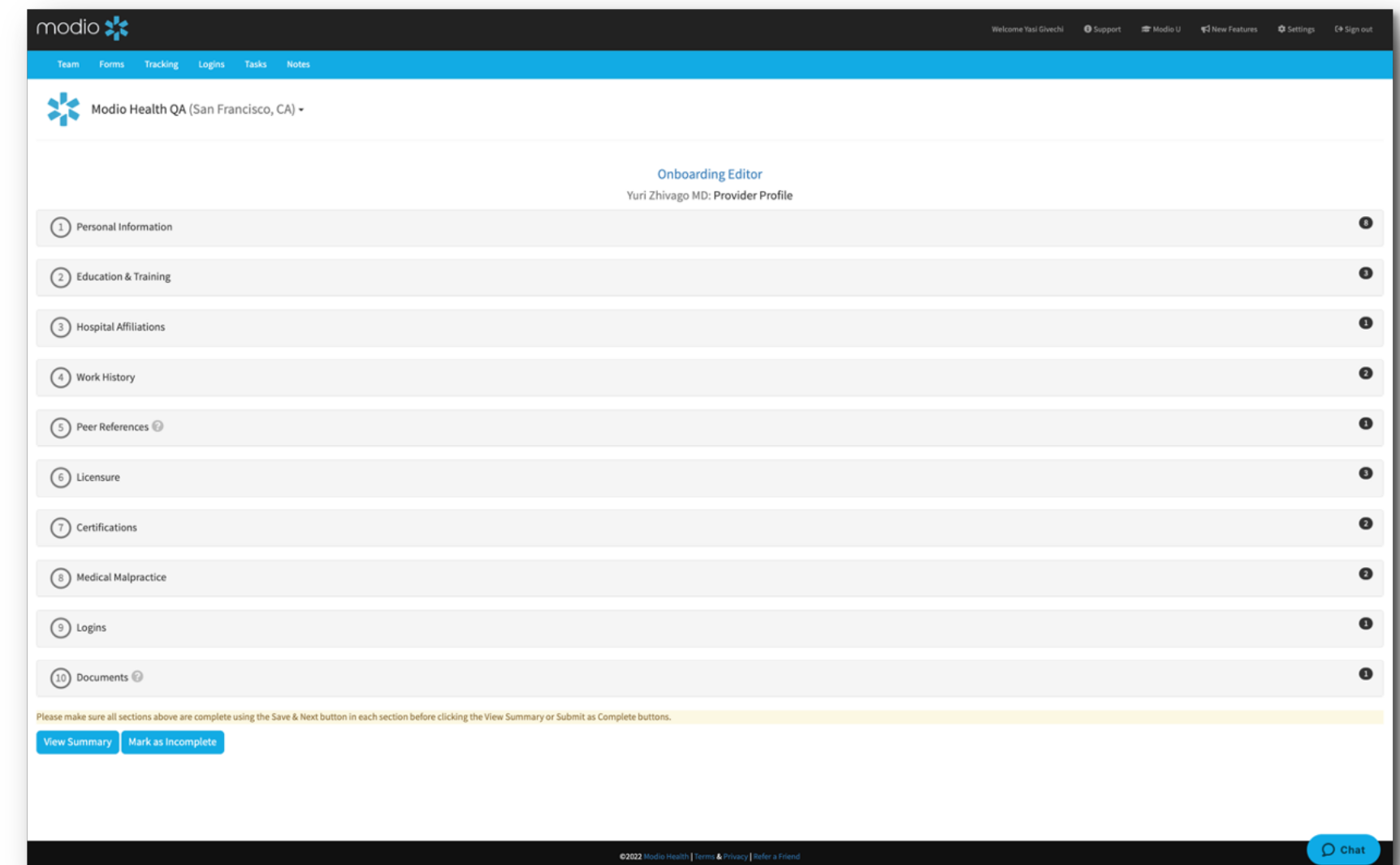
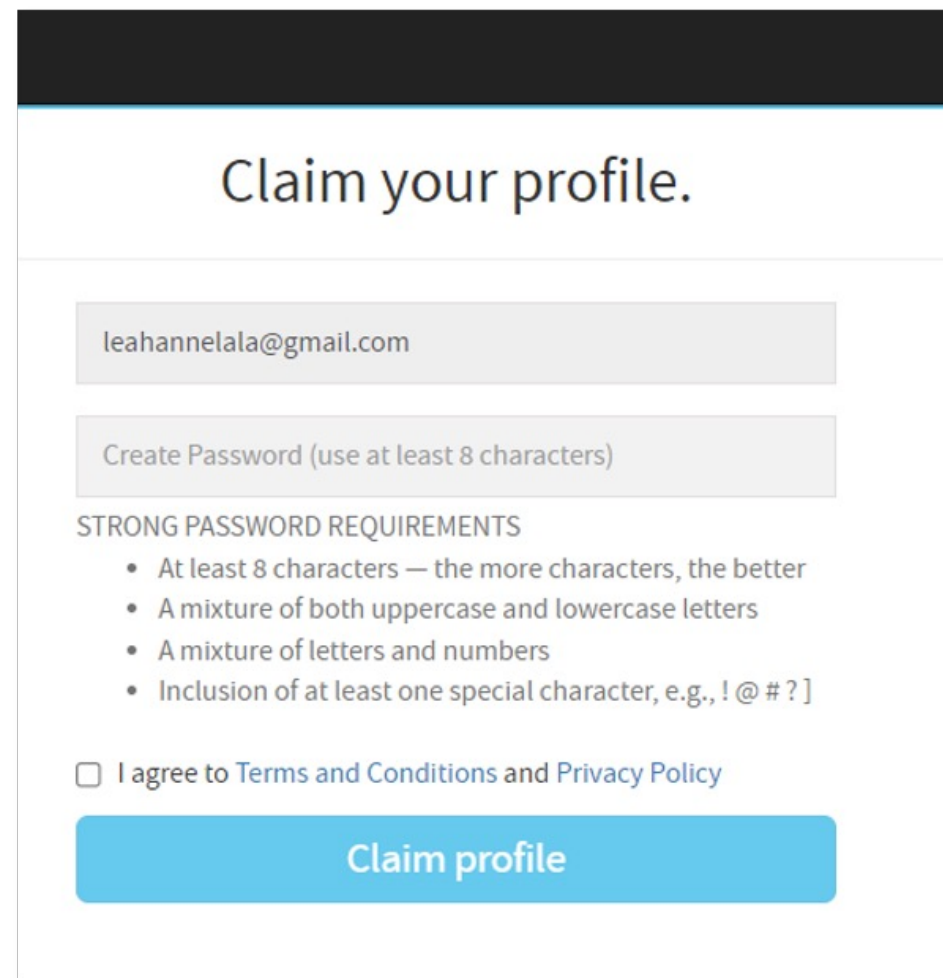
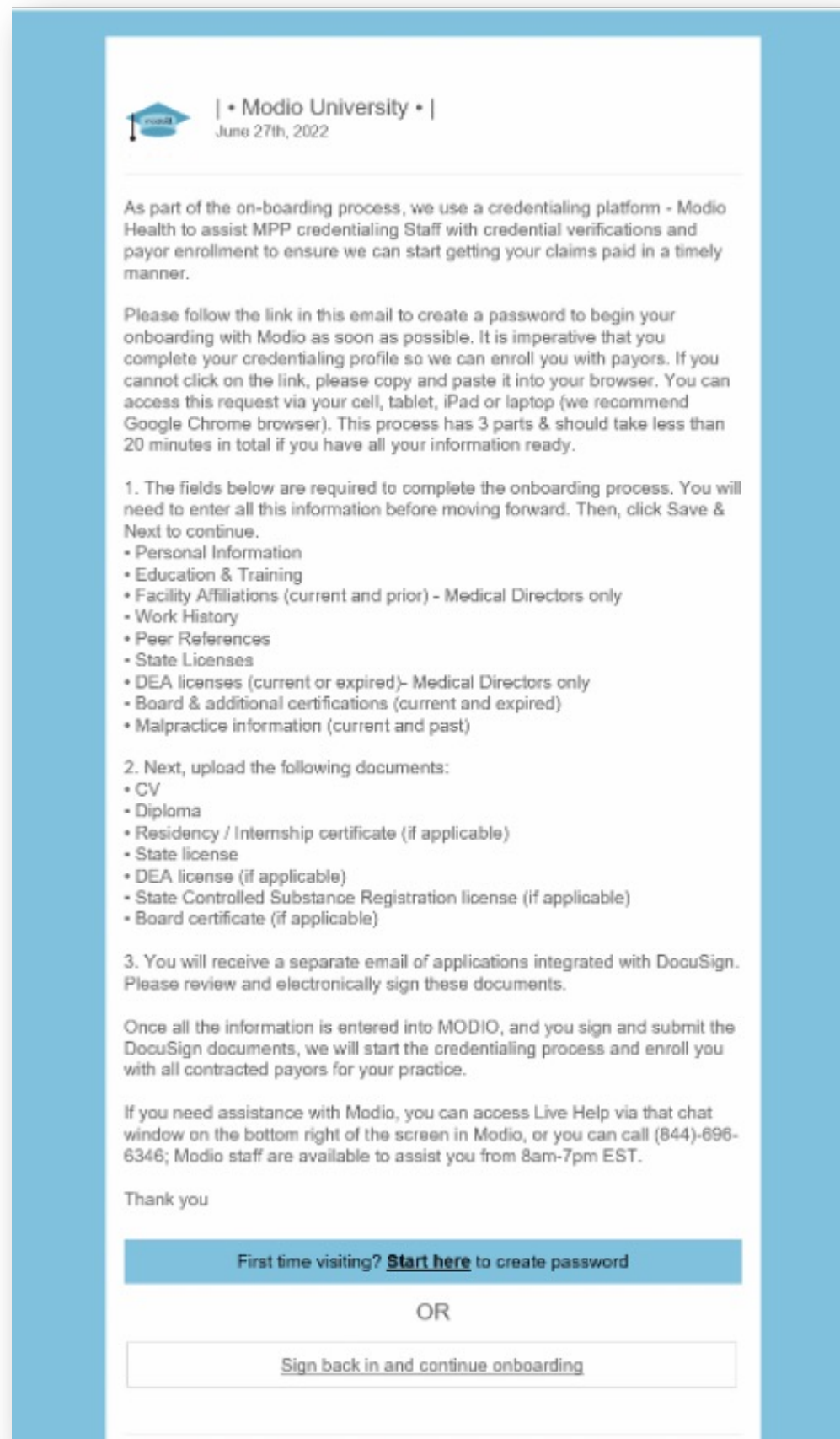
1. The provider will receive your message in their email.



2. The provider should click the link in your message, then claim their profile to start the onboarding process. The provider must use the same email address at which they received the invite.

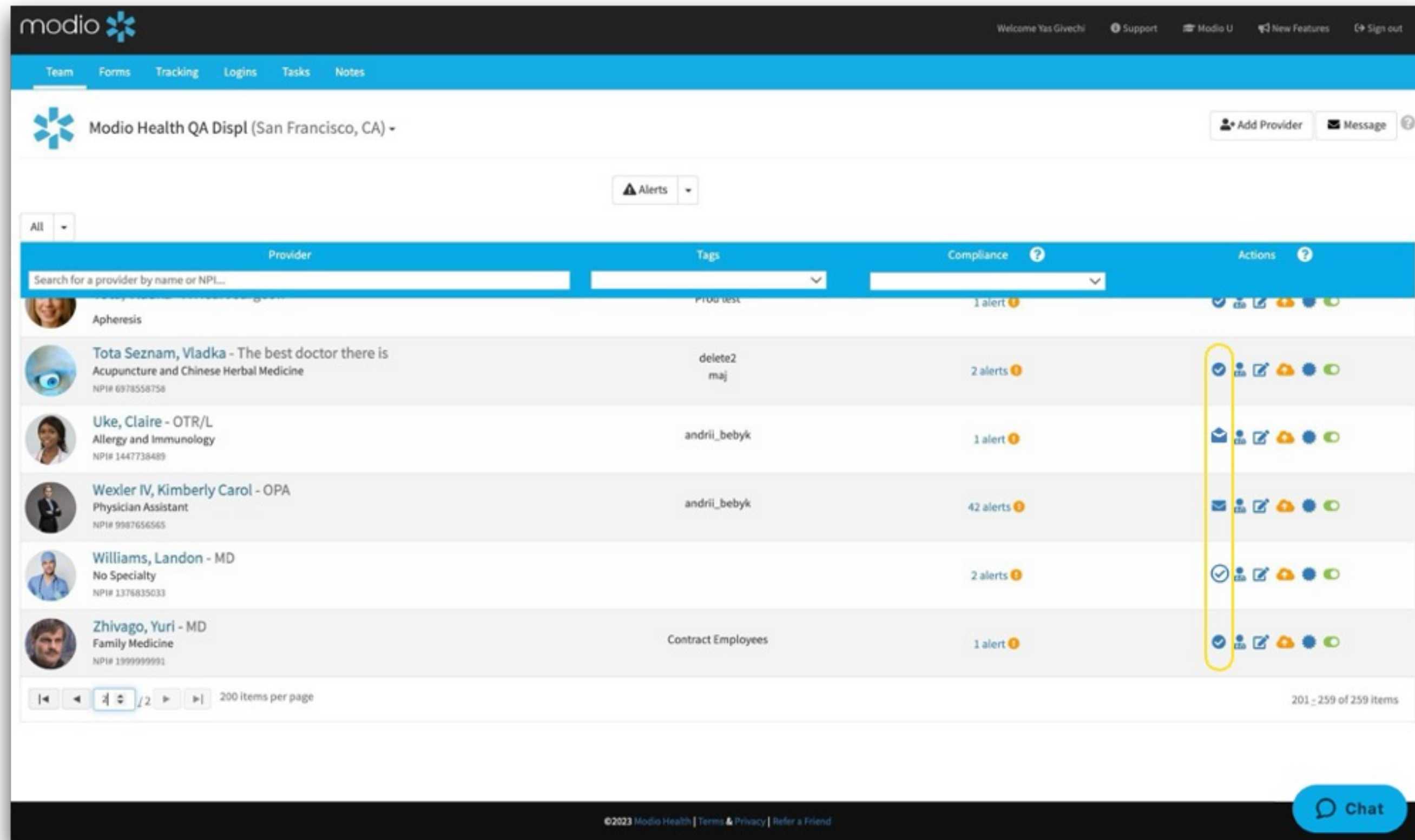


3. The provider is guided through the credentialing data sections and prompted to fill out required data. (Talk to your account rep to set up custom requirements for each field.) Any information added during onboarding is automatically copied to the provider's profile and available for viewing and editing. You can request that your provider upload a set of required or optional documents before completing onboarding (e.g. a CV or color photo).









\*View the "Provider Onboarding Tip: Guide" for an in: depth look at your Providers workflow and best practices to successfully navigate the Onboarding process.





The **envelope icons** will update in real time as your provider moves through the onboarding process. See the **icon key** below to interpret what stage of onboarding your providers are currently in.

### Icon Key:

-  **New Invitation:**  
Indicates a new provider. Click to invite.
-  **Sent Invitation**  
Indicate and Invite has been sent but not started.
-  **Accepted Profile:**  
Indicates a provider has accepted the invitation and created a profile.
-  **Incomplete Profile:**  
Indicates provider has started their profile.
-  **Completed Profile:**  
Indicates provider has completed their onboarding.
-  **Completed Profile:**  
Indicates that a coordinator has completed onboarding for this provider.

Refer to the action items to remain informed about the Provider's progress with onboarding.

From your **reports drop down** run the Web report titled **"Completed Items"**

The **"Completed Items"** report has a column dedicated to onboarding statuses. Use this **"Onboarding"** column to quickly filter and sort by the current status your providers are in throughout the onboarding process.

The screenshot shows the Modio Health QA Displ interface. On the left, a list of providers is displayed. In the center, a 'Web Reports' dropdown menu is open, with 'Completed Items' selected. On the right, the 'Completed Items for Modio Health QA Displ' report is shown. The report has columns for Provider Name, Onboarding, Forms, Documents, Logins, and Tasks. The 'Onboarding' column is highlighted with a yellow box, and a dropdown menu is open showing options like 'New Invitation', 'Sent Invitation', 'Accepted Invitation', 'Incomplete Profile', 'Complete Profile - Provider', and 'Complete Profile - Coordinator'. The report shows 259 items.

Provider Name	Onboarding	Forms	Documents	Logins	Tasks
Amber Dennis, LLC, FAC	New Invitation	0	1	0	0
Connecticut 1, FAC	New Invitation	0	0	0	0
DEMO California, FAC	New Invitation	0	1	0	0
Jessie Huston, LLC, FAC	New Invitation	0	0	0	0
Kelly Butwid, LLC, FAC	New Invitation	0	0	0	0
Kim Hutchinson, LLC, FAC	New Invitation	0	0	0	0
Laura Broughton LLC, FAC	New Invitation	1	1	0	4
Marisa Pellerin, LLC, FAC	New Invitation	0	0	0	0
Payor Example, FAC	New Invitation	0	3	0	2
Payor Practice Copy TEST, FAC	New Invitation	0	0	0	1

From your **reports drop down** run the CSV report titled **"Providers"**

The **"Providers"** report has a column dedicated to onboarding statuses. Use this **"Onboarding"** column to quickly filter and sort by the current status your providers are in throughout the onboarding process.

The screenshot shows the Modio Health QA Displ interface. On the left, a list of providers is displayed with their names, specialties, and NPI numbers. A dropdown menu is open, showing various reports, with 'Providers' highlighted. On the right, a detailed view of the 'Providers' report is shown in Excel format. The report has columns for Provider ID, Creation Date, Onboarding Status, and various contact information. A filter dialog is open over the 'Onboarding' column, showing options to filter by status: (Select All), Complete Profile - Coordinat, Complete Profile - Provider, Incomplete Profile, New Invitation, and Sent Invitation. The 'Auto Apply' checkbox is also checked.

Provider ID	Creation Date	Onboarding Status	First Name	Middle Name	Provider Type	NPI #	Work Email	Personal Email	Home Address	Home Phone	Mobile Phone	CAQH ID	Account Number	CAQH Status	CAQH Last Update
493204	12/15/22	New Invitation	Avel eCare, LLC		FAC	1111111111	avelecarellc@modio.email		111 Street, USA	(111) 111-1111			Admin	Pending	
225779	7/15/20	New Invitation	Group/Organization		FAC		modiouiver.thomas.adde			(555) 555-5555			Admin	Pending	
481501	11/2/22	New Invitation	StarshipEnterprise		FAC		azuresfac@modio.email			(666) 666-6666			Admin	Pending	
413840	5/4/22	New Invitation	Sunrise Medical Lab		FAC		sunrisemedicallab@modio.email			(999) 111-1222			Admin	Pending	
478511	10/21/22	New Invitation	Texoma Independent Phys		FAC	5555555544	texomaindependentphysicians@modio.email			(111) 111-1111			Admin	Pending	
612302	10/3/23	New Invitation	Test Provider		MD		test@modio.testemail@gmail.com			(999) 111-1222			Admin	Pending	
158129	12/12/19	Complete Profile	Theophine David		HAD	1972564813	theophine.test@gmail.cc		103 Station Place Way, Te	(757) 939-39	65775858		Admin	Complete	4/13/22
63729	10/15/18	Complete Profile	Jennifer A		MD	1073502779	1234567890.123456789a		USA	(845) 914-12	(757) 988-88	785hty71	Admin	Reattestatio	1/16/24
299754	3/12/21	Complete Profile	Tommy		NP	8888888888	tommy.boy@tommyemail USA			(801) 258-6580			Admin	Pending	
350666	9/30/21	Sent Invitation	John Kent		MD	1215987557	12346984258@modio.em		test,, test, C (444) 444-4444				Admin	Pending	
113614	8/9/19	Incomplete Profile	Arthur		MD	1111111111	ajbulman10@gmail.com			(222) 222-2222			Admin	Pending	
185014	4/15/20	New Invitation	Thomas George		MD	1659311579	tom.clifford@modio.email USA						Admin	Pending	
452000	8/8/22	Incomplete Profile	Gierra		MD	1234567891	cdenning23@c.denning@modio.email			(919) 222-22	(919) 111-1111		Admin	Pending	
603877	9/5/23	New Invitation	Jane		MD		Jane.Doorbell@modio.email						Admin	Pending	
453725	8/12/22	Complete Profile	Earl		MD	1710087036	johnsonj8888@gmail.com						Admin	Pending	
481117	11/1/22	Complete Profile	Azure V		MD	1234567890	azuregiles@gmail.com		Star Trek Enterprise E	(918) 567-8901			Admin	Pending	
325407	6/28/21	New Invitation	Kirk W		MD	1184838286	kirk.heath123@modio.em		1234 Virginia Beach Way, USA				Admin	Pending	
618742	10/18/23	New Invitation	Kirk William		MD	1184838286	kirk.heath.modiouiversty@moio.email						Admin	Pending	
250066	11/6/20	Incomplete Profile	Brandon		MD	9999999999	testing99823@brandon.holr,, USA			(801) 546-2136			Admin	Pending	
459835	8/25/22	New Invitation	Brandon		MD	1275527384	bholmes@gmail.org						Admin	Pending	
611846	10/2/23	New Invitation	Brandon		MD		brandon.holmes@modiohalth.email						Admin	Pending	
328870	7/12/21	New Invitation	Dwayne Edward		MD	1841379187	therock76587578@modio		123456789, Williamsburg	(801) 888-8888			Admin	Pending	2/27/23
560611	7/12/23	New Invitation	Frida		LPATA		Frida.Kahlo@modio.email						Admin	Pending	
513003	2/27/23	New Invitation	Rhonda		CHA		rhonda.pratt@modio.email						Admin	Pending	
496884	1/4/23	Incomplete Profile	Christine		MD		christine955smith@gmail.com						Admin	Pending	
373018	12/14/21	New Invitation	Bernie		MD	1999999991	bernie@modiohealth.com						Admin	Pending	
538647	5/22/23	New Invitation	Minnie		DC		minnie.mou@minnie@gmail.com			(919) 233-3344			Admin	Pending	
324763	6/24/21	Incomplete Profile	George R		WAIV - Waiv	7777666665	goldenpathh.goldenpathh		17400 Brand (317) 333-40	(317) 333-0740			Admin	Incomplete	
583561	7/31/23	New Invitation	Darrell Lee		MD	1447250170	darrell.murray@modio.email						Admin	Pending	
312938	5/5/21	Incomplete Profile	Jennifer		MD	1235332255	123456@gmail.com		USA				Admin	Pending	
70309	1/2/19	New Invitation	Test		MD	1234567890	test.provider.personalems		123 Main Street, Indianap	(555) 551-5551			Admin	Pending	
223759	7/2/20	New Invitation	Michael John		MD	1568453348	michael.quinn@modio.en		USA				Admin	Pending	
340009	8/16/21	Complete Profile	Leah		MD	1234567890	leahsanborn@gmail.com		3255 Newtow	(970) 214-9429			Coordinator	Pending	10/6/21
443466	7/18/22	Complete Profile	Michael		MD	1234567890	michael.scott@modio.email			(098) 754-6654			Admin	Pending	
487670	11/29/22	Incomplete Profile	Christine		MD		christine2smith@gmail.com						Admin	Pending	



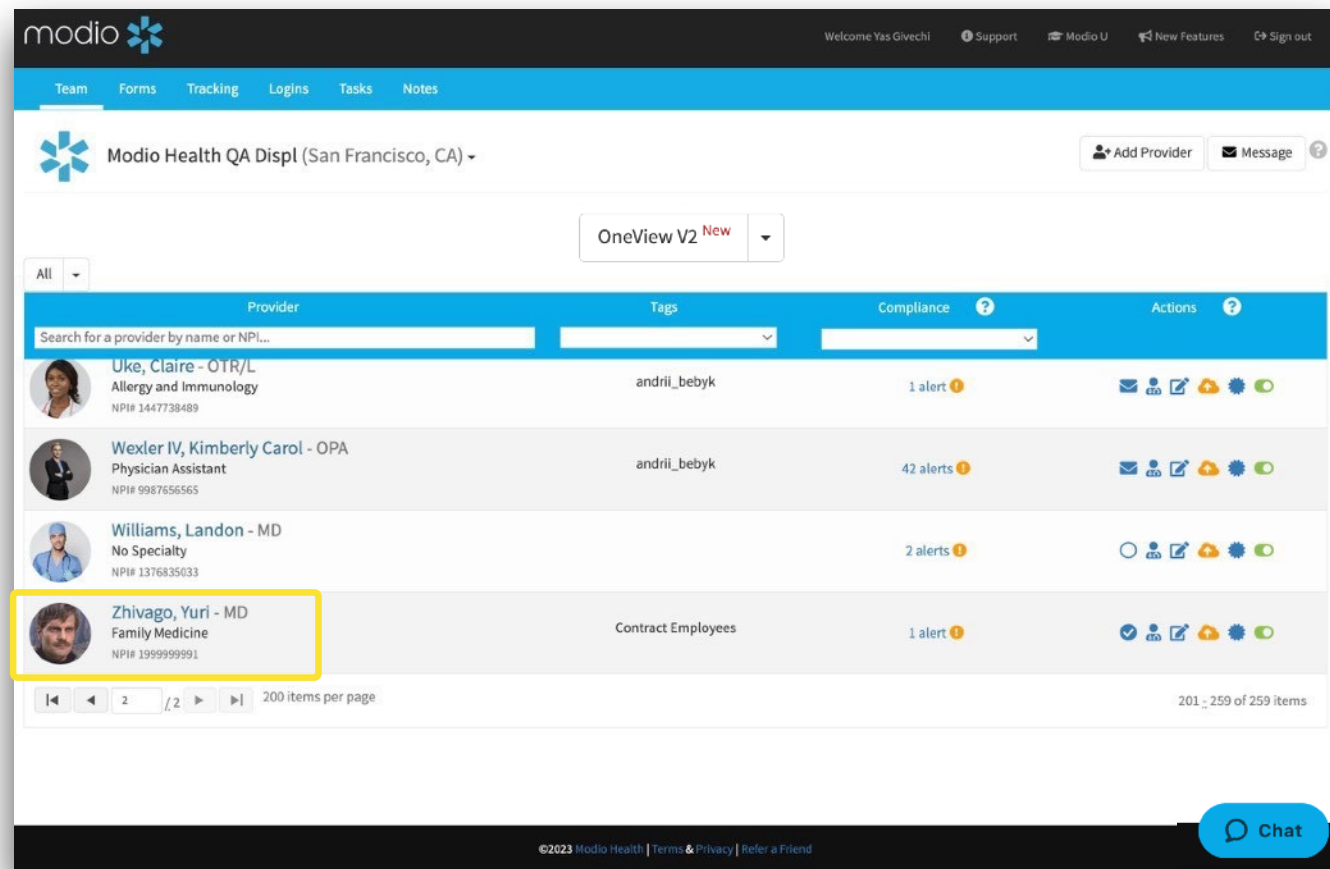
## **PART 2**

### CUSTOMIZING THE ONBOARDING TEMPLATE

**Tip Guide: Provider Onboarding** **Onboarding:** Creating Custom Onboarding Invitations. Follow these 4 clicks to access and edit the Onboarding Template.

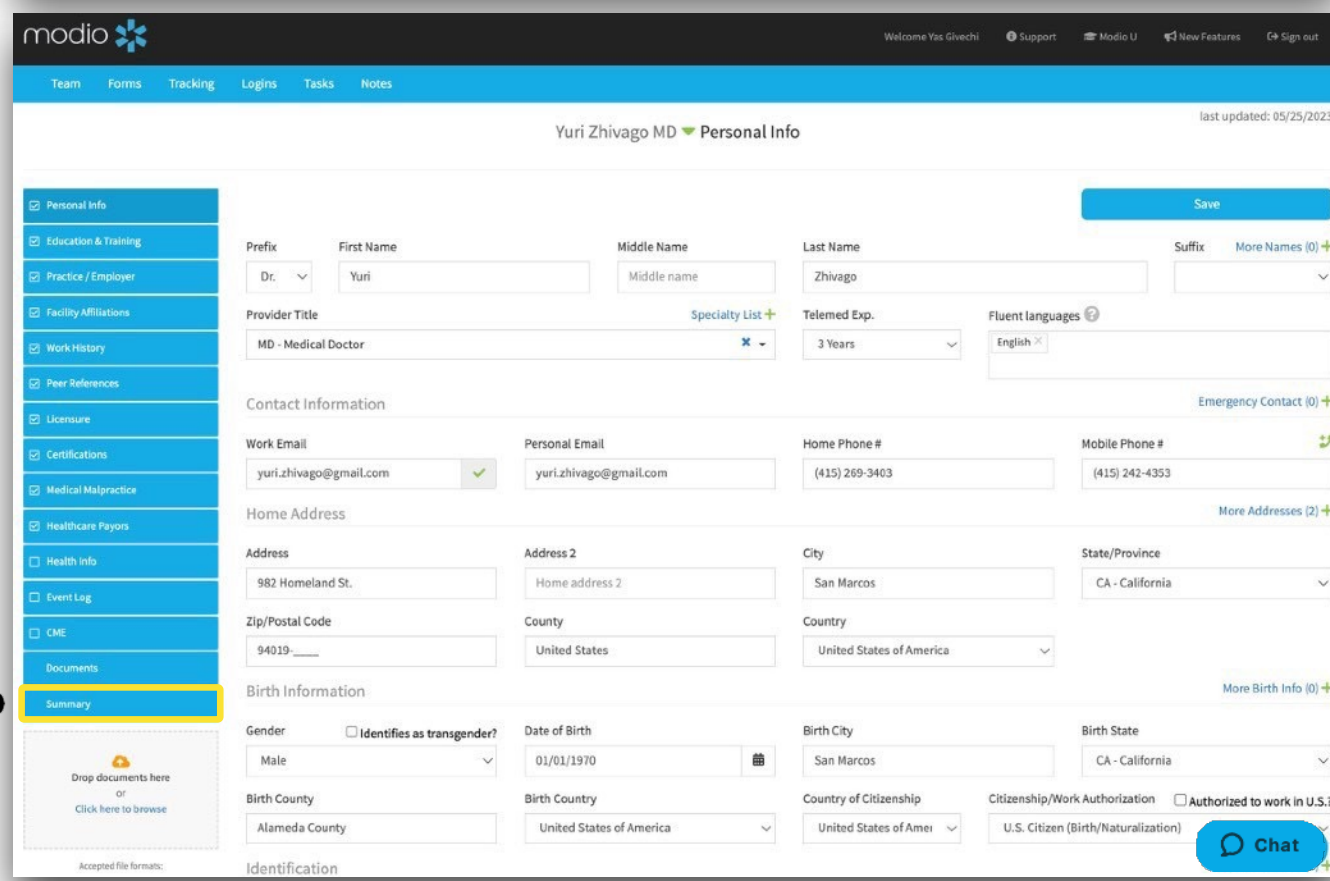
1

Click on any **provider's name** to open their profile.



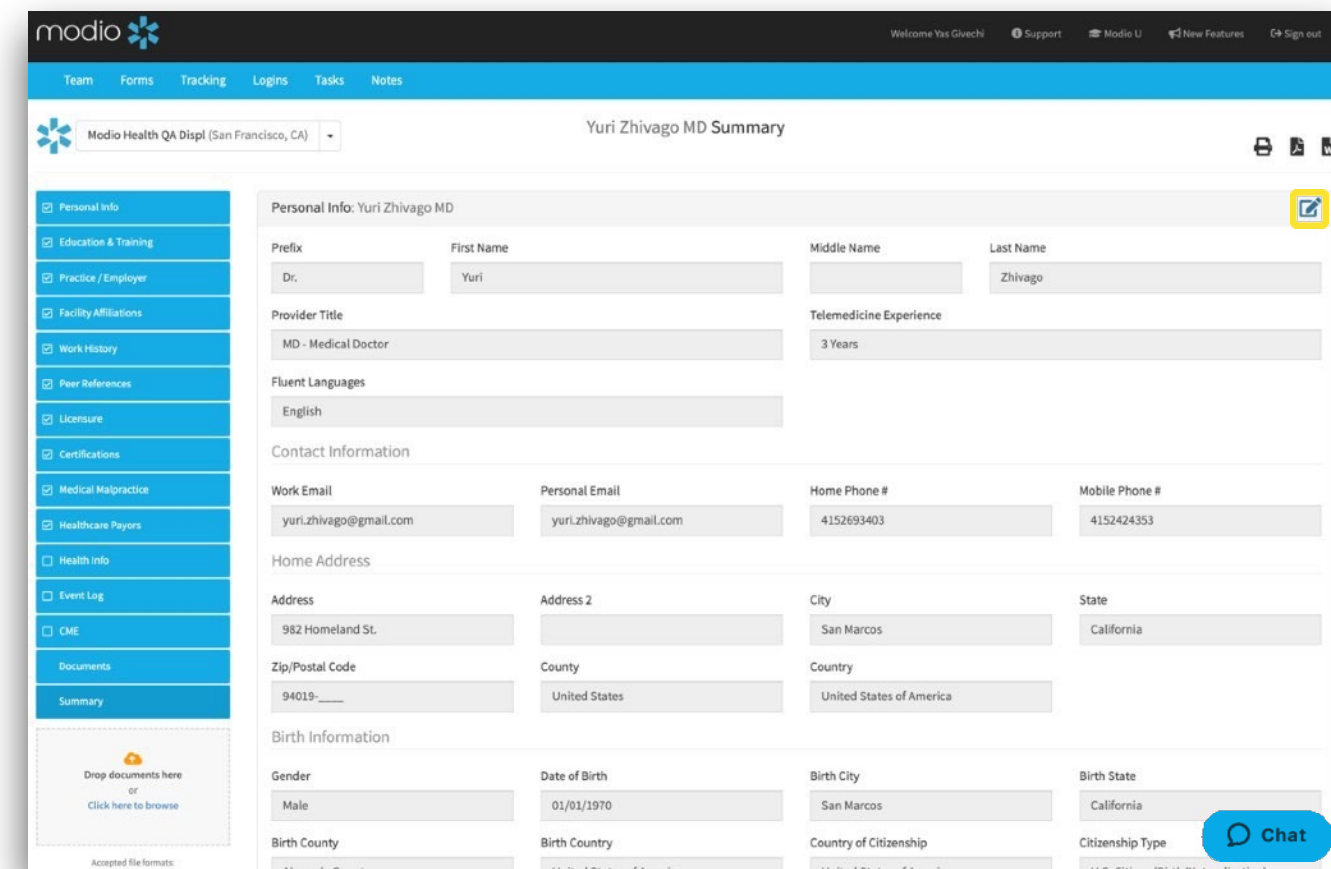
2

Select **Summary**



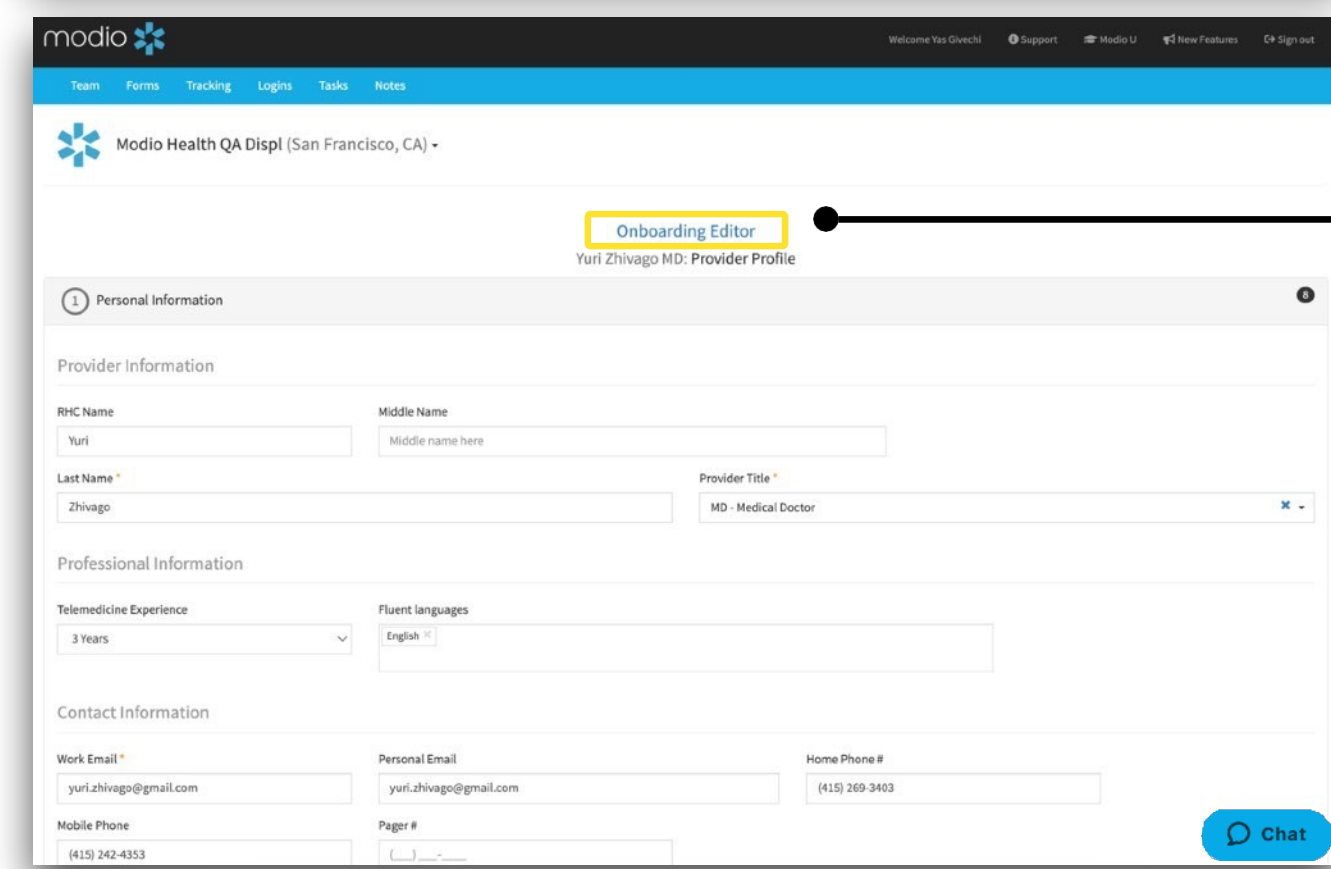
3

Select the **"Edit Icon"**



4

**"Onboarding Editor"** link will now appear on the top of the screen. Click the "Onboarding Editor" link to tailor your onboarding invitation fields or keep them as is with the default values.



## Tip Guide: Provider Onboarding

**Onboarding:** Creating Custom Onboarding Invitations. Your onboarding template can be edited to meet your organizations needs. Add the sections you want your providers to fill out. Remove the sections or fields that you don't need or that your coordinators will fill in for your providers.

Once the **Onboarding Editor** title changes to **Onboarding Viewer**, you can start customizing your invitation. Use this to toggle back and forth from the Edit view to the Provider view to review how your changes will look to the provider.

**Sections:** There are 10 different sections to modify

**Group:** Each section has a group level highlighted in blue.

**Hidden Field:** This indicates a hidden item (not visible to providers).

### Onboarding Fields

The screenshot shows the 'Onboarding Viewer' interface for a 'Provider Profile'. The form is divided into several sections, each with a blue header bar and an edit icon (pencil) and a disable icon (red X) on the right. The sections are: Personal Information (with a circled '1'), Provider Information, Professional Information, Contact Information, Emergency Contact Information, and Home Address. Each section contains various text input fields. The 'Prefix' field is marked as hidden with a greyed-out icon. A 'Chat' button is located at the bottom right of the form.

**Edit Icon:** Allows you to edit a specific field title, placeholder text, etc...

**Disable Section:** Allows you to hide an entire section in the onboarding form.

**Disable Group:** Allows you to hide an entire group within a section.

**Disable Field:** Allows you to hide a field within the group.

**Enable Field:** Click here to bring a field back into your onboarding form.

**Tip Guide: Provider Onboarding**

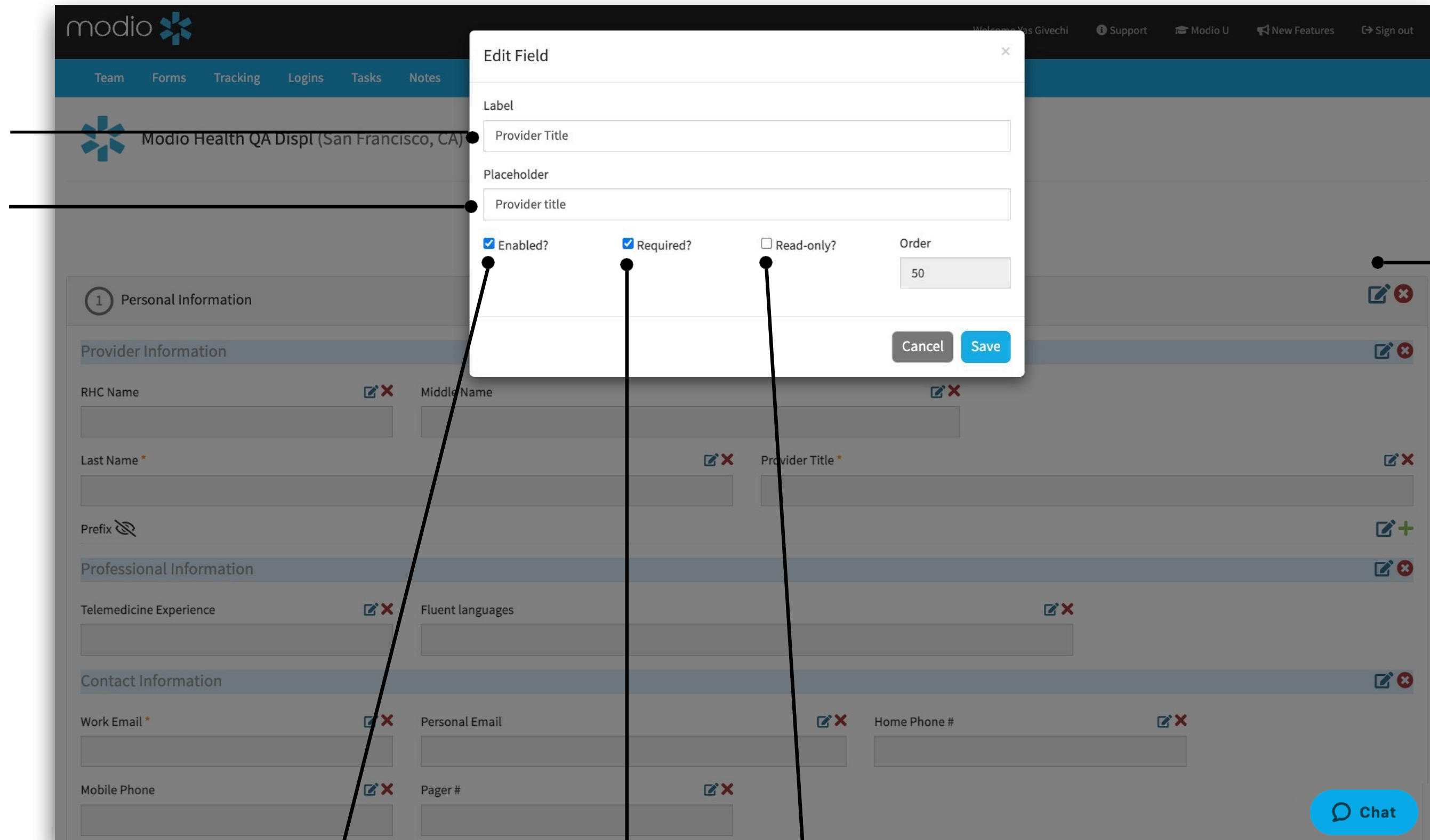
**Onboarding:** Creating Custom Onboarding Invitations. Your onboarding template can be edited to meet your organizations needs. Add the sections you want your providers to fill out. Remove the sections or fields that you don't need or that your coordinators will fill in for your providers.

**Label:**

Indicates the field this is connected to in the provider's profile.

**Placeholder:**

Add a custom placeholder text for specific instructions in filling a field.



**Enabled:** if checked, this field is visible for your providers. If unchecked, the field won't be visible.

**Required:** If checked, your providers must fill out this field in order to click Save and Next.

**Read: only:** If checked, this field will be visible to your providers but cannot be edited.

Click the **paper and pencil edit icon** to activate a specific field. Each individual field has an edit icon.

Each section also has an edit icon and a red "x". Use the red "x" to remove the corresponding section from your providers invite if that data is not needed for your organizations credentialing needs.

**Important - Required Field:**

A required field will be highlighted in red if a provider selects "Save & Next" before filling out required fields. That section will stay open and remind the provider to fill in any required fields. **Important\*** The provider will have the option to continue to other sections before filling out all required fields.

The screenshot shows the Modio web application interface. At the top, there's a navigation bar with 'modio' logo, 'New Features', 'Modio U', 'Support', and a user profile for 'Cierra Denning | OneView® Trainer'. Below this is a secondary navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The main content area is titled 'Modio University • | (Virginia Beach, VA)' and includes an 'Add Provider +' button. A search bar for 'All Providers' is present. The 'Provider Info' tab is selected, showing details for 'Leah Sanborn MD'. A side drawer is open, displaying 'Provider Info for Leah Sanborn MD' with counts for Notes (4), Documents (0), Tags (3), and Teams (2). The 'Provider Access' dropdown menu is highlighted in yellow, showing 'Full Access' (selected) and 'Read Only' options. Below the dropdown are two tags: '| • Modio University • | (Virginia Beach, VA)' and '∞ OV\*OPs ∞ (Virginia Beach, VA)'. The main form below the table includes fields for 'Provider Name', 'Last Updated', 'Title', 'NPI #', 'Primary Specialty', and 'Work Email'. The 'PROVIDER NAME' section has fields for 'Prefix', 'First Name', 'Middle Name', 'Last Name', and 'Suffix'. There is also a 'Pronouns' section with a 'Select Pronoun Types' dropdown. A 'Cancel' button is at the bottom right.

**Provider Access:** enables you to establish the permission level for the provider's profile.

**Full Access:** Permits the provider to view and make necessary changes to their profile.

**Read Only:** Allows the provider to view the data in their profile without the ability to make any modifications.

**Note:** This change is only permissible in V2, and the option will be available in the side drawer **after** the provider has successfully completed the onboarding process.





## **PART 3**

### FREQUENTLY ASKED QUESTIONS

## Tip Guide: Provider Onboarding

### Frequently Asked Questions

There is an additional Onboarding tip guide on the support page created specifically for providers.

Review that guide for an overview of your providers workflow or send it to your providers as a guide while they are working through the onboarding process.

**Q: Why are there are two different links in the email that the provider receives?**

The first link is to claim the profile. The second on it to continue the application (log in again) We recommend that your provider save this email so they can easily log into their profile in the future.

**Q: What if my providers email is incorrect when I select the message button?**

Any provider email that needs to be updated MUST be done through the personal info section in the Work Email field. Additionally, the provider must NOT change their email when they claim their profile.

**Q: My provider signed out of the onboarding invitation before completing, how can they get back in?**

The provider can re-open the link in the original email they received (it will not expire). If they do not have the email, you can copy the link from the providers "Onboarding Viewer" section to the invitation and paste it within an email to the provider outside of the platform. They will be prompted to log in and continue filling out their profile.

**Q: My provider says they didn't receive the invitation what should I do?**

Encourage them to check their spam folder or their junk folder. Additionally, your IT team may need to whitelist or add the email to the safe sender list within your organization.

**Q: I sent out invitations but forgot to make an item required.**

Can I edit invitations that were already sent out? Yes, any changes made to the invitation or "Editor" sections will apply to invitations already sent if the provider has not completed filling out the sections that were changed.

**Q: Can I have more than one onboarding template within my team?**

No, each team is limited to one onboarding template. The onboarding template is a "Team Level" feature. This means that once you update it, it will apply to all providers on your team. You will only need to set up the Onboarding template once for you team.

**Q: I added SSN and Driver's license to the invitation, why can I not see them within Onboarding Viewer?**

These are encrypted fields within the profile, your providers will see these fields if you have enabled them within your invitation.

**Q: There is an option to attach a document to the Onboarding feature, how many can I attach and is this the same as sending a form?**

You can only attach ONE document to the Onboarding invite. Any document that you send through onboarding will not be integrated with DocuSign. If you attach a document to the onboarding invite it should not be intended to be signed or filled out - it should be a read only, or information document only.

**Q: If I select the "Email Copy to Myself" option when sending one invite at a time, will my provider be able to reply directly to me from the email invite.**

Yes! This is a new addition to our onboarding invite. If you include yourself when sending the invite, the provider will have the option to reply to by email.

**Q: Can I have more than one custom email invite for my team?**

Onboarding is a team-level feature, allowing one email per team. It's recommended to use a generic email for key areas and provide specific details in a separate welcome letter as necessary, using the attachment section.

**Q: Should we send the Onboarding Invitation to our current providers, or limit it to new providers as they join our group?**

This decision should be made by your organization. However, sending it to all providers ensures access to their profiles. If the profile is complete, it allows for easy verification of accuracy.

**Q: My provider has misplaced the original email with sign-in instructions and needs to log back in. Is there a link I can share with them?**

Yes, you can find it at <http://www.modiohealth.com/physicians/#/signin>. This information is also available in the Provider's Guide to Onboarding tip guide on the support page.

**Q: Once my provider creates an account, will they be able to view the entire Team of provider profiles?**

No, the provider is limited to viewing their data only. View the Provider Onboarding tip guide for a deep dive into what your provider can and can not view.

**Q: My provider has created an account and completed their profile - is there a way for me to change their access to Read Only so they do not continue to make edit data in their profile?**

Yes! Navigate to v2, open the Provider Info grid, Open the side drawer, Select the Team tab, and there is an option to change your providers access.

**Q: I marked a field as required but when my provider completed the onboarding invite, I noticed that field had not been filled out. Are providers able to skip required fields?**

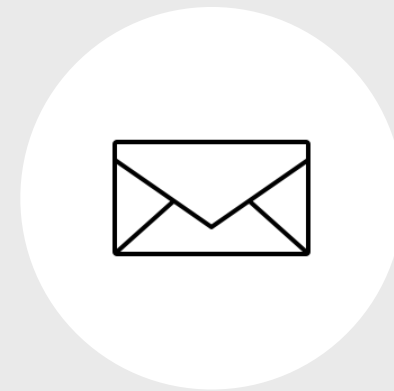
A required field will be highlighted in red if a provider selects "Save & Next" before filling out required fields. That section will stay open and remind the provider to fill in any required fields. The provider will have the option to continue to other sections before filling out all required fields.

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

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