

OneView[®]

A PROVIDERS GUIDE TO ONBOARDING

What to expect from the Onboarding Process with OneView®?

If you have received the Welcome email Onboarding Invite, then your organization is using the OneView® onboarding feature. This feature will simplify the onboarding process of completing your Provider Profile.

This tip guide will outline expectations and workflows to help you navigate and complete the onboarding intake template sent from our credentialing platform, OneView®.

Once you receive the Onboarding Invitation, you will be prompted to create an account, log in and complete the template.

Throughout this guide you will find screenshots, tips and tricks, and more to successfully fill out the new provider onboarding template sent to you by your organization.

Please do not hesitate to reach out to your organization with additional questions or to Support@modioHealth.com to reach our customer support team.

Tip Guide Key:**Part I**

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Slide 3 – 6 – The provider workflow for completing the onboarding invite

Slide 7 – Filling out location-based data points

Slide 8 – 9 – Entering Login Credentials and uploading documents

Part II

Slide 10 – 13 – Logging back into the Onboarding Application

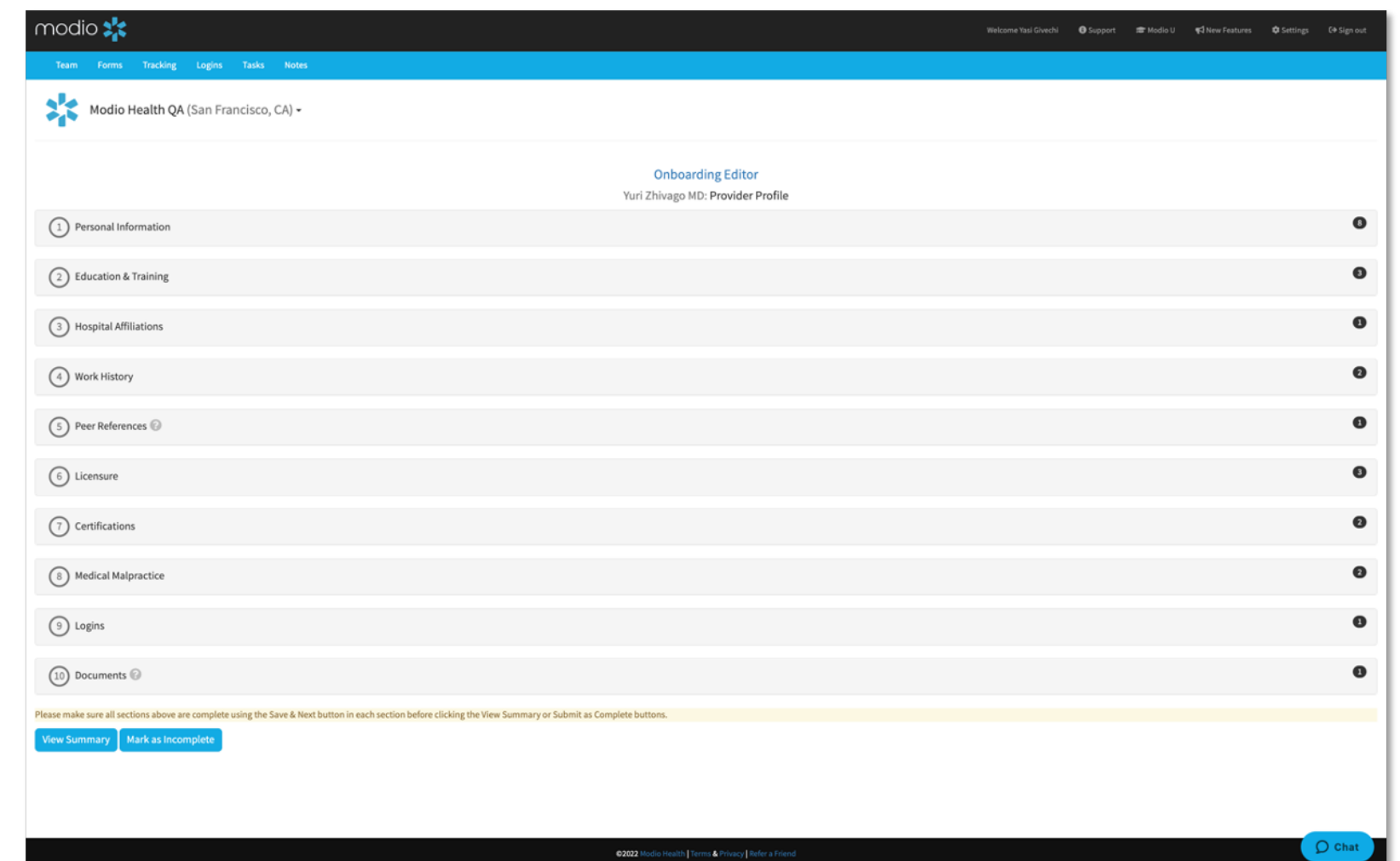
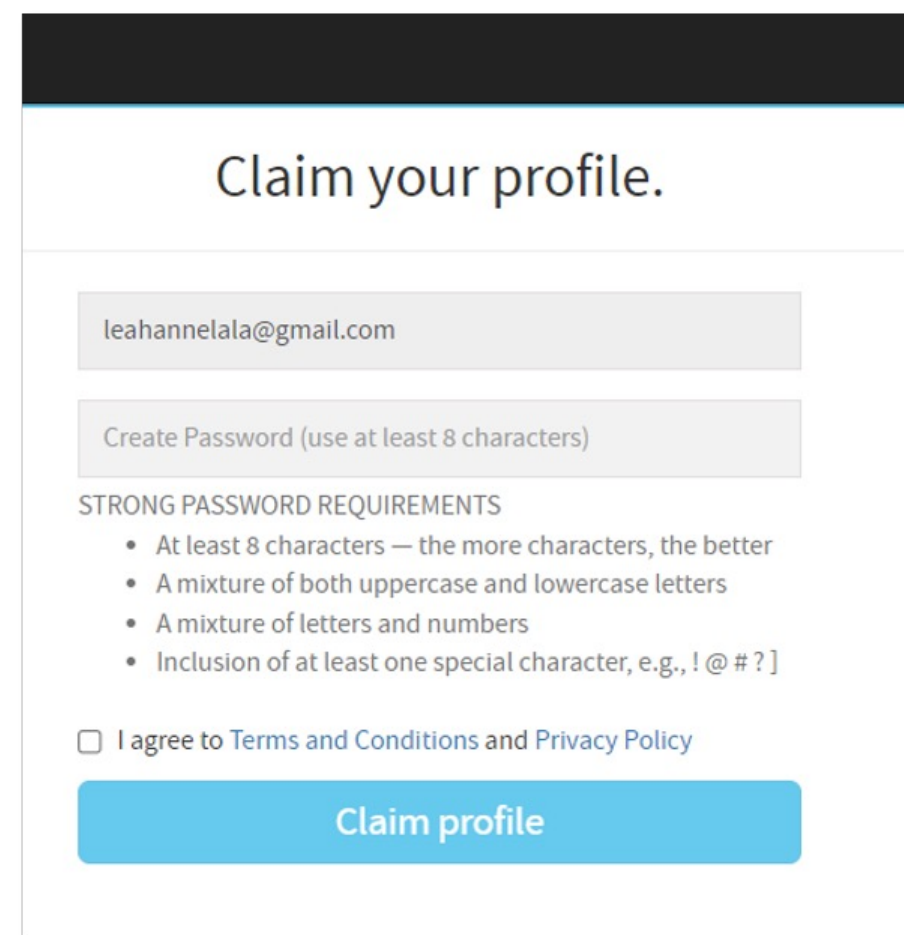
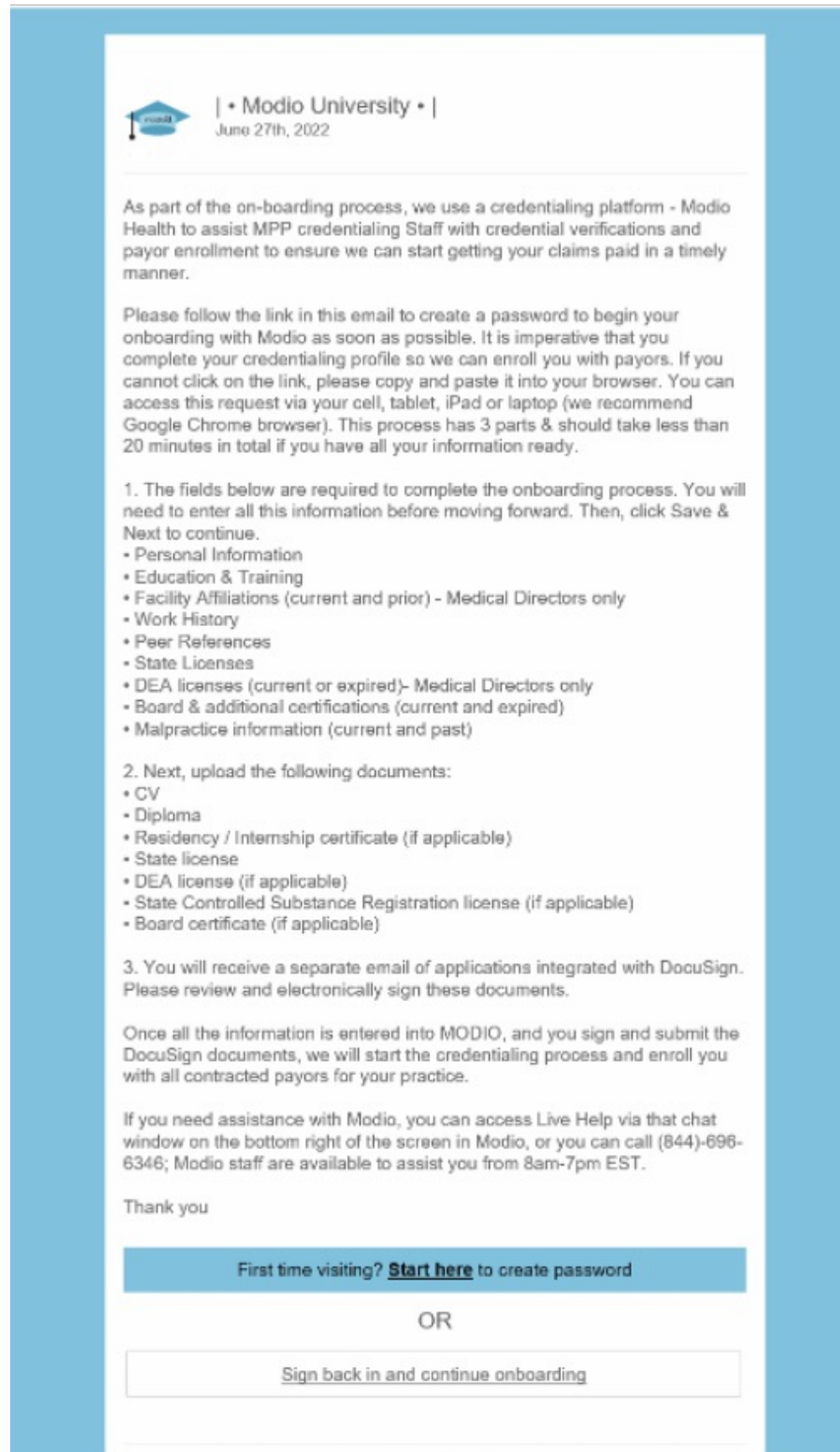
Slide 14 – Support and Contact info

1. Your Onboarding invite message will look something like this. Your organizations logo and name will display at the top of the message.
2. Read the email completely because it will include specific instructions and details from your organization.

3. Once you have read the message, select the link on the bottom to "Claim your Profile" and create your password. Check the Agree to Terms & Conditions and then select "Claim Profile to get started!!
**Important: You must use the same email address that the invite was received.

4. You will now see a template with sections to fill out as requested by your organization. Best practice is to start at the top and work your way down to make sure nothing is missed. This template has been customized to meet your organizations credentialing needs. You may be requested to upload documents and enter usernames and passwords for specific sites your organization will help manage after onboarding.

**Completing your profile promptly and accurately is the best way to move forward in your onboarding process.



Tip Guide: Provider Onboarding

Onboarding - Step 1 - Welcome Email Received

When you receive your Welcome email, it will look similar to this example. It will come from sender Message@modiohealth.com

If your organization sends you the invite and you did not receive it, please check your spam folder.

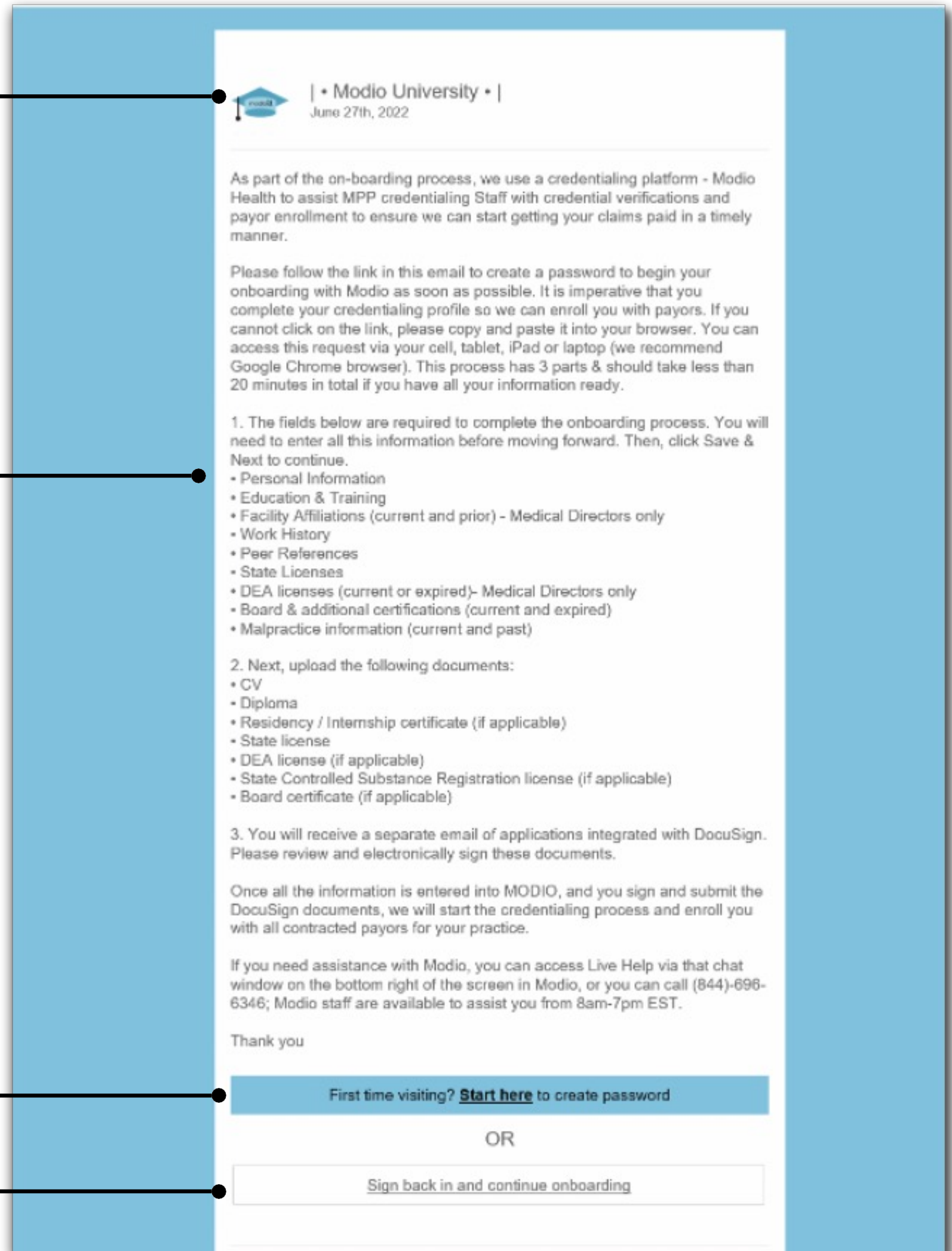
Your organizations logo and Team name will display here

Welcome email will include important details from your organization and a list of action items that require attention in order to complete the onboarding process.

Please read the entire message to best prepare to start the onboarding process.

Click this link to claim your provider profile and start your individual onboarding process.

Save this email for future use. This second link will never expire. You can use it to access your provider profile anytime in the future.



The screenshot shows an email from Modio University dated June 27th, 2022. The header includes the Modio logo and the text '| • Modio University • |'. The main body of the email explains the onboarding process and lists required information and documents. At the bottom, there are two call-to-action buttons: a blue button for 'First time visiting? Start here to create password' and a white button for 'Sign back in and continue onboarding'. Callout lines from the text on the left point to the logo/team name, the main body text, the 'Start here' button, and the 'Sign back in' button.

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.

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

- Personal Information
- Education & Training
- Facility Affiliations (current and prior) - Medical Directors only
- Work History
- Peer References
- State Licenses
- DEA licenses (current or expired)- Medical Directors only
- Board & additional certifications (current and expired)
- Malpractice information (current and past)

2. Next, upload the following documents:

- CV
- Diploma
- Residency / Internship certificate (if applicable)
- State license
- DEA license (if applicable)
- State Controlled Substance Registration license (if applicable)
- Board certificate (if applicable)

3. You will receive a separate email of applications integrated with DocuSign. Please review and electronically sign these documents.

Once all the information is entered into MODIO, and you sign and submit the DocuSign documents, we will start the credentialing process and enroll you with all contracted payors for your practice.

If you need assistance with Modio, you can access Live Help via that chat window on the bottom right of the screen in Modio, or you can call (844)-696-6346; Modio staff are available to assist you from 8am-7pm EST.

Thank you

First time visiting? [Start here](#) to create password

OR

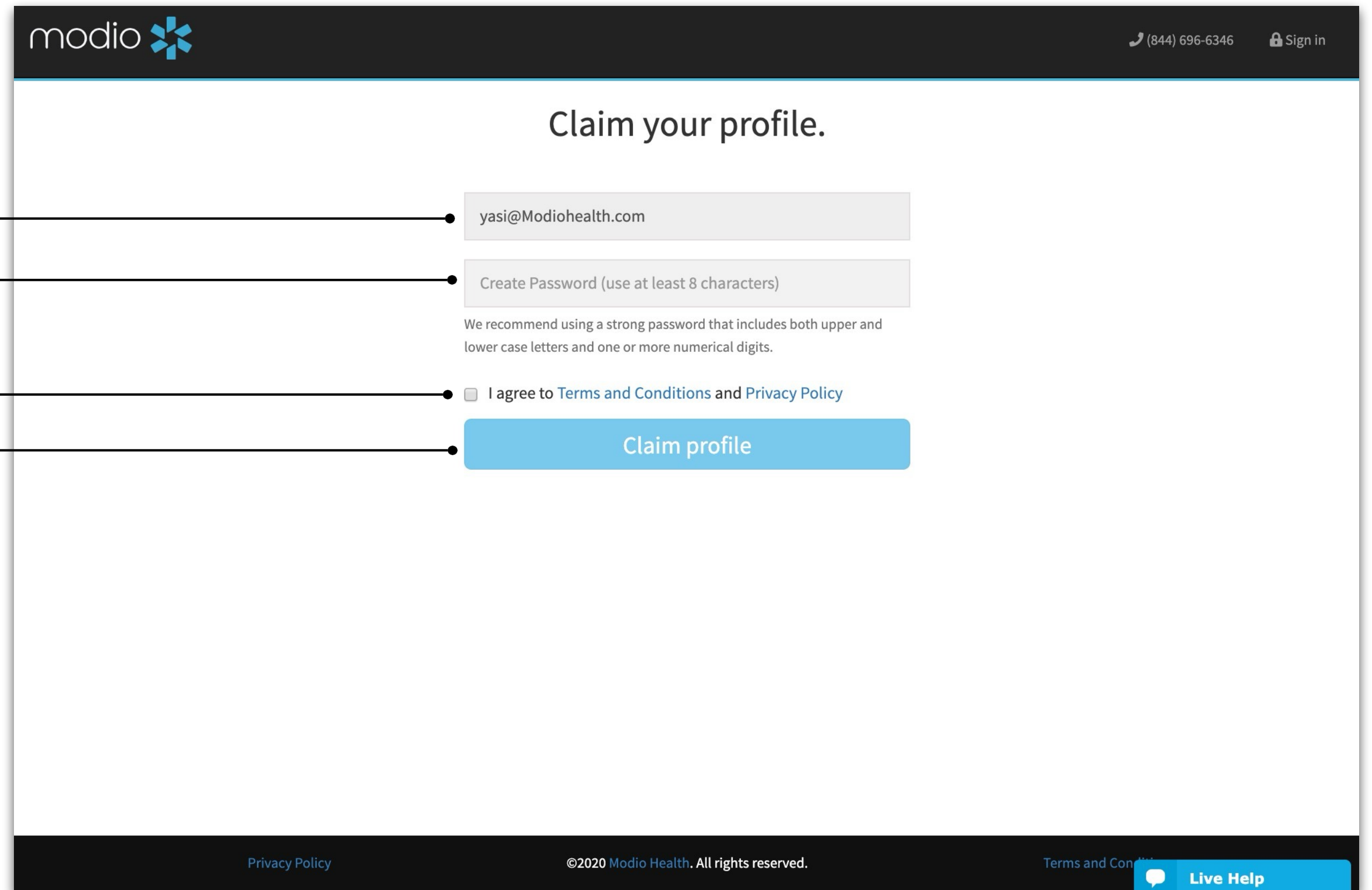
[Sign back in and continue onboarding](#)


Now, navigate onto the Modio **“Claim your provider profile”** page and enter your email and create a password. You **MUST** use the email address where the Onboarding invite was originally sent.

Create a unique password

Agree to the Terms and Conditions

Select “Claim profile”



modio  (844) 696-6346 Sign in

Claim your profile.

yasi@Modiohealth.com

Create Password (use at least 8 characters)

We recommend using a strong password that includes both upper and lower case letters and one or more numerical digits.

I agree to [Terms and Conditions](#) and [Privacy Policy](#)

Claim profile

Privacy Policy ©2020 Modio Health. All rights reserved. Terms and Conditions Live Help

Tip Guide: Provider Onboarding

Onboarding – Step 2 - Claiming Your Profile

Once you log in you will be directed to the onboarding page in OneView®.

From here, you will be asked to fill in specific data points requested by your organization. Your unique invite may include all or some of the following sections:

- Personal Information
- Education and Training
- Hospital Affiliations
- Work History
- Peer References
- Licensure
- Certifications
- Medical Malpractice
- Logins
- Documents

Any **required** fields will be indicated with an orange star.

Fill out **every requested field** in section and click "Save & Next" to navigate to the next section.

Tip: If you cannot complete the entire onboarding application, save the original email invite and use the link at the bottom to log in later. You can also bookmark the link to easily log back in.

The screenshot shows the 'Bernie Mann MD: Provider Profile' page in the Modio Health QA system. The form is divided into several sections, each with a progress indicator (1-10) on the right side. The sections are: 1. Personal Information, 2. Education & Training, 3. Hospital Affiliations, 4. Work History, 5. Peer References, 6. Licensure, 7. Certifications, 8. Medical Malpractice, 9. Logins, and 10. Documents. The 'Personal Information' section is currently active and contains the following fields: Provider Information (First Name, Middle Name, Last Name, Provider Title), Professional Information (Fluent languages), Contact Information (Work Email, Personal Email, Home Phone #, Mobile Phone), Emergency Contact Information (Contact Name, Contact Type, Email, Phone #), Home Address (Address, Address 2, City, State, Zip Code, County, Country, Mailing Address?), Birth Information (Gender, Date of Birth, Birth City, Birth State, Birth County, Birth Country, Country of Citizenship, Citizenship Type), and Identification (NPI #, Driver License or ID #, State Issued, Expiration Date, Social Security #). The 'Work Email' field is highlighted with a black box and an orange star, indicating it is a required field. The 'Save & Next' button is also highlighted with a black box. At the bottom of the form, there are two buttons: 'View Summary' and 'Submit as Complete'. A footer note states: 'Please make sure all sections above are complete using the Save & Next button in each section before clicking the View Summary or Submit as Complete buttons.'

Tip Guide: Provider Onboarding

Onboarding - Location Based Sections

The Onboarding Intake Template is customized by your organization. Some of these sections may not appear in your unique onboarding invitation.

Hover any "?" icons to view detailed instructions from your organization

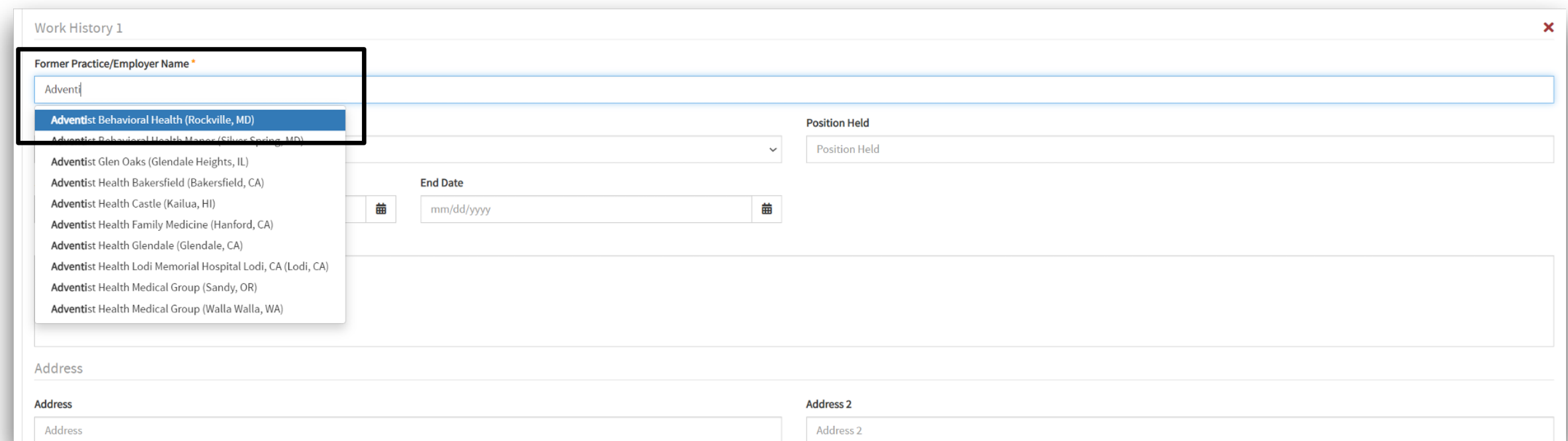
Use the **green add button** to start a new data entry.

Once you click the green add button you will be prompted to fill in location data. Search by name or address to find the correct location.

If there is not a location match, please enter the name and address in manually.



The screenshot shows a multi-step onboarding form. The sections are: 2 Education & Training, 3 Hospital Affiliations, 4 Work History, and Military Experience. A question mark icon is visible next to the Work History section header. A green 'Add +' button is located at the bottom right of the Military Experience section.



The screenshot shows the 'Work History 1' form. The 'Former Practice/Employer Name' field contains 'Advent'. A dropdown menu is open, showing a list of Adventist health locations: Adventist Behavioral Health (Rockville, MD), Adventist Behavioral Health Menzies (Silver Spring, MD), Adventist Glen Oaks (Glendale Heights, IL), Adventist Health Bakersfield (Bakersfield, CA), Adventist Health Castle (Kailua, HI), Adventist Health Family Medicine (Hanford, CA), Adventist Health Glendale (Glendale, CA), Adventist Health Lodi Memorial Hospital Lodi, CA (Lodi, CA), Adventist Health Medical Group (Sandy, OR), and Adventist Health Medical Group (Walla Walla, WA). The 'Adventist Behavioral Health (Rockville, MD)' option is highlighted. Other fields include 'Position Held', 'End Date', and 'Address'.

The Onboarding Intake Template is customized by your organization. Some of these sections may not appear in your unique onboarding invitation.

Your organization may request usernames and passwords for accounts they manage for you. Any credentials entered here will be securely stored in the OneView® platform. If you would like to add additional login credentials, use the green add button.

Once all requested login credentials are entered, click **"Save & Next"**

If your organization is requesting documents, you will see a list similar to this. Required documents are in red and will fall off the list as they are added to your profile.

Best practice is to name your documents in the format of "Provider name. Document Type. Expiration Date" before uploading.

Use the **"Drag and Drop"** option or select **"Click here to browse"** to access all documents on the device you are working from.

Once you have filled in all requested data, entered requested login information and uploaded requested documents, select **"Submit as Complete"**

This will change the status of your onboarding invite to **"Completed"** and your organization will review your completed profile.



The screenshot displays a multi-step onboarding form with 10 sections, each with a progress indicator on the right:

- 1 Personal Information (6)
- 2 Education & Training (5)
- 3 Hospital Affiliations (1)
- 4 Work History [?] (2)
- 5 Peer References (1)
- 6 Licensure (2)
- 7 Certifications (2)
- 8 Medical Malpractice (1)
- 9 Logins (1)
- 10 Documents (1)

At the bottom of the form, there is a yellow warning bar with the text: "Please make sure all sections above are complete using the Save & Next button in each section before clicking the View Summary or Submit as Complete buttons." Below this bar are two buttons: "View Summary" and "Submit as Complete". The "Submit as Complete" button is highlighted with a black box and a line pointing to it from the text on the left.

PART II

LOGGING BACK INTO THE ONBOARDING INTAKE TEMPLATE

Tip Guide: Provider Onboarding Onboarding - Logging back into OneView®

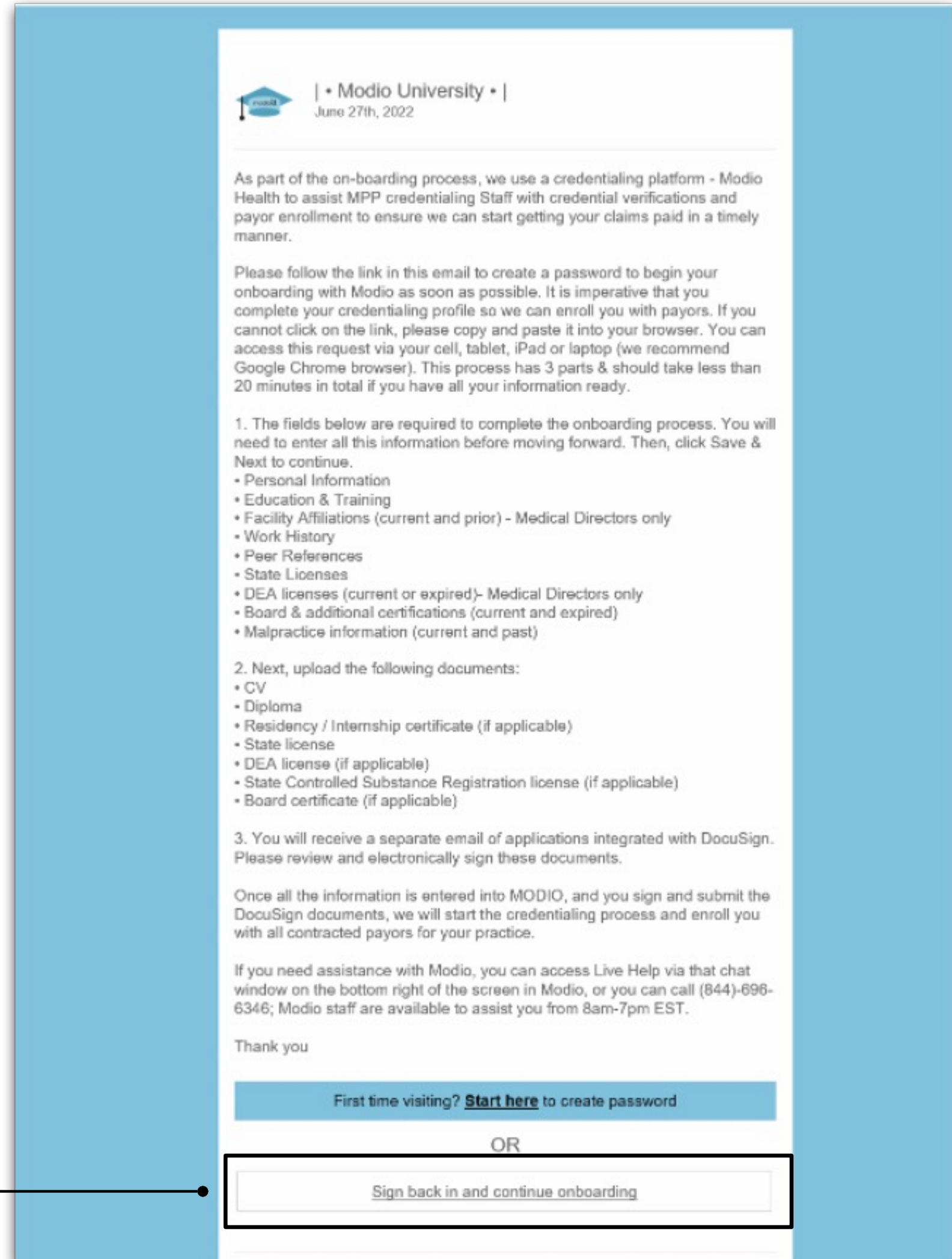
There are several ways to log back in and continue filling in your Onboarding Intake Template.

Best option: Use the provider sign in link listed here: www.modiohealth.com/physicians/#/signin

Remember to bookmark this link to quickly login in the future.

Second option: Use the original email invitation and click the second link to log back in. Enter your username and password. If you can not remember your password there will be a password reset prompt.

If your need support while logging in, please reach out to: support@modiohealth.com

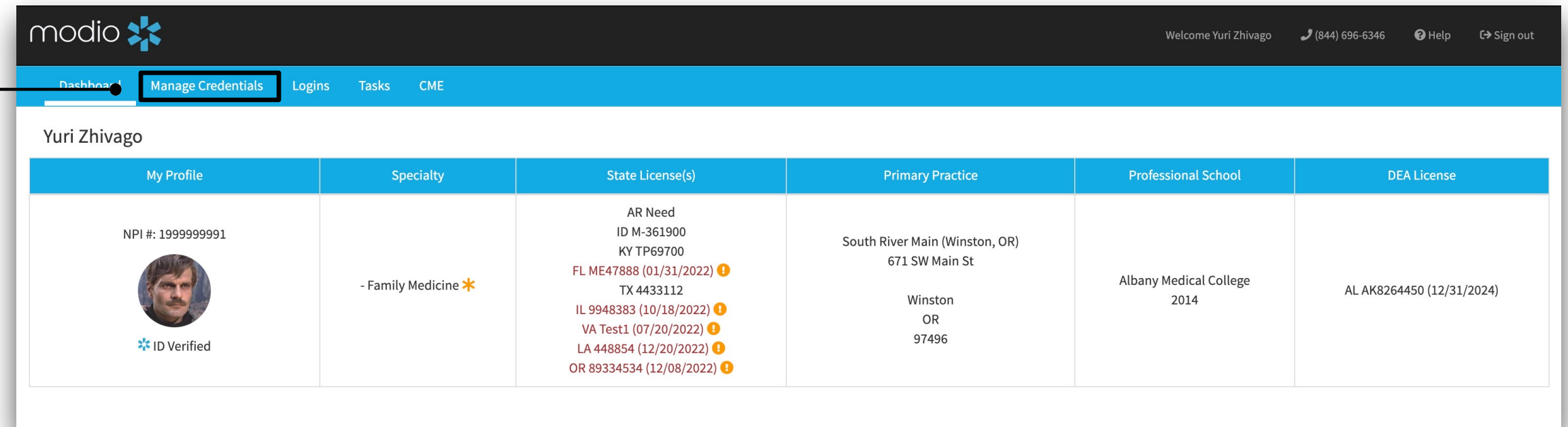


Tip Guide: Provider Onboarding







Onboarding - Navigating back to the Onboarding Intake Template

Once you are logged back into OneView®, follow this 3-step process to navigate back to your Onboarding Intake Template.

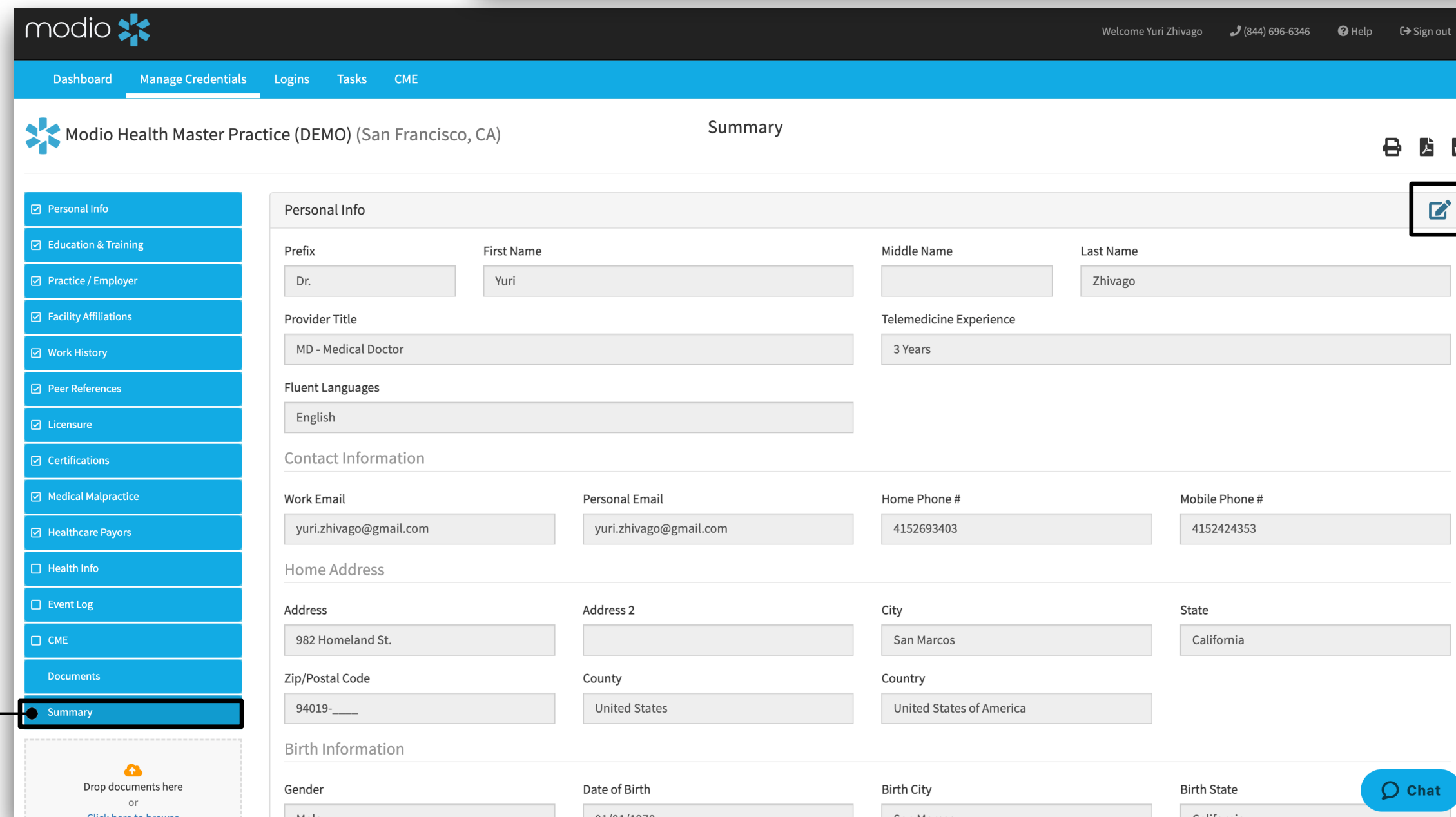
Step 1- Click on the **Manage Credentials** Section



The screenshot shows the Modio dashboard for user Yuri Zhivago. The 'Manage Credentials' tab is highlighted in the top navigation bar. Below the navigation bar, the user's profile information is displayed in a table format:

My Profile	Specialty	State License(s)	Primary Practice	Professional School	DEA License
NPI #: 1999999991  * ID Verified	- Family Medicine *	AR Need ID M-361900 KY TP69700 FL ME47888 (01/31/2022)  TX 4433112 IL 9948383 (10/18/2022)  VA Test1 (07/20/2022)  LA 448854 (12/20/2022)  OR 89334534 (12/08/2022) 	South River Main (Winston, OR) 671 SW Main St Winston OR 97496	Albany Medical College 2014	AL AK8264450 (12/31/2024)

Step 2 - Click **Summary**



The screenshot shows the 'Summary' page for a provider in the Modio Health Master Practice (DEMO) (San Francisco, CA). The 'Summary' tab is selected in the left-hand navigation menu. The page displays various fields for personal and contact information:

Personal Info

Prefix: Dr. First Name: Yuri Middle Name: Last Name: Zhivago

Provider Title: MD - Medical Doctor Telemedicine Experience: 3 Years

Fluent Languages: English

Contact Information

Work Email: yuri.zhivago@gmail.com Personal Email: yuri.zhivago@gmail.com Home Phone #: 4152693403 Mobile Phone #: 4152424353

Home Address

Address: 982 Homeland St. Address 2: City: San Marcos State: California

Zip/Postal Code: 94019- County: United States Country: United States of America

Birth Information

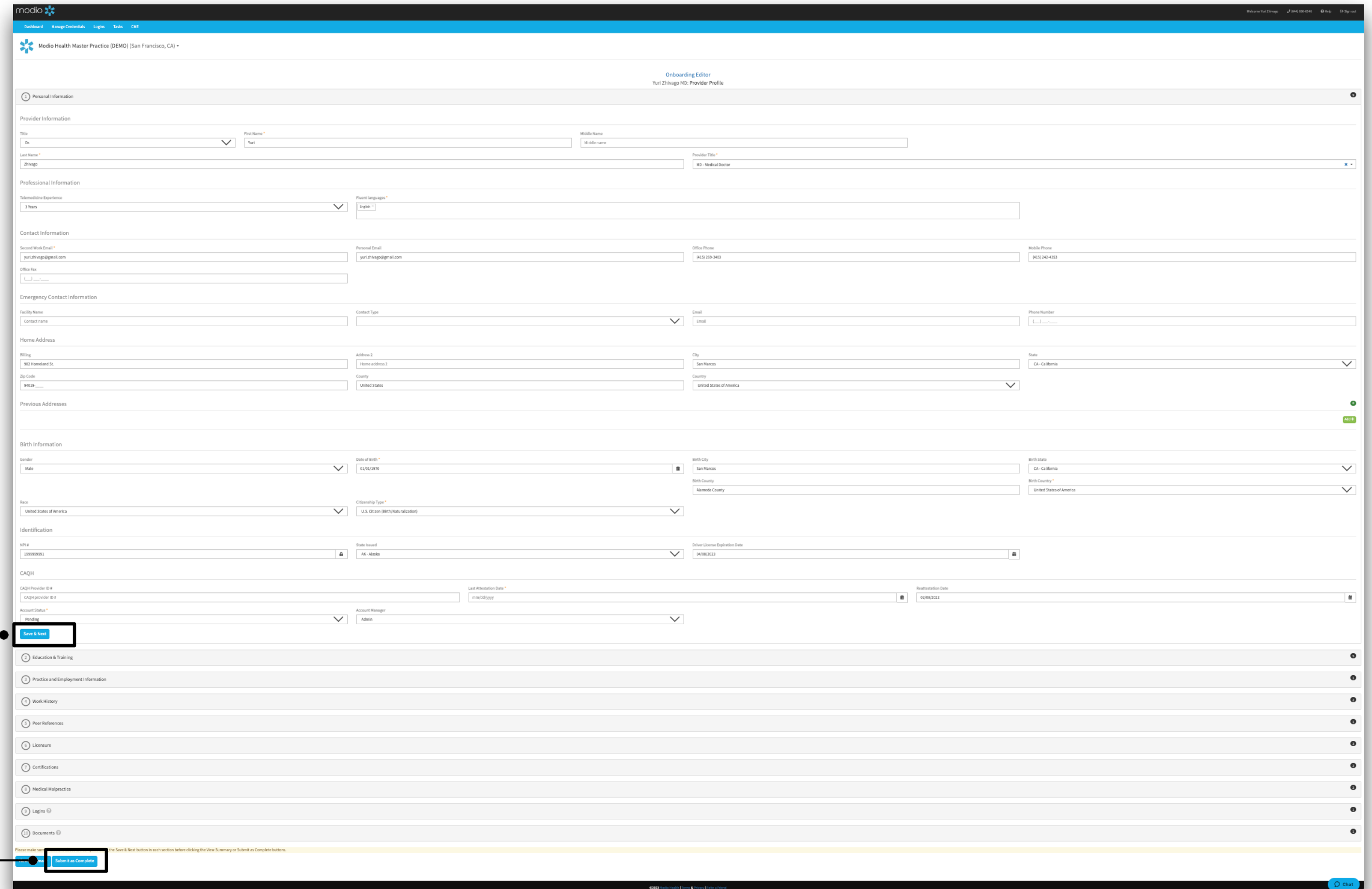
Gender: Male Date of Birth: 01/01/1970 Birth City: San Marcos Birth State: California

Step 3 - Click **Edit**

Chat

Tip Guide: Provider Onboarding

Onboarding - Navigating back to the Onboarding Intake Template



The screenshot shows the 'Onboarding Editor' interface for a provider profile. The form is divided into several sections, each with a circular icon and a title: Personal Information, Provider Information, Professional Information, Contact Information, Emergency Contact Information, Home Address, Previous Addresses, Birth Information, Identification, and Education & Training. The 'Personal Information' section is currently active and contains fields for Title, First Name, Middle Name, Last Name, and Provider Title. The 'Professional Information' section includes fields for Telemedicine Experience and Fluent Languages. The 'Contact Information' section has fields for Second Work Email, Personal Email, Office Phone, and Mobile Phone. The 'Emergency Contact Information' section includes Facility Name, Contact Name, Contact Type, Email, and Phone Number. The 'Home Address' section includes Billing, Address 1, Address 2, City, State, Zip Code, County, and Country. The 'Birth Information' section includes Gender, Date of Birth, Birth City, Birth State, Birth County, and Birth Country. The 'Identification' section includes NPI #, State Issued, Other License Expiration Date, CAQH Provider ID #, CAQH Provider ID #, Last Attribution Date, and Reattestation Date. The 'Education & Training' section is currently empty. At the bottom of the form, there are two buttons: 'Save & Next' and 'Submit as Complete'. A yellow banner at the bottom of the form contains the text: 'Please make sure to click the Save & Next button in each section before clicking the View Summary or Submit as Complete buttons.'

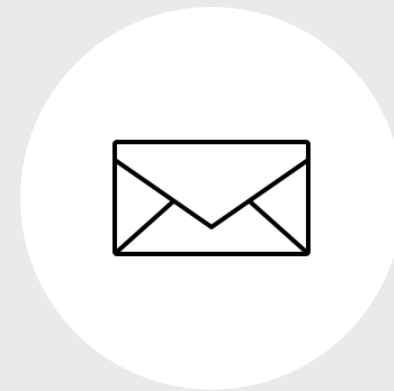
Now that you are logged back into the Onboarding Intake Template you may continue to work through the different sections. Select **"Save and Next"** to navigate through each section

When all sections have been filled out completely, click **"Submit as Complete"**

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346