



**OneView<sup>®</sup>**

TIP GUIDE: TAGS

The screenshot shows the Modio OneView V1 interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, the user is logged in as 'Yas Givechi'. The main header shows 'Modio Health Master Practice (DEMO) (San Francisco, CA)' with 'Add Provider' and 'Message' buttons. A dropdown menu is set to 'OneView V2 New'. The main content area has tabs for 'All', 'Credentialing Committee', 'Dental', 'Emergency Medicine', 'MD DO', 'MEC Review', 'Onboarding', 'Pediatrics', and 'TeleMedicine'. Below the tabs is a search bar and filters for 'Provider', 'Tags', 'Compliance', and 'Actions'. A table lists providers with their details and alert counts. The 'Actions' column for each provider contains several icons, with the edit icon (a pencil) highlighted by a red box and an orange arrow pointing to the right. At the bottom, there's a pagination control showing '1 / 1' and '200 items per page', and a 'Chat' button.

| Provider  | Tags   | Compliance | Actions |
|---|--|------------|---------|
| Family Healthcare - FAC<br>No Specialty<br>NPI# 1548200181                          |  | 14 alerts  |         |
| Abakporo, Theophine David - QMHA<br>Acupuncture<br>NPI# 1972564813                  | Dental<br>MD DO  | 6 alerts   |         |
| Abele, Jennifer B - MD<br>Emergency Medicine<br>NPI# 1073502779                     | Credentialing Committee<br>Emergency Medicine          | 11 alerts  |         |
| Abrams, Pamela - MD<br>Pediatric Endocrinology<br>NPI# 1851502215                   |  | 7 alerts   |         |
| Abroon, John David - MD<br>Hospital Medicine - Internal Medicine<br>NPI# 1588750434 | Credentialing Committee<br>Emergency Medicine<br>MD DO | 14 alerts  |         |

## Adding Tags in OneView V1

From the **Team Tab**, open the edit icon under the Teams Actions column.

1. To add an **existing** Tag, select one or multiple Tags from the dropdown list.

The screenshot shows the 'Edit Family Healthcare, FAC' form. At the top, there is a title bar with a close button. Below it, a section titled 'Tags for Modio Health Master Practice (DEMO) (San Francisco, CA)' contains a search input field with a dropdown arrow. A list of existing tags is displayed below the input field, including: Credentialing Committee, Dental, Emergency Medicine, MD DO, MEC Review, Onboarding, Pediatrics, and TeleMedicine. Below the tags section is a 'Notes' section with tabs for 'General' (2) and 'Team' (0). Two notes are visible: one from 'Admin - 11/16/2021 @ 01:45 PM' and another from '11/12/2020 @ 07:14 AM'. A 'Prepend Yas Givechi' checkbox is checked. At the bottom right, there is a 'Save Note' button and 'Cancel' and 'Save' buttons.

2. To create a **new** Tag(s), type in the word or words you want and click the **tab** key between them. Lastly, click **save**.

The screenshot shows the 'Edit Family Healthcare, FAC' form. The 'Tags for Modio Health Master Practice (DEMO) (San Francisco, CA)' section has the search input field containing the text 'Medical Leave'. Below this, the 'Teams' section shows a dropdown menu with 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. The 'Specialty List' section has two dropdown menus: 'No Specialty' and 'FQHC - Federally Qualified Health Center'. The 'Job Title' section is empty. The 'Notes' section is identical to the first screenshot, showing the 'General' and 'Team' tabs, two notes, and the 'Prepend Yas Givechi' checkbox. At the bottom right, there is a 'Save Note' button and 'Cancel' and 'Save' buttons.

### Using Tags in OneView V1

Use your Tags to filter and sort your organizations roster. Tags are also displayed in some of our Standard Reports. The Provider's report, one of your most utilized reports, includes Tags – run the report and use the Tag column to filter.

Use the Teams dashboard to filter by Tags. The Tags column, located in the center of the page, hold a dropdown to select the Tag filter you wish to apply.

The screenshot shows the Modio OneView V1 interface for 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. The main content area displays a list of providers with columns for 'Provider', 'Tags', 'Compliance', and 'Actions'. A dropdown menu is open over the 'Tags' column, listing various categories: No Tags, Credentialing Committee, Dental, Emergency Medicine, MD DO, MEC Review, Onboarding, Pediatrics, and TeleMedicine. An orange line points from the text on the left to the dropdown menu.

| Provider  | Tags   | Compliance | Actions |
|---|--|------------|---------|
| Family Healthcare - FAC<br>No Specialty<br>NPI# 1548200181                          |  | 14 alerts  | [Icons] |
| Abakporo, Theophine David - QMHA<br>Acupuncture<br>NPI# 1972564813                  |  | 6 alerts   | [Icons] |
| Abele, Jennifer B - MD<br>Emergency Medicine<br>NPI# 1073502779                     |  | 11 alerts  | [Icons] |
| Abrams, Pamela - MD<br>Pediatric Endocrinology<br>NPI# 1851502215                   |  | 7 alerts   | [Icons] |
| Abroon, John David - MD<br>Hospital Medicine - Internal Medicine<br>NPI# 1588750434 | Credentialing Committee<br>Emergency Medicine<br>MD DO | 14 alerts  | [Icons] |
| Ackerman, Daniel J - MD<br>Neurology<br>NPI# 1154642338                             | Credentialing Committee<br>MD DO<br>TeleMedicine       | 4 alerts   | [Icons] |
| Adesso, Mary - SA<br>No Specialty   | Credentialing Committee                                | 8 alerts   | [Icons] |

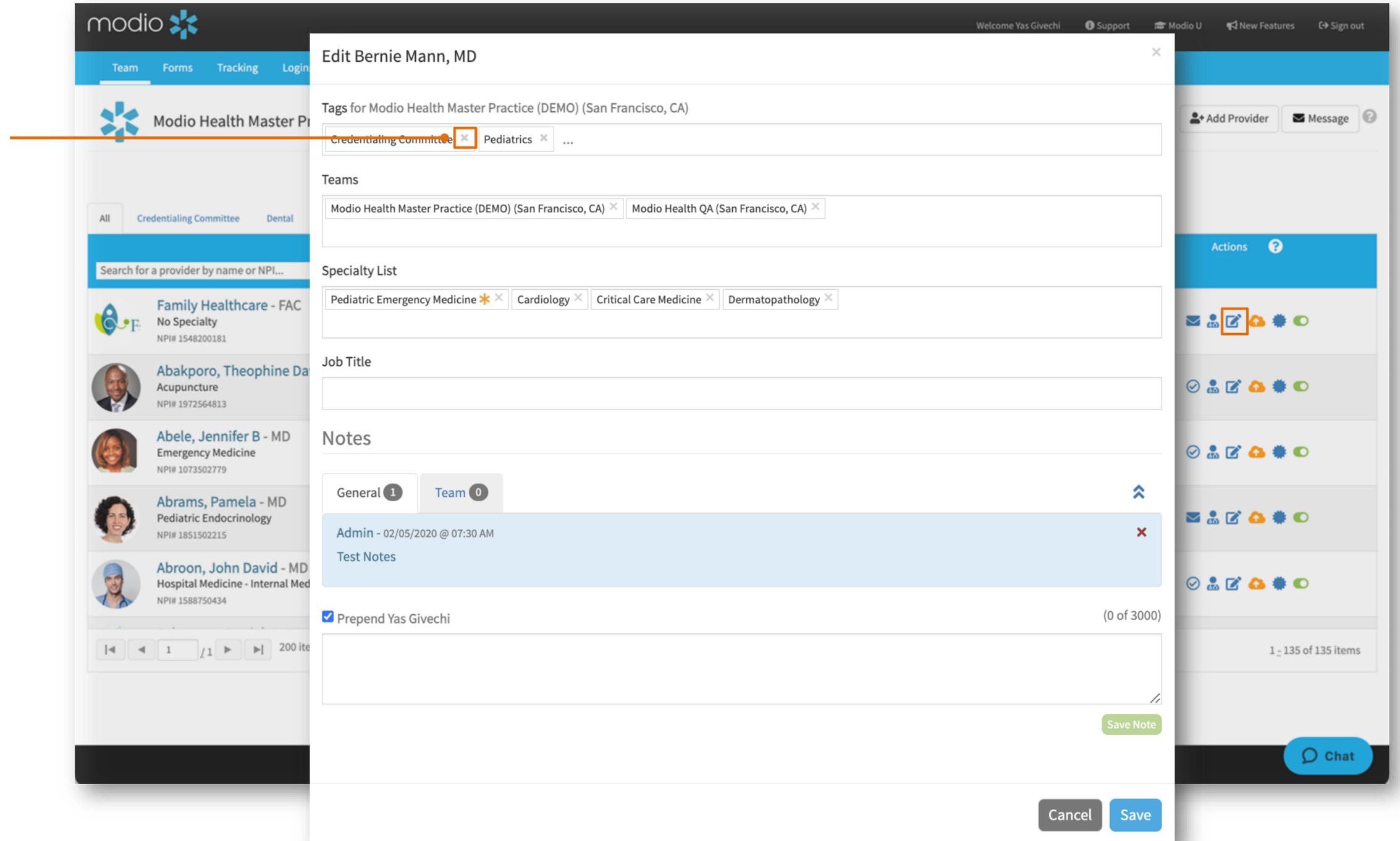
### Removing Tags in OneView V1

To remove a Tag, select the profile's edit icon (pen and paper icon).

Now, click the grey X to the right of Tag name and this will remove the desired Tag.

The Tag(s) have been removed from your provider's profile.

Lastly, click Save.



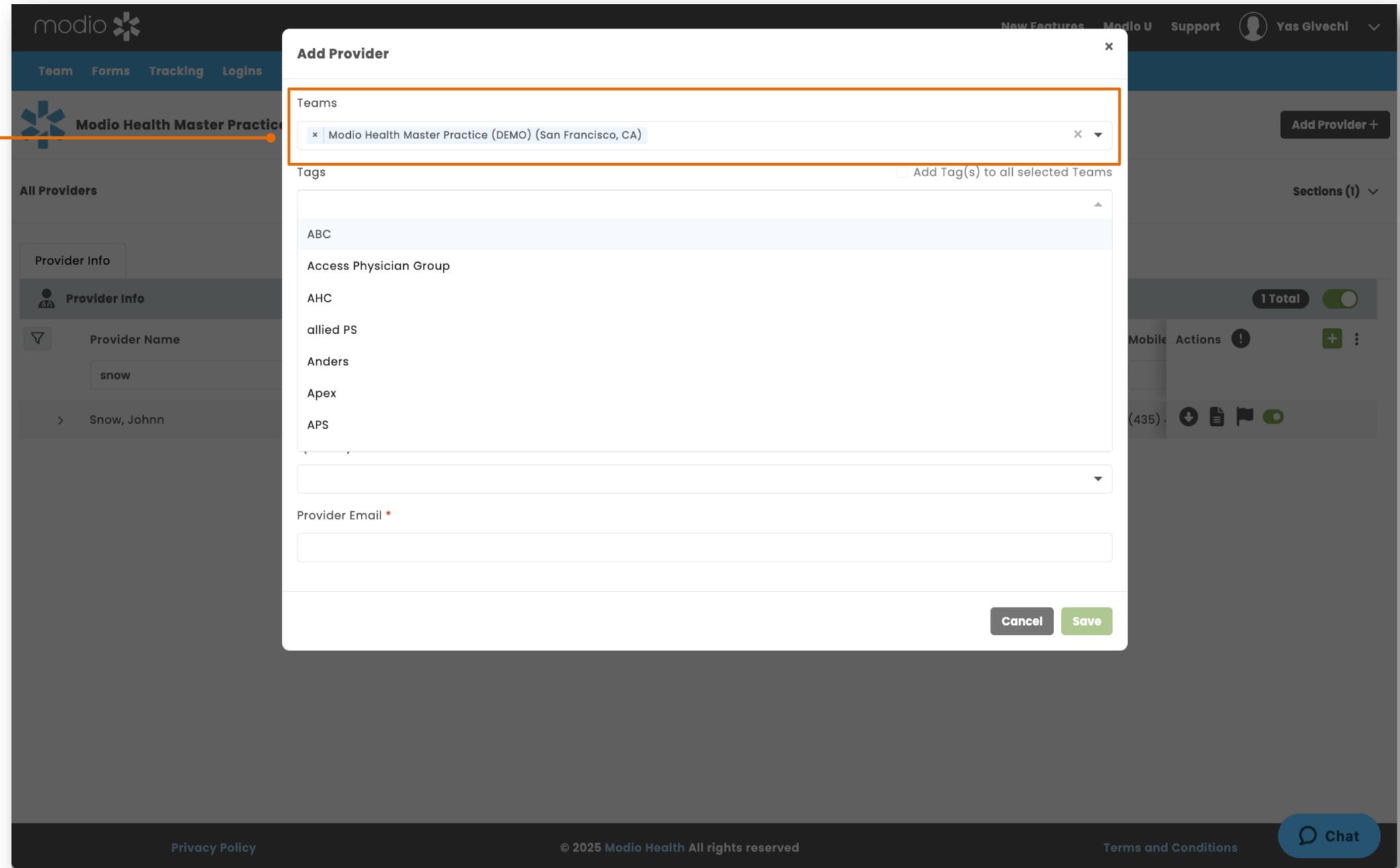
### Adding Tags for new Providers in OneView V1 & V2

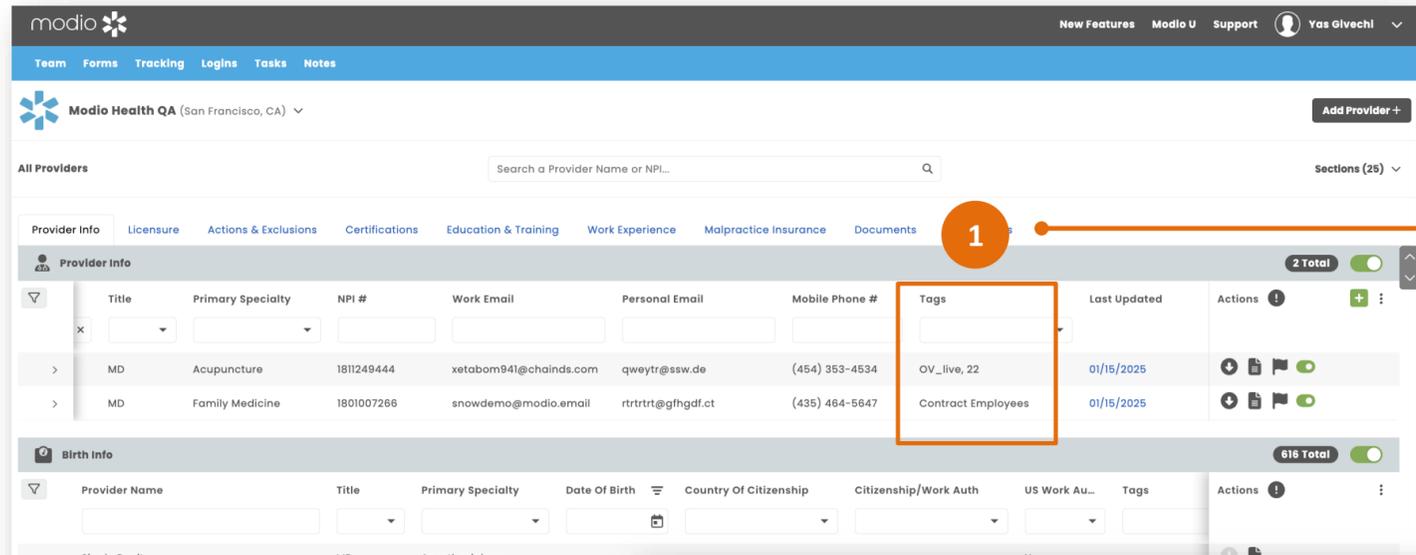
There is an option to add Tag(s) during the "Add Provider" workflow.

To add a new Tag(s), you can either create a new Tag or chose from an existing Tag(s) (following the same steps as page 3).

Click **Save**.

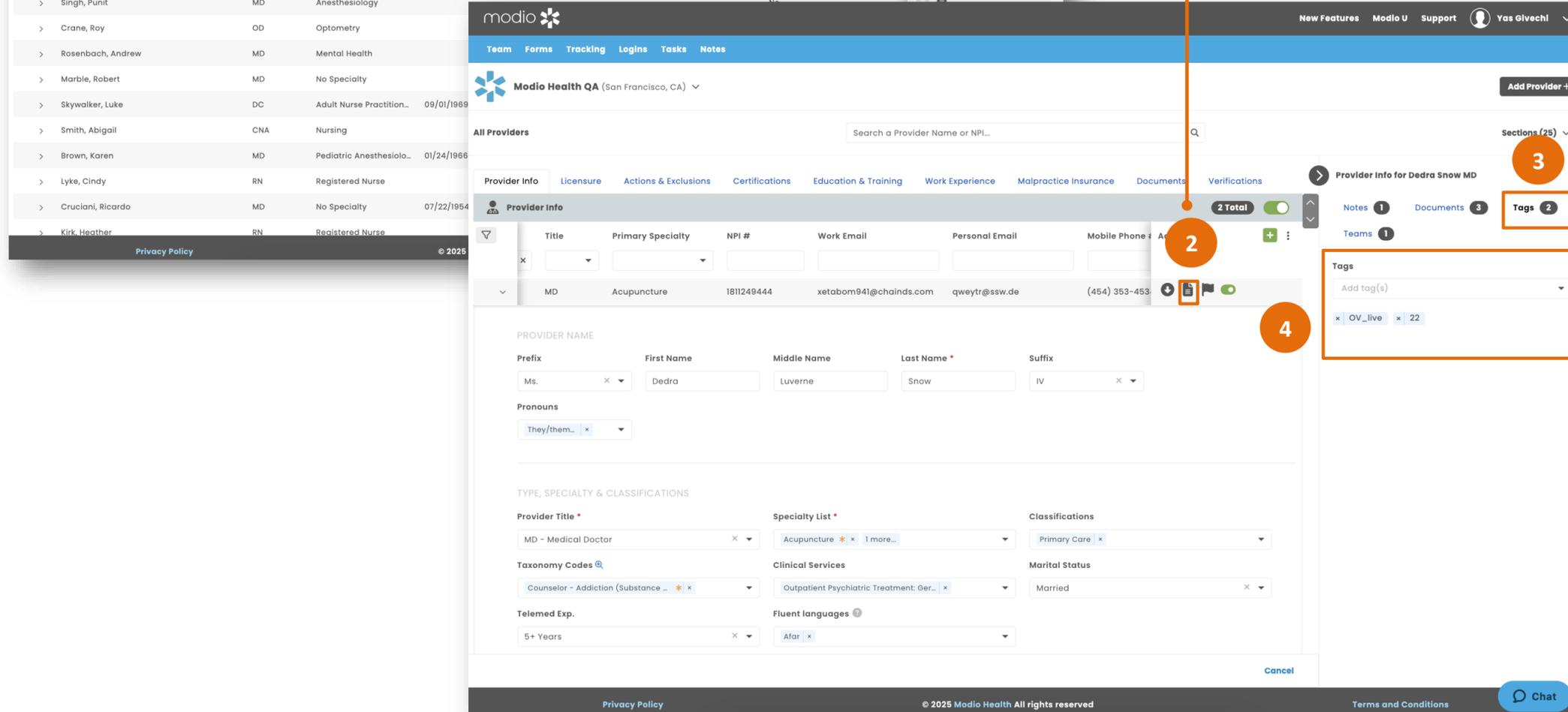
Tags added during the "Add Provider" workflow will appear in the Team page of v1 **and** the Provider Info tab of the Provider Info grid in v2.





1. The grid features a "Tags" column that supports sorting and filtering. Select one or more Tags for filtering purposes. Like other columns in V2, the "Tags" column is movable within the grid.

2. Access your Tags through the Tags tab in the side drawer's dropdown menu, or see them applied to the same providers in the Provider Info Grid.



### Adding Tags to other Grid Sections of V2

**Provide Info Grid** – All Tags here will mirror the Tags on the Team page of v1. Adding or removing a Tag here will also Add or Remove a Tag on the Team page.

**All other V2 Grids** - Tags are autonomous and allows adding Grid specific Tags. This allows for maximum customization of the platform.

If you prefer to have Tags match in all or some Grids - Reach out to support@modiohealth.com and let them know which grids you would like them to apply to. Our Data team can help set this up for you.

To access Tags in other grids, open the side drawer and select the Tags tab. From there, create new Tags or chose from existing Tags. Each Grid hosts a Tags column allowing you to multiselect Tags to filter as needed.

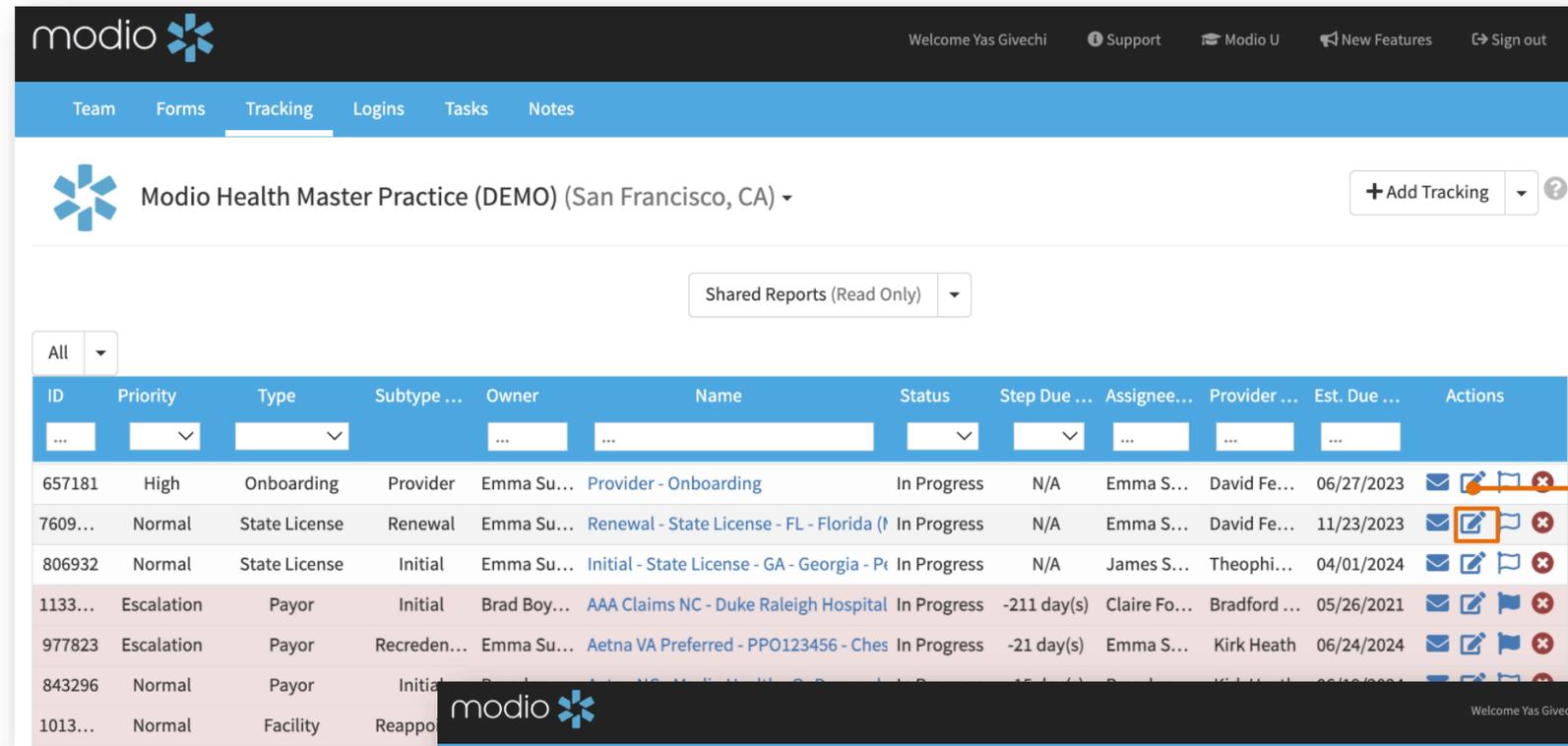
### Removing Tags in OneView V2

To remove a Tag in V2, open the side drawer within the relevant grid, access the Tags tab, and click the desired Tag.

This action is similar to V1's Tag removal process (using the gray 'x'), but in V2, changes are saved automatically.

The screenshot displays the Modio Health QA interface for a provider named Dedra Snow MD. The interface includes a top navigation bar with the Modio logo, user profile (Yas Givechi), and navigation links (New Features, Modio U, Support). Below this is a secondary navigation bar with options like Team, Forms, Tracking, Logins, Tasks, and Notes. The main content area shows the provider's information form, which is divided into several sections: Provider Info, Licensure, Actions & Exclusions, Certifications, Education & Training, Work Experience, Malpractice Insurance, and Documents. The 'Tags' section is highlighted with a red box, showing two tags: 'Medical Leave' and 'Pain Medicine'. A red line points from the 'Tags' tab in the side drawer to the 'Tags' section in the form. The form also includes fields for Title, Primary Specialty, NPI #, Work Email, and Personal Email. The 'Provider Name' section includes fields for Prefix, First Name, Middle Name, Last Name, and Suffix. The 'TYPE, SPECIALTY & CLASSIFICATIONS' section includes fields for Provider Title, Specialty List, Classifications, Taxonomy Codes, Clinical Services, and Marital Status. The interface is clean and modern, with a dark blue header and a light gray background.

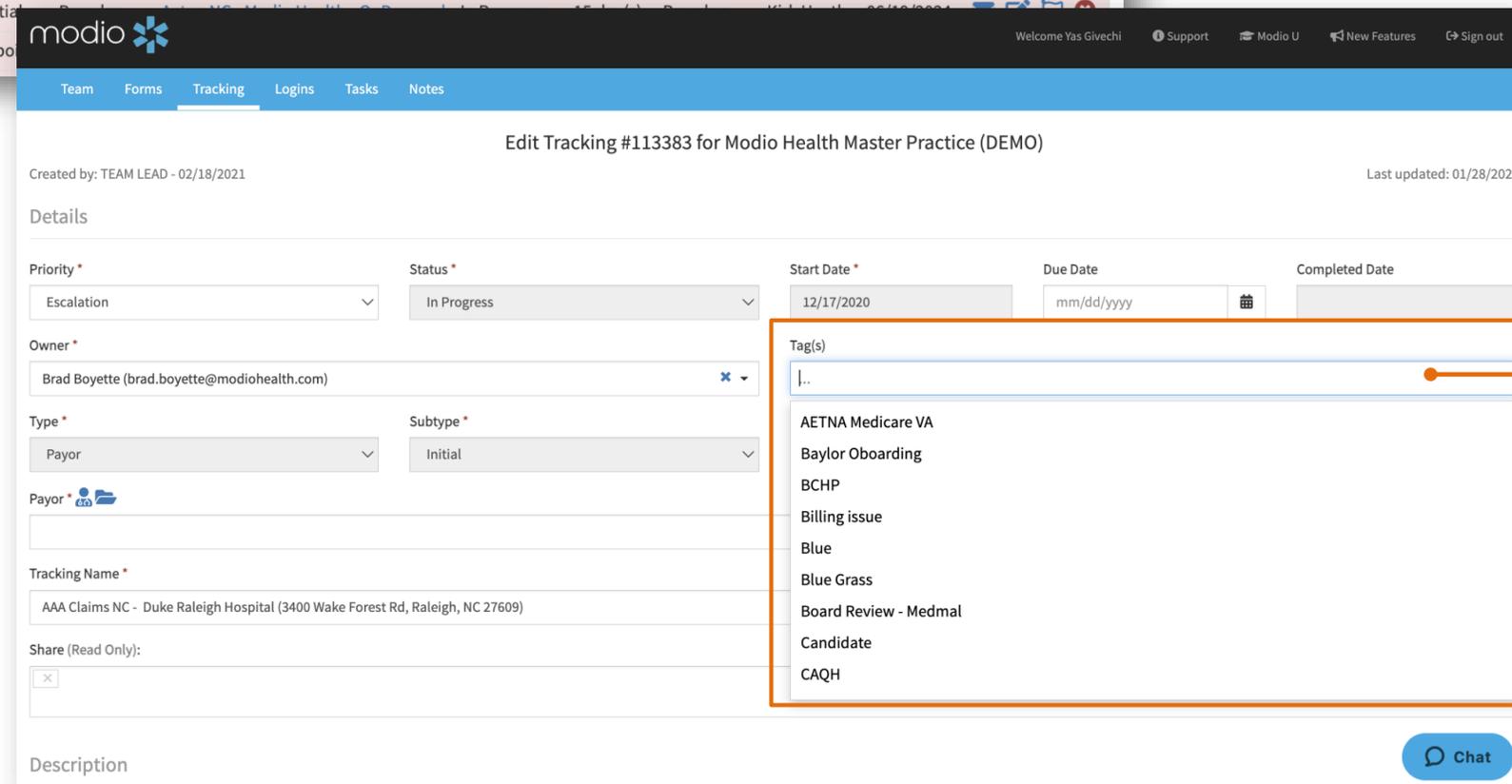
Tip Guide: Tags – Adding Tags to Tracking items



| ID      | Priority   | Type          | Subtype ... | Owner       | Name  | Status      | Step Due ... | Assignee...  | Provider ... | Est. Due ... | Actions   |
|---------|------------|---------------|-------------|-------------|---|-------------|--------------|--------------|--------------|--------------|---|
| 657181  | High       | Onboarding    | Provider    | Emma Su...  | Provider - Onboarding                       | In Progress | N/A          | Emma S...    | David Fe...  | 06/27/2023   |  |
| 7609... | Normal     | State License | Renewal     | Emma Su...  | Renewal - State License - FL - Florida (↑   | In Progress | N/A          | Emma S...    | David Fe...  | 11/23/2023   |  |
| 806932  | Normal     | State License | Initial     | Emma Su...  | Initial - State License - GA - Georgia - Pt | In Progress | N/A          | James S...   | Theophi...   | 04/01/2024   |  |
| 1133... | Escalation | Payor         | Initial     | Brad Boy... | AAA Claims NC - Duke Raleigh Hospital       | In Progress | -211 day(s)  | Claire Fo... | Bradford ... | 05/26/2021   |  |
| 977823  | Escalation | Payor         | Recreden... | Emma Su...  | Aetna VA Preferred - PPO123456 - Ches       | In Progress | -21 day(s)   | Emma S...    | Kirk Heath   | 06/24/2024   |  |
| 843296  | Normal     | Payor         | Initial     |             |   |             |              |              |              |              |  |
| 1013... | Normal     | Facility      | Reappo      |             |   |             |              |              |              |              |  |

**Adding Tags to Tracking items**

First select the pen and paper icon from the Tracking dashboard.



modio  Welcome Yas Givechi Support Modio U New Features Sign out

Team Forms **Tracking** Logins Tasks Notes

Modio Health Master Practice (DEMO) (San Francisco, CA) + Add Tracking

Shared Reports (Read Only)

All

### Edit Tracking #113383 for Modio Health Master Practice (DEMO)

Created by: TEAM LEAD - 02/18/2021 Last updated: 01/28/2025

**Details**

Priority \* Escalation Status \* In Progress Start Date \* 12/17/2020 Due Date mm/dd/yyyy Completed Date

Owner \* Brad Boyette (brad.boyette@modiohealth.com)

Type \* Payor Subtype \* Initial

Payor \* 

Tracking Name \* AAA Claims NC - Duke Raleigh Hospital (3400 Wake Forest Rd, Raleigh, NC 27609)

Share (Read Only):

Description Chat

**Tag(s)**

- AETNA Medicare VA
- Baylor Oboarding
- BCHP
- Billing issue
- Blue
- Blue Grass
- Board Review - Medmal
- Candidate
- CAQH

Add multiple Tags to tracking items as you find helpful. You can create new Tags or use your existing Tags.

**Important:** Tags in Tracking are not connected to individual providers or profiles. They are at a Tracking Record level. Tracking reports will report on Tracking Tags only, not Provider or Grid level Tags.

Tip Guide: Tags – Adding Tags to Tracking items

The image displays two screenshots of the Modio Health Master Practice (DEMO) Tracking dashboard. The top screenshot shows the 'All' tag selected in the filter menu. The bottom screenshot shows the tag dropdown menu expanded, listing various tags like 'AETNA Medicare VA', 'BCHP', 'Billing issue', 'Blue', 'Blue Grass', 'Board Review - Medmal', 'Candidate', 'CEO View', 'Florida Healthcare Clinic', 'Initial Sentara', 'LHH', 'love me some Tags', 'ModioU', 'NEW ONBOARDING', 'New provider', 'New to area', 'pending TJC', 'TEST', 'Urgent', and 'VA Surgery'.

| ID      | Priority   | Type          | Subtype          | Owner          | Name  | Status      | Step Due In | Assignee      | Provider       | Est. Due Dat... | Actions |
|---------|------------|---------------|------------------|----------------|---|-------------|-------------|---------------|----------------|-----------------|---------|
| 657181  | High       | Onboarding    | Provider         | Emma Suvall    | Provider - Onboarding                                 | In Progress | N/A         | Emma Suvall   | David Ferrell  | 06/27/2023      | [Icons] |
| 760993  | Normal     | State License | Renewal          | Emma Suvall    | Renewal - State License - FL - Florida (MD) - ME10    | In Progress | N/A         | Emma Suvall   | David Ferrell  | 11/23/2023      | [Icons] |
| 806932  | Normal     | State License | Initial          | Emma Suvall    | Initial - State License - GA - Georgia - Pending Pen  | In Progress | N/A         | James Sum...  | Theophine ...  | 04/01/2024      | [Icons] |
| 113383  | Escalation | Payor         | Initial          | Brad Boyette   | AAA Claims NC - Duke Raleigh Hospital (3400 Wak       | In Progress | -211 day(s) | Claire Forgan | Bradford Bo... | 05/26/2021      | [Icons] |
| 977823  | Escalation | Payor         | Recredentiali... | Emma Suvall    | Aetna VA Preferred - PPO123456 - Chesapeake Re        | In Progress | -21 day(s)  | Emma Suvall   | Kirk Heath     | 06/24/2024      | [Icons] |
| 843296  | Normal     | Payor         | Initial          | Brandon Hol... | Aetna NC - Modio Health - OnDemand (2228 W Gr         | In Progress | -15 day(s)  | Brandon Ho... | Kirk Heath     | 06/19/2024      | [Icons] |
| 1013885 | Normal     | Facility      | Reappoi...       | Emma Suvall    | Reappointment - Facility - Chesapeake Regional I      | In Progress | -15 day(s)  | Emma Suvall   | Kirk Heath     | 09/11/2024      | [Icons] |
| 749007  | Normal     | Payor         | Initial          | Brandon Hol... | Cigna CT Sure Fit 123 - Sentara Virginia Beach Ger    | In Progress | -10 day(s)  | Brandon Ho... | Bradford Bo... | 03/07/2024      | [Icons] |
| 977826  | Normal     | Facility      | Initial          | Emma Suvall    | Initial - Facility - Canyon Vista Medical Center (Sie | In Progress | -8 day(s)   | Emma Suvall   | Theophine ...  | 08/20/2024      | [Icons] |
| 940341  | Normal     | Payor         | Initial          | John Barry     | EmblemHealth VA HMO, PPO - Medexpress Urgen           | In Progress | 18 day(s)   | John Barry    | David Ferrell  | 09/17/2024      | [Icons] |

### Adding Tags to Tracking items

To filter your dashboard using Tags, select the desired Tag.

If you have accumulated more than **10** Tags, a dropdown menu will appear in the left corner to help you navigate them. This functionality is consistent across all V1 dashboards, including Teams, Forms, and Tracking.

For assistance with permanently removing outdated or unused Tags from Tracking, please contact [support@modiohealth.com](mailto:support@modiohealth.com). Our team can provide guidance and help with the removal process.

modio  Welcome Yasi Givechi | Support | Modio U | New Features | Sign out

Team | Forms | **Tracking** | Logins | Tasks | Notes

### Edit Tracking #806932 for Modio Health Master Practice (DEMO)

Created by: Emma Suvall - 11/27/2023 | Last updated: 03/07/2024

#### Details

|            |             |              |            |                |
|------------|-------------|--------------|------------|----------------|
| Priority * | Status *    | Start Date * | Due Date   | Completed Date |
| Normal     | In Progress | 11/27/2023   | mm/dd/yyyy |                |

|   |   |
|---|---|
| Owner *                                   | Tag(s)  |
| Emma Suvall (emma.suvall@modiohealth.com) | NEW Provider Enrollment x Billing issue x ... |

|               |           |  |
|---------------|-----------|--|
| Type *        | Subtype * | Provider *                                       |
| State License | Initial   | Theophine Abakporo (theophoine.test@gmail.com) x |

State License \* 

IA - Iowa (DO) - 564564565 Pending

Tracking Name \*

Initial - State License - GA - Georgia - Pending Pending

Share (Read Only):

...

#### Description

...

 Chat

### Removing Tags to Tracking items

Remove a Tag from any tracking item that isn't in a completed status.

Navigate back into the Tracking item you want to remove the Tag from by clicking on the editor box in the dashboard for that tracking item.

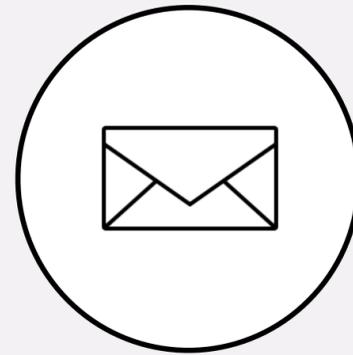
Next, click the **X** on the next to the Tag you want to remove. You can also add a new Tag or Tags at this time as well.

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

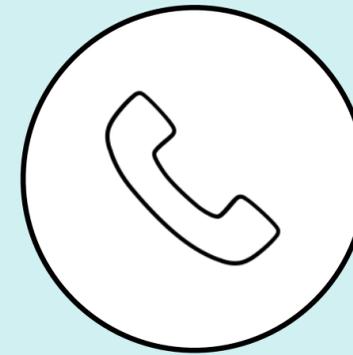
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**Online:**  
Live Chat Support



**Email:**  
[Support@modiohealth.com](mailto:Support@modiohealth.com)



**Phone:**  
844.696.6346