



**Topic: Provider Onboarding -
A Start to Finish Workflow Guide for Coordinators**



Agenda:

- Add Provider Steps 1 & 2
- Customizing Onboarding Message and Template
- Onboarding Tracking



Agenda:

- Reports
- View/ Change Provider Permission Level
- Summary
- Open Question & Answer

Onboarding Start to Finish

Add Provider

Run NPPEs Updater

Customize Onboarding Message and Template

Start Onboarding Tracking (This step will include sending onboarding invite to the provider, sending forms etc.)

****Optional** Update Provider Permission Level**

Audit Profile for Completeness by running reports

Training & Support

TRAINING & SUPPORT

We're Here To Help

Welcome to the Modio Health Training & Support Center

Here you'll find Help Guides, Training Videos, and Support information to assist providers, coordinators, and recruiters. Continue to check this page for additional training and support resources. If you can't find what you need, please feel free to contact us.

Help Guides

Providers

- [How-To Guide: Time and Expense](#)
- [OneView: Quick Start Guide](#)

Coordinators

- [Tip Guide: Getting Started for Coordinators](#)
- [Tip Guide: Read Only - Getting Started for Coordinators](#)
- [Tip Guide: Team Management - Tagging Providers](#)
- [Tip Guide: Provider Verification](#)
- [Tip Guide: Documents](#)
- [Tip Guide: Logins](#)
- [Tip Guide: Tasks](#)
- [Tip Guide: Notes](#)
- [Tip Guide: Tracking](#)
- [Tip Guide: Onboarding](#)
- [Tip Guide: Inactive/Active Providers](#)
- [Tip Guide: Forms](#)

Support

Hours: 8am - 8pm EST (Mon-Fri)

Phone: (415) 935-0755

Email: updates@modiohealth.com

Live Chat: [Click to open](#)

Product: [OneView Release Notes](#)

Updates

Request Type	Estimate
New Form Template	3 - 5 Days
Update Form Template	1 - 3 Day(s)
New Tracking Process	1 - 3 Day(s)
New/Update Facility	1 - 2 Day(s)
New General Specialty	1 - 2 Day(s)
New Title/License Type	Thursday Release
New Board/Additional Cert	Thursday Release
New Healthcare Payor	Thursday Release
New Document Type	Thursday Release

 [Live Help](#)

Questions?
www.modiohealth.com

