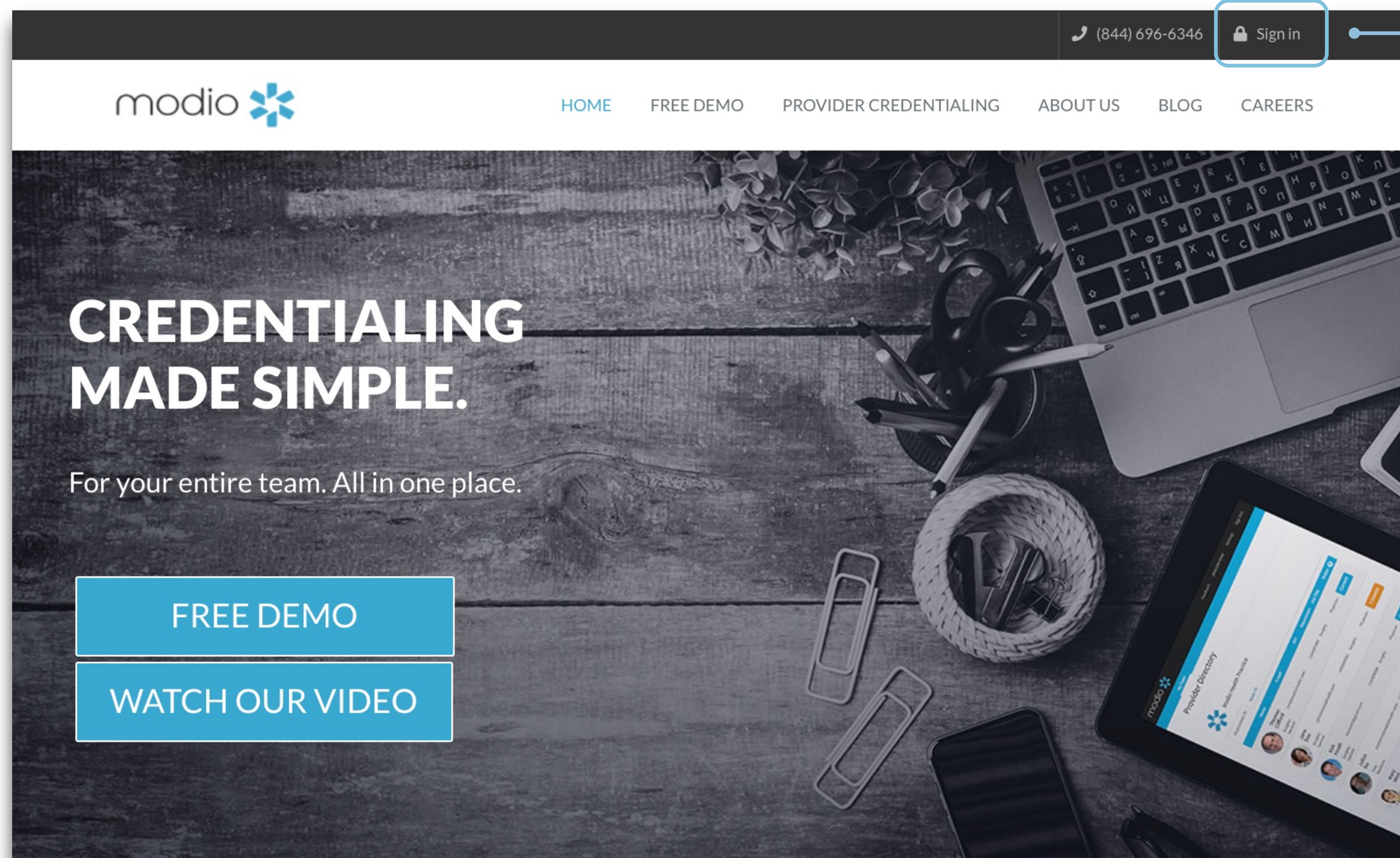




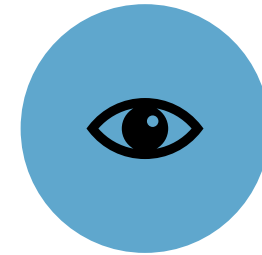
TIP GUIDE - COORDINATOR READ-ONLY



Navigate to Modio:

Visit our website at: www.modiohealth.com and click **“Sign in,”** which is located on the top right hand corner.

If you have previously bookmarked the login page you will be automatically redirected to the new login page, which you can also bookmark for quick access.



Read-only permissions grant access to your Team's Profiles within **OneView**.[®] The following lists the features which you can view.

Main **OneView** Dashboard

TEAM PAGE

View the following:

- Entire Team Roster
- Individual Profile compliance report
- Provider profile cards
- Filter or Sort by Tags
- CMEs

Navigate to each provider's Manage Credentials section

INDIVIDUAL COMPLIANCE REPORT

- View provider's compliance status.
- Download documents directly from report

PROVIDER PROFILE CARD

- View provider's profile card with snapshot and quick link to credentialing sections.
- Customize and Download CV/Resume directly from profile card.

Manage Credentials Section

MANAGE CREDENTIALS

View provider's credentialing data which includes:

- | | |
|------------------------|-----------------------|
| • Personal Info | • Licensure |
| • Education & Training | • Certifications |
| • Practice/Employer | • Medical Malpractice |
| • Facility Affiliation | • Healthcare Payors |
| • Work History | • CME |
| • Peer References | • Documents |
| | • Summary |

- Read-only users can add and view Public Notes in credentialing sections.
- View your provider's detailed credentialing data by clicking on the eye icon associated with different data entries.

UPLOADING / DOWNLOADING DOCUMENTS

- Read-only users can View, Upload and Download documents.
- View & download completed Forms.

VIEW SUMMARY

- Download printable provider summary.
- Download printable CV/Resume.

When you log in, you'll see your **Team(s)** in the **Provider Dashboard**.

Teams:
View the entire team, all in one page.

Compliance:
View individual provider compliance issues.

Tags:
Filter by sub-lists within your provider roster to quickly view or organize the profiles you are working with.

Profile Cards:
View a provider's profile card by clicking on their picture. See next slide for profile card details.

The screenshot shows the Modio Team Dashboard interface. At the top, there's a navigation bar with the Modio logo, user information (Welcome Yas Givechi), and links for Support, Modio U, New Features, and Sign out. Below this is a 'Team' header for 'Modio Health QA Displ (San Francisco, CA)'. A dropdown menu is set to 'OneView V2'. A search bar is present for finding providers by name or NPI. The main content is a table with columns for Provider, Tags, Compliance, and Actions. Three providers are listed: Joshana Smith (RN), Judd T. Smith (MD), and John Snow (MD). Each row includes a profile picture, name, specialty, NPI number, tags, compliance status, and action icons. A pagination bar at the bottom shows '1 / 2' items per page and '1 - 200 of 203 items'. A 'Chat' button is located in the bottom right corner.

Inactive Profile Roster:
Use the dropdown to toggle between Active and Inactive Profiles.

Manage Credentials:
Click here or on the provider icon to view your provider's credentials.

CME Tracking:
Hover over the CME Certification icon to view the provider's CME goals and credits.



Tip Guide: Read-Only

Profile Card

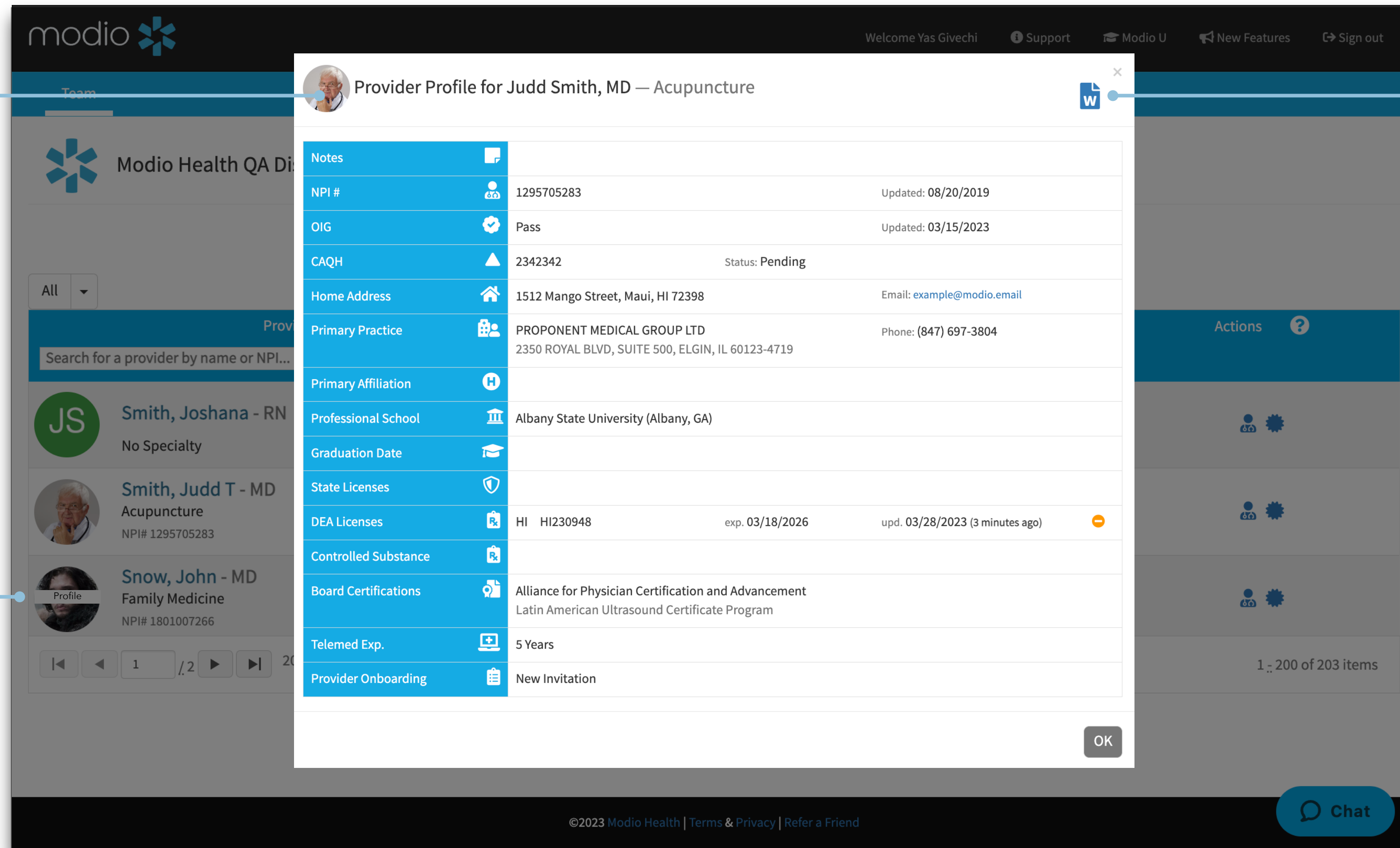
Profile Card:

View a snapshot of credentialing data within your provider's profile. Click on the blue sections for a quick link to access the corresponding section with additional data.

CV/Resume:

Click here to generate a customizable CV using the data in your provider's profile

Start Here:
View a provider's profile card by click on their profile image or initials



The screenshot shows the Modio Health QA Dashboard interface. A modal window displays the 'Provider Profile for Judd Smith, MD — Acupuncture'. The profile card includes a list of credentialing data points, each with a blue icon and a corresponding data field. A 'CV/Resume' button is located in the top right corner of the modal. The background shows a list of other providers and a search bar.

Field	Value	Updated
NPI #	1295705283	08/20/2019
OIG	Pass	03/15/2023
CAQH	2342342	Status: Pending
Home Address	1512 Mango Street, Maui, HI 72398	Email: example@modio.email
Primary Practice	PROPONENT MEDICAL GROUP LTD 2350 ROYAL BLVD, SUITE 500, ELGIN, IL 60123-4719	Phone: (847) 697-3804
Primary Affiliation		
Professional School	Albany State University (Albany, GA)	
Graduation Date		
State Licenses		
DEA Licenses	HI HI230948	exp. 03/18/2026 upd. 03/28/2023 (3 minutes ago)
Controlled Substance		
Board Certifications	Alliance for Physician Certification and Advancement Latin American Ultrasound Certificate Program	
Telemed Exp.	5 Years	
Provider Onboarding	New Invitation	

Individual Compliance Report:

View the status of your provider's State, DEA, and Controlled Substance Licensure, ABMS, OIG, Documents, etc...

Compliance Report for Judd Smith, MD

License	Add'l Info	Status	Exp. Date	Expires in	Last updated	Actions
036-070081 (IL)	No	Active	07/31/2020	expired	03/21/2019	
AK234234 (AK)	No	Active	02/24/2040	17 years	03/28/2023	

License	Status	Exp. Date	Expires in	Last updated	Actions
HI230948 (HI)	Active	03/18/2026	3 years	03/28/2023	
BD0193956	Inactive	06/30/2017	expired	06/06/2020	

Board (Specialty)	Exp. Date	Expires in	Last updated	Actions
Alliance for Physician Certification and Advancement (Latin American Ultrasound Certificate Program)			03/28/2023	

Status	NPI #	Date of Birth	Last updated	Actions
Pass	1295705283		03/28/2023	

Document Type	Exp. Date	Expires in	Last updated	Actions
State License	02/24/2019	expired	03/01/2019	

Carrier/Producer Name	State and Policy #	Exp. Date	Expires in	Last updated	Actions
aetna				03/28/2023	

View Licensure:
Click the provider icon to navigate to the license section.

Start Here

Compliance Alerts:
View individual provider issues by clicking on the alerts link.

Documents:
Download documents from the documents section.

Navigate to a credentialing profile by clicking on the providers name or selecting the "Manage Credentials" Icon from on the Team page.

Credentialing Tabs: Click on these tabs to view a provider's credentialing information.

The screenshot displays the 'View State License for Judd Smith MD' page. The sidebar on the left contains the following tabs: Personal Info, Education & Training, Practice / Employer, Facility Affiliations, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Healthcare Payors, CME, Documents, and Summary. The main form includes fields for License State (AK - Alaska), License # (AK234234), Issue Date (02/15/2023), Expiration Date (02/24/2040), License Status (Active), License Type (DC - Doctor of Chiropractic), Taxonomy Code (Otolaryngology - Facial Plastic Surgery), Primary Source Link, and a section for public notes. A table at the bottom lists documents, with one document highlighted: 'modio univ-02.png (108.13 KB)' of type 'State License' with an expiration date of '02/24/2019'.

Documents: Click the **Pen and Paper (edit icon) icon** to add an additional document.

Click the **Cloud icon** to download an existing document.

PDF Icon: Click the **PDF icon** to generate a chart with all data entries from that section. You can upload or download the PDF from here.

Licensure View: Click the **Eye icon** to view additional details or leave notes specific to that line item.

Public Notes: Leave public notes here. These will be public to the entire team.

Documents: Click the **Eye icon** to view or add documents to a specific note.



Print Summary:
Click here to print a copy of the provider's credentialing summary.



PDF:
Click the PDF icon to generate a PDF version of the provider summary.



CV/Resume Download:
Click the document icon to generate a copy of the provider's CV.

Start Here

Summary:
View a complete credentialing summary for your provider by starting here.

The screenshot displays the Modio user interface for document management. On the left, a sidebar lists various profile categories, with 'Documents' highlighted. The main content area shows a 'Documents' table for 'Judd Smith MD'. The table has columns for Type, File Name, Date, Permission, Expiration Date, Status, and Actions. A 'File Upload' dialog box is overlaid on the table, showing fields for File name (Passport Photo 3.21.34), Type (Passport Copy), Expiration (mm/dd/yyyy), and Permission (General). The dialog also includes 'Cancel' and 'Upload' buttons.

Start Here

Upload Documents:
Upload one or more files directly into your provider's profile.

Download:
Download existing documents.

Drop documents here or Click here to browse
Accepted file formats: pdf, docx, txt, rtf, gif, jpg, png

File Upload for Judd Smith MD

File name: 482.86 KB Type: Passport Copy Expiration: Not Applicable? Permission: General

File name: Passport Photo 3.21.34 .png

Expiration: mm/dd/yyyy

Cancel Upload

Option 1 - Drag & Drop
To upload a single or multiple documents, simply drag and drop to the platform.
Option 2 - Click to Upload
Click here to browse for your document(s), then choose which ones to upload.

File name:
Name your file. Use our keyword guide to have document type auto-detected.

Type:
Select the file type(s) from the drop-down menu.

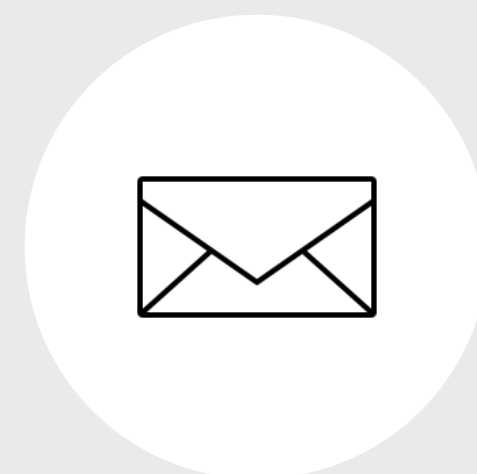
Expiration:
Click the Expiration date(s). Expiring or expired documents will show up in the "Compliance Report"

Permissions:
General - Visible only to your team(s)
Coordinator Only - Visible only to Coordinator(s)

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346