



OneView[®]

ONEVIEW[®] 101: COORDINATORS GUIDE

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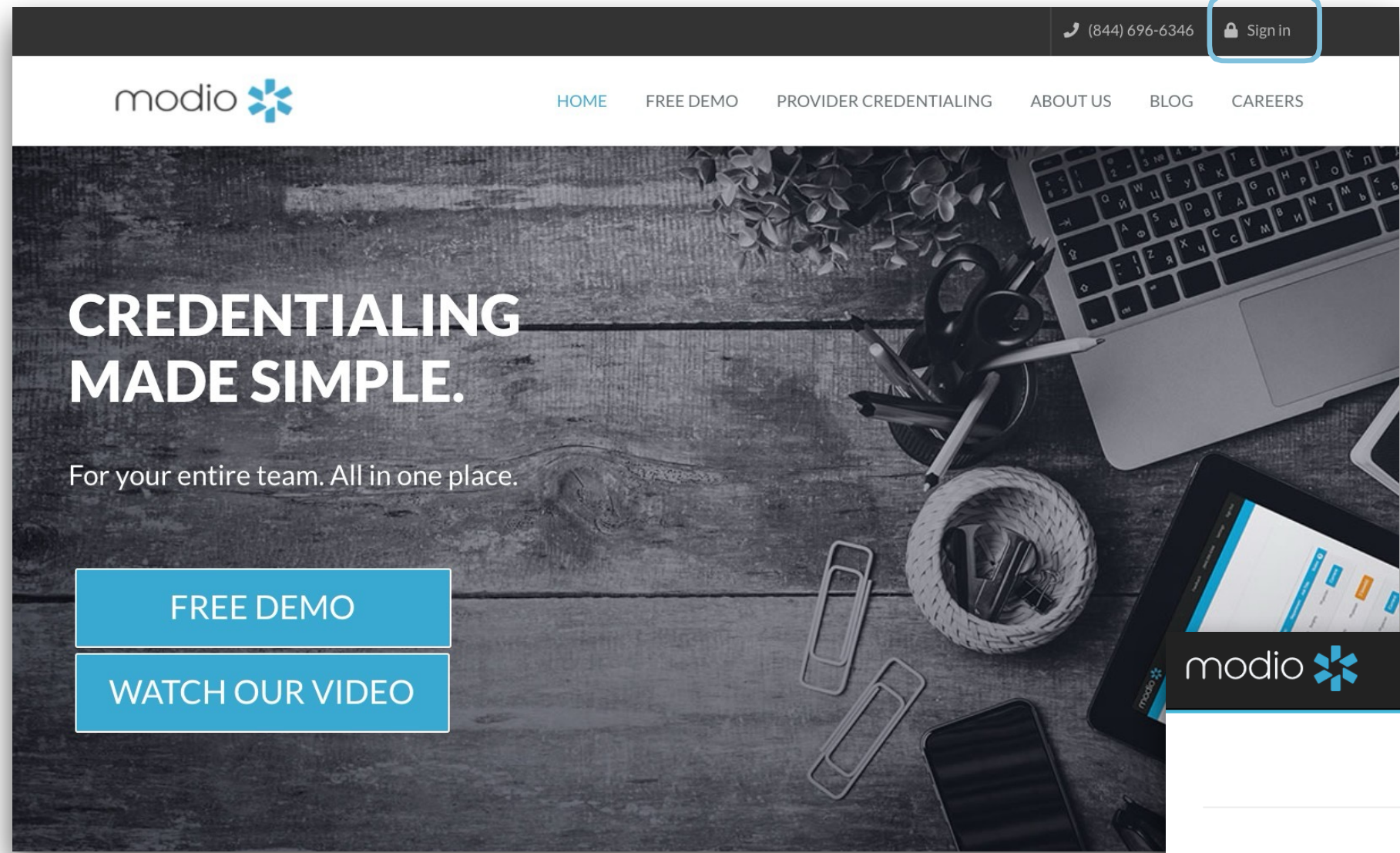
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Your Coordinator Toolbar

Here is a quick introduction to the Coordinator Toolbar. If you are a new user, this next short section will help you get started by showing you some helpful features in the OneView® platform.

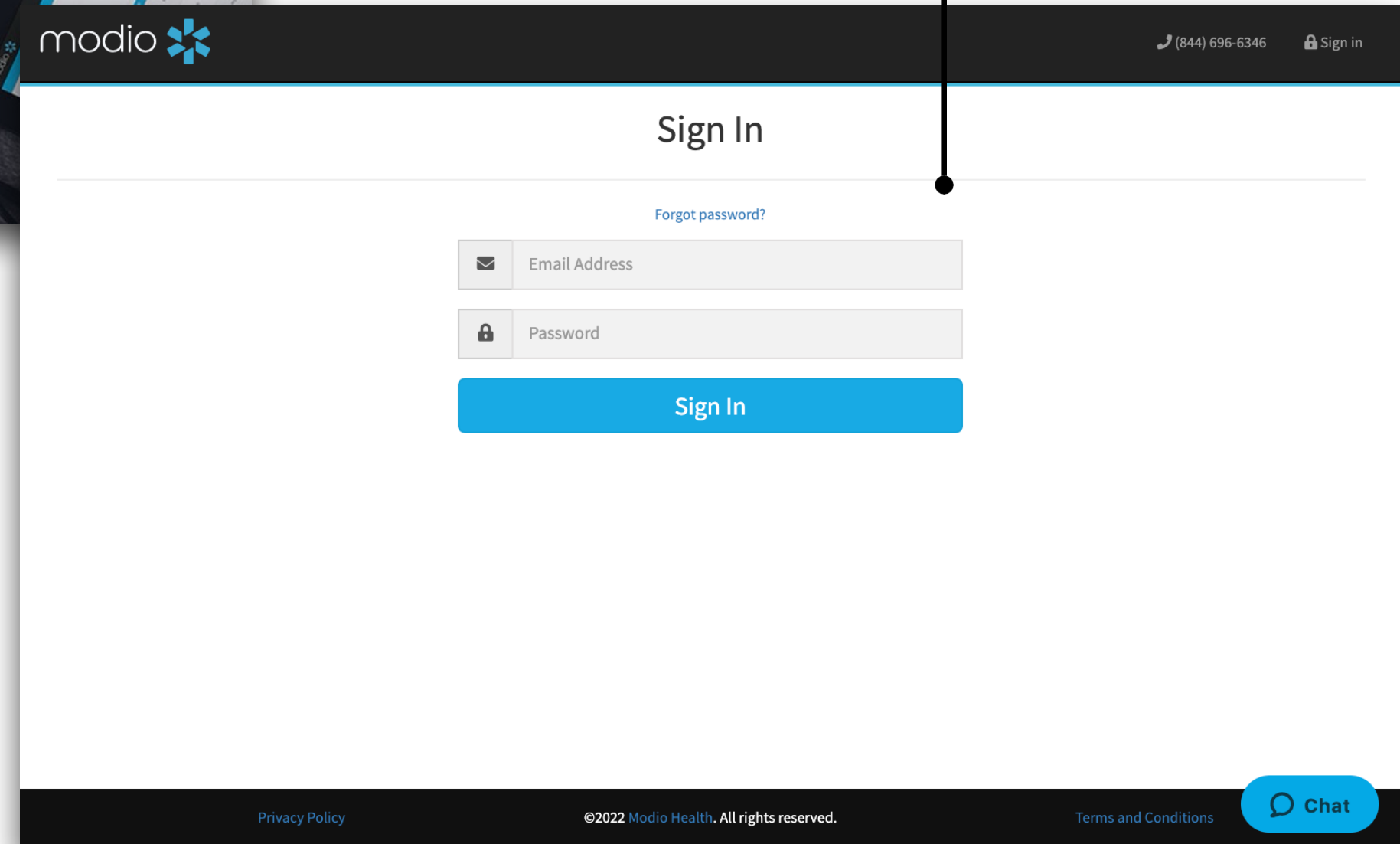


1. Navigate to Modio:

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

2. Log into OneView:

Enter in your username & password. Contact the Modio Support team if you have not received your login information yet by emailing: Support@modiohealth.com



The screenshot shows the OneView Coordinator Toolbar interface. At the top, there is a navigation bar with the Modio logo and user information: "Welcome Yas Givechi", "Support", "Modio U", "New Features", and "Sign out". Below this is a secondary navigation bar with tabs: "Team", "Forms", "Tracking", "Logins", "Tasks", and "Notes". The main header area displays "Modio Health Master Practice (DEMO) (San Francisco, CA)" with "Add Provider" and "Message" buttons. A dropdown menu shows "OneView V2 New". Below the header is a filter bar with tabs: "All", "Credentialing Committee", "Dental", "Emergency Medicine", "MD DO", "MEC Review", "Onboarding", "Pediatrics", and "TeleMedicine". The main content area is a table of providers with columns for "Provider", "Tags", "Compliance", and "Actions".

Provider	Tags	Compliance	Actions
Family Health Care - FAC No Specialty NPI# 1548200181		12 alerts	[Action icons]
Abakporo, Theophine David - MD Acupuncture NPI# 1972564813	Dental MD DO	7 alerts	[Action icons]
Abate, Mark S - MD Hematology Oncology NPI# 1588778674		11 alerts	[Action icons]
Abele, Jennifer B - MD Allergy and Immunology NPI# 1073502779	Credentialing Committee Emergency Medicine	9 alerts	[Action icons]
Abrams, Pamela - MD Pediatric Endocrinology NPI# 1851502215		5 alerts	[Action icons]
Abroon, John David - MD Hospital Medicine - Internal Medicine NPI# 1588750434	Credentialing Committee Emergency Medicine MD DO	31 alerts	[Action icons]

At the bottom of the table, there is a pagination control showing "1" of "1" items, "200 items per page", and "1 of 141 of 141 items". A "Chat" button is located in the bottom right corner.

OneView Toolbar Key:

Coordinator indicator: When you are logged in you will see your name displayed here. Your email address is a unique identifier. This means that your email address may not be repeated when creating additional coordinator and provider profiles.

Support: The support tab houses additional tip guides on all the OneView features. Click here to explore those guides and keep checking back in as we update the content frequently. You will also find contact information and other support services.

ModioU: This tab gives you access to a library of pre-recorded videos. There are in-depth videos for your favorite features within OneView. You will also find schedules for our live ModioU courses, along with a link to the course registration page.

New Features: Check out this tab every 2nd or 3rd Thursday of the month for a summary of updates and improvements that have been made to the system over the last two weeks.

Sign out: Remember to sign out of OneView when you are done with your session.



The OneView® Team Dashboard

When you log in, you'll see your Team in the OneView® Provider Dashboard. From here, you will have access to your provider credentialing profiles as well as other OneView® features.

OneView Coordinator Guide The Team Dashboard

Team Views:
If you manage multiple teams, click this arrow to switch views.

OneView v2:
Manage compliance and more for your team here.

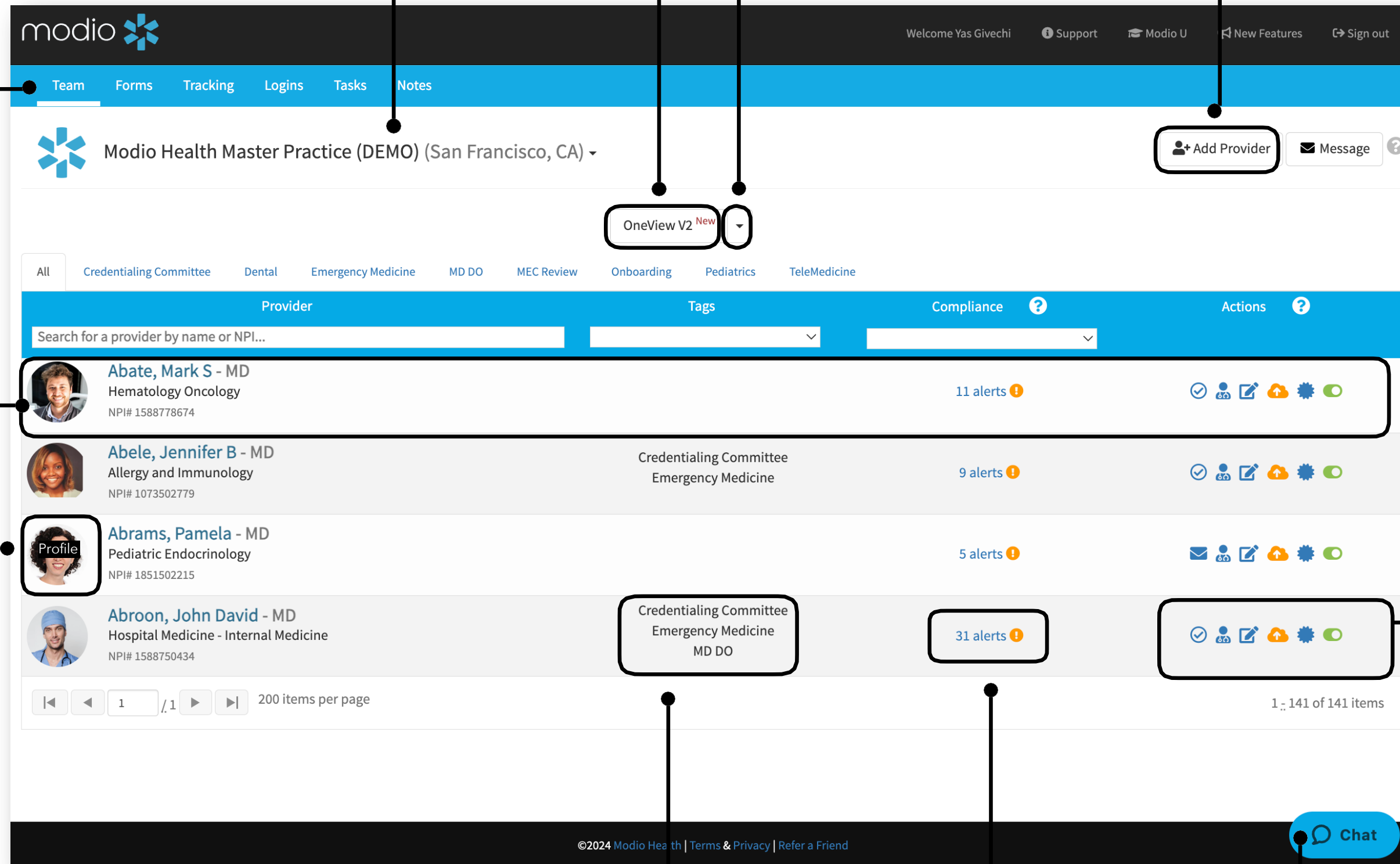
Reports:
Use the dropdown arrow to access your Team reporting options.

Add Provider:
Use our 2-step process to add providers to your team roster.

Team:
Welcome to your Team Dashboard! See your Team name here and your provider roster below.

Credentialing Profile:
Click your provider's name to open the entire credentialing profile.

Profile Cards:
To view a provider's profile card, hover over the providers initials and click "profile."



OneView Actions Key:

- New Invitation**
Indicates new provider. Click to invite.
- Accepted Invitation**
Indicates provider has completed registration.
- Incomplete Profile**
Indicates provider has started their profile.
- Complete Profile**
Indicates provider has completed their profile.
- Manage Credentials**
Securely manage a provider's credentials.
- Edit**
Edit provider Tag(s), Job Title, Team(s), Specialty List, and Notes.
- Upload Documents**
Securely upload and manage documents.
- CME**
Track provider CME goals and credits.
- Active/Inactive**
Make a provider active or inactive (does not delete credentialing data).

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

Compliance Issues:
View individual provider alerts here.

Live Chat:
Our live chat support is available from 8 am - 6 pm EST (Mon-Fri).



Team Navigation Bar

Here is an introduction to the 5 core modules that make up the Team Navigation Bar.

The screenshot shows the Modio OneView dashboard for 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. The top navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below this, there are tabs for various specialties: 'All', 'Credentialing Committee', 'Dental', 'Emergency Medicine', 'MD DO', 'MEC Review', 'Onboarding', 'Pediatrics', and 'TeleMedicine'. The main content area is a table with columns for 'Provider', 'Tags', 'Compliance', and 'Actions'. The table lists several providers with their names, specialties, tags, and alert counts.

Provider	Tags	Compliance	Actions
Family Health Care - FAC No Specialty NPI# 1548200181		12 alerts	[Icons: Mail, Add, Edit, Upload, Settings, Toggle]
Abakporo, Theophine David - MD Acupuncture NPI# 1972564813	Dental MD DO	7 alerts	[Icons: Check, Add, Edit, Upload, Settings, Toggle]
Abate, Mark S - MD Hematology Oncology NPI# 1588778674		11 alerts	[Icons: Check, Add, Edit, Upload, Settings, Toggle]
Abele, Jennifer B - MD Allergy and Immunology NPI# 1073502779	Credentialing Committee Emergency Medicine	9 alerts	[Icons: Check, Add, Edit, Upload, Settings, Toggle]
Abrams, Pamela - MD Pediatric Endocrinology NPI# 1851502215		5 alerts	[Icons: Mail, Add, Edit, Upload, Settings, Toggle]
Abroon, John David - MD Hospital Medicine - Internal Medicine NPI# 1588750434	Credentialing Committee Emergency Medicine MD DO	31 alerts	[Icons: Check, Add, Edit, Upload, Settings, Toggle]

At the bottom of the page, there is a footer with the URL 'https://www.modiohealth.com/physicians/', copyright information '©2024 Modio Health | Terms & Privacy | Refer a Friend', and a 'Chat' button.

OneView Dashboard Key:

Teams: Here you will find your home page along with your entire team roster.

Forms: Access all the forms which your organization has submitted to be mapped. Mapped forms which allow you to automatically pull data from your provider's profile and have it pre-populated onto your form/application.

Tracking: A workflow management tool for your coordinators to track all steps and progress while credentialing. Here, everything will be fully customizable to match your exact steps and workflows.

Logins: Securely store usernames and passwords for any website that will be managed on behalf of your organization or providers.

Tasks: This useful feature creates reminder notes or creates basic to-do lists.

Notes: Here you will find an aggregate list of all notes added to any provider, in all sections of their profile, by all users on your team.



Adding New Providers

Use our 2-step process to quickly add new providers to your Team roster. The add provider feature is available in both v1 and v2.

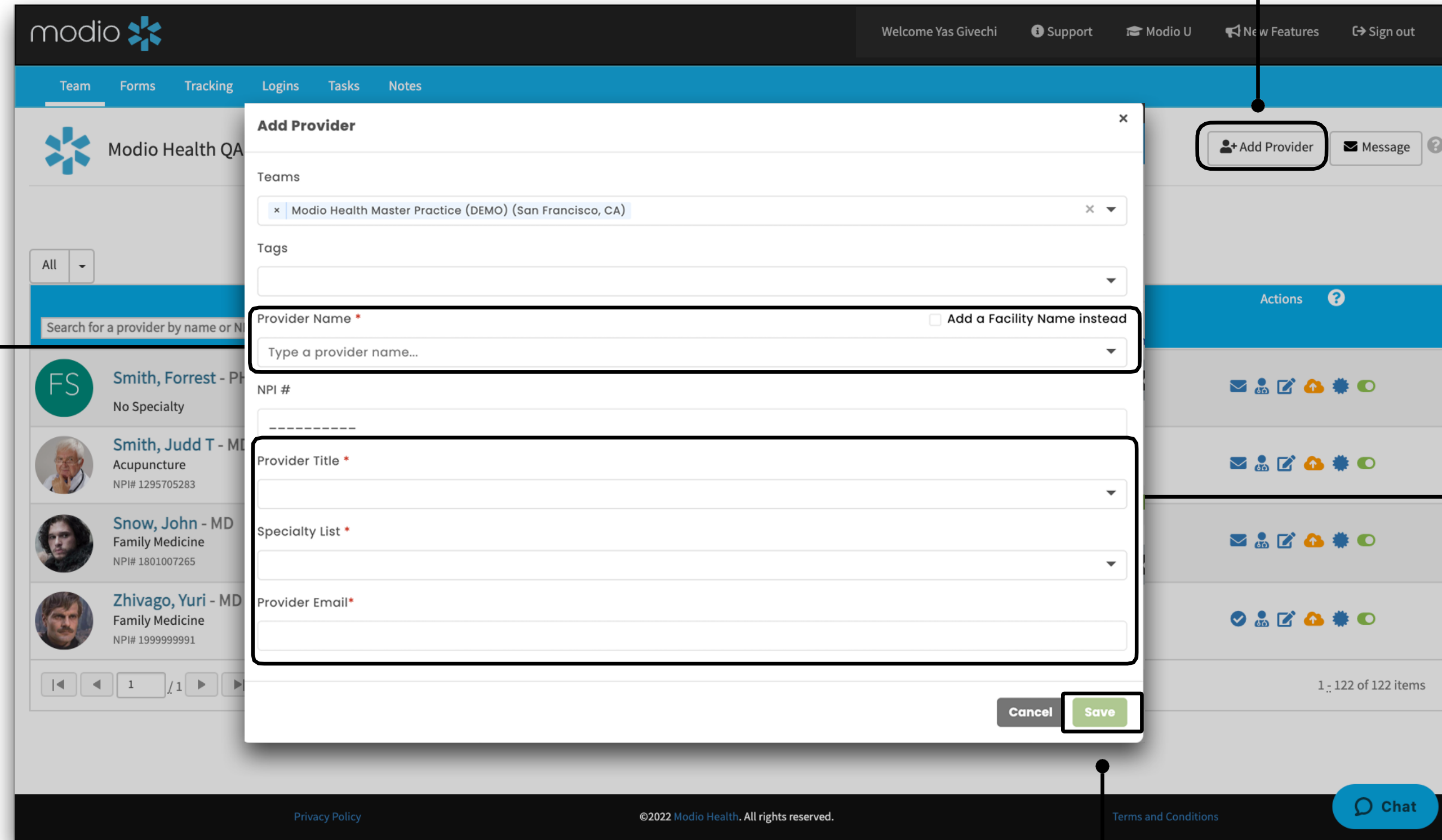
Start Step 1

Add Provider:

Click this button to get started. This button is available from the Team page and the v2 home screen.

A Provider Name:

Fill in the name field. A dropdown list of potential matches from an existing provider database will appear. After double-checking the NPI and/or license number, select your provider from the list. If your provider is not found, see Slide #13.



B Provider Title, Specialty List, Provider Email:

Fill in the three remaining required fields: title, specialty, and email. (If you don't have your provider's email, use a placeholder with your provider's name: first.last@modio.email (e.g. john.smith@modio.email).)

Do not forget to click Save!

Start Step 2

Provider Search:

Type your new provider's name here to locate them on the provider roster within the team page.

Provider Profile Card:

Click on the provider's initials (or photo, if one has been uploaded) to open the "provider profile card."

Provider Photo:

Click on this icon to add or edit a photo of your provider.

Updater Icon:

Use the refresh icon to instantly pull credentialing data from one of the many primary sources we're integrated with. See the next slide (#13) for additional info.

Final Note:

Now that the verified data has been added to your new profile, continue to build out the profile until it is complete per your organization's standards.

The screenshot displays the Modio OneView V2 interface. At the top, the user is logged in as 'Yas Givechi'. The main navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The current view is for 'Modio Health QA (San Francisco, CA)'. A search bar is present with the placeholder text 'Search for a provider by name or NPI...'. Below the search bar, a list of providers is shown, including 'Smith, Forrest - PHA', 'Smith, Judd T - MD', 'Snow, John - MD', and 'Zhivago, Yuri - MD'. The 'Snow, John - MD' profile card is expanded, showing a 'Profile' icon, a photo placeholder, and a detailed information table. The table includes fields for NPI #, OIG, CAQH, Home Address, Primary Practice, Primary Affiliation, Professional School, Graduation Date, State Licenses, DEA Licenses, Controlled Substance, Board Certifications, Telemed Exp., and Provider Onboarding. A refresh icon is visible in the top right corner of the profile card. A yellow circle highlights the search bar, and a line points from the 'Provider Photo' text to the photo placeholder in the profile card. Another line points from the 'Updater Icon' text to the refresh icon in the profile card.

Updater Icon:

After running an updater, all available data from the source will be automatically populated on your provider's profile.

Adding a Provider

Tip #1-

Make sure to confirm your provider's **NPI** before adding – the provider database can include duplicate names.

Tip #2-

If your provider has had a name change, try looking under their previous name.

Tip #3 -

If your provider is not listed, click here to skip profile claim. This will create the profile without populating NPI, license number, or other data.

Provider Profile

Summary:

- Optimize the Add Provider process by leveraging our integration options up-to-date
- Existing database allows you to pull up to date information to add to your provider profiles

Notes:

Use the Edit action on the dashboard to update the provider notes displayed here.

NPI #:

Click on the NPI updaters button to get NPPES data in seconds. Accept the updates for practice address, state licenses, payors, education and more. The NPPES search will return:

- Current Practice Address – displays practice address
- Current License Info – displays licenses found
- Current Healthcare Payor Info – displays payors found

State Licenses:

View the provider's state licenses by state, number and last date updated.

- Primary Source Links** – click on the magnification glass to access state primary source sites.
- Info:** State abbrev. – number (type), expiration, last updated – use the "update" date value to verify when the data was last verified.

Telemedicine Experience:

Optional field found in Personal Info.

Provider Profile for Yuri Zhivago Jr., DPM — Internal Medicine

✕

Notes	Moving to new address in 3 weeks.			
NPI #	1234567890			
Primary Practice	Modio Health Demo (San Francisco, CA) 535 Mission St, San Francisco, CA 94105		Start Date 03/29/2018	
Primary Affiliation				
Professional School	Rush Medical College of Rush University (Chicago, IL)			
Graduation Date	06/30/1987	ECFMG? Yes		
State License(s)	CA - 123456789 (NP) exp. 11/30/2016 upd. 08/22/2018 (5 days ago) KS - KST1321 exp. 07/09/2017 upd. 05/04/2018 (4 months ago) NY - 1312321 (DPM) exp. 06/05/2018 (3 months ago) TN - TN-1342 exp. 07/27/2017 upd. 05/04/2018 (4 months ago) TX - J3501 (MD) exp. 01/19/2018 (7 months ago) VA - VA 123123 exp. 10/03/2020 upd. 05/04/2018 (4 months ago)			
DEA License(s)	CA - 987654321 exp. 01/01/2022 upd. 01/17/2018 (7 months ago)			
Controlled Substance License(s)	CA - CA092134 (MD) exp. 08/03/2019 upd. 01/17/2018 (7 months ago)			
Board Certification(s)	American Board of Internal Medicine Internal Medicine exp. 01/01/2016 American Osteopathic Board of Surgery Family Physicians			
Telemedicine Experience	3 Years			
Provider Onboarding	Incomplete Profile			

OK

Primary Practice:

Lists primary practice from Practice/ Employer section.

Primary Affiliation:

Lists primary affiliation from Hospital Affiliations section.

DEA Licenses:

Add DEA license(s): click on the updater icon to run a DEA search for:

- Current DEA Info
- Primary Source Verification PDF

Controlled Substance License(s):

Lists CSL license(s) from Licensure.

Common Questions

How do you look up the data from LN?

We look up data from LN using NPI to make sure we are bringing in data for the correct provider. Because of this, when you enter the provider name you will see a list of options with NPI included. We are actually doing a lookup with NPPES on the back end to validate the NPI before using it to look up data with LN. Pretty cool!

What will it look like?

The add provider window will look very similar to how it has in the past. You click the same place, and add the same data. You may notice the background looks a little different. This is because the updated add provider window is hosted on our OneView V2 platform, so you are getting a look at that. When you click **save**, you will be back on the Team page just as you were before.

How often is LN updated?

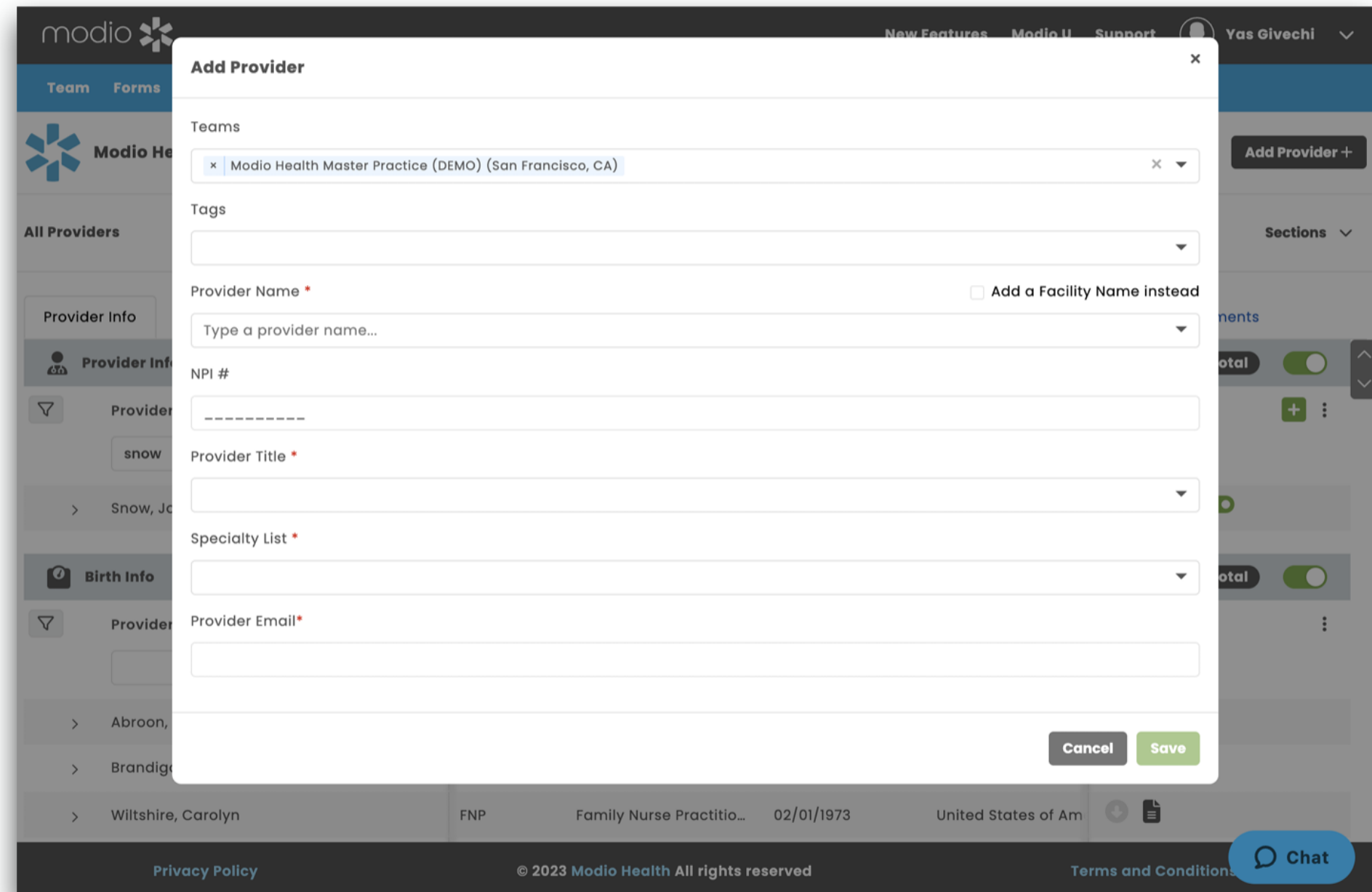
Modio receives continuous updates from LN via an API. Whenever they update their data, it is reflected in OneView. We always use the most up to date data we have from them to look up data for new providers.

Are all provider types included in the LN data?

Not all, provider types are included in LN data. The most common providers with NPIs are included: MD, DO, NP and PA.

What fields of data are eligible to come in?

Modio brings in state, DEA and controlled substance licenses and some board certifications from LN. We have found this data from LN to be accurate, but always recommend running Carbon on the licenses that are added. LN is a trusted source, but only the boards (which Carbon is integrated with) are true primary sources.



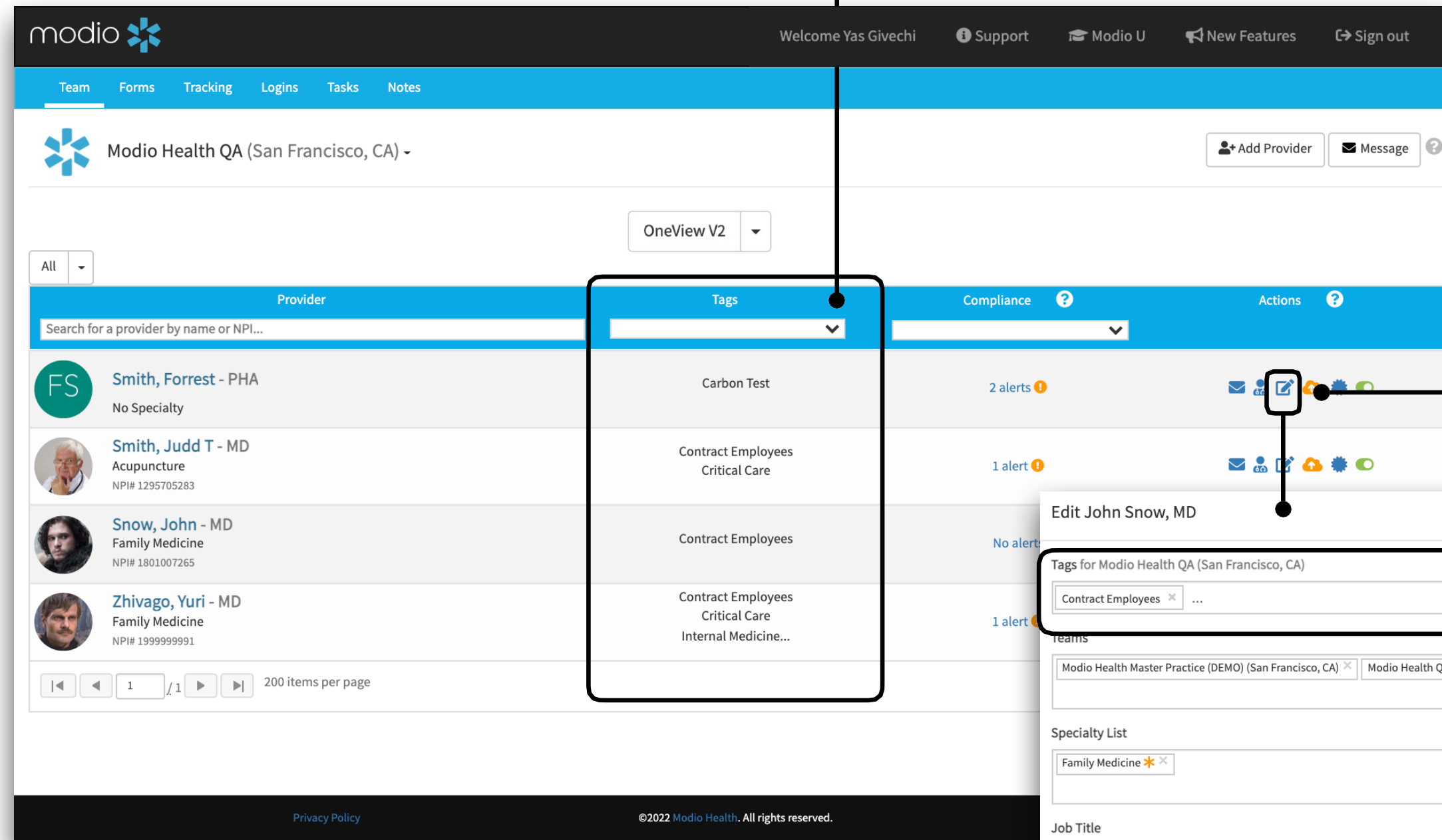


Tags

Use the v1 Tags feature to customize your team dashboard by creating sub lists within your provider roster.

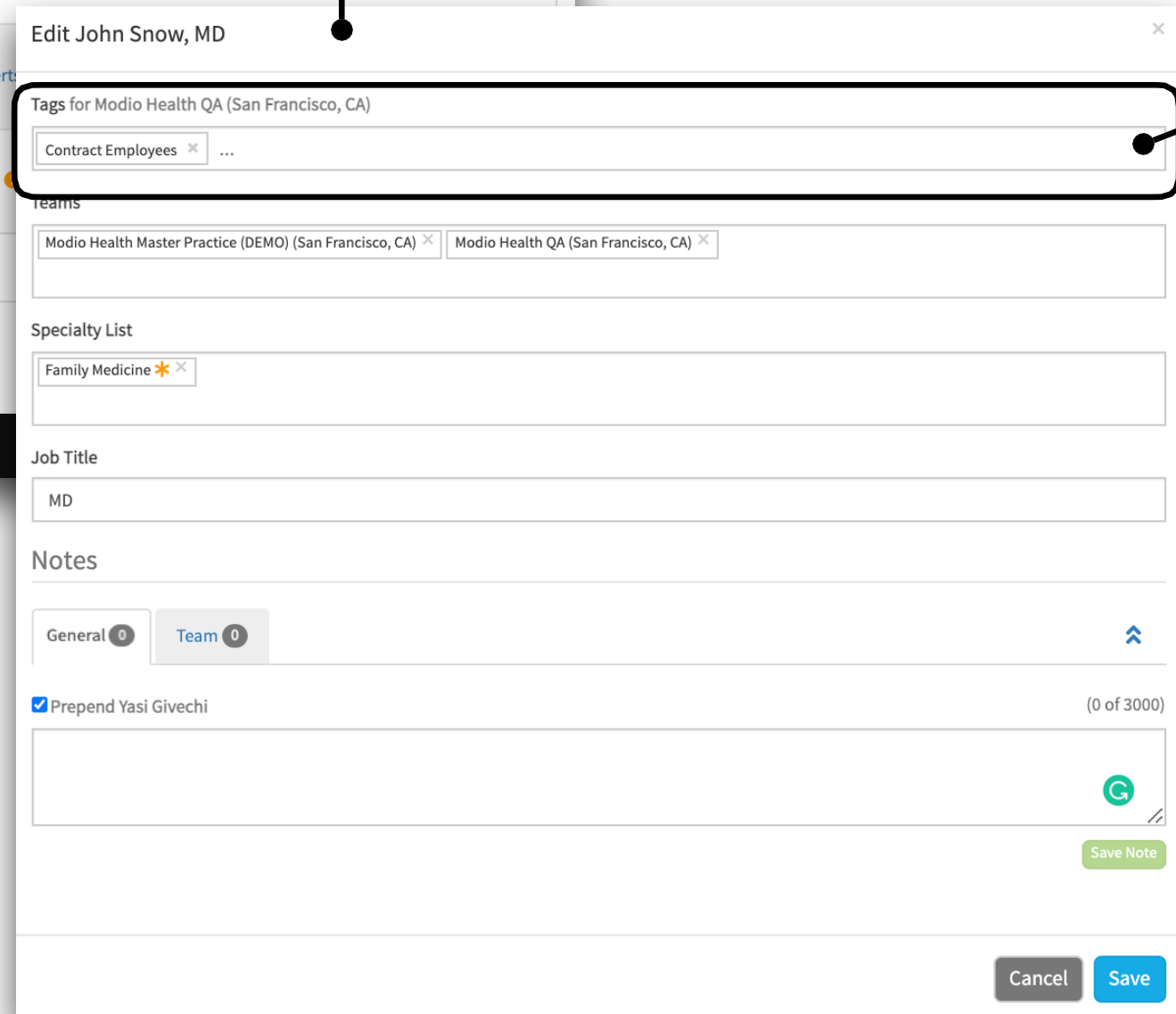
Tag(s): Add a tag(s) to your provider profiles to create sub-lists within your Team. View the tags in the Tag column of your team dashboard.

Filter: Use the Tags column to filter by a specific tag.



Start Step 1

Edit Icon: Click here to access the edit feature. The top section is where you can add and remove tags.



Adding a new Tag: Free text to enter in your tag and then click the "tab" button on your keyword to create a new tag. This tag will be available to use for any provider on your team.

Removing a Tag: From the edit popup select the small gray X on your tag and press save. All tags must be removed from a team in order to disappear from the tags list. Your tag will be removed from that profile. Tags that already exist in your Team can easily be added to additional providers; click into the tag field to view the dropdown list of existing tags.

Tags : Tips for success

- Providers can have more than one tag
- Use cases: Service locations, Title, Practice type, etc...
- V1 Tags also apply to v2 Personal info grid. See v2 tip guide for additional information.



Reports

Quickly run a variety of web and CSV reports from the reporting dropdown arrow.

Viewing Reports:

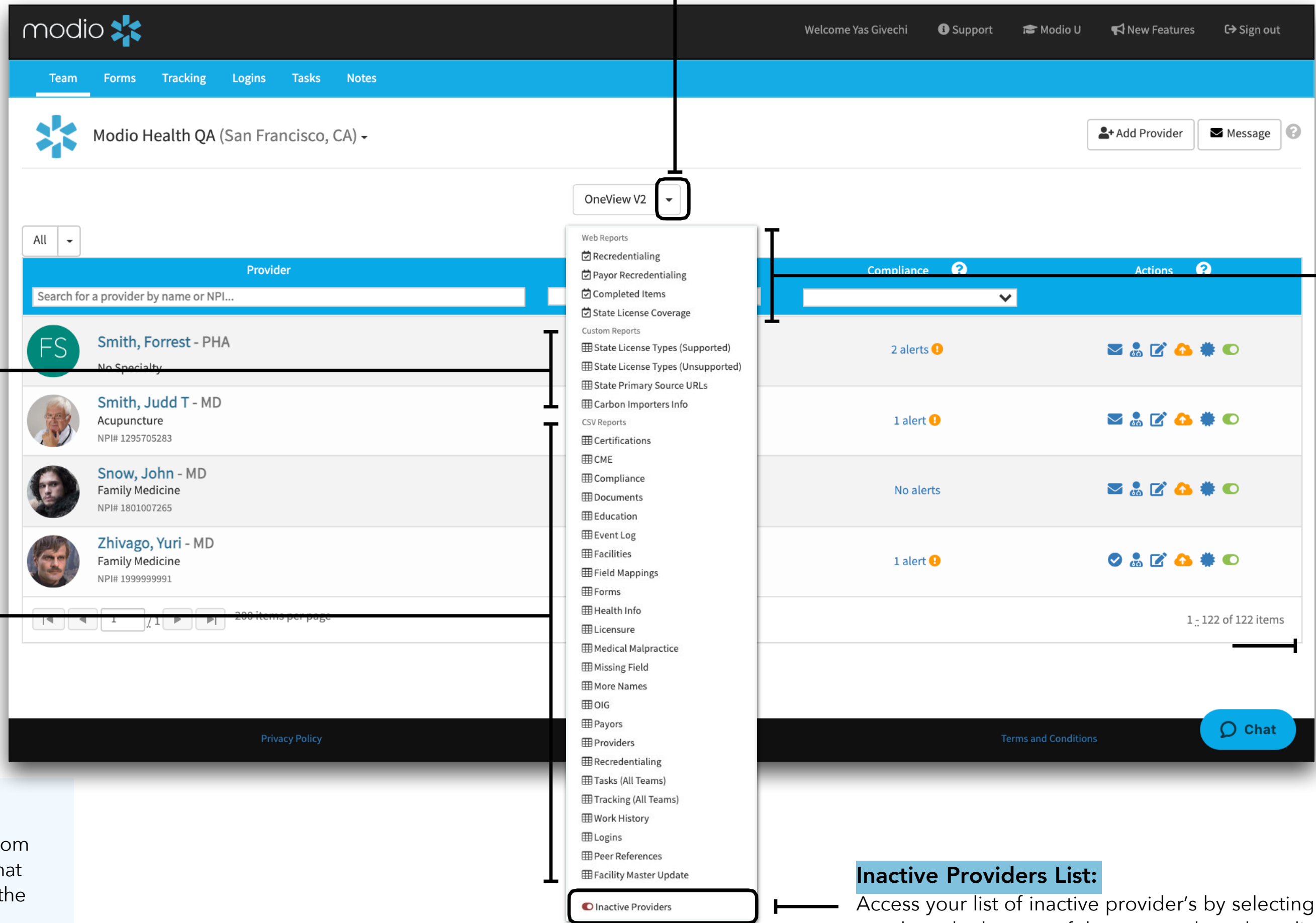
Use the dropdown caret to access your Team reporting options. Select from CSV and Web reports.

Custom Reports:

If your organization has a reporting need that is not met by an existing report, let our support team know and we can build a custom report just for you.

CSV Reports

These reports will download an Excel file to your computer's files.. All the columns can be sorted, filtered and manipulated through Excel.



Web Reports:

This section of the column stores the web reports. These reports will open a dashboard on your screen where you will view the data within your Team. You will be able to sort and filter each column, but not make edits or changes.

Key takeaway:

All the data in these reports is coming from you provider's profiles. The more data that is housed within your provider profiles, the more robust your reports will be.

Inactive Providers List:

Access your list of inactive provider's by selecting the red toggle at the bottom of the reports drop down list.

Viewing Reports:

Use the dropdown caret to access your Team reporting options. Select from CSV and Web reports.

CSV Reports

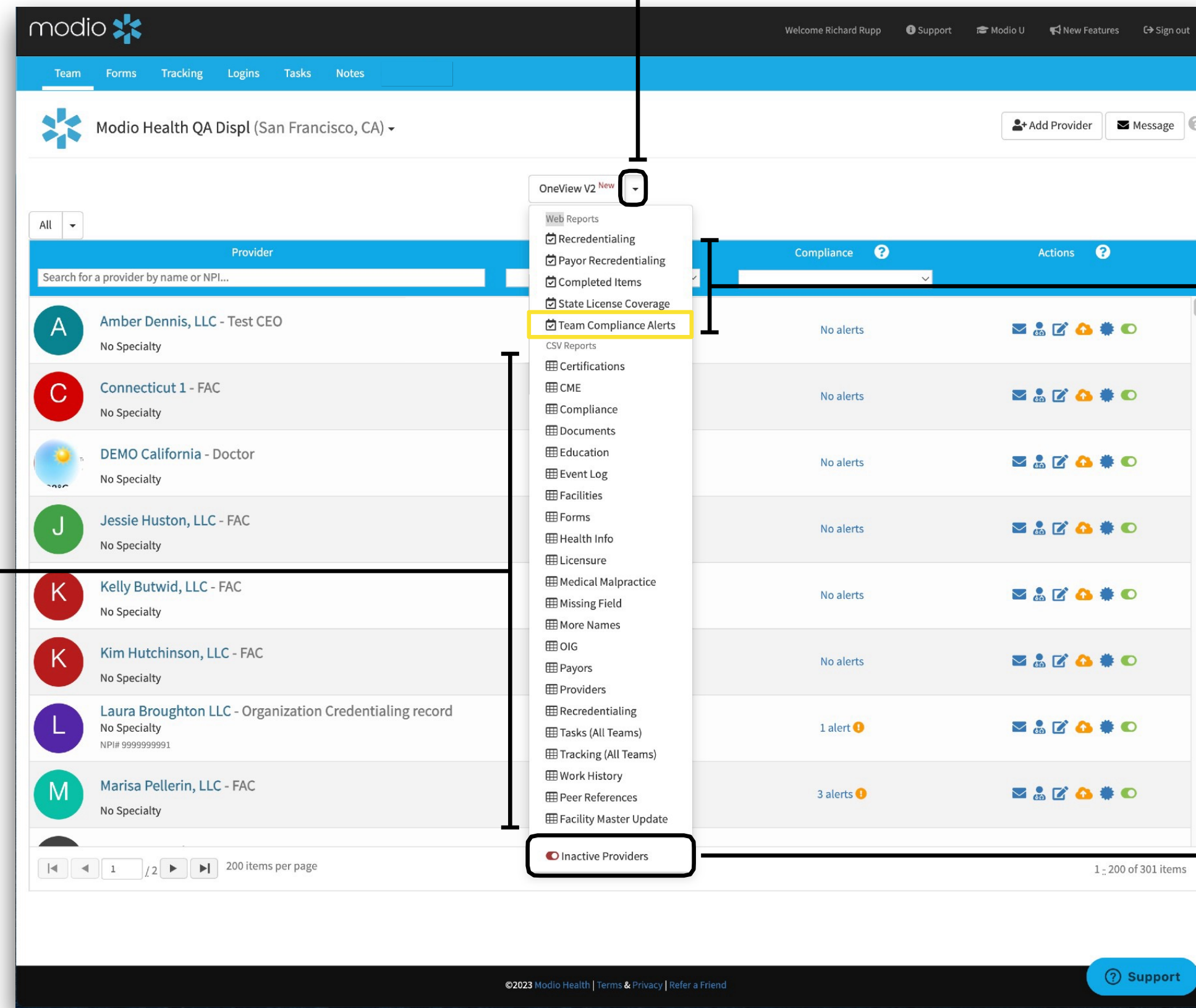
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Key takeaway:

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Credentialing Profile Audit

Learn to effectively and efficiently add data to the 13 sections of your provider's credentialing profile. Adding data to create complete profiles will help set your organization up for success.

Credentialing Sections:

Use our database of facility master records to add locations to your provider credentialing profiles.

The credentialing sections that utilize master record are:

- Education and Training
- Practice/Employer
- Facility Affiliations
- Work History
- Peer Reference

The screenshot shows the Modio OneView interface for a provider's credentialing profile. The main header identifies the provider as Yuri Zhivago MD. The left sidebar contains various credentialing sections, with a bracket highlighting 'Practice / Employer', 'Facility Affiliations', 'Work History', and 'Peer References'. The main content area displays a table of existing 'Practice/Employer' records. An 'Add Practice/Employer' modal window is open, showing a form with several fields. The 'Current Practice/Employer Name' field is highlighted with a red star, indicating it is a required field. Other fields include 'Office Type', 'Practice/Employer Type', 'Start Date', 'End Date', 'Staff Category', 'Patient Age Range', 'Patient Type', 'Accepting new patients?', 'Initial Credentialing Date', 'Last Credentialed Date', 'Credentialing End Date', 'Reappointment Start Date', 'Credentialing Status', and 'Notes'. A 'Prepend Yas Givechi' checkbox is also visible at the bottom of the modal.

Tip: The required fields are indicated by an orange star. The rest of the fields are optional for you to fill out according to your credentialing needs.

Current Practice/Employer:

Search for your practice location by address keywords, e.g. "1234 Smith". A dropdown list of potential matches will appear for you to select from. If your address does not generate a match, try to search by name. If the location is still not found, email us at Support@modiohealth.com so that we can create a new record for you. It is required that you include the name and address of the location you wish to add. You may include other optional data like NPI, TIN, and billing address (reach out to our team for a full list of fields).

Adding Data Tip:

Required fields will be indicated by a red star (*). The rest of the fields are optional for you to fill out according to your organizations credentialing needs. The data that is added to these different sections will all be accessed when using the reports feature as well as the forms module. Complete your credentialing profiles now to set yourself up for success in the future.

Credentialing Sections:

Add data to these sections: accessed when using the reports feature as well as the forms module. Complete your credentialing profiles now to set yourself up for success in the future.

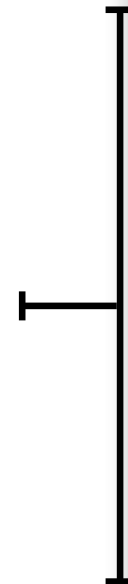
Start Step 1

Add + :

Use the green add button and a new modal will open for you to add your data.

Credentialing Sections:

All these sections have an option to add free text notes.



Add Notes:

Select the Public tab or the Team tab to determine who can see the notes. Once you have added notes to your provider profiles you will be able to use the Notes tab from the Team Navigation Bar to view them.

General Notes:

Everyone on your team will be able to view these notes. This includes your coordinators, read only/full access, and providers that may have access to the platform.

Team Notes:

These notes will be visible to coordinators within the specified team who have full access.



Documents

Upload, download, and share from the Documents section in your credentialing profiles.

Completed Forms:

View the forms completed for your providers here.

Upload:

Upload one or more files directly into your provider's file.

Download:

Download a zip file of all documents.

Email:

Share any document directly with your provider or any coordinator in your team.

The screenshot shows the Modio web interface for document management. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, the user is identified as 'Yuri Zhivago MD' with a dropdown arrow and the word 'Documents'. A secondary navigation bar contains 'Securely Upload, Download, and Email Documents.' Below this, there's a 'Documents' dropdown menu with 'Completed Forms' selected. The main content area is divided into sections: 'Personal Info' (with a count of 3), 'Health Info' (0), 'Malpractice' (0), 'Education' (0), and 'Miscellaneous' (2). Each section contains a table of documents with columns for Type, File Name, Date, Permission, Expiration Date, Status, and Actions. The 'Personal Info' section lists three documents: 'Color Photo' by Powell Alisha, 'Color Photo' by Udall Dana, and 'Curriculum Vitae (CV)' by Analytics Results. The 'Miscellaneous' section lists two documents: 'Kick-off graph 2:19:18 .png' and 'macbook.png'. On the right side of the interface, there are three buttons: 'Upload', 'Download', and 'Email'. A 'Chat' button is also visible at the bottom right. A sidebar on the left lists various document categories, with 'Documents' highlighted. A yellow circle labeled 'Start Step 1' points to the 'Documents' category. A 'Drag and Drop' box is also present, indicating where to drop documents or click to browse. Accepted file formats are listed as pdf, docx, txt, rtf, gif, jpg, png.

Start Step 1

Drag and Drop:

To upload a single document, simply drag and drop to the platform.

Batch Document Uploading:

Upload multiple files by clicking here.

*For a more detailed guide to Documents, please refer to the Documents Guide in the Support Section

File Type:

Select the file Type(s) from the drop-down menu if they did not auto populate.

Expiration:

Expiring or expired documents will show up in the Alerts or compliance section.

File Name:

Name your file. OneView will auto-detect the type of documents you upload if they are titled in this format: Provider name, Document type, EXP date. Example: "John Smith NY State License exp 12312022."

Permissions:

General - Visible to the provider and to any coordinators on the team.

Coordinator Only - Visible to only Coordinators on the team.

The screenshot displays the 'File Uploads for Leah Sanborn MD' modal window. It features a table with the following data:

File name	Size	Type	Expiration	Not Applicable?	Permission
Kirk Heath ABMS EXP 01012021	386.29 KB	Board Certification	01/01/2021	<input type="checkbox"/>	General
Kirk Heath DEA Utah EXP 01012021	100.73 KB	DEA	01/01/2021	<input type="checkbox"/>	General
Kirk Heath Diploma EXP 01012021	348.22 KB	Diploma	01/01/2021	<input type="checkbox"/>	General

The background interface shows the user profile for Yuri Zhivago MD with a sidebar menu containing categories like Personal Info, Education & Training, Practice / Employer, Facility Affiliations, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Healthcare Payors, Health Info, Event Log, CME, Documents, and Summary. A 'Documents' section is visible with a table listing items like 'Color Photo', 'Curriculum Vitae (CV)', and 'Miscellaneous'.

*For a more detailed guide to Documents, please refer to the Documents Guide in the Support Section

To avoid manually entering details like your file type and expiration date, you can use our built-in formatting system to have those details grabbed right from your file's original name.

For example, you can name a file like this on your computer: 'John Doe CV EXP 01022022.' When you upload that file to our platform, it will automatically fill in the category and expiration date (Curriculum Vitae expiring on 01/02/2022).

Below is a formatting guide for naming your files:

1)First Name Last Name Document Type EXP MMDDYYYY. (MMDDYY is also acceptable.)

2)You can separate each word with a space, or any punctuation in this list:

- period (.)
- underscore (_)
- hyphen (-)
- plus (+)

Use the guide to the right to help you name your files appropriately. Following these guides will help organize both your computer files and your Modio files.

Document Type	Possible Names	Example (First Name Last Name Document Name EXP MMDDYYYY)
Curriculum Vitae (CV)	cv, resume, vitae	Jane Doe CV EXP 01022022
Color Photo	photo, image	Jane Doe Photo EXP 01022022
PPD Test Results	ppd	Jane Doe PPD EXP 01022022
Certificate of Insurance (COI)	coi, insurance	Jane Doe COI EXP 01022022
ECFMG Certificate	ecfmg	Jane Doe ECFMG EXP 01022022
MD Diploma	diploma, school	Jane Doe Diploma EXP 01022022
Residency, Internship, Fellowship Certificates	residen, resident, residency, intern, fellow	Jane Doe Residency EXP 01022022
Social Security Card	ssn, social	Jane Doe SSN EXP 01022022
Immunization Information	immun, flu	Jane Doe Immun EXP 01022022
Case Logs	case, logs	Jane Doe Case EXP 01022022
Board Certification Certificate(s)	board, abms	Jane Doe ABMS EXP 01022022
NPDB Self-Query	npdb	Jane Doe NPDB EXP 01022022
Facility Applications	app	Jane Doe App EXP 01022022
Facility Attestations	attest	Jane Doe Attestation EXP 01022022
Payor Contracts	payor, medicare, medicaid, aetna, etc. (get payor list)	Jane Doe Payor EXP 01022022
Driver License Copy	dl, driver	Jane Doe DL EXP 01022022
Passport Copy	passport	Jane Doe Passport EXP 01022022
DD214	dd214	Jane Doe dd214 EXP 01022022
State Controlled Substance Document	csl	Jane Doe CSL EXP 01022022
DEA	dea	Jane Doe DEAI EXP 01022022
State Medical License	license	Jane Doe License EXP 01022022
Other Certs (ATLS, BLS, PALS etc)	atls, acls, arls, bls, pals, nals, nccpa, also, corec, cpr, nrp	Jane Doe ATLS EXP 01022022
Exam Scores	score, usmle	Jane Doe Score EXP 01022022
Malpractice Case Response	malpractice, mal practice	Jane Doe Malpractice EXP 01022022
Tax Documents	tax, w9, w-9	Jane Doe Tax EXP 01022022
Delineation of Privileges (DOP)	dop, privilege	Jane Doe DOP EXP 01022022
Reference Letters	peer, refer	Jane Doe Peer EXP 01022022
Modio Health	admin	Jane Doe Admin EXP 01022022
Background Check	bgc, background	Jane Doe Background EXP 01022022
CME	cme	Jane Doe CME EXP 01022022
AMA Profile	ama profile	Jane Doe AMA Profile EXP 01022022
Facility Contracts	contract	Jane Doe Contract EXP 01022022
Other	"unknown"	Jane Doe Unknown EXP 01022022

*For a more detailed guide to Documents, please refer to the Documents Guide in the Support Section



Modio University & Support Page

Take advantage of a wide arrange of Tip Guides,
Live Trainings, and other OneView resources.

modio logo | Welcome Yas Givechi | Support | Modio U | New Features | Sign out

Team | Forms | Tracking | Logins | Tasks | Notes

Modio Health QA (San Francisco, CA) - Add Provider | Message

OneView V2

All

Provider	Tags	Compliance	Actions
Smith, Forrest - PHA No Specialty	Carbon Test	2 alerts	[Icons]
Smith, Judd T - MD Acupuncture NPI# 1295705283	Contract Employees Critical Care	1 alert	[Icons]
Snow, John - MD Family Medicine NPI# 1801007265	Contract Employees	No alerts	[Icons]
Zhivago, Yuri - MD Family Medicine NPI# 1999999991	Contract Employees Critical Care Internal Medicine...	1 alert	[Icons]

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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.

Support

Hours: 8 am - 4 pm EST (Mon-Fri)
 Phone: 844-636-6364
 Email: support@modiohealth.com
 ModioU Resources & Assessments
 Modio University

OneView Browser Compatibility

Recommend Chrome, Safari, and Firefox
 Not Recommended Internet Explorer or Microsoft Edge

Help Guides

- The Guide: OneView
- The Guide: Add New Provider Experience - NEW!
- The Guide: UDDI/USA Guide - NEW!
- The Guide: Copy Feature - NEW!
- The Guide: Credentialing Quick Guide - OneView 101 Overview
- The Guide: Master Records vs PAC Profiles vs OneView Teams
- The Guide: Forms: Requesting New Forms
- The Guide: Forms: Using Forms
- The Guide: Facility Management
- The Guide: Logins
- The Guide: Profiles: Getting Started for Coordinators
- The Guide: Team Management - Tagging Providers
- The Guide: Provider Not Active
- The Guide: Documents
- The Guide: Documents: Top Guide
- The Guide: Reports

Updates

Request Type	Estimate
New Form Template	3 - 7 Business Days
Update Form Template	1 - 3 Business Days
New Tracking Process	1 - 3 Business Days
Tracking Revisions & Corrections	3 - 7 Business Days
New Update Facility	1 - 2 Business Days
New General Specialty	1 - 2 Business Days
New Title/Username Type	Thursday Release
New Board/Additional Cert	Thursday Release
New HealthCare Paper	Thursday Release
New Document Type	Thursday Release

Support: The support tab houses additional tip guides on all the OneView features. Click here to explore those guides and keep checking back in as we update the content frequently. You will also find contact information and other support services.

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MODIO UNIVERSITY

Welcome to Modio University!

Through Modio University, you will have full access to live, personalized training sessions with the opportunity to ask any questions about the platform and other credentialing topics. In just a matter of hours, you'll be an expert on all things OneView!

Register for courses [here](#).

View the course descriptions and register from our current course directory.

Recorded Courses:

Course Title and Link	Course Description
Course 101: OneView Team Management including navigation tips & tricks.	Our most in-demand course is now available! Regardless of whether you are new to the Modio Family or a long-time user, this training is designed to equip you with the tools you need to achieve success. The course includes fundamental OneView navigation techniques, provider profile management, and other essential topics. Furthermore, we'll provide you with valuable tips and tricks to maximize your OneView experience.
Course 102: Intermediate Features and Developing Workflows	This course will cover navigation tips and tricks and highlight some of our favorite features within OneView. This is a great opportunity for any new team members to your organization, and for any coordinators who would a review of our platform and the features that we offer.
Course 103: Tracking Management & Best Practices	Let's take a look at the OneView tracking feature. Course 103 will cover the tracking process from start to finish, including how to manage your tracking process.

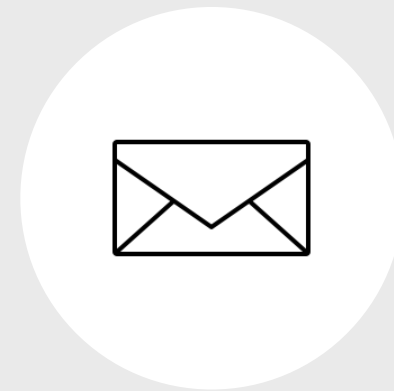
Modio U: This tab gives you access to a library of pre-recorded videos. There are in-depth videos for your favorite features within OneView. You will also find schedules for our live ModioU courses, along with a link to the course registration page.

This tip guide was designed as a high-level overview of the OneView dashboard and covers all topics that are detailed in the OneView 101 Training Course. You can view more in-depth tip guides for each section of OneView on the Support page or by clicking the links on the table of contents.

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346