



OneView[®]

Managing Payors in OneView:
A Credentialing Team Guide



Managing Payors in OneView: A Credentialing Team Guide

This guide explains how to use the Payor section in OneView and defines each available field to help credentialing teams navigate the platform effectively.

Sections:

Part 1: The Payor Section - Defining the column headers and data points.

Part 2: Tracking Feature for Payor Workflows

Part 3: Best Practices and Helpful hits

PART 1

Adding & Editing a Payor Record

Once a payor has been added to your profile, there are many options to add data. Keeping the correct data will support your organization in completing payor workflows

Column Headers: Use column headers to quickly view, and filter by basic payor details.

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Jennifer Abele MD ▾ Healthcare Payors

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Healthcare Payors83Add +CopyEmail

Payor Name	State	Provider #	Effective Date	End Date	Status	Actions
2020 EyeCare		-	06/05/2024	-	Pending	
UNC Cancer Hospital (450 W Dr, Chapel Hill, NC 27599)		-	03/07/2024	-	Active	
Absolute Injury & Pain Physicians (2160 Dunn Ave, Jacksonville, FL 32218) TIN: 562612383 Group NPI: 1649322215		-	-	-	-	
Medexpress Urgent Care - Parkersburg (2832 Pike St, Ste 1, Parkersburg, WV 26101)		-	-	-	Denied	
AdventHealth Avista (100 Health Park Dr, Louisville, CO 80027) Group NPI: 1518170893		-	-	-	-	
AARP	AK	-	06/08/2024	-	Revalidation	
Sentara Careplex Hospital (3000 Coliseum Dr, Hampton, VA 23666)		-	-	-	-	
Medexpress Urgent Care - Parkersburg (2832 Pike St, Ste 1, Parkersburg, WV 26101)		-	-	-	Denied	
CareFirst - Medicare	AK	-	-	-	Closed Network	
AdventHealth Avista (100 Health Park Dr, Louisville, CO 80027) Group NPI: 1518170893		-	-	-	-	
Brookdale Virginia Beach (937 Diamond Springs Rd, Virginia Beach, VA 23455)		-	-	-	-	
Aetna - Preferred	AL	-	-	-	Suspended	
Duke Raleigh Hospital (3400 Wake Forest Rd, Raleigh, NC 27609)		-	-	-	Termed	

Payor Name - The insurance company or payor (e.g., Aetna, BlueCross).

State - The state in which the credentialing is applicable.

Provider # - The provider ID assigned by the payor.

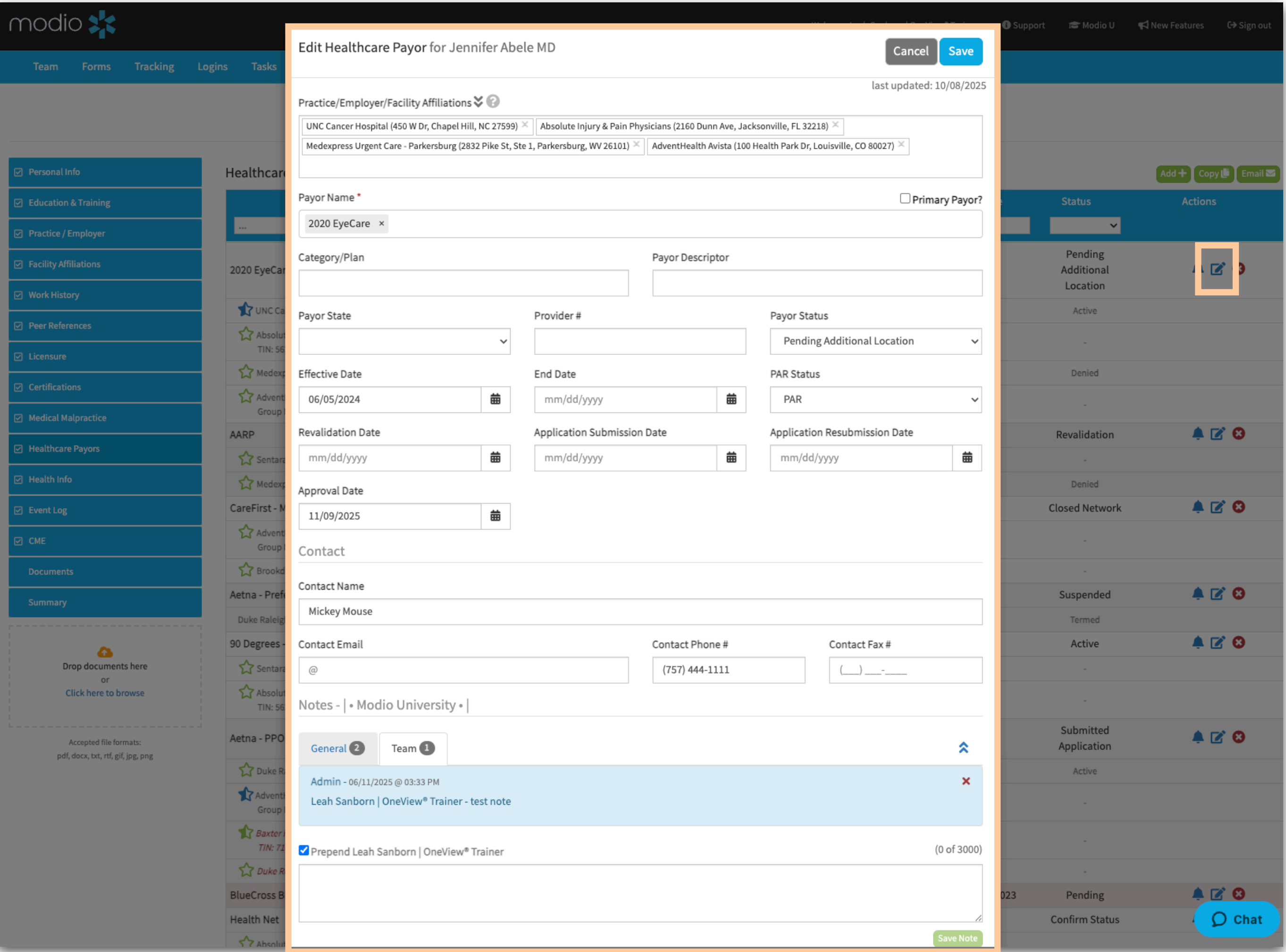
Effective Date - The start date of participation with the payor.

End Date - The expiration or recredentialing date.

Status - Pending, Active, or other stages of credentialing.

Actions - Edit, delete, or enable/disable alerts (bell icon).

Editing a Payor Record: Once a payor has been added to your profile, there are many options to add data. Keeping the correct data will support your organization in completing payor workflows.



***Note: All required fills will have a red asterisk beside them. Remaining fields are optional.**

- **Practice/Employer/Facility Affiliations** – Links the payor to a corresponding practice/facility. Locations must be added to the location sections prior to linking them to Payors.
- **Payor Name:** Select a payor from the dropdown.
- **Pro Tip:** Keep your Payor section organized by entering each payor name only once – One Payor Entry per payor application submitted. The keeps the data in one place and eliminates duplicate work.
- **Category/Plan** – Free type a category or plan type (e.g., PHO, PPO, Medicaid).
- **Descriptor** – Capture any odd rules – Example, facilitylevel limitations or unique documentation requirements.
- **Provider #** – Unique ID assigned by payor.
- **Payor Status** – Choose from Pending, Active, etc.
- **Pro Tip:** The status list is very long – Decide as an organization what statuses your team will use and what they mean to your organization to stay organized.
 - Credentiaing cycle dates.
 - Effective Date
 - End Date
 - Revalidation Date
- **Application Dates** – Track submission, resubmission, and approval.
- **Contact Info** – Store payor rep contact info here for easy communication.
- **Notes** – Add helpful context for your team to view.
- **Documents** – Upload and store any supporting documents related to the specific payor and provider. **Example:** Approval or Renewal letters.

Location Specific Details: As locations are added to Payors, use these additional location based fields to track location level data

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Drop documents here or
Click here to browse

Accepted file formats:
pdf, docx, txt, rtf, gif, jpg, png

Healthcare Payor Management

UNC Cancer Hospital (450 W Dr, Chapel Hill, NC 27599)

Absolute Injury & Pain Physicians (2160 Dunn Ave, Jacksonville, FL 32218)

Medexpress Urgent Care - Parkersburg (2832 Pike St, Ste 1, Parkersburg, WV 26101)

AdventHealth Avista (100 Health Park Dr, Louisville, CO 80027)

last updated: 10/08/2025

CancelSave

Practice/Employer/Facility Affiliations

Medexpress Urgent Care - Parkersburg (2832 Pike St, Ste 1, Parkersburg, WV 26101)

Credentialing

Initial Credentialing Date

Last Credentialed Date

Credentialing End Date

Process Start Date (Optional)

mm/dd/yyyy

mm/dd/yyyy

mm/dd/yyyy

mm/dd/yyyy

Historical Credentialing Date

mm/dd/yyyy

Location-specific

Provider #

Effective Date

End Date

Payor Status

PAR Status

PAR Date

Revalidation Date

Application Submission Date

Payor Descriptor

Application Resubmission Date

Approval Date

Fee Schedule Name

Fee Schedule Amount

Notes

General0Team0

Prepend Leah Sanborn | OneView® Trainer

(0 of 3000)

Save Note

Payor Name *

Primary Payor?

2020 EyeCare

SupportModio UNew FeaturesSign Out

Add +CopyEmail

StatusActions

Pending Additional Location

Active

Denied

Revalidation

Denied

Closed Network

Suspended

Termed

Active

Submitted Application

Active

Pending Confirm Status

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Use the **Practice Employer/Facility Affiliation** field for that Payor, to link one or more locations to the same payor.

Pro Tip: Ensure that the locations are listed under the Practice/Employer and/or Facility Affiliation section of the provider's profile and linked to the facility master record, so they can be added to payors.

As a best practice, always include precise credentialing dates and status details for each location to ensure accuracy and consistency.

Fee Schedule Name / Amount – Track reimbursement terms.

PAR Status & PAR Date – Indicates participation status.

Credentialing Dates: Location Level

- Initial Credentialed Date
- Last Credentialed Date
- Credentialing End Date
- Process Start Date
- Historical Credentialing Date

PART 2

Tracking Feature for Payor Workflows

Use the Payor section in combination with the Tracking feature to ensure you don't miss a deadline again. Watch your Payor workflows and credentialing progress move forward with Payor tracking templates.

Tracking is a powerful tool that helps you and your team manage tasks more efficiently. Since it’s fully customizable, you can design workflows tailored to your specific payor processes.

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New Tracking for | • Modio University • |

Details

Priority *

Normal

Status *

Pending

Start Date *

10/17/2025

Use current date?

Due Date

mm/dd/yyyy

Completed Date

Owner *

Leah Sanborn | OneView® Trainer (leah.sanborn@modiohealth.com)

Tag(s)

Type *

Payor

Subtype *

Initial/Link to TIN

Recredentialing

Appeal

Change of Information

Claim Denial - Payor issue

EDI

ERA

EFT

Payor *

Select Payor...

Tracking Name *

Share (Read Only):

Provider *

Select a provider

Append to Tracking Name

Description

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- Type** – Select “Payor.”
- Possible Subtype Options** – Initial / Link to TIN, Recredentialing, Appeal, Change of Information, Claim Denial, EDI / ERA / EFT.
- Status** – Pending, In Progress, Complete, Archived.
- Pending** – The tracking has been created but not started yet.
- In Progress** – The tracking has been started and is actively being worked on.
- Completed** – All steps have a start and completed date entered. The workflow is complete.
- Archived** – Trackings that have been created but not finished. Example, tracking that was created in error or tracking that was started but there is no need to complete the workflow (e.g. provider no longer works for your org.)
- Due Date** – Track credentialing processes and assist in meeting deadlines.
- Owner/Assignee** – Assign team accountability.
- Owner** – Oversees the entire workflow. One owner per tracking.
- Assignee** – Assigned per step, each step can be assigned to the correct team member as needed.
 - Pro Tip:** To use tracking for healthcare payors, a location needs to be linked to that payor, as shown on slide 6.

Viewing Active Tracking Events

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+ Add Tracking

?

Shared Reports (Read Only) ▾

All

Client A

Demo

gjpdfjgipdf

New Test

Tag2

Test

Test1

Test2

ID	Priority	Type	Subtype	Owner	Name	Status	Step Due In	Assignee	Provider	Est. Due Date	Actions
1293504	Normal	Payor	Recredentialing	Danessa McSh...	1199SEIU National Benefit Fund - EVMS Audiology (207	In Progress	50 day(s)	Danessa McS...	Danessa Lee	01/24/2025	
1792440	Normal	Payor	Initial/Link to TIN	Brandon Holm...	Dr. Kirk Heath - Aetna AL Group A - Modio Health - OnD	In Progress	7 day(s)	Brandon Hol...	Kirk Heath	11/13/2025	
1185982	Normal	Payor	Initial/Link to TIN	Danessa McSh...	Medicare MD - Jamaica Hospital Medical Center (8900 '	In Progress	7 day(s)	Danessa McS...	Theophine Ab...	11/11/2024	
1246474	Normal	Payor	Initial/Link to TIN	Leah Sanborn ...	90 Degrees AZ PHO - St Anthony Hospital Lakewood (1	In Progress	6 day(s)	Leah Sanborn...	Leah Sanborn	12/20/2024	
535907	Normal	Payor	Recredentialing	Danessa McSh...	Aetna AZ PPO - Baxter Regional Medical Center (624 H	In Progress	6 day(s)	Danessa McS...	Jennifer Abele	04/24/2023	
569962	Normal	Payor	Recredentialing	Leah Sanborn ...	90 Degrees AZ PHO - University of Utah (201 President	In Progress	4 day(s)	Leah Sanborn...	Cierra Denning	05/02/2023	
1830664	Normal	Payor	Recredentialing	Brandon Holm...	1199SEIU National Benefit Fund - (AZ) Medix Infusion (	In Progress	1 day(s)	Brandon Hol...	teste teste	12/03/2025	
569961	Normal	Payor	Initial/Link to TIN	Leah Sanborn ...	90 Degrees AZ PHO - Sentara Careplex Hospital (3000 C	In Progress	0 day(s)	Leah Sanborn...	Cierra Denning	05/02/2023	

1

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200 items per page

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The tracking dashboard provides a realtime overview of all payor related tasks. You can filter by:

- Type (Payor)
- Subtype (e.g., Initial or Recredentialing)
- Status: Pending and In Progress are the default filters. (Additional filters include Archived and Completed)
- Provider or Group Name
- Assignee or Owner Name

Pro Tip - Use the “Name” column to filter by groups of payors. Type in the payor name (e.g. Aetna, Cigna, United..) and focus on one major payor at a time.

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Healthcare Payors 24

AddCopyEmail

Payor Name	State	Provider #	Effective Date ...	End Date	Status	Actions
90 Degrees - PHO	AZ	-	-	-	Denied	
St. Anthony Hospital Lakewood (11600 W 2nd Pl, Lakewood, CO 80228) Group NPI: 1750813325		-	-	-	-	
Duke Raleigh Hospital (3400 Wake Forest Rd, Raleigh, NC 27609)		-	-	-	-	
CareFirst - Medicare	AK	-	-	-	Pending	
Aetna - Preferred	AL	-	-	-	Active	
St. Anthony Hospital Lakewood (11600 W 2nd Pl, Lakewood, CO 80228) Group NPI: 1750813325		-	-	-	Active	
Vanderbilt Tullahoma Harton (1801 N Jackson St, Tullahoma, TN 37388-8259)		-	-	-	In Progress	
Duke Raleigh Hospital (3400 Wake Forest Rd, Raleigh, NC 27609)		-	-	-	-	
Aetna	AZ	-	-	-	-	
St. Anthony Hospital Lakewood (11600 W 2nd Pl, Lakewood, CO 80228) Group NPI: 1750813325		-	-	-	In Progress	
Vanderbilt Tullahoma Harton (1801 N Jackson St, Tullahoma, TN 37388-8259)		-	-	-	-	
1199SEIU National Benefit Fund	CA	-	-	-	-	
St. Anthony Hospital Lakewood (11600 W 2nd Pl, Lakewood, CO 80228) Group NPI: 1750813325		-	-	-	Submitted Application	

In a provider’s profile, under the Healthcare Payor section, you’ll see star icons next to payors with linked locations. These stars serve as quick links to your payor tracking workflows.

Pro Tip: A half-filled star means tracking is in progress, blue stars indicate a new or initial process, and green stars represent the recredentialing process. A star will never show as completely filled in.

PART 3

Best Practices & Helpful Tips for Payor Management



1. Effective & End Dates

- If no end date is listed, assume 3 years for Medicaid and 5 years for Medicare.
- Medicare calls it "Revalidation Date," most others say "Recredentialing Date."

2. Recredentialing

- Wait for payor notifications before recredentialing.
- CAQH is used by many payors, but not Medicare or Medicaid.

3. Payor Naming Standard

- Use one payor name and list subcategories in the Category/Plan field.
- Example: Use "Aetna" (not "Aetna PPO" and "Aetna Preferred" separately)
- Exception: Different states = different payors.

4. Tracking Subtypes

- Use the right subtype (Initial, Appeal, Change of Info, etc.) for clarity.
- Appeals are usually handled by billing teams.

5. Onboarding New Groups

- Always check if the practice is already contracted.
- If adding new providers, each requires an individual application.

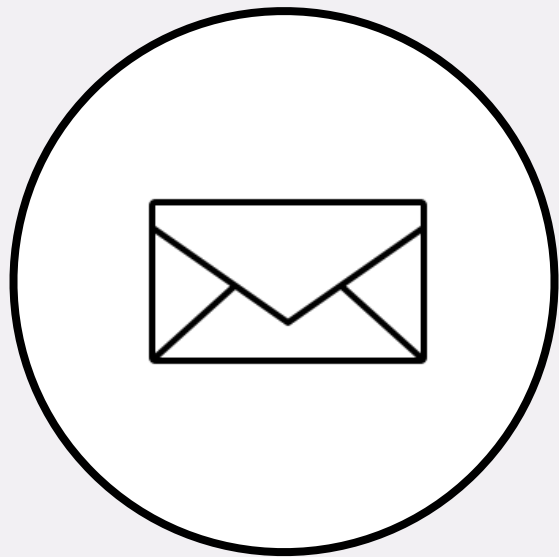
6. Unique Payor Quick Tips:

- Some payors enforce facility-level credentialing separate from provider enrollment. Always confirm.
- Use the bell icon to mute out-of-network payors without removing them from the provider's profile.
- Track CAQH pulls to know when payors are reviewing data.
- Keep provider addresses updated: mismatched zip codes = denied claims.

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346