

# OneView

Tip Guide: Logins



**Getting Started:** Use the Logins feature to store Usernames and Passwords for any accounts your organization manage for your providers or your team. This feature will help your team stay organized by keeping all logins in one place.

## Who can access Logins:

- Available to Full-Access Coordinators by Team.
- Visible to Providers who have access to their own profile through the Onboarding feature.

## **Team Logins:**

- Logins are Team level Profiles that live on more than 1 team will have different lists of Logins by Team.
- Logins are encrypted fields withing OneView audits are in place for any coordinators who access logins.
- Stay organized by storing all provider and coordinator usernames and passwords in one single secure location



# **Efficiency Tips:**

- 1. Update your Onboarding invite to request Login Details directly from your provider. When the provider enters their usernames and password from the Onboarding invite, the data will automatically be added to the Logins dashboard.
- 2. Store your team's shared passwords in the logins tab. If you currently use a shared spreadsheet, enter those login details here. If your team has an FAC profile, you can use that as the Account Owner.
- 3. Use the notes section in Logins to add additional information for your team to view.

#### OneView: Tip Guide - Login Dashboard



Use the Logins tab to store usernames & passwords for any accounts that you manage for your providers and your team. Logins is a Team level feature and is available to all full access coordinators on your team. Providers can only see logins that they own (including logins you create for the provider).

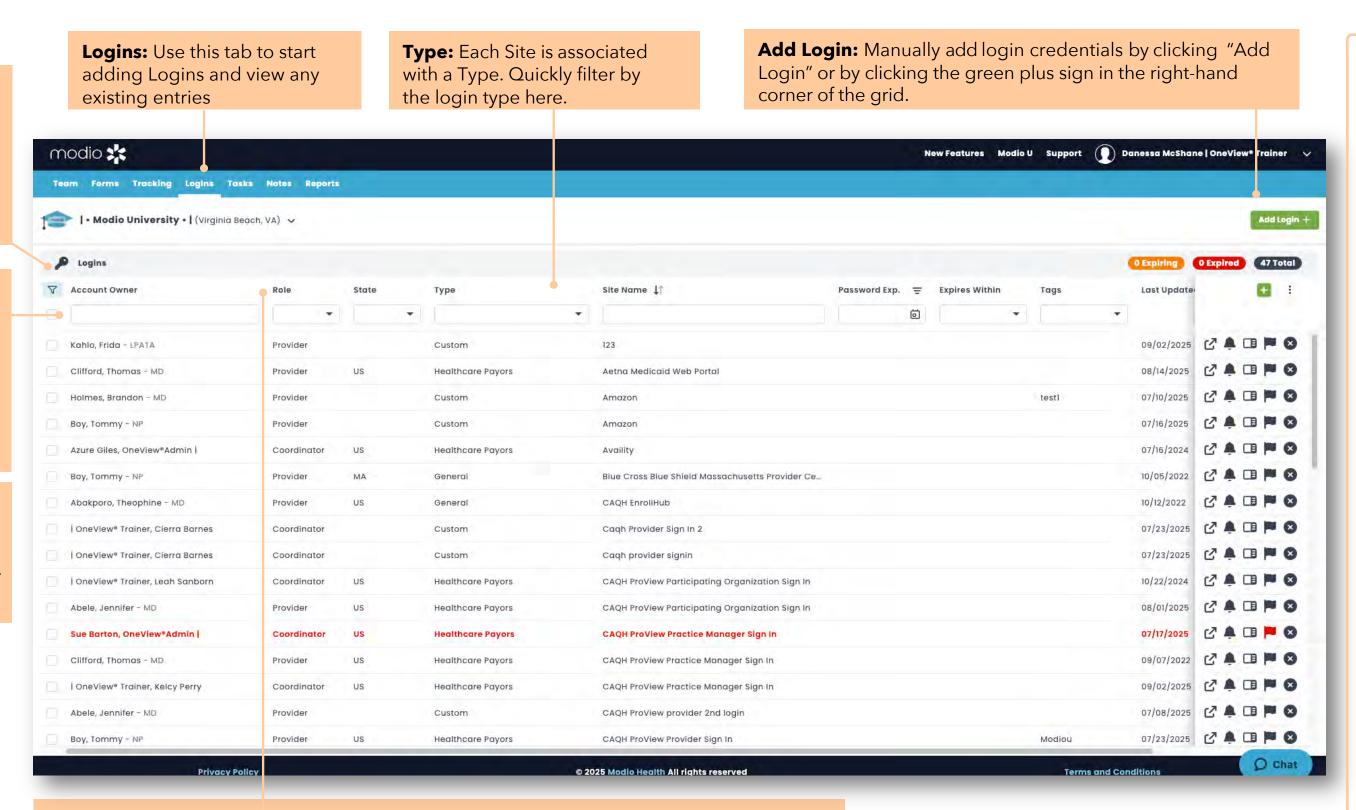
#### **Filter Boxes:**

Each blank box at the top of each column works as a filter. Use them to apply different filters. Use more than one filter at a time to quickly locate the Logins you are looking for.

#### **Account Owner:**

Type in the providers or coordinators name to filter and find that users credentials. The name listed in this column should be whomever the Username and Password belongs to

**Important**: Logins is a Team level feature and all accounts that are stored here will be accessible by all full access coordinators on your Team.



• Coordinator: Logins created for

• **Provider:** Logins created for providers

• **FAC:** Logins created for group/facility profiles

coordinators

Role: This will automatically be

entered based off the account

owner you select for the login.

#### Icon Key:

**Direct Link:** 

Click here to be directed to the stored Logins website.

**Viewing Logins:** 

To view an existing login, click the Side Panel icon in the Actions column.



**Deactivate Logins:** 

Archive or deactivate a login by clicking here.
Archived logins can be retrieved by changing the grid filter to "show inactive records" within the threedot icon.



Flagging:

Click on this icon to "flag" a login when it requires attention. Done updating a flagged login? Just click on the icon again to remove the marker.



**Bell:** 

Click on this icon to disable or enable alerts for the specific login

## OneView: Tip Guide - Adding Logins



Securely store provider or coordinator login information for any site such as CAQH, PECOS, and more.

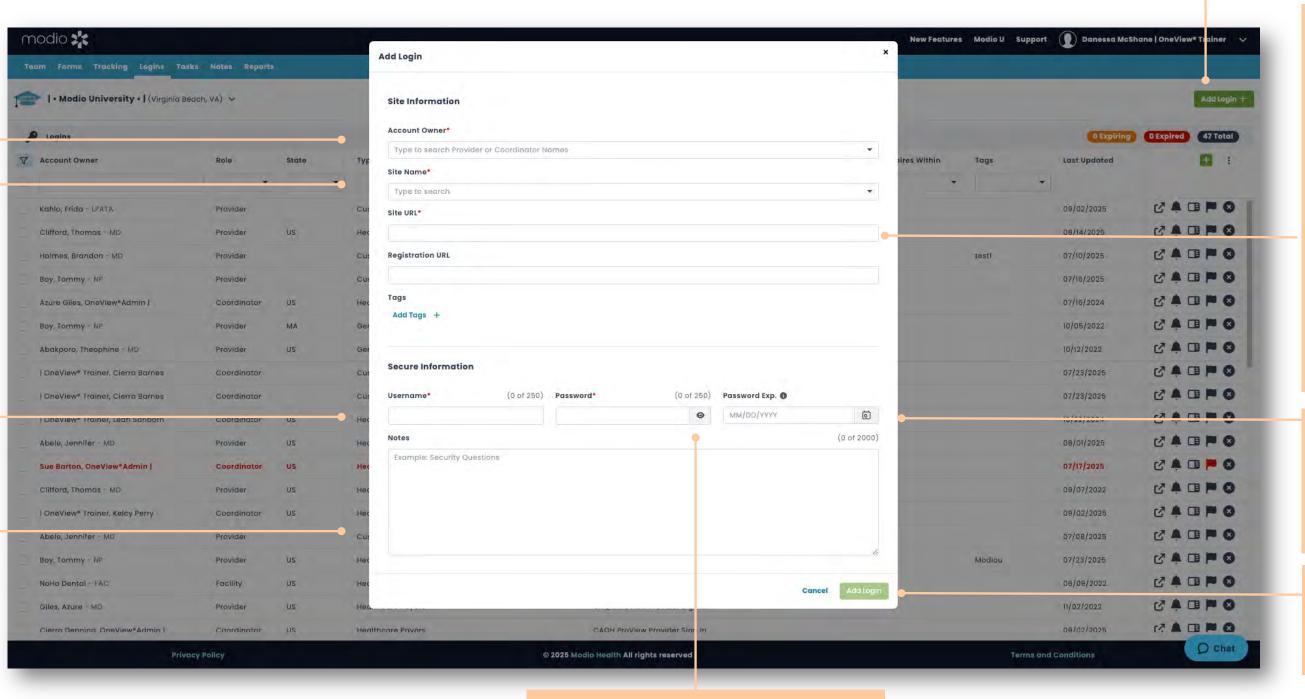
**Account Owner**: Choose an Account Owner from the drop-down list. The login credentials (username/password) should match the owner you are adding.

**Site Name:** Type within the free text field to search for the site you wish to add. This will pull a list of potential matches for you to select from. If you picked a website, the URL (address) will be auto- filled in the Site URL and Registration URL fields

**Username & Password:** Enter in the appropriate Username and Password. These fields will be encrypted once you click Save.

**Notes:** Add Notes as needed. This section will be encrypted once you click "Add Login"

**Efficiency Tip:** Update your Onboarding Invitation to include Logins. As your provider fills them out, they will appear in this section.



#### **Site Name & Registration URL:**

**Start Here - Add Login:** 

Start Here by clicking "Add Login."

If you picked a website, the URL (address) will be auto- filled in the Site URL and Registration URL fields. If you picked a custom website, enter the URL for the site here. (Examples are "http://yourwebsitename.com" and "http://yourwebsitename.com/signup"

\*If the website can't be found within our dropdown, please enter the URL for the site in the "Site URL and Registration URL" fields. Please then send this information to <a href="mailto:support@modiohealth.com">support@modiohealth.com</a>

**Password Exp.:** Add an expiration date to any of your logins.

\*Pro Tip\* Enter "t+# of days" to count from today.

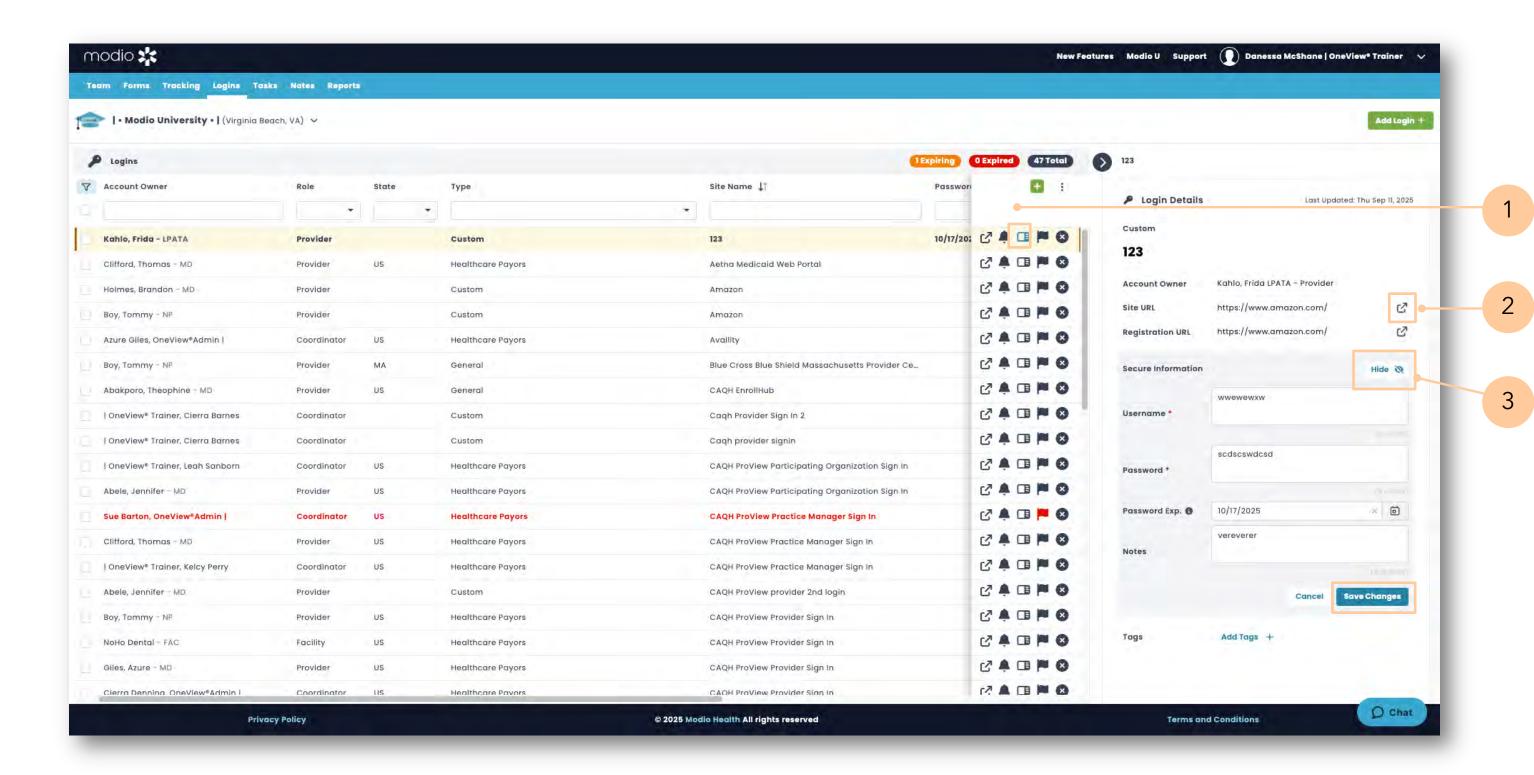
**Add Login:** Once you're done entering the username and password. Click the "Add Login" button to save it.

**Eye Icon:** Click on the eye icon to view or hide the password you just added.

### OneView Tip Guide - Login Features: Accessing and Viewing Saved Logins

View and manage existing Logins for your providers and your team.





**Editing Logins**: To view an existing login, click the Side Panel icon in the Actions column.

**Visiting a Saved Site:** Click on the link to be directed to the website of the stored Login.

#### **Eye Icon to View Passwords and Notes:**

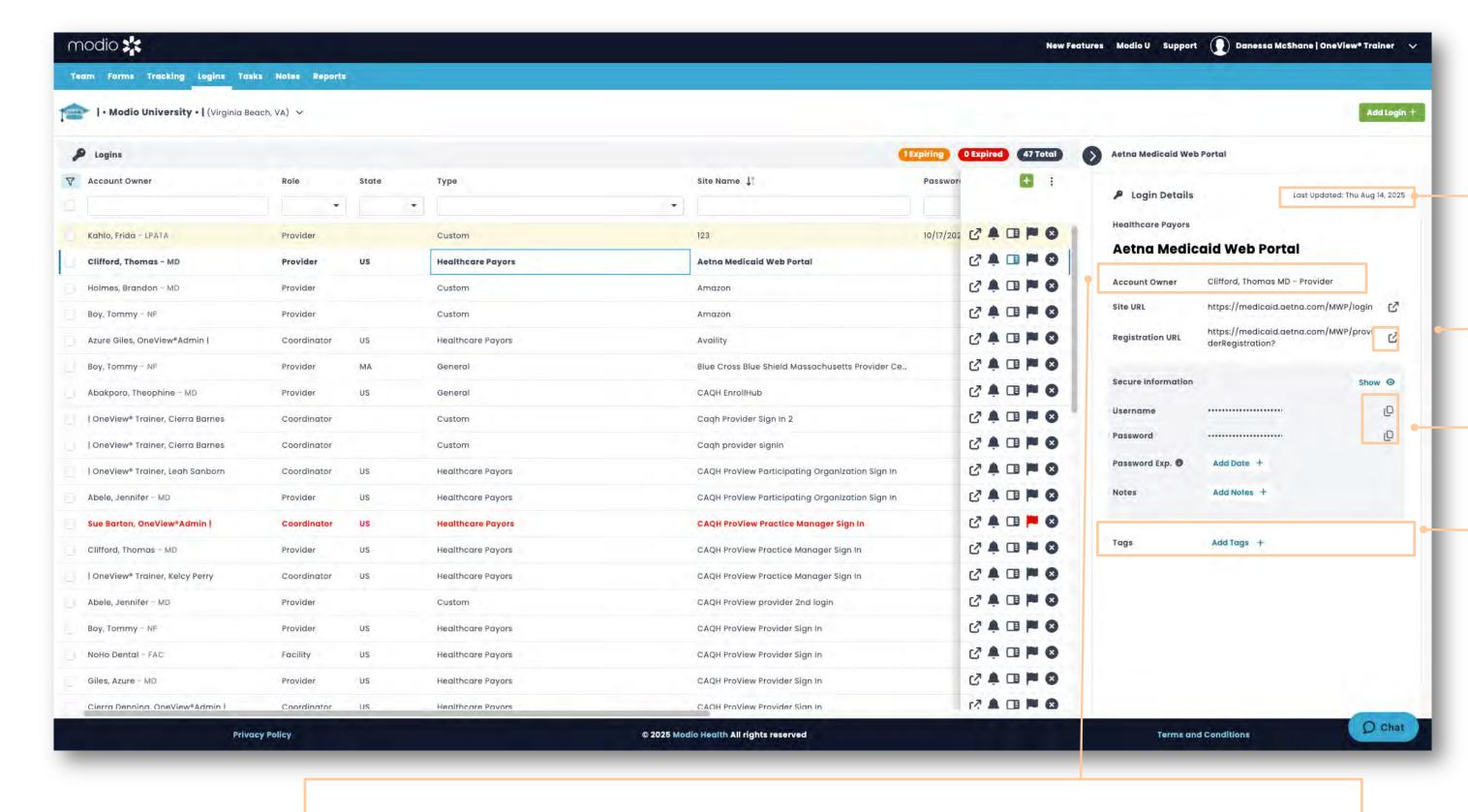
Click on the hide icon in the Secure Information box to gain access to a saved username, password, and notes. Click on the fields to make your edits. Once you've made your changes, click the "Save Changes" button to save your edits.

\*Pro Tip\* If you double click on any of the encrypted fields you will be able to view that information and make edits to those fields.

**Note**: Each time a user decrypts a Login, Modio stores that information for auditing/compliance.

## OneView Tip Guide - Login Features: Accessing, Viewing, and Editing Saved Logins





Option to change the "Account Owner" field:

- 1. Select the 📑 icon to open the side panel.
- 2. Click on the current account owner.
- 3. Click the grey "x" to remove.
- 4. Use completion matching to select a new Account Owner from the dropdown.

**Note:** Changing the Account Owner will not generate a "Save" button. When you click away, your Account Owner changes will automatically be saved.

**Important:** The Username and Password in the entry should belong to the Account Owner. Changing the Account Owner should be followed by reviewing the Username and Password in the existing entry for accuracy.

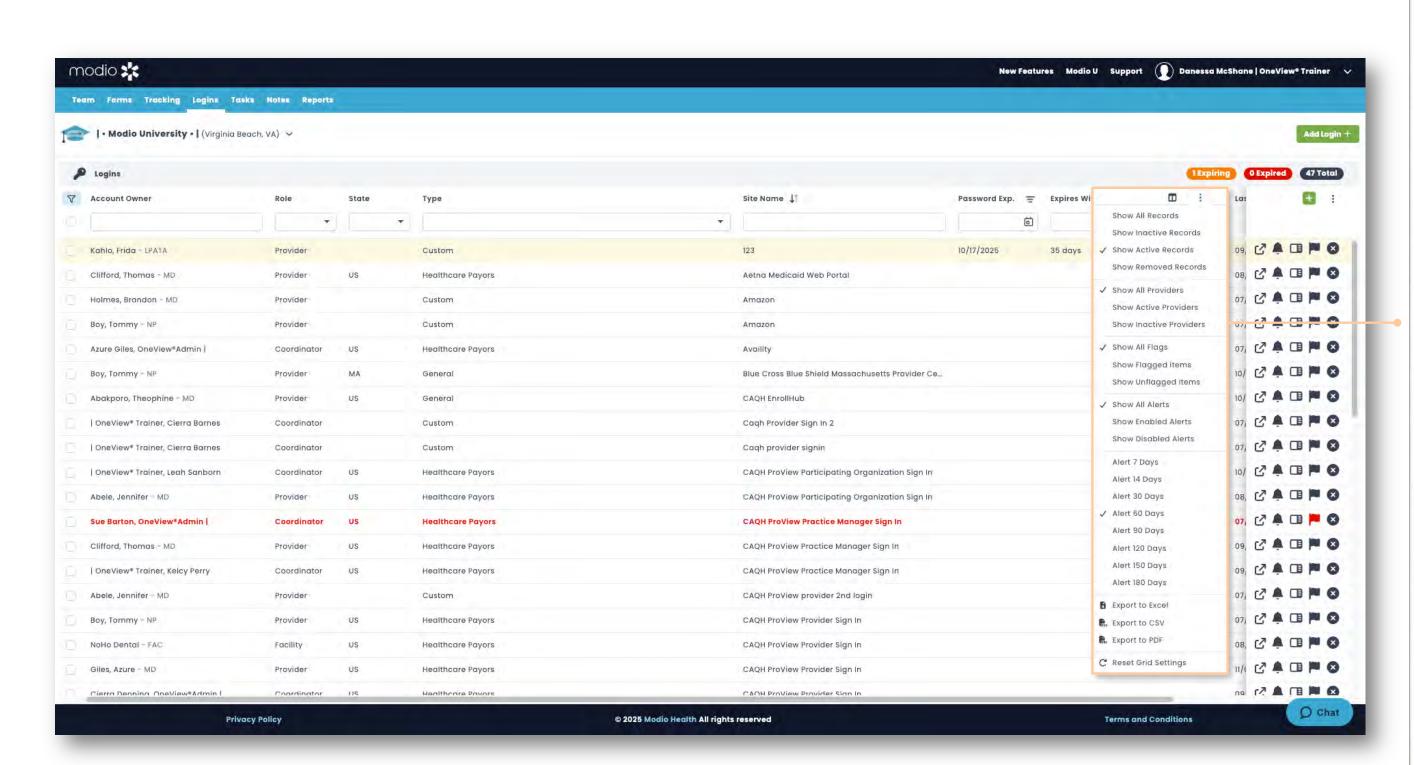
**Last Updated:** View the last updated date to see when the login was last updated.

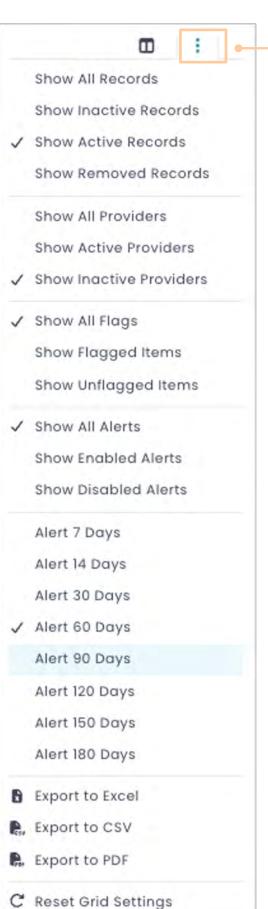
**Site Quick Link:** Quickly open the site you need to access by clicking here.

**Copy Icon:** Click the copy icons to copy and paste usernames and passwords into the website you opened with the grey arrow icon, and then log in.

**Tags:** Add tags for any usernames and passwords you are creating



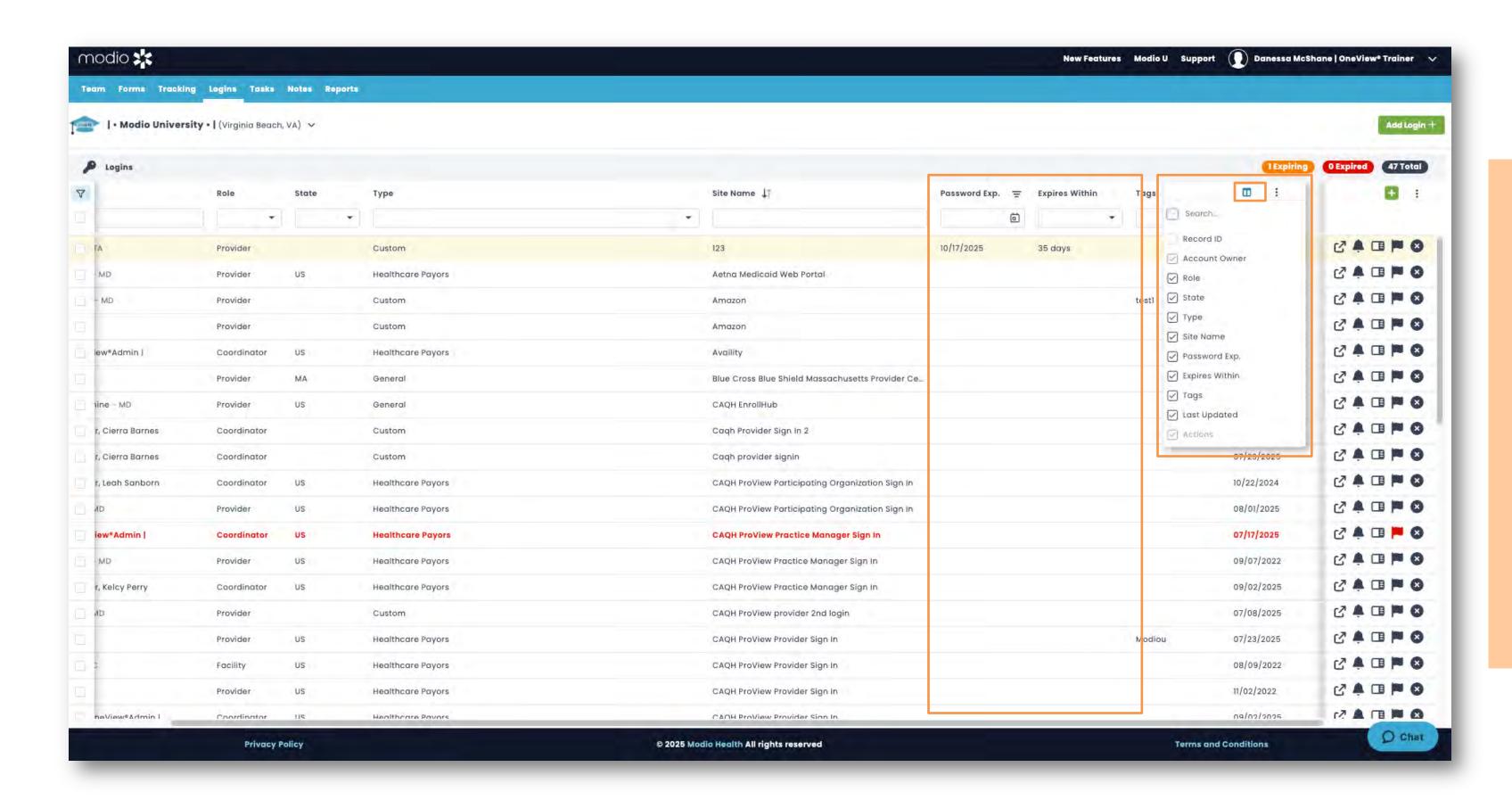




Three Dot Icon: Click this icon to view additional filtering option for the Logins grid.

- View inactive, active or all records.
- View Logins for active, inactive, or all providers.
- Filter to Login records that are flagged, unflagged or all flags.
- View enabled or disabled alerts (this is connected to the bell icon under the Actions item column).
- Adjust the Alert day intervals if adding expiration dates to logins.
- Generate an Excel, CSV, or PDF to gather all data within the grid.
- Reset grid settings to default





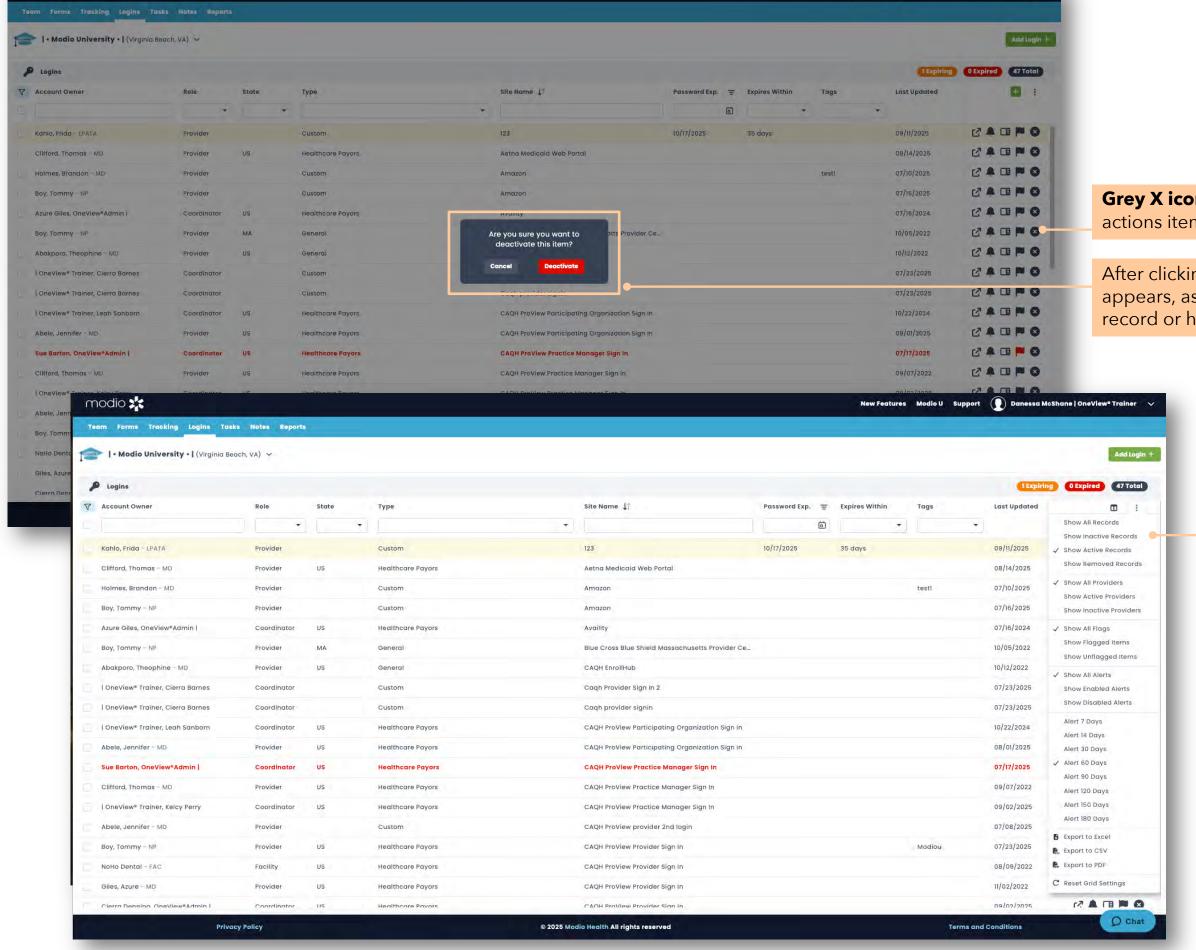
Column Icon: Within the three-dot icon, you will see the column icon to the left. Click this icon to add or remove columns within the grid you are in.

\*Pro Tip\* If you would like to see when a login expires, be sure to check off the "Password Exp." And "Expires Within" box.

If adding expiration dates to logins, be sure to use the "Expiring", "Expired", or "Total" filters located at the right-hand corner of your grid to prioritize your logins. These filters are also considered sticky.

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New Features Modio U Support Danessa McShane | OneView® Trainer

**Grey X icon:** Click on the grey X icon under the actions item column to deactivate a login record.

After clicking the grey x there will be a pop-up that appears, asking if you'd like to **deactivate** the record or hit cancel.

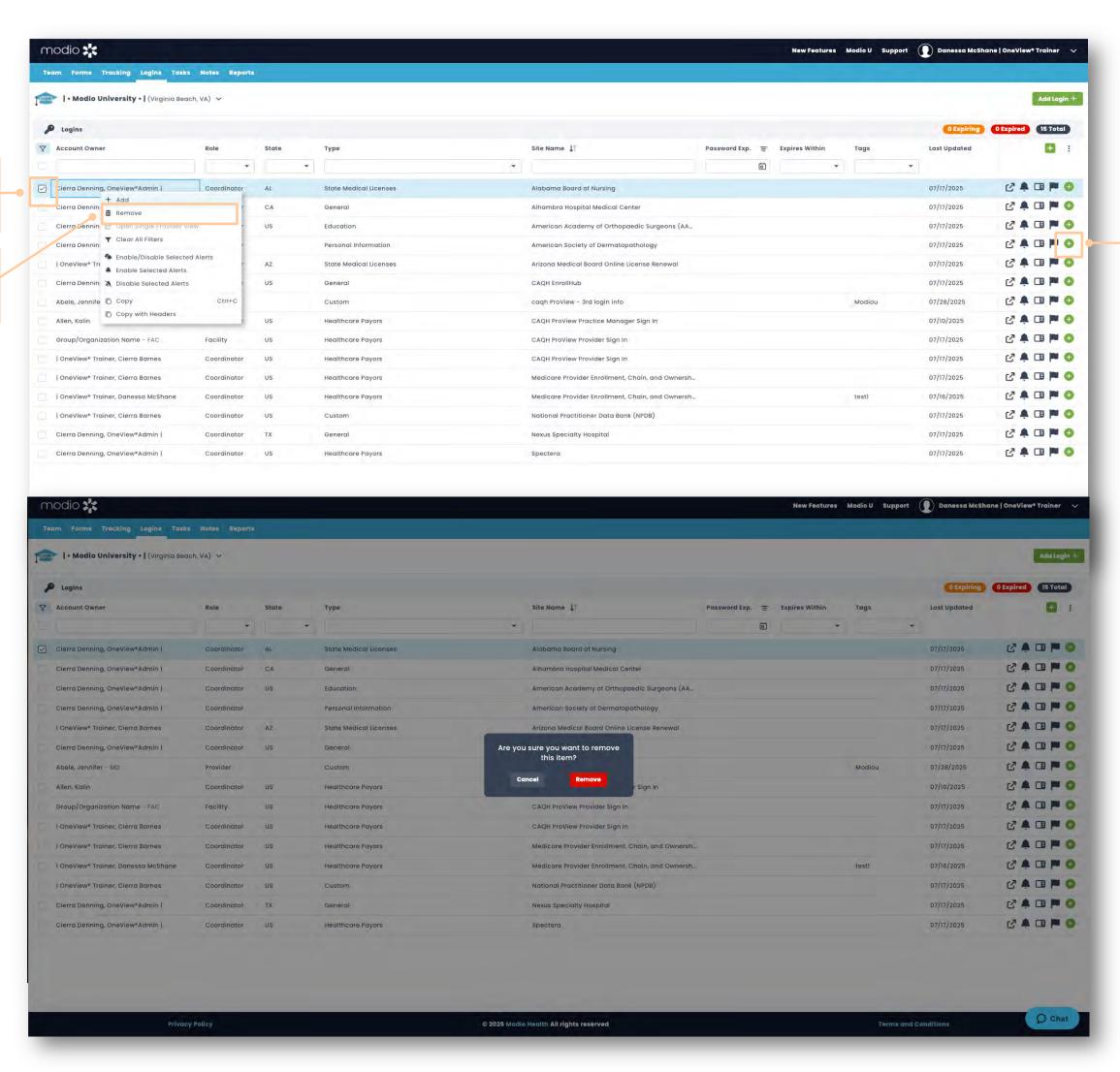
**Inactive Records:** Click on the three-dot icon and filter your grid to "Show Inactive Records."

### OneView Tip Guide - Removing Logins

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- Once you've switched to view the inactive records.

  Click on the empty box to left of the provider's name, to select the record.
- Once you've switched to view the inactive records. Click on the empty box, left of the provider's name, to select the record.



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#### Restoring a deactivated Login:

To restore the deactivated login record, click the green plus sign icon under the Actions item column.

#### **OneView:Tip Guide - Logins**

## **Frequently Asked Questions & Efficiency Tips**

#### Q: Can I run a report or download all stored information from the Logins tab?

There is a Logins report available by request. Since the Logins report contains sensitive data, clients do not have access to run it themselves. If you would like a copy of the report, please email <a href="mailto:Support@ModioHealth.com">Support@ModioHealth.com</a> and our team will be happy to assist.

#### Q: What if I need to change the Username or Password of a Login that I have already added?

- 1. Start by clicking the "Side Panel" icon for the Login entry you wish to modify.
- 2. A pop-up from the right-hand side will appear, displaying the encrypted username and password.
- 3. Click the "Show" icon to view these credentials, and click on the fields to make any edits
- 4. Make any necessary changes to the fields.
- 5. After making changes, remember to click "Save Changes" to save the updated credentials, as the system won't automatically save this modification.

NOTE: Each time a user decrypts a Login, Modio stores that information for auditing/compliance and tracking purposes.

#### Q: Can Providers enter their own Usernames & Passwords?

Yes! Your organization can use the Onboarding feature to request logins directly from your provider. See the Onboarding tip guide for additional information.

**Q:** I can't find the site I need in the logins site list - how do I add the username and password? If the site you need isn't listed, please email **Support@modiohealth.com** with the full site URL and the site name. Our support team will review and add it promptly. We expand our site list based on client requests, so feel free to send us any login portals you'd like to see included.

There is an option to manually add your logins information: Select Add Login, manually type in the site name, and Copy/Paste the full URL starting with http://. Then, enter the Username and Password and select Add Login.

**Please note:** Manually entering usernames and passwords will have downstream effects on Onboarding templates, any missing items reports, and searches. Best practice is to enter and save logins under a site available in the dropdown and request any new sites to be added by Support.

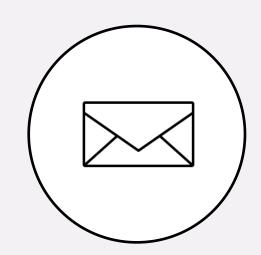


For additional questions or further training, contact the Modio Team via:



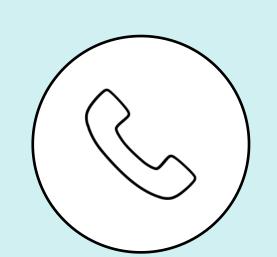
Online:

Live Chat Support



**Email:** 

support@modiohealth.com



Phone:

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