

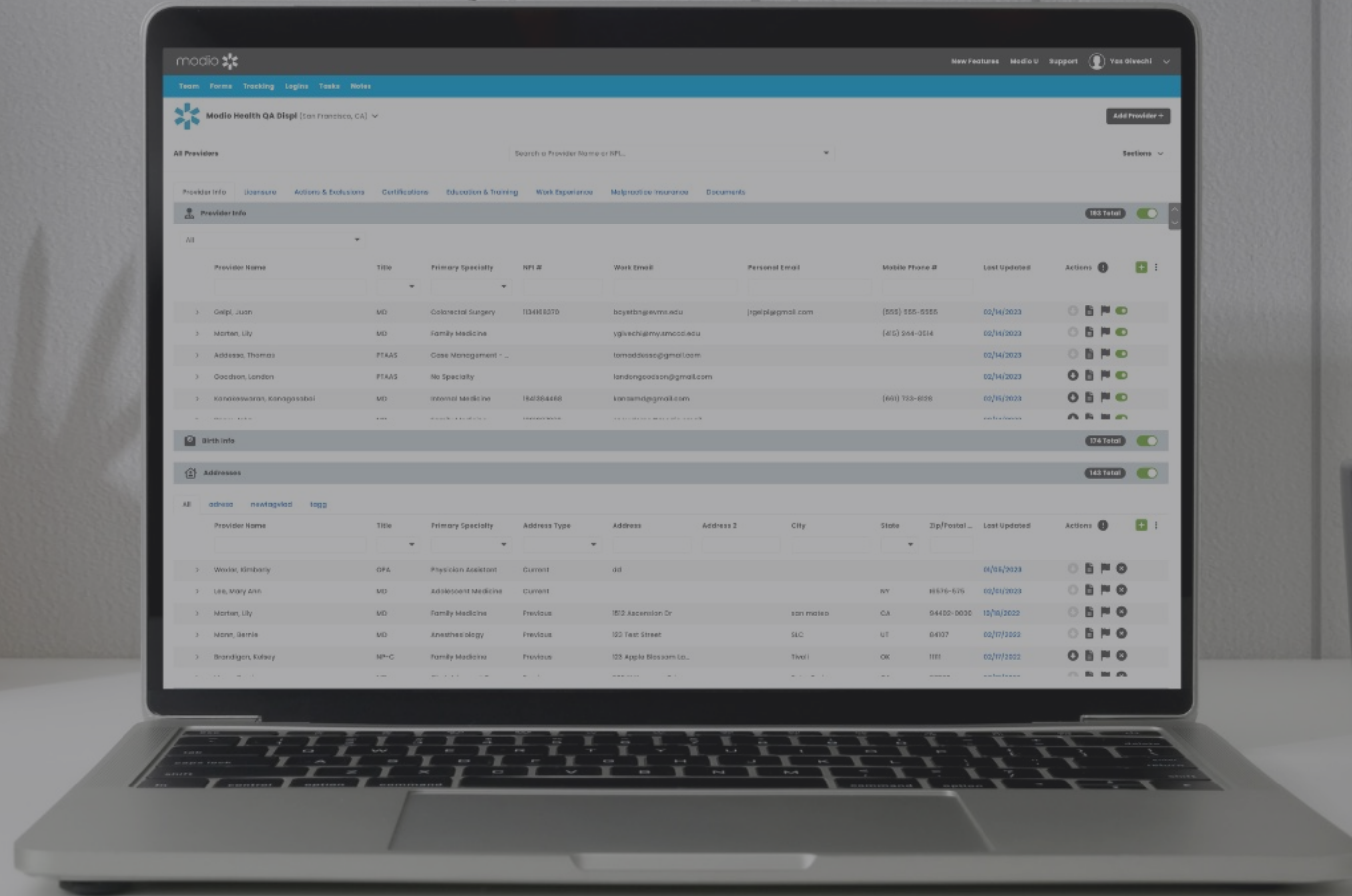


OneView[®]

OneView V2 Complete
Overview Guide

Introducing Modio OneView V2

A new way to add and enhance provider profiles



Introducing OneView V2

What is OneView V2?

Modio has developed a new page to customize how you view and manage credentialing data: OneView V2. This page is built on newer technology, which allows Modio to include:

- New features like access to audit history
- The ability to restore inactive records
- The ability to customize the page to fit your personal workflow

Is it a separate platform?

No. OneView V2 has all the same content as the traditional OneView profile, but it has additional functionality and looks different. The data on this new page is the same as the data you manage on our other OneView pages, just presented in a new way (and with some new and improved features!). The design of OneView V2 is intended to empower users to view and edit data with minimal clicks, and to allow for updating data both quickly and in bulk.

Do I use the same log in?

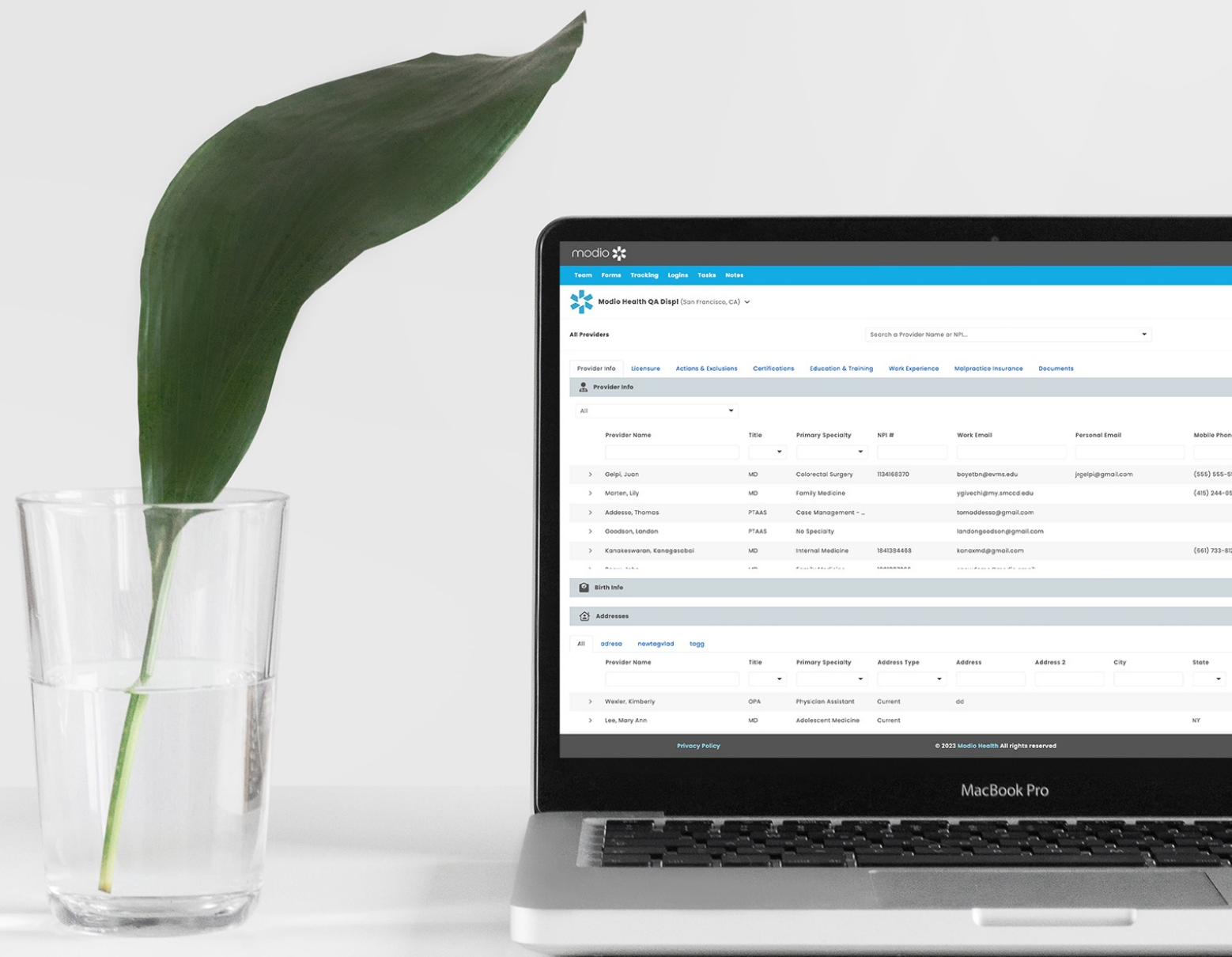
Correct - No separate log in is needed

How do I access it?

Once you are logged in, click on the "OneView V2" button on the Team page to access it.

How do I get back to the original OneView pages?

Click on the main sections on the top blue bar to go back (Team, Tracking, Forms, Tasks, Notes).



Glossary of OneView V2 Terminology

OneView V2: Page accessed by clicking "OneView V2" from the Team page

Single provider view: When OneView V2 is filtered to view a single provider. Access this by searching provider NPI or name in the top search bar, or by right clicking on any provider record and selecting "Open single provider view."

All provider view: When OneView V2 displays all providers. If you are in single provider view, return to all provider view by clicking the "x" in the search bar.

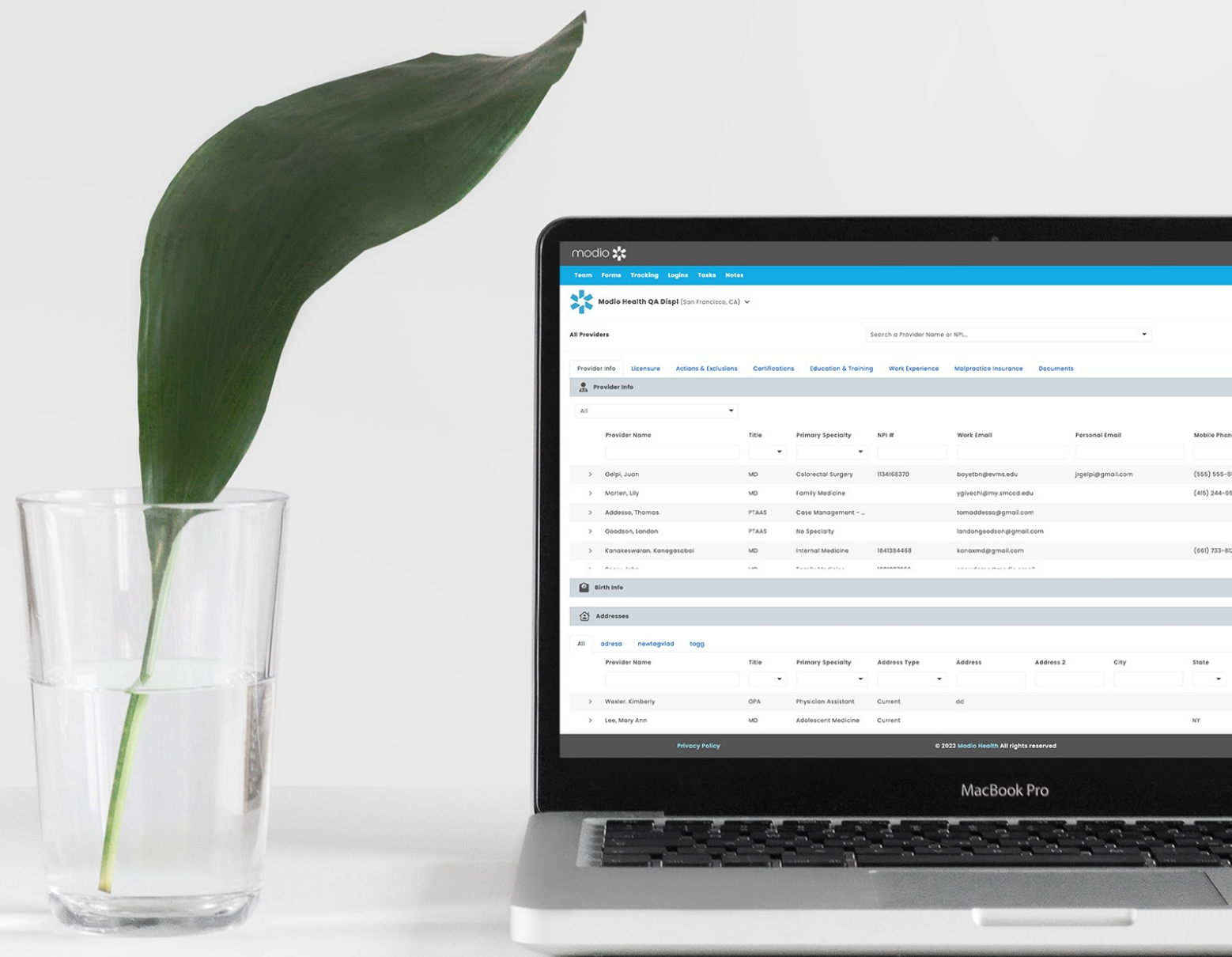
Grid: Category of provider data that is represented as a distinct section on the OneView V2 page. Examples of grids include State Licenses, Facility Affiliations, and Work History.

In-line editing row: Differing per grid, these high-use fields are in the top row of data for each record. Double click in any cell in the in-line editing row to edit data.

Detail view: Shows all fields associated with the record. Access by clicking the caret to the left of the provider name on a record.

Grid Settings: Page for customizing what OneView V2 should look like. Your personal grid settings are saved and will remain the same if you leave of OneView then log back in.

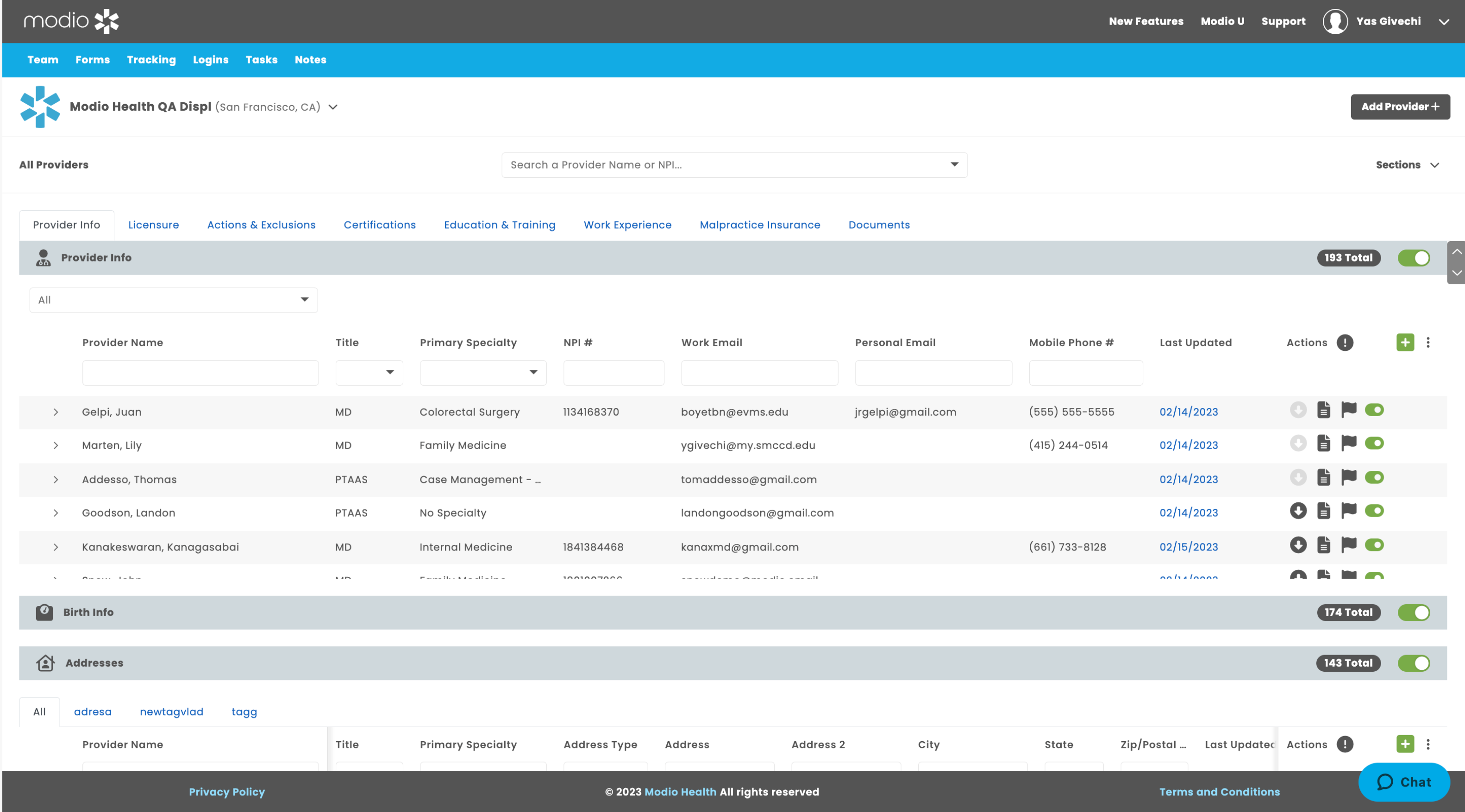
Sections filter: Option for filtering only the sections you want to see at the current moment. For example, if you want to update state licenses, select State Licenses within the sections filter and you will see only that grid. Clear your selections if you want to return to viewing all grids at once.



Tip Guide: OneView V2 - Getting Started

Let's Get Started

- 1. Log into OneView as you normally would - go to modiohealth.com and click "sign in" or follow your organizations protocol.
- 2. Click on the **OneView V2** button located on the top middle of your dashboard.
- 3. You'll arrive on the all-provider view of the OneView V2 page, which lists all providers within your team. Their data is grouped by section into grids.



Tip Guide: OneView V2 - Dashboard View Settings

View Customization

Customize which grids appear and in what order

Click on the Teams dropdown at the top left. Scroll to the bottom of the dropdown and click on "Grid Settings".

The screenshot displays the Modio OneView V2 dashboard interface. At the top, there is a navigation bar with the Modio logo and user information (Yas Givechi). Below this is a secondary navigation bar with links for Team, Forms, Tracking, Logins, Tasks, and Notes. The main content area shows the 'Modio Health QA Displ' team page for San Francisco, CA. A dropdown menu is open, showing options: 'Select a team:', 'Modio Health Master Practice (DEMO) (San Francisco, CA)*', 'Upload a logo', 'View team profile', and 'Grid Settings'. The 'Grid Settings' option is highlighted with a red box. Below the dropdown, there are sections for 'Provider Info' (193 Total) and 'Birth Info' (174 Total). The 'Provider Info' section contains a table with columns: Provider Name, Title, Primary Specialty, NPI #, Work Email, Personal Email, Mobile Phone #, Last Updated, and Actions. The 'Addresses' section (143 Total) is partially visible at the bottom.

Provider Name	Title	Primary Specialty	NPI #	Work Email	Personal Email	Mobile Phone #	Last Updated	Actions
> Gelpi, Juan	MD	Colorectal Surgery	1134168370	boyetbn@evms.edu	jrgelpi@gmail.com	(555) 555-5555	02/14/2023	[Icons]
> Marten, Lily	MD	Family Medicine		ygivechi@my.smccd.edu		(415) 244-0514	02/14/2023	[Icons]
> Adesso, Thomas	PTAAS	Case Management - ...		tomaddesso@gmail.com			02/14/2023	[Icons]
> Goodson, Landon	PTAAS	No Specialty		landongoodson@gmail.com			02/14/2023	[Icons]
> Kanakeswaran, Kanagasabai	MD	Internal Medicine	1841384468	kanaxmd@gmail.com		(661) 733-8128	02/15/2023	[Icons]



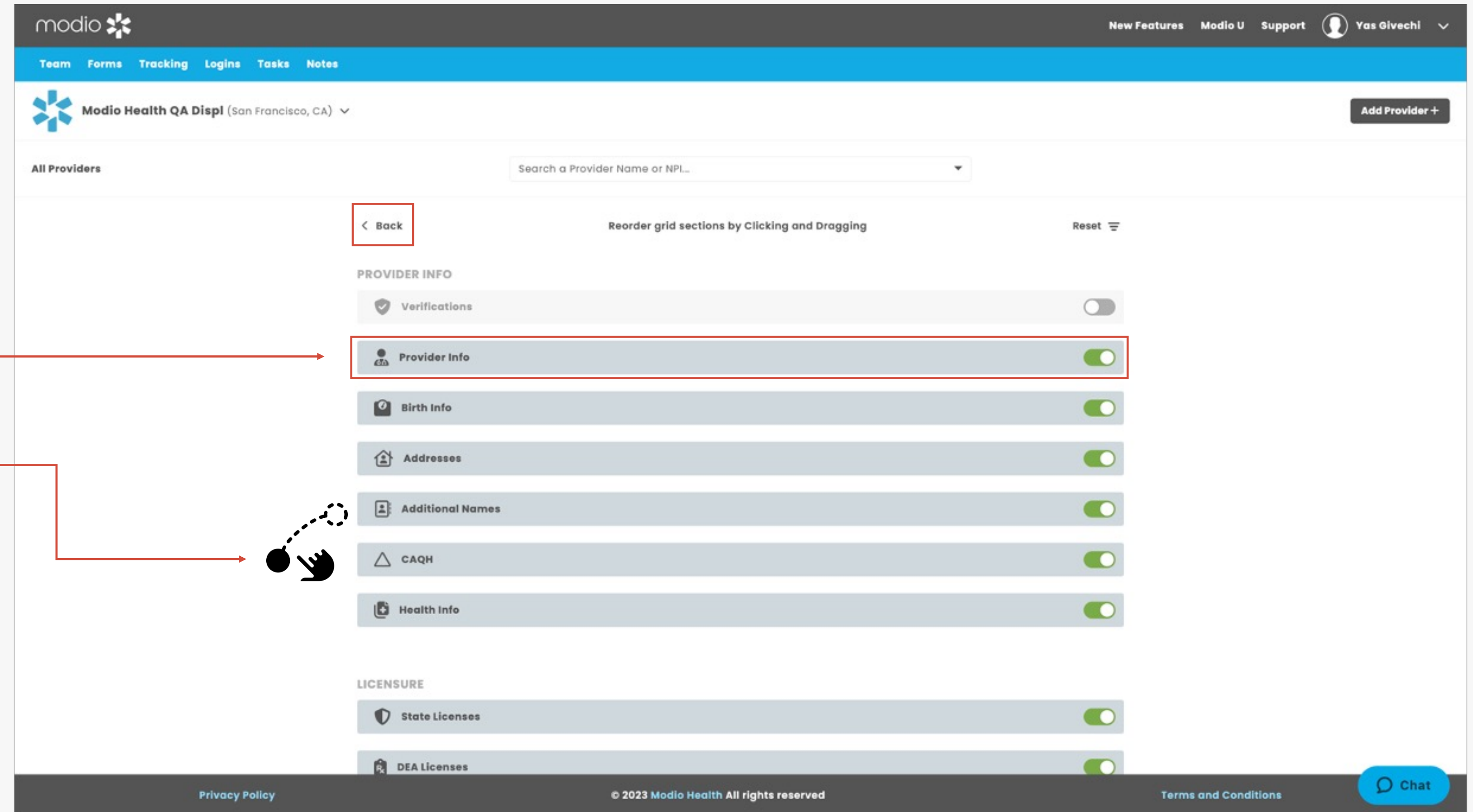
View Customization

Customize which grids appear and in what order

Use the toggles next to each grid to enable/disable the grid. If it is toggled on, you will see the grid. If it's toggled off, you will not see the grid on your OneView V2 page.

You can also **drag and drop** the grids into the order that best fits your workflow. For example, if you always update affiliations first, drag that grid to the top of the list so it appears first on your page.

Once you are satisfied with your changes, click "**Back**."



Tip Guide: OneView V2 - Dashboard View Settings: View Customization

The screenshot shows the Modio Health QA Displ dashboard. At the top, there is a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below this, the dashboard title is 'Modio Health QA Displ (San Francisco, CA)' with an 'Add Provider +' button. A search bar for 'Search a Provider Name or NPL...' is present. The main content area is divided into sections: 'Provider Info' (193 Total), 'Birth Info', and 'Addresses' (143 Total). The 'Provider Info' section is active, showing a table of providers with columns: Provider Name, Title, Primary Specialty, NPI #, Work Email, Personal Email, Mobile Phone #, and Last Updated. A column customization menu is open on the right, listing the columns with checkboxes. The 'Search...' checkbox is unchecked, while all other checkboxes are checked. The 'Addresses' section below shows a table with columns: Provider Name, Title, Primary Specialty, Address Type, Address, Address 2, City, State, Zip/Postal, Last Updat, and Actions.

Provider Name	Title	Primary Specialty	NPI #	Work Email	Personal Email	Mobile Phone #	Last Updated
> Gelpi, Juan	MD	Colorectal Surgery	1134168370	boyetbn@evms.edu	jrgelpi@gmail.com	(555) 555-5555	02/14/2023
> Marten, Lily	MD	Family Medicine		ygivechi@my.smccd.edu		(415) 244-0514	02/14/2023
> Addesso, Thomas	PTAAS	Case Management - ...		tomaddesso@gmail.com			02/14/2023
> Goodson, Landon	PTAAS	No Specialty		landongoodson@gmail.com			02/14/2023
> Kanakeswaran, Kanagasabal	MD	Internal Medicine	1841384468	kanaxmd@gmail.com		(661) 733-8128	02/15/2023

Customize which grids appear in each grid

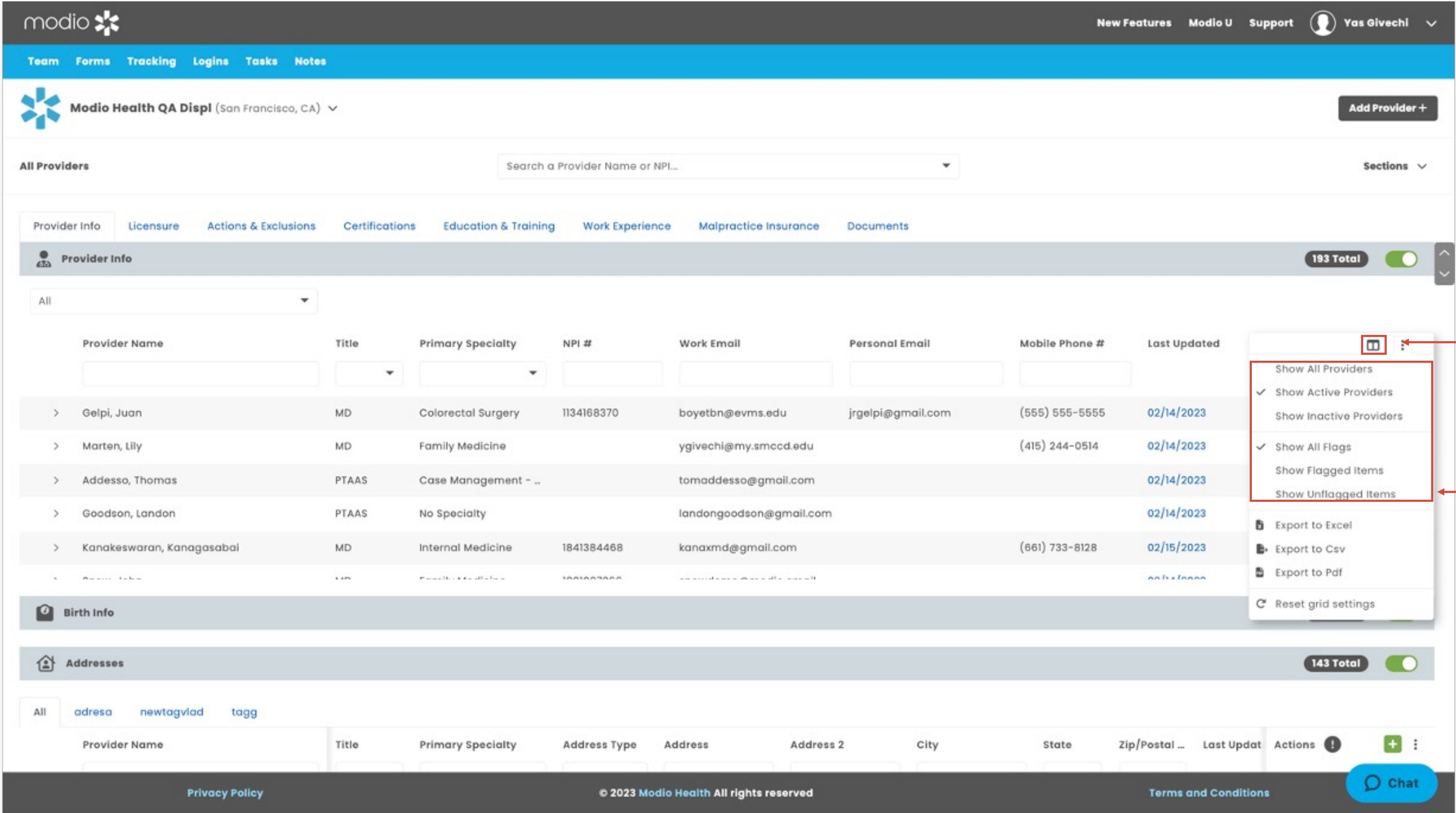
You can choose to customize which columns are visible in the in-line editing row, by accessing the columns section of the grid menu.

Uncheck or check columns to set which ones you want to appear in the grid.

You can also drag columns in each grid to re-order them.



Tip Guide: OneView V2 - Dashboard View Settings: Customization



View Customization

Customize which records appear by record status

OneView V2 gives users the ability to view inactive records - you also can now restore formerly inactivated records to active status.

In the grid menu for each grid, you can select if you want **Active** records, **Inactive** records, or **All** Records to display in the grid.



View Customization

Customize your alert interval for records in each grid

OneView V2 gives users the ability to customize their alert interval in each section - Records in each grid with expirable items turn red when expired and turn yellow based on the specified alert interval. The alert interval can be set to 1-6 months.

The specified alert interval also impacts the Expiring counts in orange at the top of each grid. This will give you an idea of how many records are expiring soon according to the interval you set.

Alert intervals are set by each individual user and are specific to each grid. I.e., you can set a 6-month alert interval for a licensing board you know needs a lot of lead time, and a 1-month interval for malpractice renewals that have a faster turnaround time.

The screenshot displays the Modio OneView V2 dashboard for 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. The interface includes a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below the navigation, there are tabs for 'Provider Info', 'Licensure', 'Actions & Exclusions', 'Certifications', 'Education & Training', 'Work Experience', 'Malpractice Insurance', and 'Documents'. The main content area shows two grids: 'State Licenses' and 'DEA Licenses'. The 'State Licenses' grid has a summary bar with '0 Expiring', '88 Expired', and '88 Total'. The 'DEA Licenses' grid has a summary bar with '6 Expiring' and '32 Exp'. A dropdown menu is open over the 'DEA Licenses' grid, showing alert interval options: 'Alert 1 Month', 'Alert 2 Months' (selected), 'Alert 3 Months', 'Alert 4 Months', 'Alert 5 Months', and 'Alert 6 Months'. Other options include 'Show All Records', 'Show Inactive Records', 'Show Active Records', 'Show All Flags', 'Show Flagged Items', 'Show Unflagged Items', 'Show All Alerts', 'Show Enabled Alerts', 'Show Disabled Alerts', 'Export to Excel', 'Export to Csv', 'Export to Pdf', and 'Reset grid settings'. The footer contains 'Privacy Policy', '© 2023 Modio Health All rights reserved', 'Terms and Conditions', and a 'Chat' button.

Tip Guide: OneView V2 - Page Feature Overview

On both single provider view and all provider view, there are some core elements of the OneView V2 page.

The screenshot displays the Modio OneView V2 interface for a provider named Kirk Heath, MD. The interface includes a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The main content area shows provider details and a table of licenses. Three callouts highlight key features:

- 1 Sections Filter:** A filter panel on the right side of the page, enclosed in a red box, allows users to select which grid(s) they want to see. It includes sections for 'Provider Info', 'Birth Info', 'Licensure', 'Actions & Exclusions', 'Certifications', 'Education & Training', 'Work Experience', and 'Documents'. Each section has a search box and a 'Clear' button. The 'Licensure' section is currently selected, showing 'State Licenses', 'DEA Licenses', and 'Controlled Substances'.
- 2 In-line editing row:** A row in the 'State Licenses' table is highlighted in red, indicating it is in an in-line editing state. The row contains the following data: Provider Name: Heath, Kirk; License Type: MD; License: 0101241; Add'l Info: No; State: VA; Status: Current Active; Issue Date: 06/04/2007; Exp. Date: 04/30/2024; Last Updated: 01/19/2023.
- 3 Column filters:** A filter box at the bottom of the 'DEA Licenses' table, enclosed in a red box, allows users to filter the data by Provider Name, License, State, Status, Payment Indicator, Issue Date, Exp. Date, Expires In, Last Updated, and Actions.

1 Sections Filter: Use this filter to select which grid(s) you want to see right now. Click the "x" to clear your selection.

2 In-line editing row: Double click in the row of visible data for each record to quickly update data.

3 Column filters: Type in the filter box or select from the dropdown to filter the column below. Click on a column header to sort by the column. Click again to sort in reverse order.

Tip Guide: OneView V2 - Page Feature Overview Continued

On both single provider view and all provider view, there are some core elements of the OneView V2 page.

The screenshot displays the Modio OneView V2 interface for a provider named Kirk Heath, MD. The interface is organized into several sections:

- Header:** Includes the Modio logo, navigation links (New Features, Modio U, Support), and a user profile (Demo Coordinator).
- Provider Profile:** Shows the provider's name, specialty (General Surgery), and a search bar.
- State Licenses:** A table with columns for Provider Name, License Type, License, Add'l Info, State, Status, Issue Date, Exp. Date, and Expires In. It includes a summary bar with counts: 0 Expiring, 1 Expired, and 2 Total. A grid menu is open over this table, listing options such as 'Show All Records', 'Show Inactive Records', 'Show Active Records', 'Show All Flags', 'Show Flagged Items', 'Show Unflagged Items', 'Show All Alerts', 'Show Enabled Alerts', 'Show Disabled Alerts', 'Alert 1 Month' through 'Alert 6 Months', 'Export to Excel', 'Export to Csv', 'Export to Pdf', 'Export Summary Pdf', 'Export Summary Pdf - All License Types', and 'Reset grid settings'.
- DEA Licenses:** A table with columns for Provider Name, License, State, Status, Payment Indicator, Issue Date, Exp. Date, Expires In, and Last U. It includes a summary bar with counts: 0 Expiring.
- State Controlled Substance Licenses:** A table with columns for License, State, Status, Payment Indicator, Issue Date, and Exp. Date. It includes a summary bar with counts: 0 Expiring.

Callout boxes highlight specific features:

- 4:** Points to the expiration counts (0 Expiring, 1 Expired, 2 Total) at the top of the State Licenses grid.
- 5:** Points to the grid menu that allows users to customize records displayed, export summaries/reports, and reset grid settings.
- 6:** Points to the caret icon on the left of a row in the State Licenses grid, which opens a detail view for that record.

6 Detail View:

To view additional fields for each record, click on the caret at the left of the row to open detail view.

4

Expiration Counts: These counts at the top of each grid will show you the # of expiring records (based on the alert interval you set in grid settings), the # of expired records, and the # of total records in the grid.

5

Grid Menu: Each grid has a menu to customize records displayed in the grid, export summaries/reports, and reset grid settings back to default.

Tip Guide: OneView V2 - Page Feature Overview Continued

On both single provider view and all provider view, there are some core elements of the OneView V2 page.

The screenshot displays the Modio OneView V2 interface for a provider named Kirk Heath, MD. The interface is organized into several sections, each with a table of records and an 'Actions' column on the right. The sections are:

- State Licenses:** A table with columns: Provider Name, License Type, License, Add'l Info, State, Status, Issue Date, Exp. Date, Expires In, Last Updated, and Actions. It shows two records for Kirk Heath, MD. A magnifying glass icon in the Actions column is highlighted with callout 7.
- DEA Licenses:** A table with columns: Provider Name, License, State, Status, Payment Indicator, Issue Date, Exp. Date, Expires In, Last Updated, and Actions. It shows two records for Kirk Heath, MD. A green '+' button in the Actions column is highlighted with callout 8, and the 'Last Updated' date '12/16/2022' is highlighted with callout 9.
- Education & Training:** A table with columns: Provider Name, Education Type, School/Institution, Degree, Specialty/Major, Start Date, End Date, Completed, and Actions. It shows five records for Kirk Heath, MD. The 'Actions' column is highlighted with callout 10.
- Exams:** A table with columns: Provider Name, Exam Type, Exam, Status, Issue Date, Exp. Date, Expires In, Last Updated, and Actions. It shows zero records.

The interface also includes a top navigation bar with 'New Features', 'Modio U', 'Support', and 'Demo Coordinator'. A search bar is located at the top right of the provider view. The footer contains 'Privacy Policy', '© 2023 Modio Health All rights reserved', 'Terms and Conditions', and a 'Chat' button.

9 Audit History:

Click on the Last Updated Date for any record to view the audit history.

10 Actions:

Action icons are at the far right of each record row. Run updaters, download documents, silence alerts, access notes, flag items, and inactivate records.

7 Find Licenses: In single provider view, you will see a magnifying glass icon in the state license and DEA grids. Click this to search for licenses that are not already in OneView using FSMB for state licenses and USDOJ for DEA.

8 Add Records: Each grid has a green "+" button to add a new record. You can also right click anywhere in the grid and choose "Add" to do the same.

Tip Guide: OneView V2 - Adding a Provider

You may want to start by checking if the provider is already in OneView. Do this by searching their NPI (if they have one) or their name in the top search bar.

If the provider does not exist, add them to OneView by clicking **"Add Provider"** at the top right of the screen.

Select the provider with the correct NPI from the dropdown list. Modio uses the NPI to pull in licenses and certification data from LexisNexis.

The screenshot displays the Modio OneView V2 interface. A modal window titled "Add Provider" is open in the center, allowing for the addition of a new provider. The modal includes the following fields:

- Teams:** A dropdown menu with "Modio Health Master Practice (DEMO) (San Francisco, CA)" selected.
- Tags:** An empty dropdown menu.
- Provider Name:** A text input field with the placeholder "Type a provider name...". A checkbox labeled "Add a Facility Name instead" is located to the right.
- Provider Title:** A dropdown menu.
- Specialty List:** A dropdown menu.
- Provider Email:** A text input field.

At the bottom of the modal are "Cancel" and "Save" buttons. In the background, the main interface shows a list of providers under the "All Providers" tab. The "Add Provider +" button in the top right corner of the main interface is highlighted with a red box. The footer of the page includes "Privacy Policy", "© 2023 Modio Health All rights reserved", "Terms and Conditions", and a "Chat" button.

Start Here

Tip Guide: OneView V2 - NPPES Updater

Additional records can be added from the NPPES NPI registry to enhance profiles. To access this information, select “Run Update” next to the NPI field in the detail view of the Provider Info grid. If an NPI does not yet exist on the profile, it will display all related name matches for you to select the correct NPI.

The screenshot shows the Modio OneView V2 interface with a modal window titled "Updating NPPES Info for Kirk Heath". The modal is overlaid on a provider profile page for Kirk Heath, MD. The modal contains the following sections:

- Header:** "Updating NPPES Info for Kirk Heath" with a close button (X) and a "Last Saved" timestamp. A yellow button labeled "Update From Source" is visible.
- Provider Information:** A table showing current and source data for Provider Name, NPI Number, and Last Updated.
- Select which item(s) to add/update:** A section with a toggle switch and a list of items to be updated:
 - Enumeration Date: 05/09/2007
 - Last Updated: 03/17/2018 (NPPES NPI Registry)
- Addresses:** A section with a toggle switch and a list of addresses:
 - Practice Address: Meru Health Medical California, PC (San Mateo, CA) * 19 S B St, Ste 3, San Mateo CA 94401 USA. Ph: (650) 240-4850 • Fax: (650) 240-4850.
 - Unspecified: 1120 First Colonial Rd, Suite 203, Virginia Beach VA 234542418 USA. Ph: (757) 481-4424 • Fax: (757) 481-3820.
- State Licenses:** A section with a toggle switch and a list of licenses:
 - State License: NC 2015-02245 208600000X Surgery
 - State License: VA 0101241891 208600000X Surgery
 - State License: VA 0101241891 208600000X Surgery
- Footer:** "Cancel" and "Update Selected" buttons.

Next, the modal will display available records. You can choose to toggle on or off each section or select individual records. Records already on the profile will be greyed out, to avoid duplicates.

Select “Update Selected” to add the chosen records. This will also update the Last Updated date to note when data was last pulled from NPPES.

Tip Guide: OneView V2 - Updating Provider Data

The screenshot displays the Modio Health Master Practice (DEMO) interface. At the top, there is a navigation bar with the Modio logo, user name 'Yas Givechi', and links for 'New Features', 'Modio U', and 'Support'. Below this is a secondary navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The main header shows 'Modio Health Master Practice (DEMO) (San Francisco, CA)' and an 'Add Provider +' button.

The main content area is titled 'All Providers' and features a search bar labeled '1' with the placeholder text 'Search a Provider Name or NPI...'. To the right of the search bar is a 'Sections (3)' filter button. A red box highlights this filter, which is expanded to show a list of sections:

- Provider Info
- Verifications
- Birth Info
- Addresses
- Add'l Names
- CAQH
- Health Info
- Licensure
 - State Licenses
 - DEA Licenses
 - Controlled Substances
- Actions & Exclusions
 - Event Log
 - OIG
 - SAM
 - Certifications
 - Board Certifications
 - Other Certifications
 - Education & Training
 - Education & Training
 - Exams
- Work Experience
 - Practice/Employer
 - Facility Affiliations
 - Work History
 - Peer References
 - Military Experience
 - Malpractice Insurance
 - Documents

Below the filter, there are two tables. The first table, titled 'State Licenses', has columns for Provider Name, License Type, License, Add'l Info, State, and Status. It lists several providers, with one row highlighted in yellow. The second table, titled 'DEA Licenses', has columns for Provider Name, Title, Primary Specialty, License, State, Status, Payment Indi..., Issue Date, Exp. Date, and Expires In. It lists four providers.

At the bottom of the interface, there is a footer with 'Privacy Policy', '© 2023 Modio Health All rights reserved', 'Terms and Conditions', and a 'Chat' button.

1 Find your provider, or manage all at once: If desired, go to single-provider view by searching for your provider in the top search bar. If you are working on your full provider population, stay in all provider view (clear any selected provider from the top search bar).

2 Use the sections filter to target what you are working on: Filter for the section(s) you want to work on using the sections filter. You can select one or multiple grids at a time. Use this feature to quickly display only the grids you currently need.



Tip Guide: OneView V2 - Updating Provider Data: Updating Existing Records

4 There are a few ways to update existing records.

Data in the in-line editing rows can be changed by simply **double-clicking** on the field. Data will be automatically saved when you click away from the field.

If the field you are looking for is not shown in the in-line editing row, you can access all fields available for the record in detail view. Open this by clicking on the **caret** to the left of the provider name (shown right).

After making changes in the detail view, make sure to click **Save**.

The screenshot shows the Modio Health Master Practice interface. At the top, there is a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below this is the practice name 'Modio Health Master Practice (DEMO) (San Francisco, CA)' and an 'Add Provider +' button. The main content area displays provider information for 'Kirk Heath, MD - General Surgery'. There are two tables: 'Provider Info' and 'Birth Info'. The 'Provider Info' table has columns for Provider Name, NPI #, Work Email, Personal Email, Mobile Phone #, Last Updated, and Actions. The 'Birth Info' table has columns for Provider Name, Date Of Birth, Country Of Citizenship, Citizenship/Work Auth, US Work Auth, Last Updated, and Actions. A red box highlights a dropdown caret next to the provider name 'Heath, Kirk' in the 'Birth Info' table. A red arrow points from this caret to the 'Detail View' section below. The 'Detail View' section contains various input fields for birth information, including Date Of Birth, Country Of Citizenship, Citizenship/Work Auth, US Work Auth, Birth City, Birth State, Birth County, Birth Country, Gender, Identifies as transgender?, Hair Color, Eye Color, Height (inches), and Weight (lbs). A red arrow points from the 'Save' button in the 'Detail View' section to the text 'Save' in the tip.



Tip Guide: OneView V2 - Updating Provider Data: Adding Notes, Tags, and Documents

5 Add Notes, Tags and Documents to Records

The screenshot shows the 'Edit State License 2015-02245 for Kirk Heath MD' modal. The modal is divided into three main sections: 'Tag(s)', 'Notes', and 'Documents'. The 'Tag(s)' section has a text input field with a dropdown arrow. The 'Notes' section has a 'Public' and 'Team' toggle, a text area for notes (0 of 3000), and a 'Save Note' button. The 'Documents' section has a 'Drop documents here or Click here to browse' area with supported file types (PDF, DOCX, TXT, RTF, GIF, JPG, PNG) and a table of existing documents. The table has columns for Name, Document Type, Permission, Date, Exp. Date, and Actions. One document is listed: 'Heath Kirk NC 2015-022...' with document type 'State License Verifi...', permission 'Public', date '12/14/2022', and expiration '08/20/2021'. The modal also has 'Cancel' and 'Save' buttons at the bottom.

A shortcut for document upload: You can also drag and drop documents from your computer onto any row of data to upload them to the specified row.

Tags can be added to provider records in any section within this modal. If you want to add tags at the provider level, do so in the Provider Info grid. Tags in other grids will be specific to each individual record.

Click on **the document icon** to open the modal with record notes, tags and documents.



Tip Guide: OneView V2 - Updating Provider Data: Running Multiple License Updates

6 Run Carbon when available - for up to 10 records at a time.

b. You can run up to 10 Carbon updaters at once. Select the records you want with the checkboxes to the left of the Provider Name column

c. Next right click and select **"Update Selected Licenses"** from the right click menu. You can also click on the updater icons one after another and they will all run concurrently.

The screenshot shows the Modio Health Master Practice (DEMO) interface for San Francisco, CA. The user is logged in as Yas Glvechi. The main content area displays the profile of Kirk Heath, MD, a General Surgeon. Below the profile, there are several sections for license management:

- Immunizations:** A table with columns for Provider Name, License Type, License, Status, Issue Date, Exp. Date, Expires In, Last Updated, and Actions. Three records are shown for Kirk Heath, MD, all with a status of 'Complete' and a last updated date of 02/17/2022.
- State Licenses:** A table with columns for Provider Name, License Type, License, Add'l Info, State, Status, Issue Date, Exp. Date, Expires In, Last Updated, and Actions. Two records are shown for Kirk Heath, MD. The first is 'Current Active' (VA, 06/04/2007, 04/30/2024) and the second is 'Inactive' (NC, 10/23/2015, 08/20/2021). A context menu is open over this section, with 'Update Selected Licenses' highlighted. A red arrow points to an updater icon in the actions column of the first record.
- DEA Licenses:** A table with columns for Provider Name, License Type, License, Add'l Info, Status, Payment Indicator, Issue Date, Exp. Date, Expires In, Last Updated, and Actions. Two records are shown for Kirk Heath, MD. The first is 'Paid' (10/31/2024) and the second is 'Expired' (12/20/2022). A red box highlights the updater icon in the actions column of the second record.
- State Controlled Substance Licenses:** A table with columns for Provider Name, License Type, License, Add'l Info, Status, Payment Indicator, Issue Date, Exp. Date, Expires In, Last Updated, and Actions. No records are found for Kirk Heath, MD.

a. Once you've added licenses and some other record types, you may see an **updater icon**. When this is visible, a Carbon integration is available for the record.

Clicking on icon will run Carbon, returning verified fields directly from the primary source websites and saving a PSV document automatically.

Tip Guide: OneView V2 - Viewing Record Audit History

Here is how to check record audit history:

OneView V2 allows you to look up the history of changes on each record yourself.

Use the date updated dropdown in the **Prior Record** column to choose which point in the past you'd like to compare to the current record.

For each point in time, you can see what the data was and who updated it. Differences between the current record and the selected prior record will be highlighted in **yellow**.

Record Details Created By Kathy Hager (Admin) on 03/08/2022, 12:15 PM

Record ID	814856
Provider Name	Kirk Heath
Provider ID	269
Identifier(s)	MD VA 0101241891
Primary Source	https://dhp.virginiainteractive.org/Lookup/Detail/0101241891

Doctor License Supervisors

State License History	Prior Record	Current Record
Date Updated	02/15/2023, 9:22 AM	02/16/2023, 1:24 PM
Revision ID	02/16/2023	814856
Update Source	02/16/2023, 1:24 PM	OneView V1
Updated By (Role)	02/15/2023	Brandon Holmes OneView* Trainer (C)
License #	02/15/2023, 9:22 AM	0101241891 *
License # Display	02/06/2023	
State		Virginia (VA)
License Type	MD - Medical Doctor	MD - Medical Doctor
Permit Type		
Occupation	Medicine	Medicine
Specialties	Surgery	Surgery

Last Updated Actions

02/16/2023

02/06/2023

02/16/2023

12/20/2022

Start Here: Click on the **'Last Updated'** date on any record to see a side-by-side comparison of the current record, and past versions of that record.



Tip Guide: OneView V2 - Viewing & Restoring Inactive Records

The screenshot shows the Modio OneView V2 interface for a provider named Kirk Heath, MD. The interface includes a navigation bar with options like Team, Forms, Tracking, Logins, Tasks, and Notes. Below the navigation bar, there's a header for the practice (Modio Health Master Practice (DEMO) (San Francisco, CA)) and a search bar for the provider. The main content area displays a list of records with columns for Provider Name, Type, Test/Immunization, Questionnaire Type, Status, Completion Date, Exp. Date, Expires In, and Last Updated. A grid menu is open over the records, showing options to show all records, show inactive records, show active records, show all flags, show flagged items, show unflagged items, show all alerts, show enabled alerts, show disabled alerts, alert 1-6 months, export to Excel, export to CSV, export to PDF, and reset grid settings. A red box highlights the 'Show Inactive Records' option. Below the records, there's a 'State Licenses' section with a table of licenses. At the bottom, there's a footer with Privacy Policy, © 2023 Modio Health All rights reserved, Terms and Conditions, and a Chat button.


Provider Name	Type	Test/Immunizati...	Questionnaire Ty...	Status	Completion D...	Exp. Date	Expires In	Last Updated
Heath, Kirk	Testing & Reports	PPD Test Results		Negative	08/06/2018	08/06/2019	expired	02/17/2022
Heath, Kirk	Testing & Reports	Drug Test		Negative	01/29/2019	02/15/2019	expired	02/17/2022
Heath, Kirk	Testing & Reports	Drug Test		Negative	03/11/2019	11/02/2019	expired	02/17/2022
Heath, Kirk	Immunizations	Influenza		Complete		04/21/2018	expired	02/17/2022
Heath, Kirk	Immunizations	Influenza		Complete	02/02/2018	02/02/2019	expired	02/20/2023
Heath, Kirk	Immunizations	Covid-19 Vaccine		Complete				02/17/2022
Heath, Kirk	Immunizations	Covid-19 Vaccine		Complete				02/17/2022


Provider Name	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date	Expires In	Last Updated
Heath, Kirk	MD	0101241...	No	VA	Current Active	06/04/2007	04/30/2024		02/16/2023
Heath, Kirk	MD	2015-02245	No	NC	Inactive	10/23/2015	08/20/2021	expired	02/06/2023
Heath, Kirk	NNP-BC	2015-02245	No	NC	Inactive	10/23/2015	08/20/2021	expired	06/22/2022
Heath, Kirk		MB1036107	No	NE	Other Action				01/24/2023
Heath, Kirk		pending - 1	No	AL	Pending				02/20/2023

OneView V2 allows you to view and restore records that were previously made inactive.

In each grid's grid menu, you can choose to show Active records, Inactive records or All records. In Inactive or All records view, you will be able to view inactive records.

Inactive records will have a green "+" icon where the "x" icon usually is to the far right of the record row.

 Click the green icon to restore the inactive record back to active status.

 Deactivate records



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



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support@modiohealth.com



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