



OneView[®]

GETTING STARTED GUIDE:
ONEVIEW V2 OVERVIEW

Introducing OneView V2

Our new optimized OneView V2 dashboard brings a fresh look and experience to credentials management. Built to save you time, you will now be able to manage your team of providers more efficiently and accurately than ever before. Everything you know and love about OneView is still here (including all your data) but our OneView V2 revamped technology will open access to new features and capabilities.

The screenshot displays the Modio OneView V2 dashboard for 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. The interface includes a top navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. A user profile for 'Marie Robertson' is visible in the top right. Below the navigation, there are tabs for 'Provider Info', 'Licensure', 'Actions & Exclusions', 'Certifications', 'Education & Training', 'Work Experience', 'Malpractice Insurance', and 'Documents'. The 'Provider Info' section is active, showing a list of providers with columns for 'Provider Name', 'NPI #', 'Work Email', and 'Personal Email'. A '145 Total' indicator is present. Below this, the 'Birth Info' section is shown, with columns for 'Provider Name', 'Title', 'Primary Specialty', 'Date Of Birth', 'Country Of Citizenship', and 'Citizenship/Work Auth', with a '144 Total' indicator. The bottom of the dashboard features a footer with 'Privacy Policy', '© 2023 Modio Health All rights reserved', 'Terms and Conditions', and a 'Chat' button.

OneView V2 can be accessed from the Teams page

Accessing OneView V2

The new features can be accessed via a button on the Team page.

The screenshot shows the Modio Teams page interface. At the top, there is a navigation bar with the Modio logo and user information: "Welcome Richard Rupp", "Support", "Modio U", "New Features", and "Sign out". Below this is a secondary navigation bar with tabs for "Team", "Forms", "Tracking", "Logins", "Tasks", and "Notes". The main content area displays a list of providers for "Modio Health QA Displ (San Francisco, CA)". A yellow callout box with a black border points to a button labeled "OneView V2" with a "New" badge, which is highlighted with a black circle. The provider list includes entries such as "Amber Dennis, LLC - Test CEO", "Connecticut 1 - FAC", "DEMO California - Doctor", "Jessie Huston, LLC - FAC", "Kelly Butwid, LLC - FAC", "Kim Hutchinson, LLC - FAC", "Laura Broughton LLC - Organization Credentialing record", and "Marisa Pellerin, LLC - FAC". Each entry shows details like specialty, tags, compliance status, and alert counts. The bottom of the page features a pagination control showing "1 / 2" and "200 items per page", and a total count of "1 - 200 of 301 items".

All Provider View vs. Single Provider View

OneView V2 can be used to view all providers in your team (All Provider View) or to view one provider's data at a time (Single Provider View).

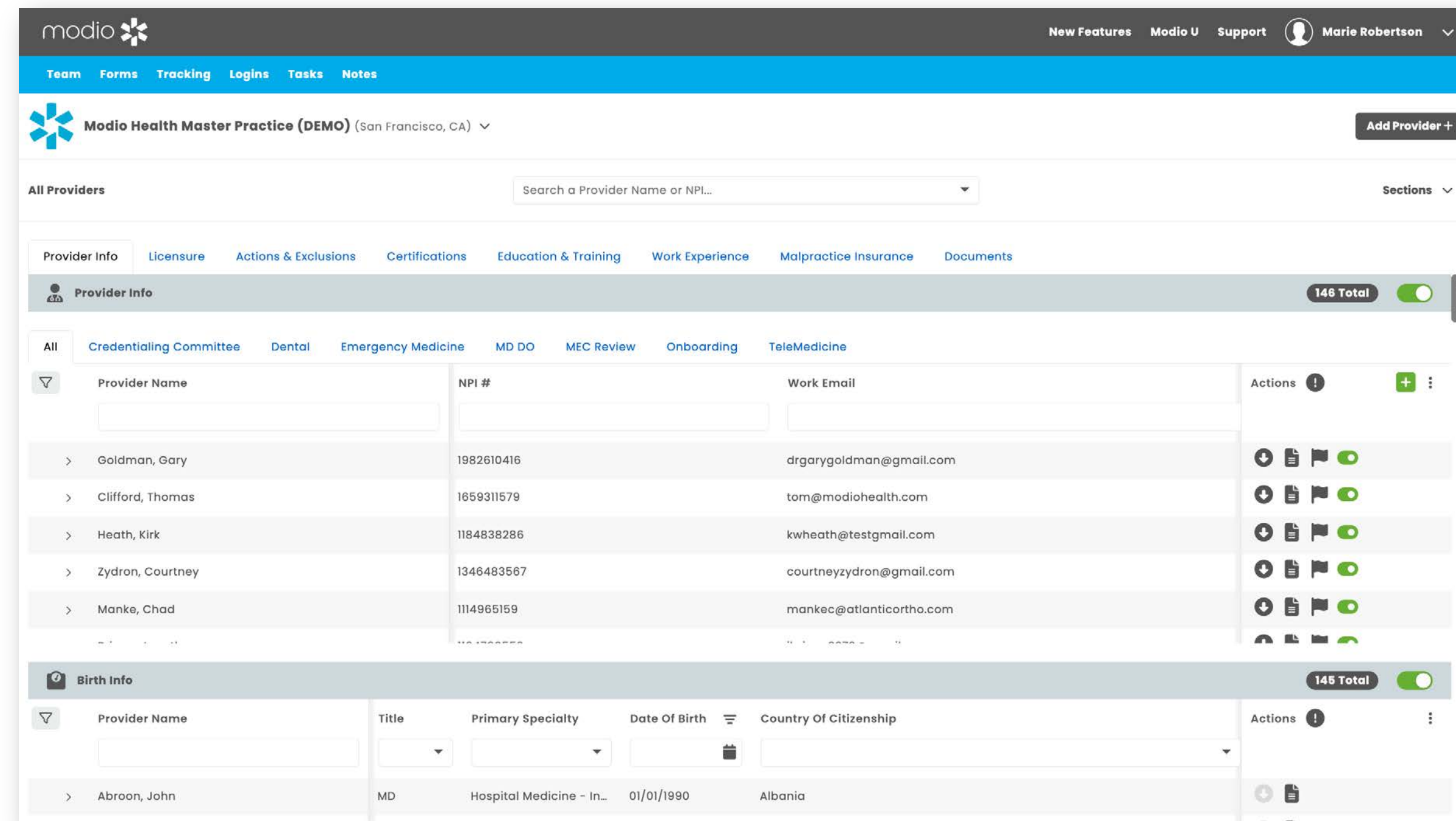
All Provider View is helpful for managing compliance, searching for which providers are a part of a certain facility or practice, or seeing which providers are missing data. Any time you want to look across the full group of providers on your team, this is a good tool.

Single provider view lets you see just one provider at a time in the new OneView V2 format. This is like a provider profile and is helpful for if you are working on updating data for one specific provider.

You can use whichever works best for your workflow; most users use both throughout their day depending on what they are working on

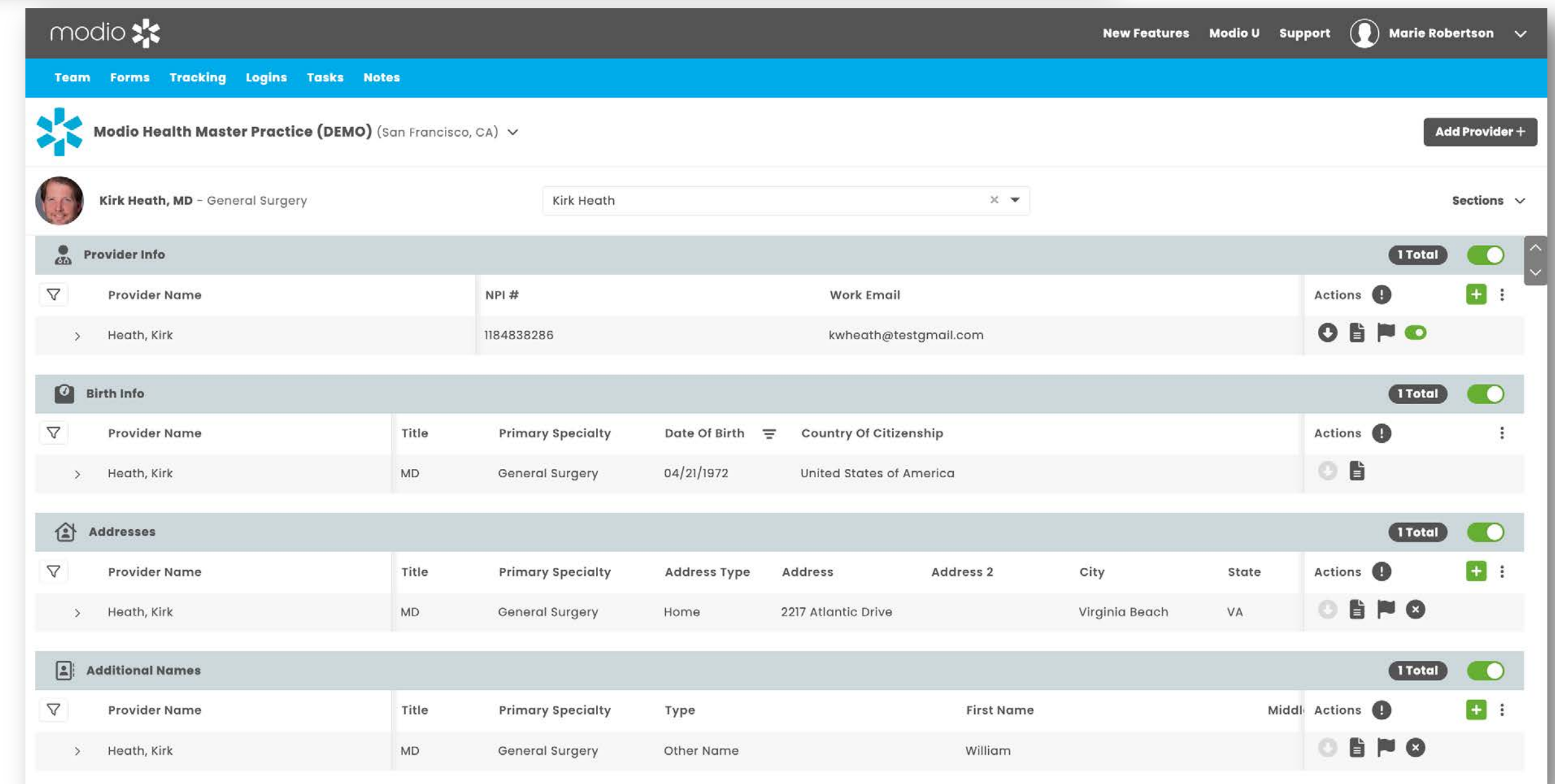
Customize what you want to see

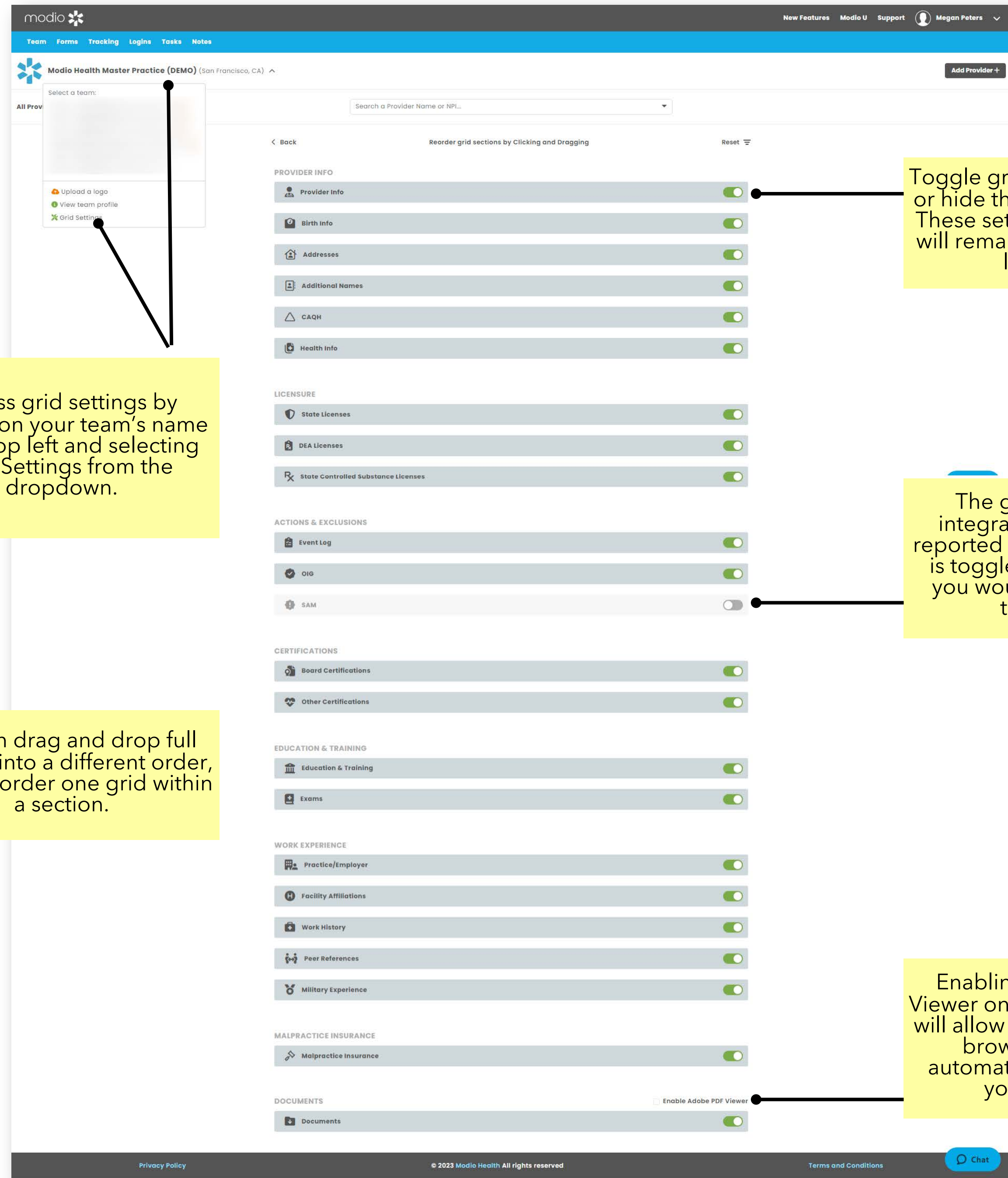
One of the benefits of OneView V2 is it can be customized to each user's preferences. On the next pages of this guide we will review how to personalize V2 so you only see the data and sections you want.



All Provider View

Single Provider View





Personalize your Grid Settings

Using the Grid Settings menu, you can change the visibility and order of all grids in OneView V2. These settings are sticky, which means they will persist every time you log in unless you choose to reset.

Access grid settings by clicking on your team's name at the top left and selecting Grid Settings from the dropdown.

You can drag and drop full sections into a different order, or just reorder one grid within a section.

Toggle grids on or off to show or hide them on the V2 page. These settings are saved and will remain set each time you log back in.

The grid for our SAM integration (which tracks reported compliance actions) is toggled off by default. If you would like to see this, toggle it on.

Enabling the Adobe PDF Viewer on the documents grid will allow them to open in the browser rather than automatically download to your computer.

Use the Sections Filter to simplify your view

This is a key tool for filtering OneView V2 down to exactly what you are working on. Note: This selection will reset every time you refresh the page.

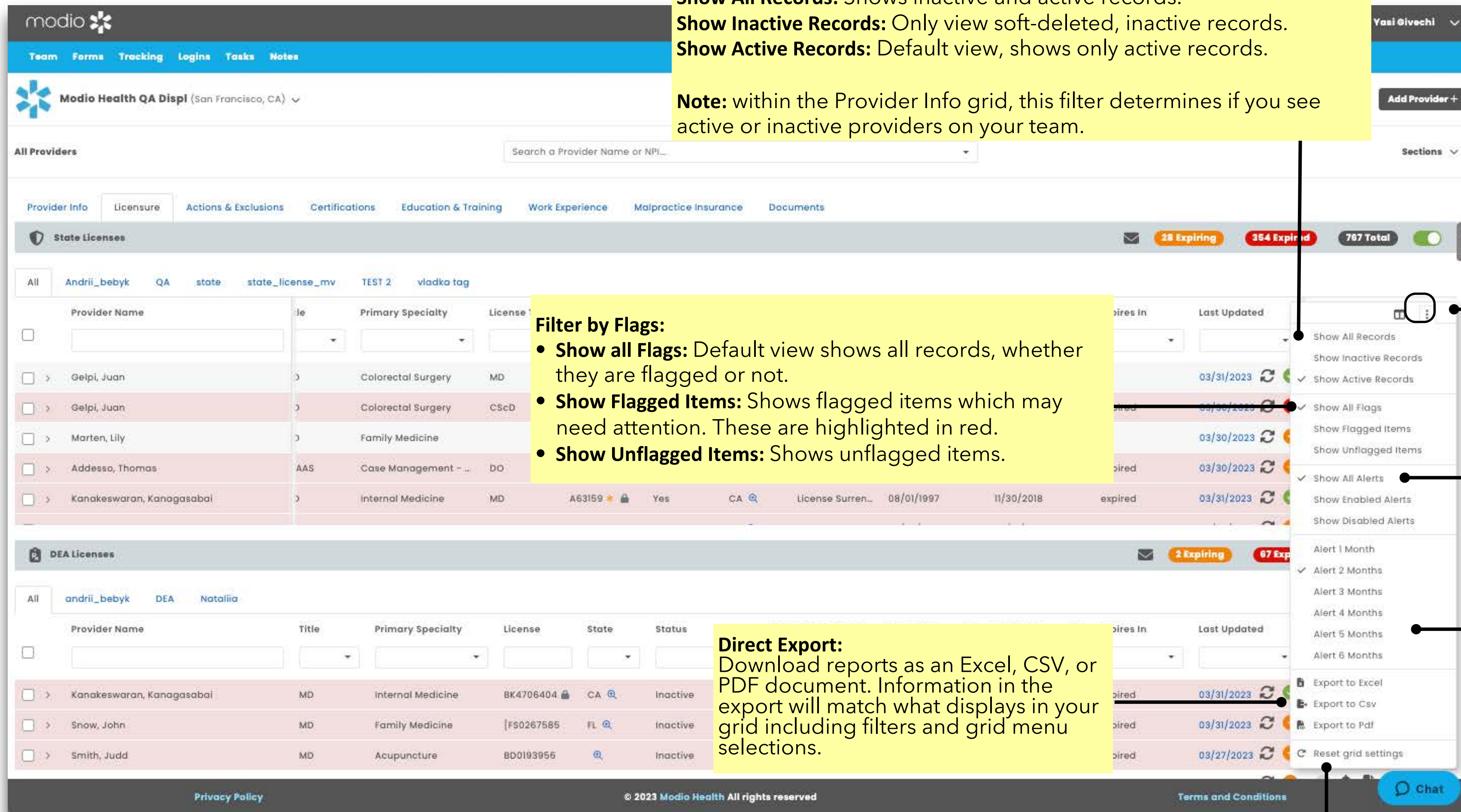
The screenshot shows the Modio Health Master Practice (DEMO) dashboard. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, the dashboard title is 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. A search bar for 'All Providers' is present. The 'Sections (6)' filter is open, displaying a list of sections with checkboxes. The 'Birth Info' table is visible below the filter, showing columns for Provider Name, Title, Primary Specialty, Date of Birth, and Country of Citizenship.

Provider Name	NPI #
> Goldman, Gary	1982610416
> Clifford, Thomas	1659311579
> Heath, Kirk	1184838286
> Zydron, Courtney	1346483567
> Manke, Chad	1114965159

Provider Name	Title	Primary Specialty	Date Of Birth	Country Of Citizenship
> Abroon, John	MD	Hospital Medicine - In...	01/01/1990	Albania
> Brandigan, Kelsey	NP-C	Family Medicine	11/22/1966	United States of America
> Wiltshire, Carolyn	FNP	Family Nurse Practitio...	02/01/1973	United States of America
> Briggs, Jonathan	MD	Hospital Medicine - In...	04/22/1972	United States of America

Click **Sections** to open our sections filter. Use this to check which credentialing grids are visible or hidden on your dashboard. Check the box for the section (or sections) you are working on in real time to filter down what you see.

If you disabled a grid in grid settings, it will appear greyed out, but you can still select and view it as needed through the sections filter.



Set Visible Records:
Show All Records: Shows inactive and active records.
Show Inactive Records: Only view soft-deleted, inactive records.
Show Active Records: Default view, shows only active records.
Note: within the Provider Info grid, this filter determines if you see active or inactive providers on your team.

Filter by Flags:

- **Show all Flags:** Default view shows all records, whether they are flagged or not.
- **Show Flagged Items:** Shows flagged items which may need attention. These are highlighted in red.
- **Show Unflagged Items:** Shows unflagged items.

Direct Export:
 Download reports as an Excel, CSV, or PDF document. Information in the export will match what displays in your grid including filters and grid menu selections.

Click the **three dots** to open the grid menu and customize your grid settings. Settings are unique to each grid. Keep in mind that these selections will be saved for you each time you log in, although choosing to view inactive records will revert to default view upon refresh.

Filter by Alert Status:
 Select record visibility based on alert status. Default view is set to enabled alerts. Your visibility settings are personal to you, but changes to alerts (i.e., silencing the bell) for each record will be visible by all team members.

Set it & Forget it: Set an alert interval based on your own monthly range preference (between 1 and 6 months).

Reset Grid Settings: Reset your custom settings to the Modio default.

Resize and Reorder Columns: Adjust your columns by selecting what you want to view first. Just click, hold and drag the columns to organize your columns or click between columns to resize them.

Personalize your Grid Columns

Adjust your grid columns to personalize your grid view.

Filter Quickly in Columns: Use the filter icon to show the search and filter options for each column in the grid. Clicking on the column name within the filter row will also change the sort options between ascending and descending.

Enable or Disable Columns:

Click on the column icon in the grid menu to adjust which columns you can see.

Select what you want to view or hide using the checkboxes. This will help you maximize your screen space and let you focus on exactly what you need to see.

The screenshot shows the Modio Health Master Practice (DEMO) dashboard for San Francisco, CA. It features two main sections: State Licenses and DEA Licenses. The State Licenses section displays a table with columns for Provider Name, License, Add'l Info, State, Status, Issue Date, Exp. Date, and Last Updated. A grid menu is open on the right, showing checkboxes for each column to toggle visibility. The DEA Licenses section shows a similar table with columns for Provider Name, State, License, and Status. The dashboard includes navigation tabs (Team, Forms, Tracking, Logins, Tasks, Notes), a search bar, and various status indicators like '11 Expiring', '94 Expired', and '360 Total' for State Licenses, and '1 Expiring', '38 Exp' for DEA Licenses. A user profile for Marie Robertson is visible in the top right corner.

Coordinator-specific (per grid): Saved at the individual grid level. For example, you can choose to show all records (active + inactive) for state licenses, then view only active records for facility affiliations.

Coordinator + Team-specific: Saved based on the team you are accessing. For example, you can have different grids visible for each OneView team you belong to. OneView will remember your settings for each team.

Not a Sticky Setting: Cleared each time you log out. These features (filtering for inactive records and flagged records) can help with data lookup but could restrict record visibility if not changed. For that reason, these views will return to the default when you log back in.

Understand Saved Customization Settings

OneView saves most settings for a continuous experience every time you log in.

	Coordinator-specific (per grid)	Coordinator + Team-specific	Not a sticky setting
Grid Toggle on/off (Grid Settings page)		✓	
Grid Order (Grid Settings page)		✓	
Enabled PDF Viewer (Grid Settings page)		✓	
Show All Records (Grid Menu)	✓		
Show Active Records (Grid Menu)	✓		
Show Inactive Records (Grid Menu)			✓
Alerts Status Filters (Grid Menu)		✓	
Alert Interval (Grid Menu)		✓	
Flags Filters (Grid Menu)			✓
Show Filter Row	✓		
Grid Column Filter		✓	
Grid Column Sort		✓	
Grid Column Position		✓	
Grid Column Width		✓	
Grid Column Visibility		✓	

Getting started: Features and Navigation

In the remainder of this guide, we will take a look at the most commonly used features on the new OneView V2 pages and how to use them.

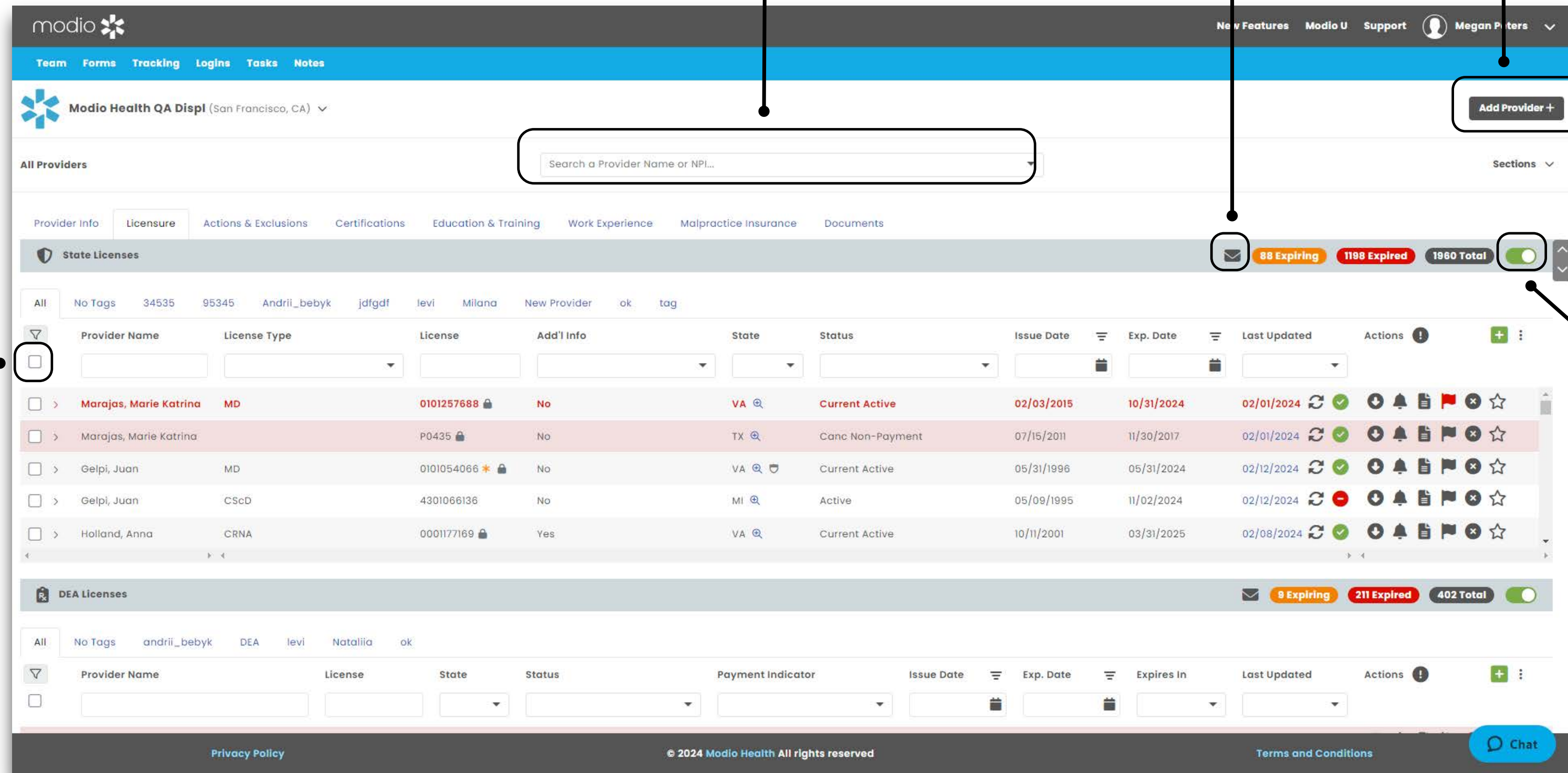
Need to focus on an individual provider? Search for them here to go to **Single Provider View** of their profile.

Send an **email alert summary** to yourself or to your providers.

Add ***new*** Providers to your team. We recommend having their **NPI** ready - If you use NPI we can look up data from LexisNexis to get you started.

Bulk Licensure Updaters: This checkbox will select all visible providers in your grid. You can also manually select checkboxes for licenses you want to run. Once checked, you can run updates for up to 10 licenses by right clicking over the area and choosing "update selected licenses."

Hide a grid from the page. You can re-enable it from the grid settings.



Additional Features and Navigation

Update data quickly

Double click in any field to edit a visible field with inline editing, then click out of the cell to save. This will save you a ton of time since you can add credentialing information directly from one location.

Drag and Drop Document Upload:

Upload documents directly to a record with the new auto-file feature. Just drag and drop a document onto the row you want it associated with. Documents will be sorted into the appropriate document library based on name and can be accessed from the side drawer or Documents grid.

The screenshot shows the Modio Health Master Practice interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, the 'Modio Health Master Practice (DEMO)' header is visible. The main content area is divided into sections: 'All Providers' with a search bar, 'State Licenses' with a summary bar (11 Expiring, 94 Expired, 360 Total), and 'DEA Licenses' with a summary bar (1 Expiring, 38 Expired, 155 Total). Each section contains a table of provider records with columns for Provider Name, License, Add'l Info, State, Status, Issue Date, Exp. Date, and Last Updated. An 'Actions' column is present in each table, containing various icons for document management and record actions.

Select **Actions** to view a key with the meaning of each icon.

- Download**
Download the latest document.
- Alert**
Hide less important records.
- Edit**
Edit Tags, Notes, or Documents.
- Flag**
Flag records that require attention.
- Add**
Restore a soft deleted record.
- Remove**
Soft delete a record.
- Toggle**
Temporarily hide an item from view.
- Update**
Update provider data.
- Asterisk**
Denotes a primary record.
- Multi-State**
Indicates multi-state compact licenses.
- Search**
Links to external reference websites.
- Verification**
Record verification status.

Click the updater icon to run Carbon. You can click on them one after another to run multiple (up to 10) at once.

Quickly **download** the latest document associated with the record (if available). In V2, Carbon now auto-saves PSV documents!

Additional Features and Navigation

Navigate directly to verification websites by clicking the **magnification icon**, when available. This will open the primary source site in a new tab.

Update additional data using **Detail View**.

Click the **arrow** next to a record to view additional fields of data in detail view. Use it to edit more detailed credentialing information, beyond what is visible in the in-line editing row.

The screenshot displays the Modio OneView V2 interface. At the top, there is a navigation bar with the Modio logo and user information for Marie Robertson. Below this is a header for 'Modio Health Master Practice (DEMO) (San Francisco, CA)'. The main content area shows a table of 'State Licenses' for 'Kirk Heath, MD - General Surgery'. The table has columns for Provider Name, License, Add'l Info, State, Status, Issue Date, Exp. Date, Last Updated, and Actions. A record for 'Heath, Kirk' is selected, and its details are shown in a form below the table. The form includes fields for State (VA - Virginia), License Type (MD - Medical Doctor), License (0101241891), First Name (Kirk), Last Name (Heath), Status (Active), Issue Date (06/04/2007), Exp. Date (04/30/2024), Don't Renew? (Yes), Primary? (Yes), Multi-state? (No), Taxonomy Codes (Surgery (208600000X)), and Enrollment in Prescription Drug Monitoring Program? (Enrolled in Prescription Drug Monitoring Program?). At the bottom right of the form are 'Discard Changes' and 'Save Record' buttons.

Save any edits made or **Discard Changes** if you don't need to save it.

Don't worry - if you try to leave without saving OneView will remind you to.

Open the side drawer

Click the **arrow** to open/close the side drawer. By default, it will be collapsed and show you counts of how many notes, tags and documents are associated with the record.

Note - the side drawer will remember its last setting. If you frequently add docs, notes or tags, you may want to leave it open. If you do not, leave it closed.

Notes, Tags and Documents

In V2, we have a new way to view additional record data - the side drawer. We call it this because it looks like a drawer that opens or closes from the side of the page.

View side drawer

You can do this in 2 ways:

1. Click the **arrow** to open detail view. When you open detail view, you will see the side drawer.

2. Click the document icon to quickly open the side drawer

The screenshot shows the Modio OneView V2 interface for a provider named Kirk Heath, MD. The main content area displays the provider's state license details, including a table of licenses and a search criteria section. A side drawer is open on the right side of the page, showing tabs for Notes (2), Documents (1), and Tags (0). The Notes tab is selected, displaying a list of public notes. The interface includes a top navigation bar with links for Team, Forms, Tracking, Logins, Tasks, and Notes. A user profile for Marie Robertson is visible in the top right corner. The footer contains links for Privacy Policy, Terms and Conditions, and a Chat button.

Click on the tab you want to view

Click on a tab depending on what you want to view.

Notes - view public and team notes as a thread. You can also add a new note.

Documents - View documents linked to the record. Default view shows active documents - remove the filter to display inactive documents. Mouse over a document to see the full file name.

Tags - View record tags or add new ones.

Note - the Provider Info grid has an additional tab for Teams. This is where you can see and change team memberships.

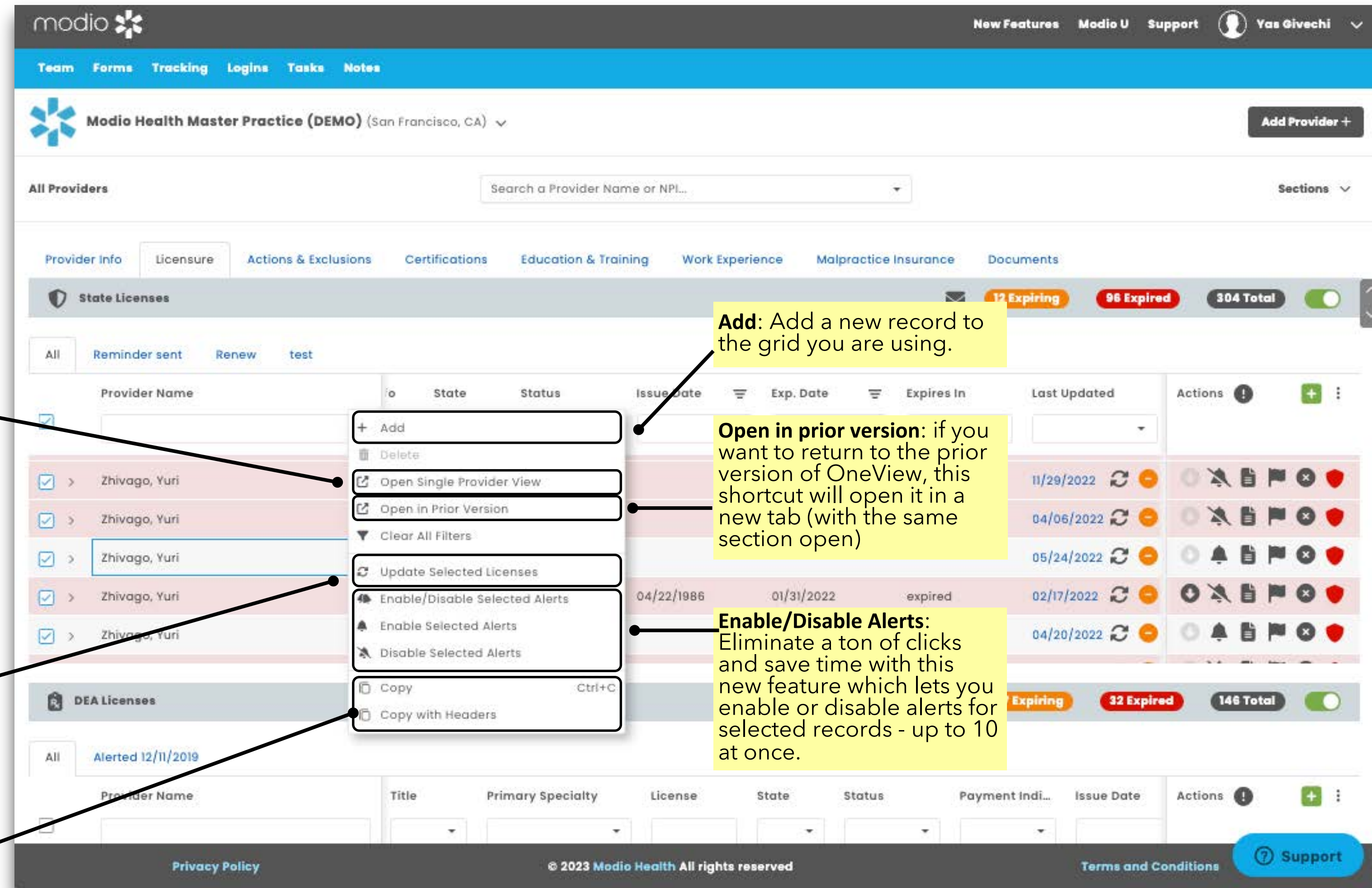
Right-click Menu

Right-click anywhere on a record to see actions you can take.

Open in single provider view: Leave all provider view and go to the single provider's credentialing profile.

Update Selected Licenses: Update Carbon for the license(s) of the provider(s) selected. You can do this for up to 10 at once!

Copy / Copy with Headers: Copy the data from OneView directly into another tool.



Add: Add a new record to the grid you are using.

Open in prior version: if you want to return to the prior version of OneView, this shortcut will open it in a new tab (with the same section open)

Enable/Disable Alerts: Eliminate a ton of clicks and save time with this new feature which lets you enable or disable alerts for selected records - up to 10 at once.

Last Updated Date and Audit History

You can easily see when a record was last updated using the Last Updated Date. Click on this date to view Audit History for the record.

Audit history compares a prior record (the center orange column) to the current record (the right green column). By default, it will show the most recent record, but you can change this and choose any prior record to compare to the current record.

Additional tabs
Some grids (like provider info and licenses) may contain multiple tabs. If you don't see the field you are looking for when you scroll down, check if there are more tabs.

Select the "Date Updated" you want to see
By default, the most recent prior update is selected. Choose another record from this dropdown to look at a different prior record.

Look for highlighting
OneView will highlight field differences between the current and selected prior record to draw your attention to them

Last Updated Date
This date indicates when the record was most recently updated. Clicking the date will open Audit History so you can view more details.

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

Supervisors

State License History	Prior Record	Current Record
Date Updated	08/18/2023, 11:38 AM	08/22/2023, 7:49 AM
Revision ID	0-37822604	814856
Update Source	OneView V1	OneView V1
Updated By (Role)	Lauren Vaughn (C)	Kirk Heath (P)
License #	0101241891 *	0101241891 *
License # Display		
State	Virginia (VA)	Virginia (VA)
License Type	MD - Medical Doctor	MD - Medical Doctor
Permit Type		
Occupation	Medicine	Medicine
Specialties	Surgery	Surgery

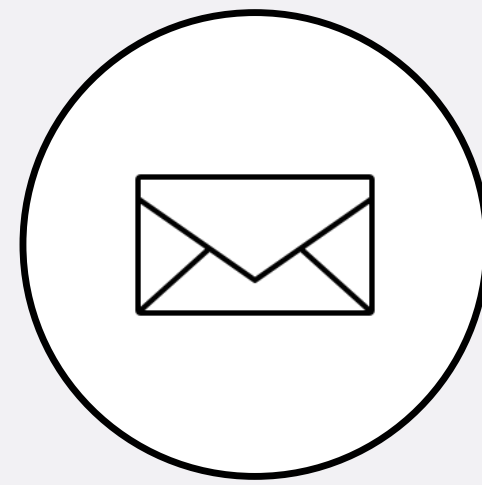
Audit History

Last Updated	Actions
08/22/2023	[Refresh] [Check] [Download] [Alert] [Flag] [Close] [Star]
09/05/2023	[Refresh] [Check] [Download] [Alert] [Flag] [Close] [Star]
03/06/2023	[Refresh] [Check] [Download] [Alert] [Flag] [Close] [Star]
03/06/2023	[Refresh] [Check] [Download] [Alert] [Flag] [Close] [Star]
08/10/2023	[Refresh] [Check] [Download] [Alert] [Flag] [Close] [Star]

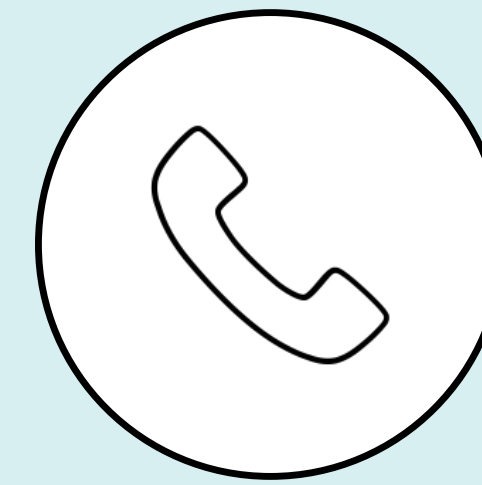
For additional questions or further training, contact the Modio Team via:



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