

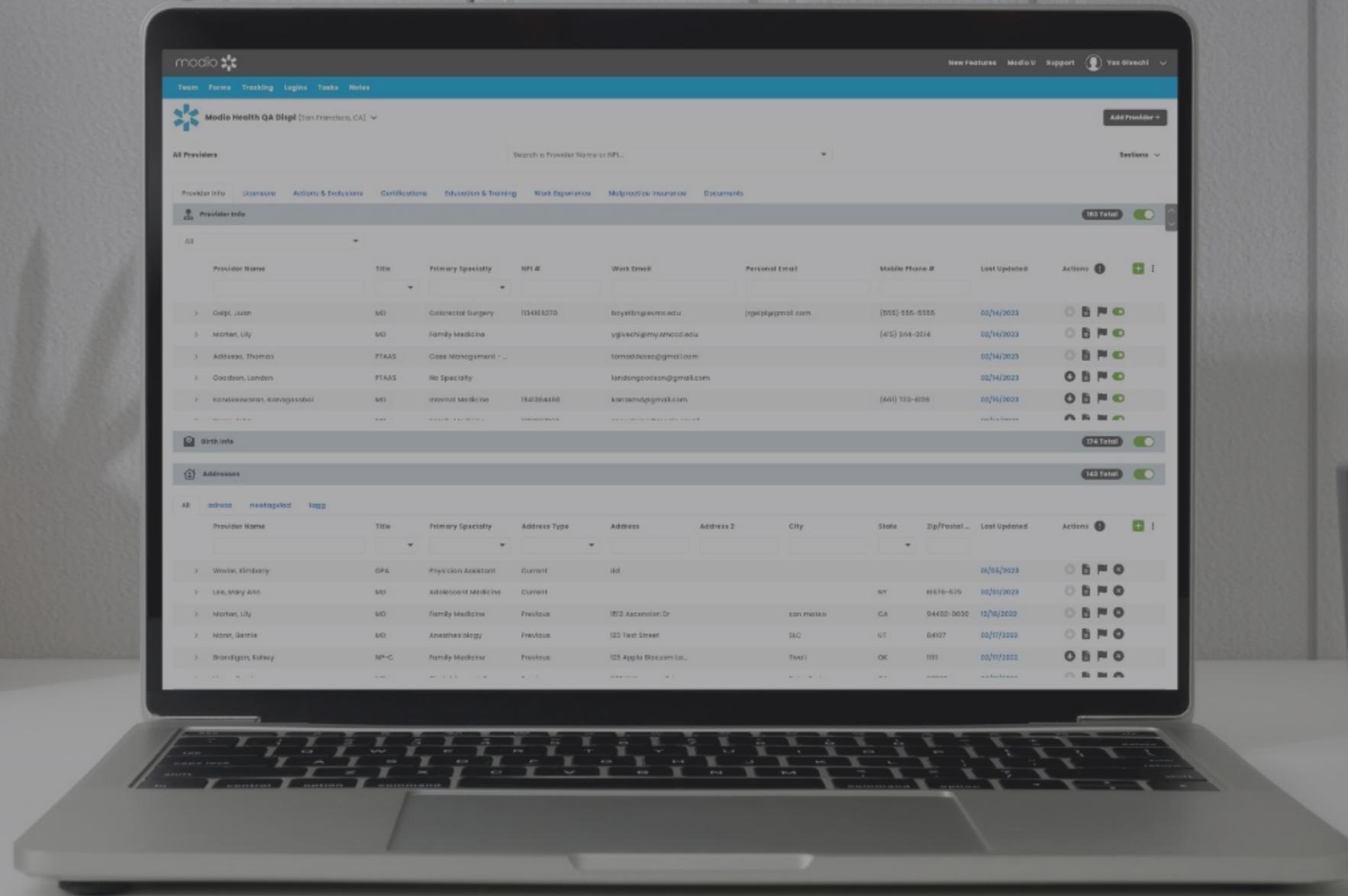


# OneView<sup>®</sup>

## OneView V2 Verification Features Overview Guide

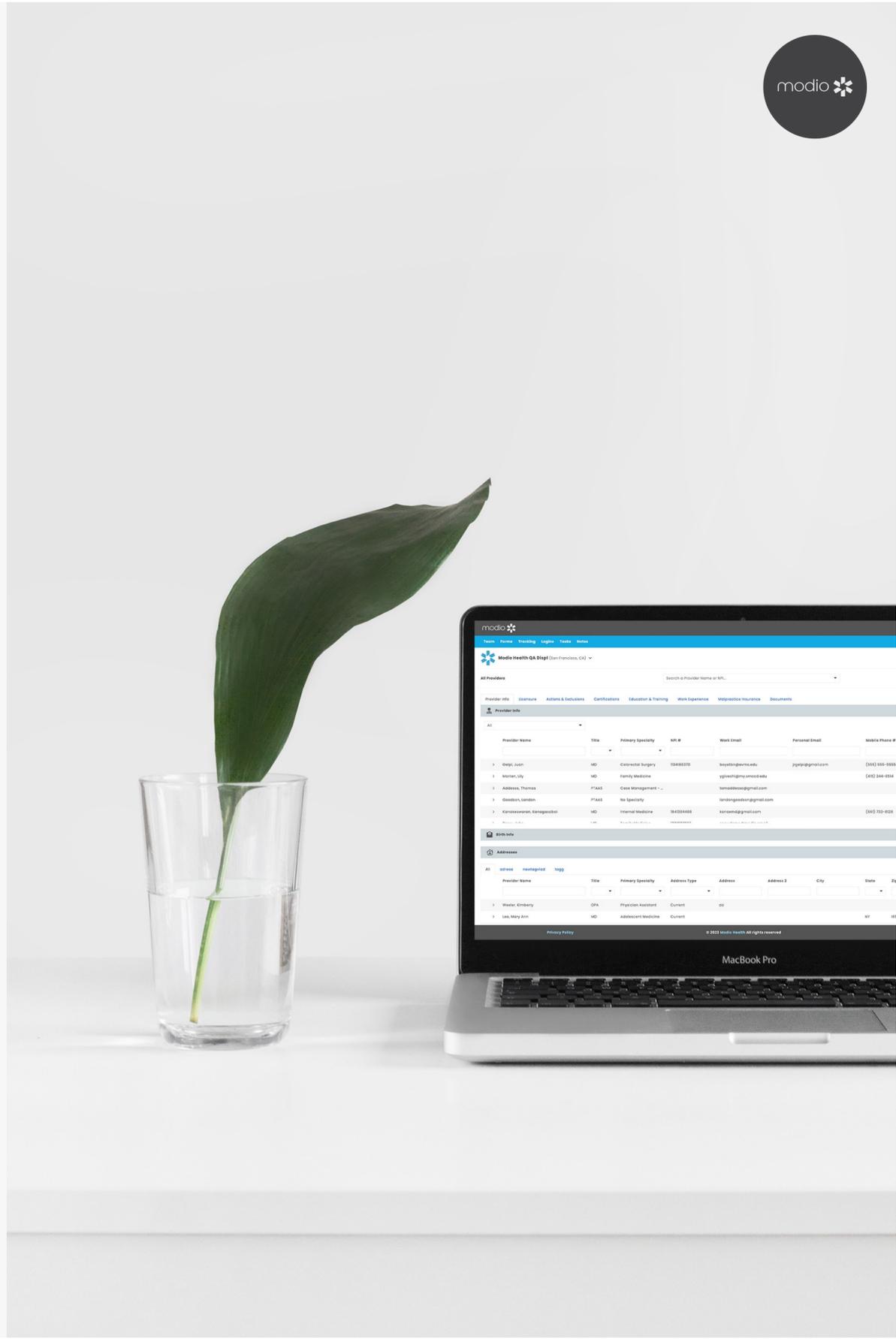
# Verification Features in OneView V2

Document and store verification data, note and supporting documents



# Topics

- What is the goal of these features?
- Are the verification features right for you?
- Current limitations
- How verification data is stored
- Verification feature terminology
- Full feature overview

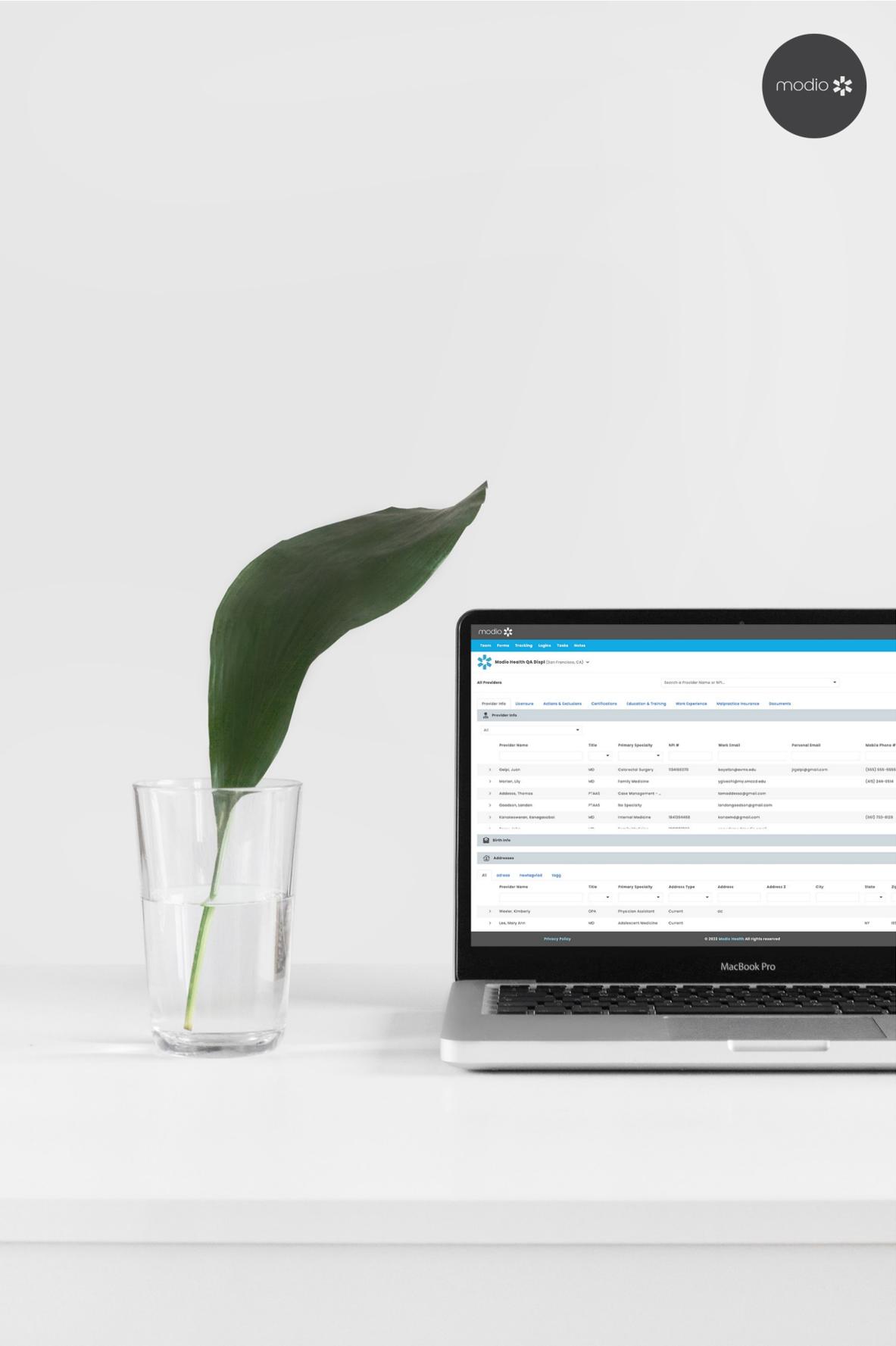




# The Benefits of OneView V2

Support organizations with stringent verification data requirements (like accredited CVOs) by:

- Producing a consolidated verification summary PDF with a data section showing what fields were verified and supporting documents included in the packet.
- Storing documentation of verification data on the individual record level
- Supporting resetting verifications if the process must be restarted because the original process was incomplete or if it is time to recredential

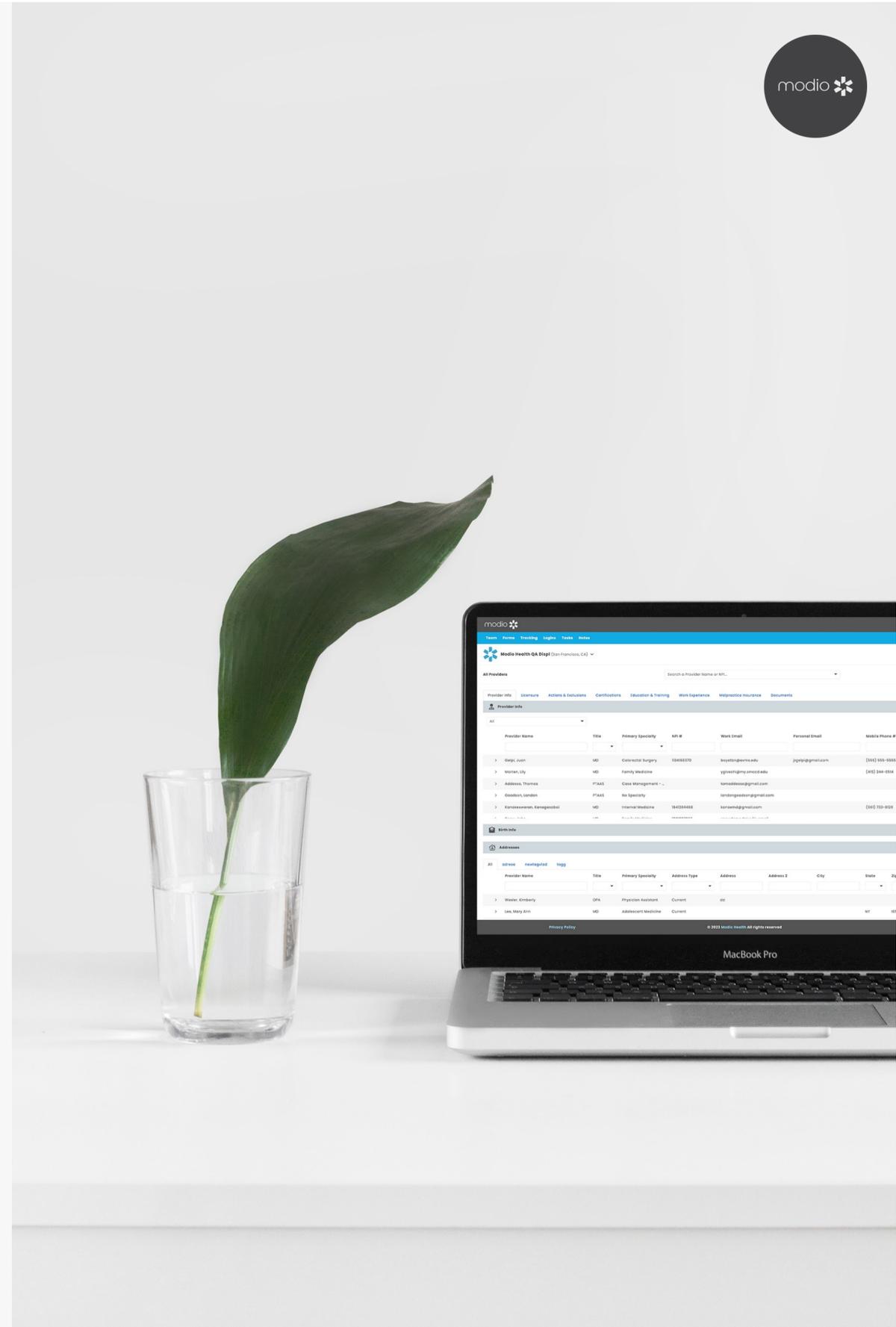


# Are The Modio Verification Features Right For Me?

**Background:** Modio created the OneView V2 verification features to address the needs of our parent company's CVO, which is accredited by NCQA.

There are multiple types of certifications managed by NCQA, and organizations can be accredited by other governing bodies as well.

Depending on your organizations needs, you may be able to meet documentation for your governing body using our DocuSign integration or another approach. We recommend working with your Customer Support contact or Project Manger to determine what is the best fit for you if you need to capture verifications in OneView.





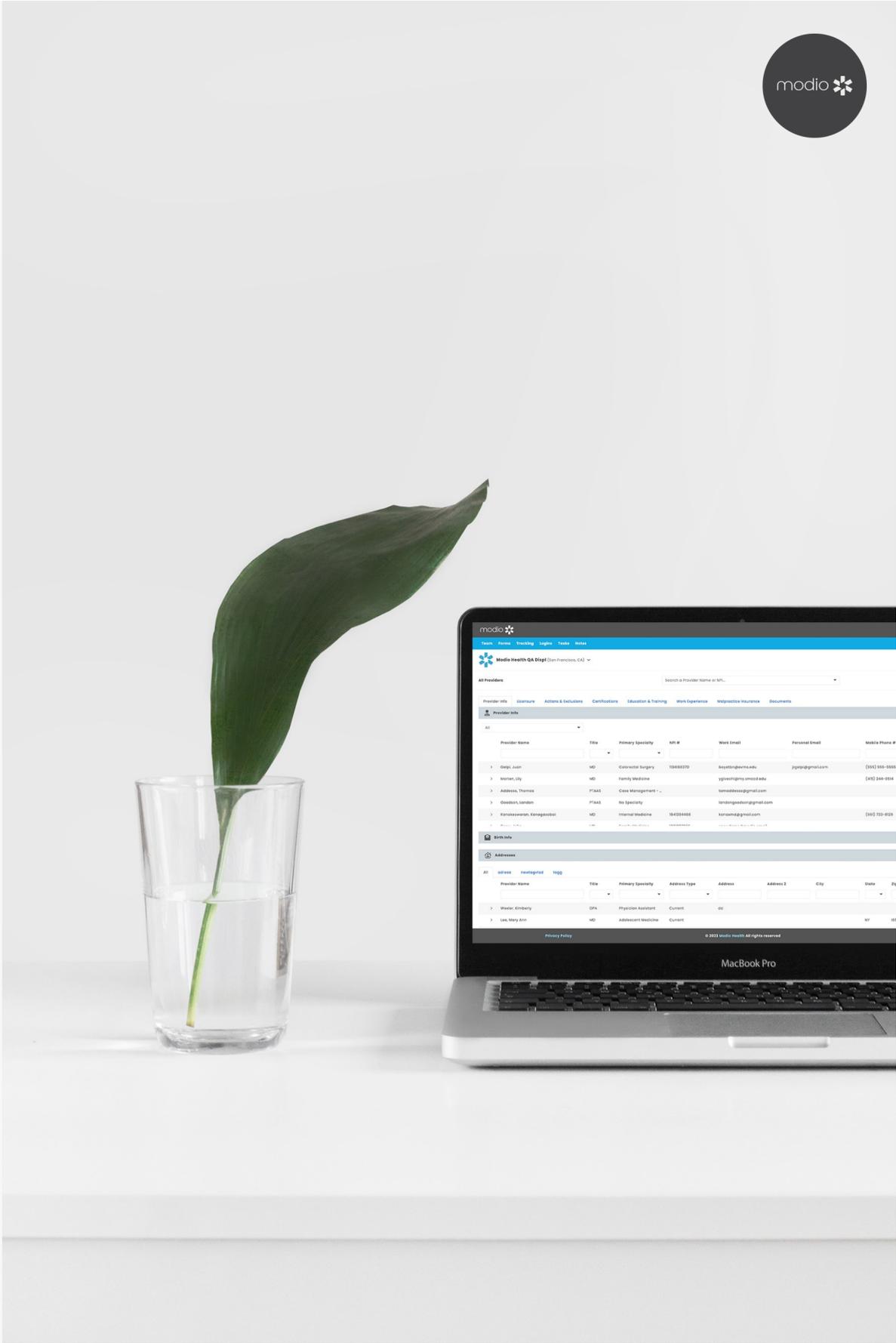
# Current Limitations of OneView V2

This is a **beta version** of this feature set that is limited.

As a first iteration of these features, Modio has built them according to the specifications of our parent company's CVO. Small customizations can be made, like adding your organization's name on the summary PDF and excluding specific fields for specific providers.

We cannot yet customize the verification summary PDF for each organization.

In the future, we plan to grow this feature and the ability to customize it pending our parent company getting results of their NCQA audit and getting feedback from our auditor.



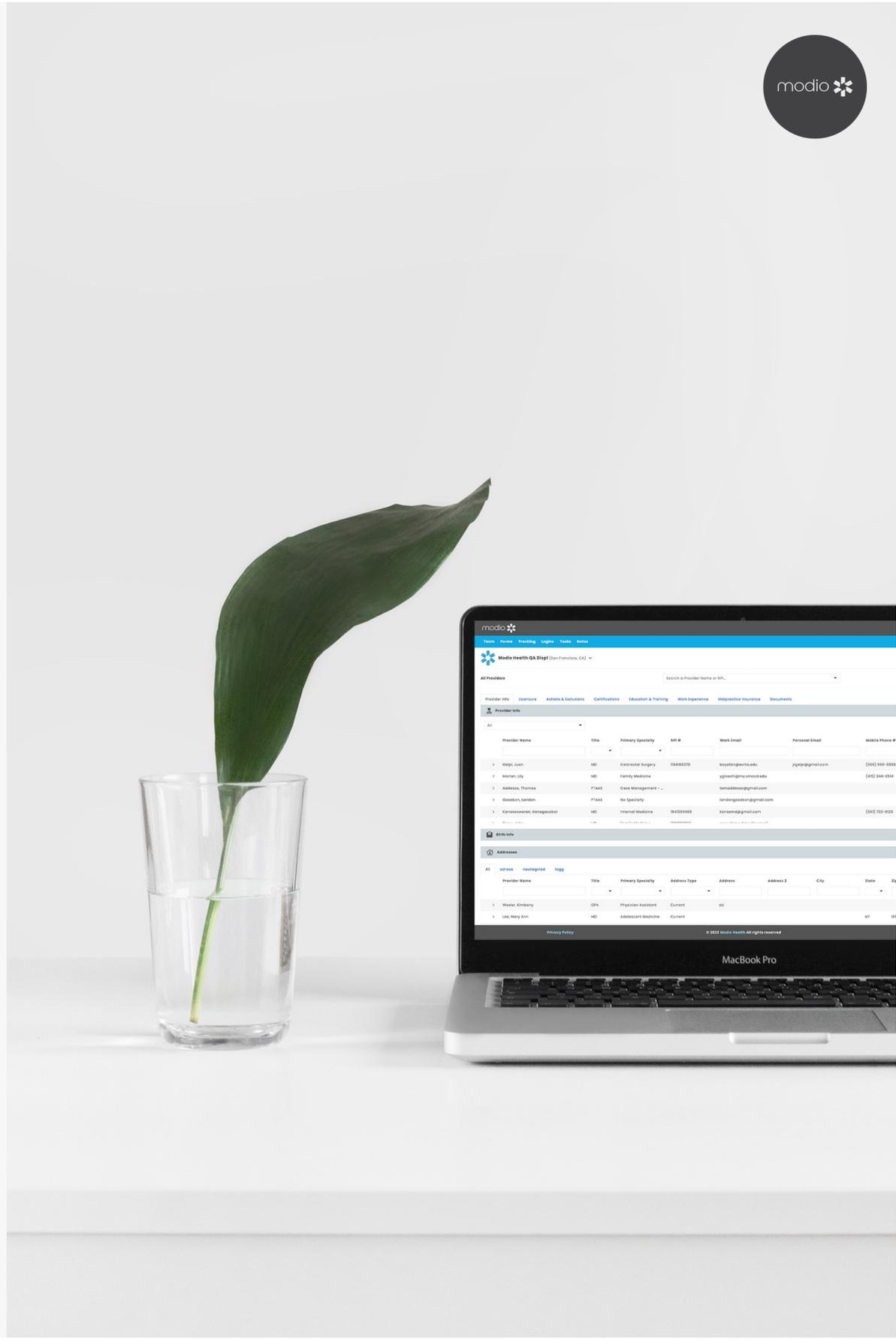
# How verification data is stored - "frozen in time"

Verification data is stored in a separate history ledger on the back end of OneView.

Our intent is for each verification to be "frozen in time"

OneView data must continue to evolve but the verification data should be a snapshot in time of what the data was at the time of the verification.

For example, if a coordinator verifies a state license on Jan 1st that is Active. On Jan 2nd, the license is made inactive on probation. In this case, we want the verification data to capture that at the time the license was verified it was Active so if the organization approved their credentials, they did so not yet knowing the license was on probation.



# OneView V2 Common Terminology

- **OneView V2 Page Link:** [www.modiohealth.com/oneview](http://www.modiohealth.com/oneview)
- **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.
- **Verification Grid:** By default, Verifications is the first grid under Provider Info. Make sure this grid is toggled on to see the verification features.
- **Verification Icons:** When the verifications grid is enabled, you will see verification icons next to records that are eligible to be verified. The verification icons are shaped like shields and are at the far right of the record row next to other actions.
- **Verification Details:** A window that opens when you click on the verification icons; this contains the verification history (so you can compare previous verification records to the current one), verification supporting documents, verification notes, and verification data fields. Capturing the update reason is also done in verification details.
- **Update Reason:** If a record has a saved verification, then changes are made to the data that was verified, users will be prompted to add an update reason within verification details.
- **Verification Summary PDF:** This PDF is the final product of the verification process that can be saved for audit. It combines all verification data and supporting documents into a PDF.

# Feature Overview

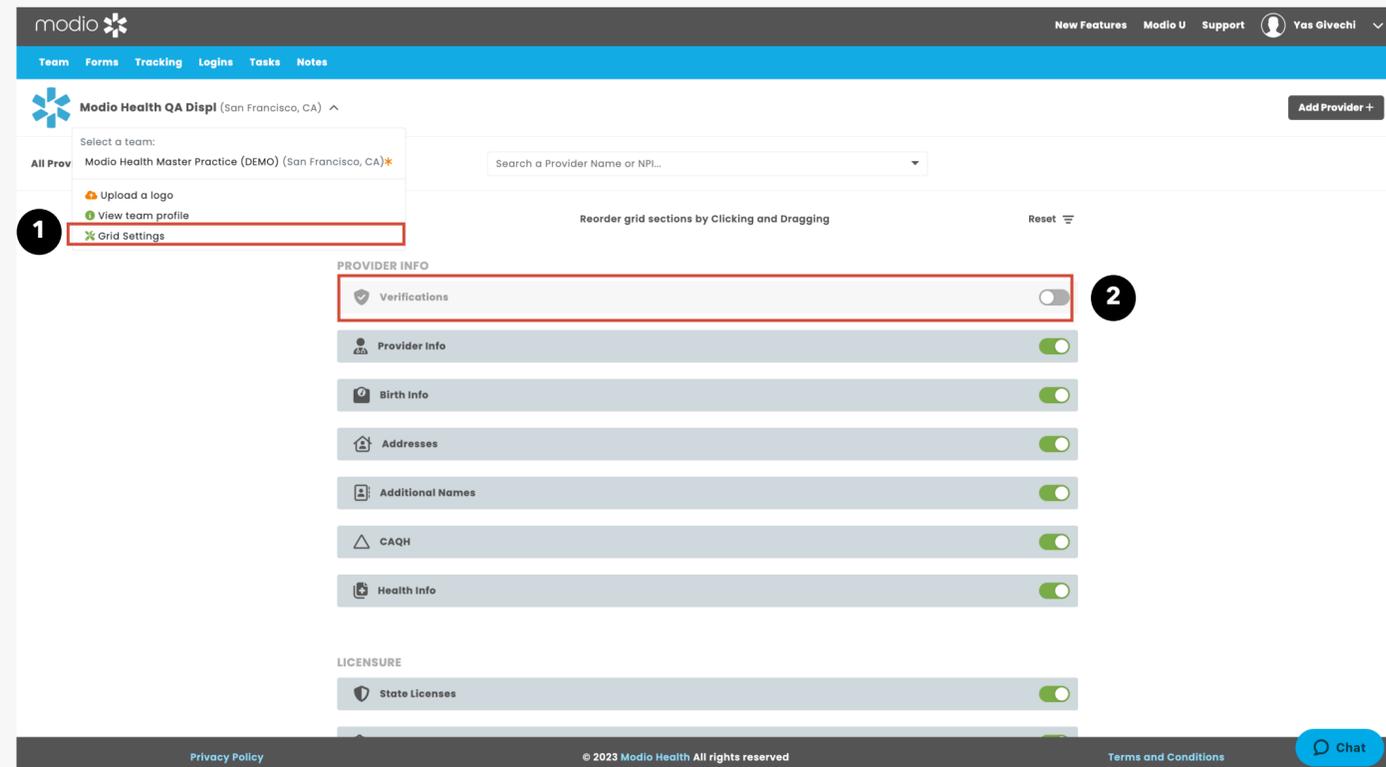
The screenshot displays the Modio Health QA Displ interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below this, the main header shows 'Modio Health QA Displ [San Francisco, CA]' and an 'Add Provider' button. A search bar is present for 'Search by Provider Name or NPI...'. The main content area is divided into sections: 'All Providers' (183 Total), 'Birth Info' (176 Total), and 'Addresses' (143 Total). Each section contains a table of data.

Provider Name	Title	Primary Specialty	NPI #	Work Email	Personal Email	Mobile Phone #	Last Updated	Actions
Galpi, MD	MD	Colonectal Surgery	1134818370		jrgel@gpmol.com	(855) 855-5555	02/14/2023	
Le, MD	MD	Adolescent Medicine		lygach@...				
Marler, Lily	MD	Family Medicine		lmarler@...				
Marron, Gerrie	MD	Anesthesiology		gerrie@...				
Brandtger, Kirby	NP-C	Family Medicine						

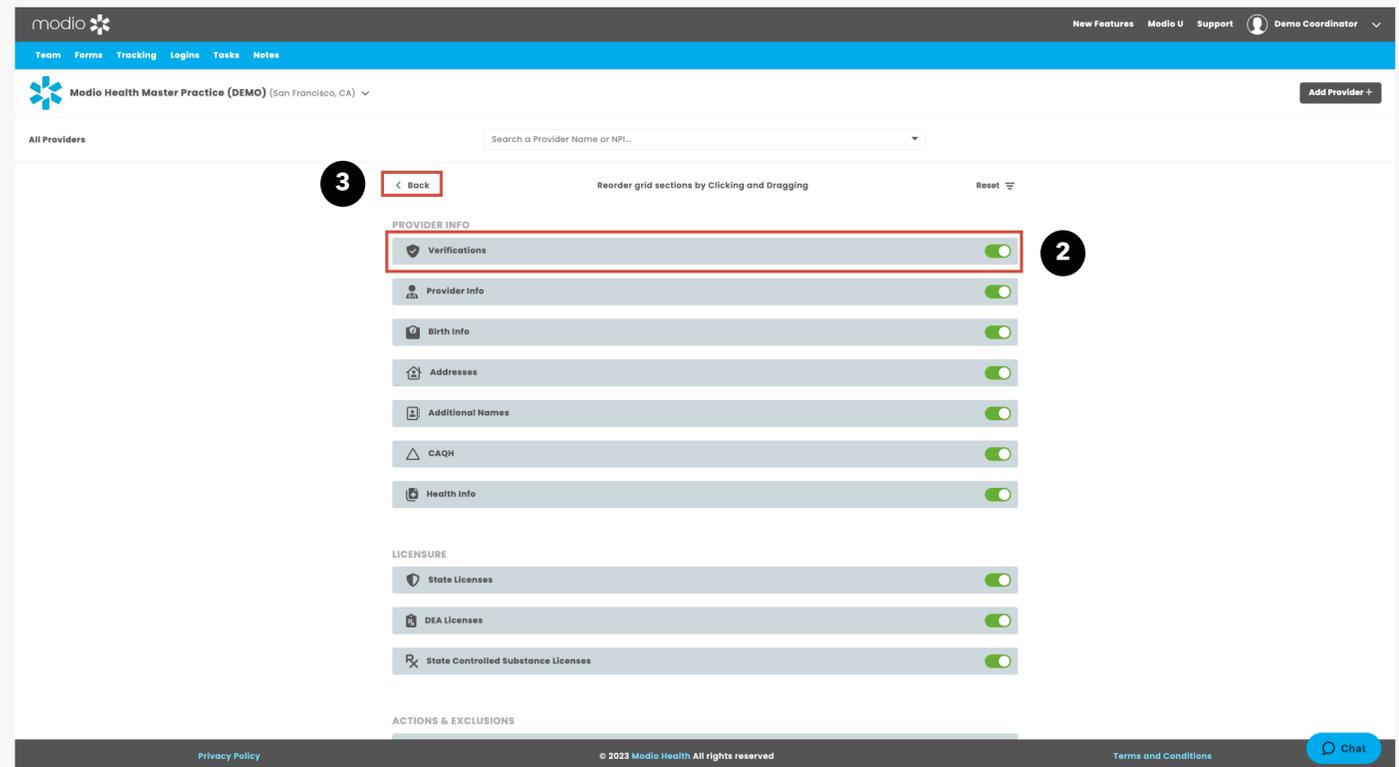
  

Provider Name	Title	Primary Specialty	Address Type	Address	Address 2	City	State	Zip/Postal ...	Last Updated	Actions
Winkler, Kimberly	OPA	Physician Assistant	Current	dd					04/04/2023	
Lee, Mary Ann	MD	Adolescent Medicine	Current			San Mateo	NY	10516-6176	02/01/2023	
Marler, Lily	MD	Family Medicine	Previous	1812 Ascension Dr		San Mateo	CA	94402-0030	10/06/2022	
Marron, Gerrie	MD	Anesthesiology	Previous	122 Tenth Street		SAC	UT	84107	02/17/2022	
Brandtger, Kirby	NP-C	Family Medicine	Previous	125 Apple Blossom Ln.		Tulsa	OK	74111	02/17/2022	

# OneView V2 Feature Overview: Getting Started



1. Enable the verifications grid in grid settings.
2. This will show you the grid, but also enable the other verification features too, like the **verification icons**.



3. When you click "**Back**" to return to the main OneView V2 page, you will see the verifications grid and features.
4. Once you are back on the main OneView V2 page, **filter** for the provider you are completing verifications for.

# OneView V2 Feature Overview: Verification Icons

The screenshot displays the Modio OneView V2 interface for a user named Kirk Heath, MD. The interface is divided into two main sections: Education & Training and Facility Affiliations. Both sections feature a table of records with various columns and a set of verification icons in the 'Actions' column.

**Education & Training Section:** This section has a toggle for '5 Total' records. The table includes columns for Provider Name, Education Type, School/Institution, Degree, Specialty/Major, Start Date, End Date, Completed?, and Last Updated. The records are as follows:

Provider Name	Education Type	School/Institution	Degree	Specialty/Major	Start Date	End Date	Completed?	Last Updated
Heath, Kirk	Medical School	Eastern Virginia Medical School	MD		09/01/1998	05/31/2002	Completed	02/17/2022
Heath, Kirk	Residency	Eastern Virginia Medical School		General Surgery	07/01/2002	06/30/2007	Completed	02/17/2022
Heath, Kirk	Internship	Eastern Virginia Medical School		General Surgery	07/01/2002	07/01/2007	Completed	02/17/2022
Heath, Kirk	Nursing School	University Of North Carolina At ...	BS	Business	01/06/2022	06/24/2022		02/17/2022
Heath, Kirk	PostGrad	Old Dominion University			01/04/2022	03/26/2022		02/17/2022

**Facility Affiliations Section:** This section has a toggle for '7 Total' records, with '0 Expiring' and '6 Expired' indicators. The table includes columns for Provider Name, Facility Name, Staff Category, Facility Type, Appt. End Date, Expires In, Start Date, End Date, and Last Updated. The records are as follows:

Provider Name	Facility Name	Staff Category	Facility Type	Appt. End Date	Expires In	Start Date	End Date	Last Updated
Heath, Kirk	Sentara Virginia Beach General Hospital	Resigned	Hospital	07/11/2017	expired	08/29/2008	07/11/2017	01/26/2023
Heath, Kirk	Sentara Williamsburg Regional Medical Ce...	Active	Hospital	10/31/2020	expired	10/04/2018	Current	01/26/2023
Heath, Kirk	Chesapeake Regional Medical Center	Locum Tenens	Hospital	03/08/2020	expired	04/10/2018	Current	01/26/2023
Heath, Kirk	Sentara Leigh Hospital	Active	Hospital	08/01/2020	expired	03/08/2020		01/26/2023
Heath, Kirk	Sentara Princess Anne Hospital		Hospital	10/31/2020	expired	08/04/2011	Current	04/14/2022
Heath, Kirk	Sentara Virginia Beach General Hospital		Hospital	10/31/2020	expired	02/05/2019	Current	04/14/2022
Heath, Kirk	Sentara Albemarle Medical Center	Resigned				12/07/2015	03/07/2015	04/14/2022

The 'Actions' column for each record contains a set of icons: a plus sign, a bell, a document, a flag, a trash can, and a shield. The shield icon is highlighted with a red box and an arrow, indicating its function as a verification icon. The shield icon is green for records that are eligible for verification (e.g., the first record in the Education & Training section and the first record in the Facility Affiliations section) and red for records that are not eligible (e.g., the second record in the Education & Training section and the last record in the Facility Affiliations section).

On any records eligible for verification (Reminder - these are set by our parent company's CVO, but we plan to make these more customizable in the future), you will see verification icons.

## OneView V2 Feature Overview: Verification Icon Key

The **Verification Icons** look different based on verification status, and whether the data in OneView has been updated since the record was last verified. If the data in OneView has been updated since the record was last verified, you will see the “Updates Available” version of the icon.

### More on Updates Available:

This will draw your attention to whether the data has changed since the last verification was saved. Sometimes data changing is good - like if a license is renewed and it now has a new expiration date. Sometimes it is bad - like if verified data is changed to be incorrect. You can open verification details to evaluate what has changed.



**Verified**



**Verified - Updates Available**



**Not Started**



**In Progress**



**In Progress - Updates Available**



**Ready for Recredentialing**



**Restart**



**Ready for recred or Restart - Updates Available**



**Not Able to Verify**



**Due Diligence**



**Not Able to Verify or Due Diligence - Updates Available**

# OneView V2 Feature Overview: Verification Details - Field Overview

Click on a verification icon to open Verification Details. Verification details is where you can view verification history, add supporting documents and verification notes, and save the verification status, method and date.

## Let's look at the components of Verification Details:

- 1 **Quick Navigation:** Use this to jump to a section without manually scrolling
- 2 **Record Details:** Expand this section to see high level identifying details of the record
- 3 **Comparison Section:** Compare the current OneView record (center) with what was last verified (right)
- 4 **Documents Section:** Documents uploaded to the record will show in this section. Use the toggles to designate if you want to include the document as a supporting document for your verification. Note - if the record has PDFs saved by Carbon, all will be toggled off except the most recent by default.

The screenshot shows the 'NC State Licenses for Kirk Heath MD' interface. It features a top navigation bar with tabs for 'Record Details', 'State Licenses Verification', 'Documents', and 'Notes'. Section 1 (Record Details) shows a dropdown menu. Section 2 (Record Details) is expanded to show a table with the following data:

Record ID	688591
Provider Name	Kirk Heath
Provider ID	325407
Identifier(s)	VA MD 2015-02245
Certification/License #	2015-02245
Primary Source	<a href="https://portal.ncmedboard.org/verification/search.aspx">https://portal.ncmedboard.org/verification/search.aspx</a>

Section 3 (State Licenses Verification) shows a comparison table with a 'Verified' status indicator:

State Licenses Verification	Current Record	Verified
Last Updated	12/09/2022	12/09/2022
Updated By (Role)	Marie Robertson (C)	Marie Robertson (C)

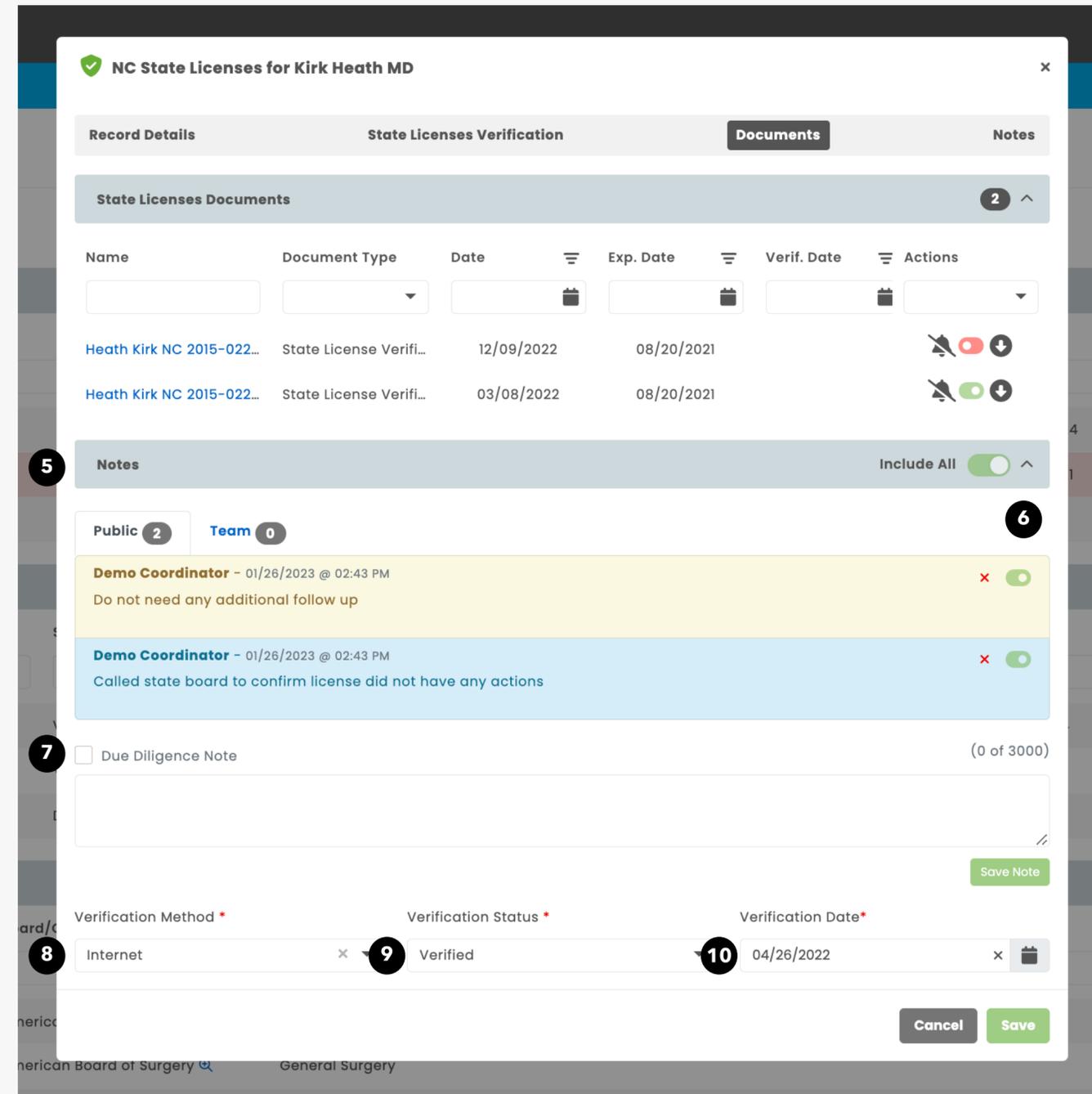
Section 4 (State Licenses Documents) shows a table with columns for Name, Document Type, Date, Exp. Date, Verif. Date, and Actions. The table contains two rows of data:

Name	Document Type	Date	Exp. Date	Verif. Date	Actions
Heath Kirk NC 2015-022...	State License Verifi...	12/09/2022	08/20/2021		<input type="checkbox"/> <input type="checkbox"/>
Heath Kirk NC 2015-022...	State License Verifi...	03/08/2022	08/20/2021		<input type="checkbox"/> <input type="checkbox"/>

At the bottom right, there are 'Cancel' and 'Save' buttons.

# OneView V2 Feature Overview: Verification Details - Field Overview Continued

- 5 Notes Section:** Public notes saved here will be included on the verification summary PDF unless toggled off. Team notes will not be included on the verification summary PDF.
- 6 Note Toggles:** Notes toggled on will be included on the verification summary PDF. Note you can toggle all notes on or off at once using the "Include All" toggle in the notes header.
- 7 Due Diligence Note Checkbox:** If you need to track due diligence notes for compliance, you can use this checkbox to designate a note is part of due diligence (not all organizations need to track this)
- 8 Verification Method:** How you obtained the verification. The dropdown list here is specific to what type of record you are verifying
- 9 Verification Status:** Status options include Not Started, In progress, Verified, Not Able to Verify, and Due Diligence. Note - you must be in In Progress status to make edits.
- 10 Verification Date** - You can track date of verification separately from the date you verified something. For example, if you received an email verification on Jan 1st, and you are documenting it on Jan 3rd, the verification date would be Jan 1st



# OneView V2 Feature Overview: Verification Details - Toggles for verification fields on Summary PDF

Though the verification fields that are eligible to appear on the verification summary PDF are not customizable at this time, but within the eligible fields you can designate whether they go onto the summary for each provider.

If you expand the comparison section, you will see toggles next to some fields. These are the verification fields that are eligible to appear on the verification summary PDF.

All verification fields are toggled on by default

If you want to exclude one of these fields for the record you are working on, click the toggle to turn the field off from appearing on the summary.

An example of when you may toggle a field off is if you pull an AMA report for a provider and they do not include medical school start date on the verification. You may have medical school start date in OneView, but you do not want it on the verification summary since it's not included on the PSV doc. In that case, you may choose to toggle off the medical school start date field.

VA State Licenses for Kirk Heath MD

Record Details State Licenses Verification Documents Notes

Issue Date	06/04/2007	<input checked="" type="checkbox"/>	06/04/2007
Exp. Date	04/30/2024	<input checked="" type="checkbox"/>	04/30/2024
License Status	Current Active	<input checked="" type="checkbox"/>	Current Active
License Status Display			
RX Authority			
Supervisors			
Alerts	Yes		Yes
Flagged	No		No
Deleted	No		No

State Licenses Documents 1 ^

Name	Document Type	Date	Exp. Date	Verif. Date	Actions
Heath Kirk VA 01012418...	State License Verifi...	12/14/2022	04/30/2024		<input checked="" type="checkbox"/> <input type="checkbox"/>

Notes Include All  ^

Public 0 Team 0

Cancel Save

American Board of Anesthesiol... Pediatric Anesthesiology 98754321

# OneView V2 Feature Overview: Verification Details - Update Reason

If you save a verification in any status besides **Not Started**, OneView will track if updates are made to verified fields since your last save.

If changes have been made to verified data since the **last saved verification**, you will see the updates available icon.

When you open verification details, you will be prompted to add **Update Reasons** for any verification data that has changed before you save again.

**Update Reasons** only apply to fields that appear on the verification summary PDF. The list of update reasons is standard:

- . Updated
- . Duplicate
- . Inaccurate
- . Not Applicable

**Tracking Update Reason** helps highlight when verification data was changed, and ensures those changes were justified.

The screenshot displays the 'NC State Licenses for Kirk Heath MD' record. The 'State Licenses Verification' tab is selected, showing a comparison between 'Current (Update Available)' and 'Verified' data. The 'Current' column has a yellow background and a warning icon, while the 'Verified' column has a green background. The table includes fields for 'Last Updated', 'Updated By (Role)', 'Issue Date', 'Update Reason\*', 'License Status', and another 'Update Reason\*'. Below the table is a 'See More' link. The 'Documents' tab shows a table with columns for 'Name', 'Document Type', 'Date', 'Exp. Date', 'Verif. Date', and 'Actions'. The 'Notes' tab is also visible at the bottom.

# OneView V2 Feature Overview: Verification Grid

In the verifications grid, you will see any prior verification summaries generated for the provider. Let's look at the components of this grid:

The screenshot shows the Modio Health Master Practice (DEMO) interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, the practice name 'Modio Health Master Practice (DEMO) (San Francisco, CA)' is displayed. The user profile 'Kirk Heath, MD - General Surgery' is shown. A search bar contains 'Kirk Heath'. The 'Verifications' section is active, showing a table with the following columns: Provider Name, ID, Summary Type, Status, Summary Date, Created By, Verified By, Last Updated, and Actions. A single record is visible for 'Heath, Kirk' with ID '18594', Summary Type 'Initial', Status 'Review', Summary Date '01/26/2023', Created By 'Demo Coordinator', and Last Updated '01/26/2023'. Summary statistics at the top right of the grid show '1 Review', '0 Revise', and '1 Total'. The Actions column contains icons for download, notifications, print, flag, and close.

Provider Name	ID	Summary Type	Status	Summary Date	Created By	Verified By	Last Updated	Actions
Heath, Kirk	18594	Initial	Review	01/26/2023	Demo Coordinator		01/26/2023	[Download] [Bell] [Print] [Flag] [Close]

1  
View the **Summary Type** for each record.

2  
View the **Summary Status:**

- **Verified:** Finalized,
- **Review:** Pending audit
- **Revise:** Audited and errors were found

3  
View **Summary Date**

4  
View who generated the summary

5  
View who audited the summary if applicable

6  
Each verification record has a corresponding PDF you can download to view by clicking the **Download Icon**

# OneView V2 Feature Overview: Verification Summary PDF Generation

In the verifications grid, right click and select **"Add"** to add a new verification summary PDF for the provider you are working on.

The screenshot displays the Modio Health QA Displ interface for provider Kirk Heath, MD. The main area is a grid of verification records. A context menu is open over a row, with the 'Add' option highlighted. A red arrow points from the text on the left to the 'Add' option in the menu.

checkbox	Name	Count	Type	Status	Date	Reviewer	Reviewer	Date	Actions
<input type="checkbox"/>	Heath, Kirk	150	Ad Hoc	Verified	10/08/2021	Richard Rupp	Marie Robertson	09/30/2022	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15539	Ad Hoc	Review	10/27/2022	Vladimira Molcanova		02/15/2023	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15546	Initial	Review	10/27/2022	Marie Robertson		11/10/2022	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15547	Initial	Rev		Marie Robertson		02/15/2023	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15548	Initial	Rev		Marie Robertson		10/27/2022	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15549	Initial	Rev		Marie Robertson		10/27/2022	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15559	Initial	Rev		Marie Robertson		10/27/2022	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15562	Initial	Rev		Marie Robertson		11/01/2022	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15735	Recred	Rev		Marie Robertson		11/02/2022	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	15822	Recred	Rev		Marie Robertson		11/10/2022	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	16122	Recred	Review	11/10/2022	Marie Robertson		01/25/2023	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	18544	Initial	Verified	01/25/2023	Marie Robertson	Marie Robertson	02/09/2023	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	19117	Initial	Review	02/09/2023	Marie Robertson		02/15/2023	📄🔔🚩ⓧ
<input type="checkbox"/>	Heath, Kirk	19370	Recred	Verified	02/15/2023	Marie Robertson	Marie Robertson	02/15/2023	📄🔔🚩ⓧ

**Provider Info** 1 Total

Provider Name	NPI #	Work Email	Personal Email	Mobile Phone #	Last Updated	Actions
> Heath, Kirk	1184838286	kirk.heath123@modio.email			02/14/2023	📄🔔🚩ⓧ



# OneView V2 Feature Overview: Verification Summary Customization

You can choose how to customize your verification summary PDF:

- 1 Record Status:** You can choose to include records of any status, only active, or only inactive on the summary
- 2 Verification Types:** Select which verification statuses you want to include. For example - you may choose to exclude those still in progress.
- 3 Summary Type:** Set if this is initial or recredentialing, or if it is an ad hoc request outside of the credentialing cycle
- 4 Summary Status:** If you require each summary to be audited, leave in the default status of review. If you do not, update this status to Verified.
- 5 Sections Included:** All records that meet the criteria you have selected above will be checked, but you can make adjustments to exactly what you want to include.
- 6 Save or Download:** If you download the summary will be downloaded to your computer only, and if you save it will be uploaded to OneView in the verifications grid.

**Verification Summary for Kirk Heath MD** Verified by Demo Coordinator (C) on 01/27/2023

**Summary Details**

Provider Name: Kirk Heath (269)

**1** Record Status:  All Records  Active Records  Inactive Records

**2** Verification Types:  Due Diligence  In Progress  Not able to verify  Verified

**3** Summary Type:  Initial  Recred  Ad Hoc

**4** Summary Status: Review

Dates: Received Date (MM/DD/YYYY) Signature Date (MM/DD/YYYY)

**5** **Sections Included** Select All

- Provider Info
- FSMB
- SAM
- NPDB
- Verification Notes
- State Licenses
  - NC - MD - 2015-02245
  - VA - MD - 0101241891
- DEA Licenses
  - AL - Waiting on AL license
  - VA - FH0329032
- Controlled Substances
- OIG
- Board Certification
- Education & Training
- Facility Affiliations
- Other Documents

**Summary Notes** (0 of 3000)

**6** Download Cancel Save **6**

# OneView V2 Feature Overview: Verification Summary PDF

Open the verification summary once you have saved or downloaded it to view it. You will see:

- 1 **Header:** Includes date summary was generated and the summary type, provider name and title
- 2 **Organization Name:** Your organization name will be here
- 3 **Demographic Data:** A standard set of demographic data is included on the first page of the summary
- 4 **Section Headers:** Types of verified data are designated with section headers
- 5 **Sections Included:** All records that meet the criteria you have selected above will be checked, but you can make adjustments to exactly what you want to include.
- 6 **Verified Fields:** The left column of each record shows what fields were verified
- 7 **Verification Information:** The right column of each record shows information about the verification (status, date, by who, how)

1 Generated: 01/27/2023 13:49:22 CST Provider Verification Summary (Initial): Kirk Heath, MD

2 Modio Health Master Practice (DEMO)  
**Provider Verification Summary**  
**Kirk Heath, MD**  
General Surgery

3

<b>NPI:</b>	1184838286	<b>Date Of Birth:</b>	XXX-XX-0150
<b>Cred Type:</b>	Initial	<b>SSN:</b>	XXX-XX-0150
<b>Home Address:</b>	2217 Atlantic Drive, Virginia Beach, VA 23454		
<b>Other Names:</b>			
<i>First</i>	<i>Middle</i>	<i>Last</i>	<i>Type</i>
William		Heath	Other Name

4 **BOARD CERTIFICATIONS**  
American Board of Surgery - General Surgery

<b>Expiration Date:</b>	Yes	<b>Status:</b>	Verified
<b>Indefinite?:</b>		<b>Verified Date:</b>	01/26/2023
<b>Cert. Status:</b>		<b>Verified By:</b>	Demo Coordinator
<b>Reverification Date:</b>	12/31/2019	<b>Verified How:</b>	ABMS
<b>MOC/OCC Status:</b>	Participating		

5 **EDUCATION & TRAINING**  
Medical School - Eastern Virginia Medical School

<b>Degree:</b>	MD	<b>Status:</b>	Verified
<b>Specialty/Major:</b>		<b>Verified Date:</b>	01/26/2023
<b>End Date:</b>	05/31/2002	<b>Verified By:</b>	Demo Coordinator
<b>Completed?</b>	Completed	<b>Verified How:</b>	Email
<b>ECFMG Cert #:</b>			

Internship - Eastern Virginia Medical School

<b>Degree:</b>	General Surgery	<b>Status:</b>	Not able to verify
<b>Specialty/Major:</b>		<b>Verified Date:</b>	01/26/2023
<b>Start Date:</b>	07/01/2002	<b>Verified By:</b>	Demo Coordinator
<b>End Date:</b>	07/01/2007	<b>Verified How:</b>	Email
<b>Completed?</b>	Completed		



# OneView OneView V2 Feature Overview: Verification Summary PDF - Documents

After the verification data in the summary PDF, you will see supporting documents. These are the documents that were included in verification details for each verification record that is on the summary PDF.

1 Each document has a **header** that includes the **Verification Date** (this is the Verification date set in the verification details modal) and the summary type, provider name and provider title

2 Each document has a **footer** that contains who the document was **Verified By** and a page number

1 Verified: 01/26/2023

Provider Verification Summary (Initial): Kirk Heath, MD

Heath Kirk VA 0101241891 12-14-2022 (pdf)

Generated date: 12/14/2022 12:17:19 CST

DHP Website

Virginia Department of Health Professions  
License Lookup

Current as of 12/14/2022 13:17

License Information	
License Number	0101241891
Occupation	Medicine
Name	Kirk W Heath
Address	Virginia Beach, VA 23451
Initial License Date	06/04/2007
Expire Date	04/30/2024
License Status	Current Active
Additional Public Information*	No

This serves as primary source verification of the credential issued by the Commonwealth of Virginia and meets the requirements of the Joint Commission.

\* "Yes" means that there is information the Department must make available to the public pursuant to §54.1-2400.2.H of the Code of Virginia; please note that this may also include proceedings in which a finding of "no violation" was made. For additional information click on the "Yes" link above. "No" means no documents are available.

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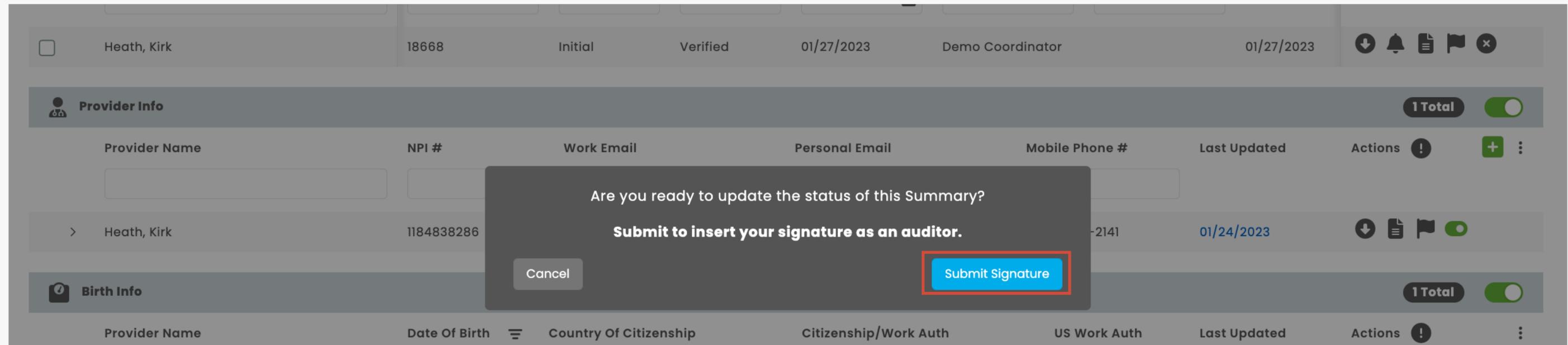
Source: <https://dhp.virginiainteractive.org/Lookup>

2 Verified by: Demo Coordinator

pg.4



# OneView V2 Feature Overview: Verification Summary - Insert Audit Signature



If your process requires you to audit each verification summary, you can **track** who the auditor was, the audit date and the audit outcome. Once you have reviewed the summary and confirmed if it is accurate or inaccurate, update the status for the verification summary in the verifications grid.

If you update from **Review > Verified or Revise > Review**, OneView will confirm if you'd like to insert your signature as an auditor. Click "**Submit Signature**" to insert an additional page into the summary PDF with audit information.

# OneView V2 Feature Overview: Verification Summary - Insert Audit Signature

If you download the **Summary PDF** again after updating the status and inserting an auditor signature, you will see a new page has been inserted before the supporting documents.

This page will contain who the auditor was, the audit date, and the audit status (what the status was updated to)

If auditing verifications is a required part of your process, this will provide the documentation to support that need.

Generated: 01/27/2023 14:45:15 CST Provider Verification Summary (Initial): Kirk Heath, MD

<b>Audited By:</b>	Marie Robertson
<b>Audit Date:</b>	01/27/2023
<b>Audit Status:</b>	Verified

pg.4

Generated by: Marie Robertson (marie.robertson@modiohealth.com)



# Oneview V2 Feature Overview: Bulk Status Change of Verification Records

If you need to reset the status of all verifications for a provider, you can use the Bulk Status Change feature.

This is helpful for:

**Recredentialing:** As a part of recredentialing, you may need to re-do verifications that were done as a part of initial credentialing

**Restarting:** Sometimes (based on your organizations internal policies) verifications are only "good" for a certain amount of time (90-120 days for example), and if credentialing is not completed within that window you may need to restart the verifications.

In the verifications grid, right click and select "**Bulk Status Change**" to start this process.

The screenshot displays the Modio Oneview V2 interface for a provider named Kirk Heath, MD. The main area is a grid of verification records. A context menu is open over one of the records, with the 'Bulk Status Change' option highlighted in red. A red arrow points from the text 'In the verifications grid, right click and select "Bulk Status Change" to start this process.' to the 'Bulk Status Change' option in the menu.

Provider	NPI #	Work Email	Personal Email	Mobile Phone #	Last Updated	Actions
Kirk Heath, MD	1184838286	kirk.heath123@modio.email			02/14/2023	[Icons]



# OneView V2 Feature Overview: Bulk Status Change

## You can choose how to customize your verification summary PDF:

- 1 Record Status:** You can choose to change records of any status, only active, or only inactive on the summary
- 2 Verification Types:** Select which verification statuses you want to include in the change. For example - you may choose to exclude those still in progress.
- 3 Bulk Change To:** Choose if you want to change all your selections to Ready for Recredentiaing or Restart
- 4 Sections Included:** All records that meet the criteria you have selected above will be checked, but you can adjust the selections based on which records you want to change
- 5 Change:** When you are finished with your selections, click change to complete the bulk status change

Once you have done the bulk status change, the records you indicated will reflect the status you specified.

**Bulk Status Change for Kirk Heath MD**

**Change Details**

Provider Name: Kirk Heath (269)

**1** Record Status:  All Records  Active Records  Inactive Records

**2** Verification Types:     +

**3** Bulk Change To:  Ready for Recred  Restart

**4** Sections Included Select All

- Board Certification
- Education & Training
- Facility Affiliations
- FSMB
- State Licenses
  - NC - MD - 2015-02245
  - VA - MD - 0101241891
- DEA Licenses
- Controlled Substances
- OIG
- SAM
- NPDB
- Other Documents

**5**