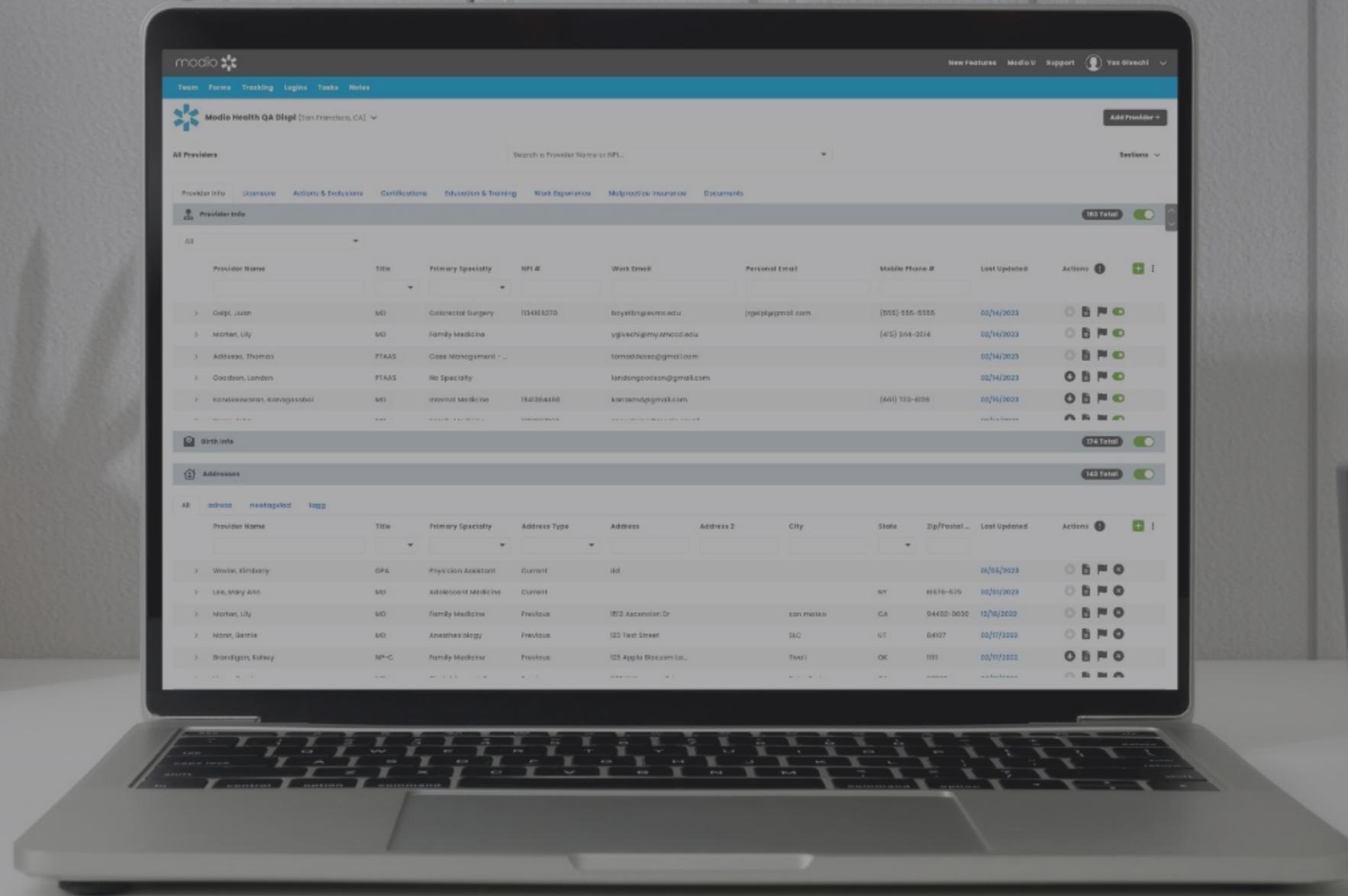# OneView©

## OneView V2 Verification Features Overview Guide

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Verification Features in OneView V2

Document and store verification data, note and supporting documents

Topics

o   What is the goal of these features?

o   Are the verification features right for you?

o   Current limitations

o   How verification data is stored

o   Verification feature terminology

o   Full feature overview
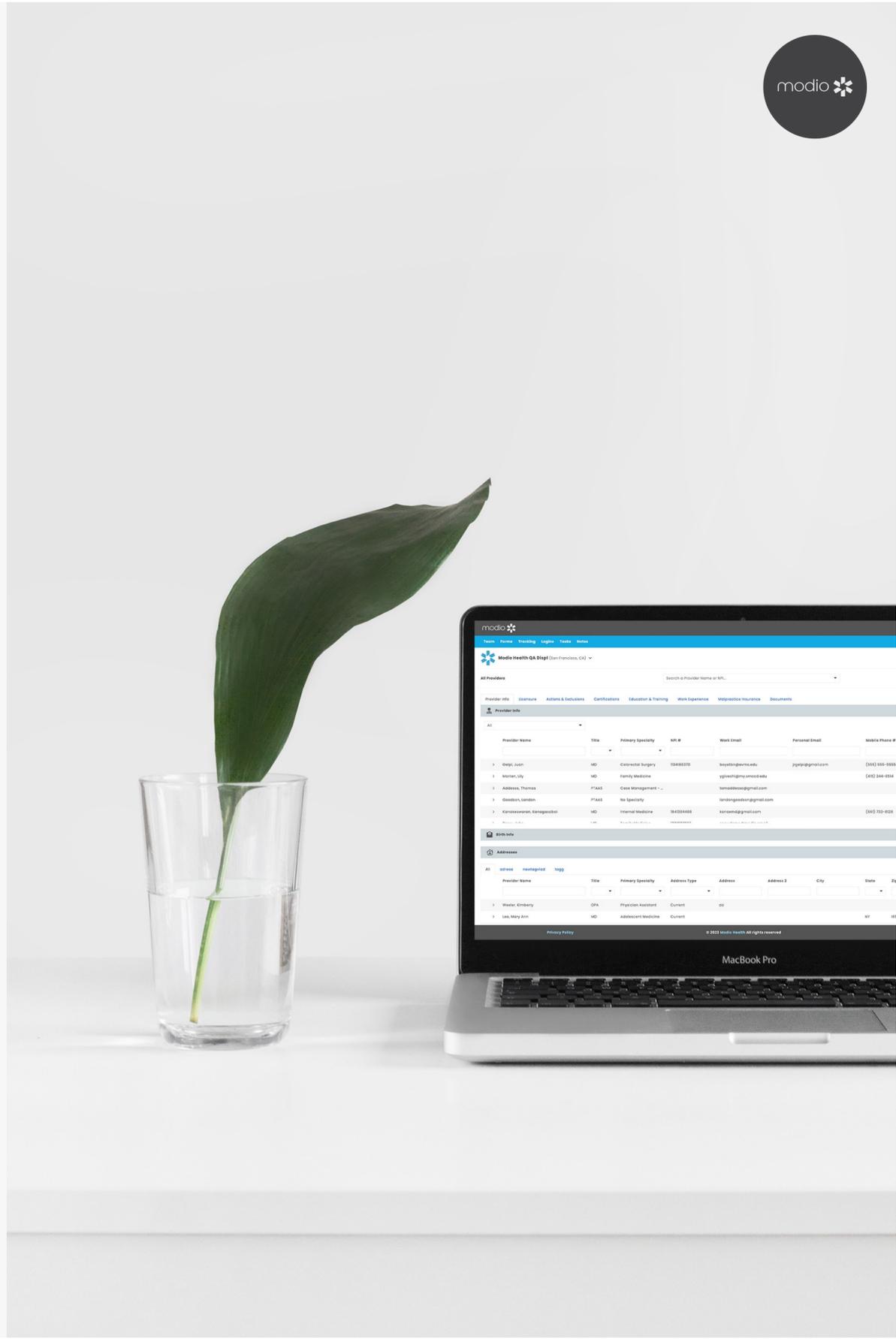
The Benefits of OneView V2

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

o   Producing a consolidated verification summary PDF with a data section showing what fields were verified and supporting documents included in the packet.

o   Storing documentation of verification data on the individual record level

o   Supporting resetting verifications if the process must be restarted because the original process was incomplete or if it is time to recredential
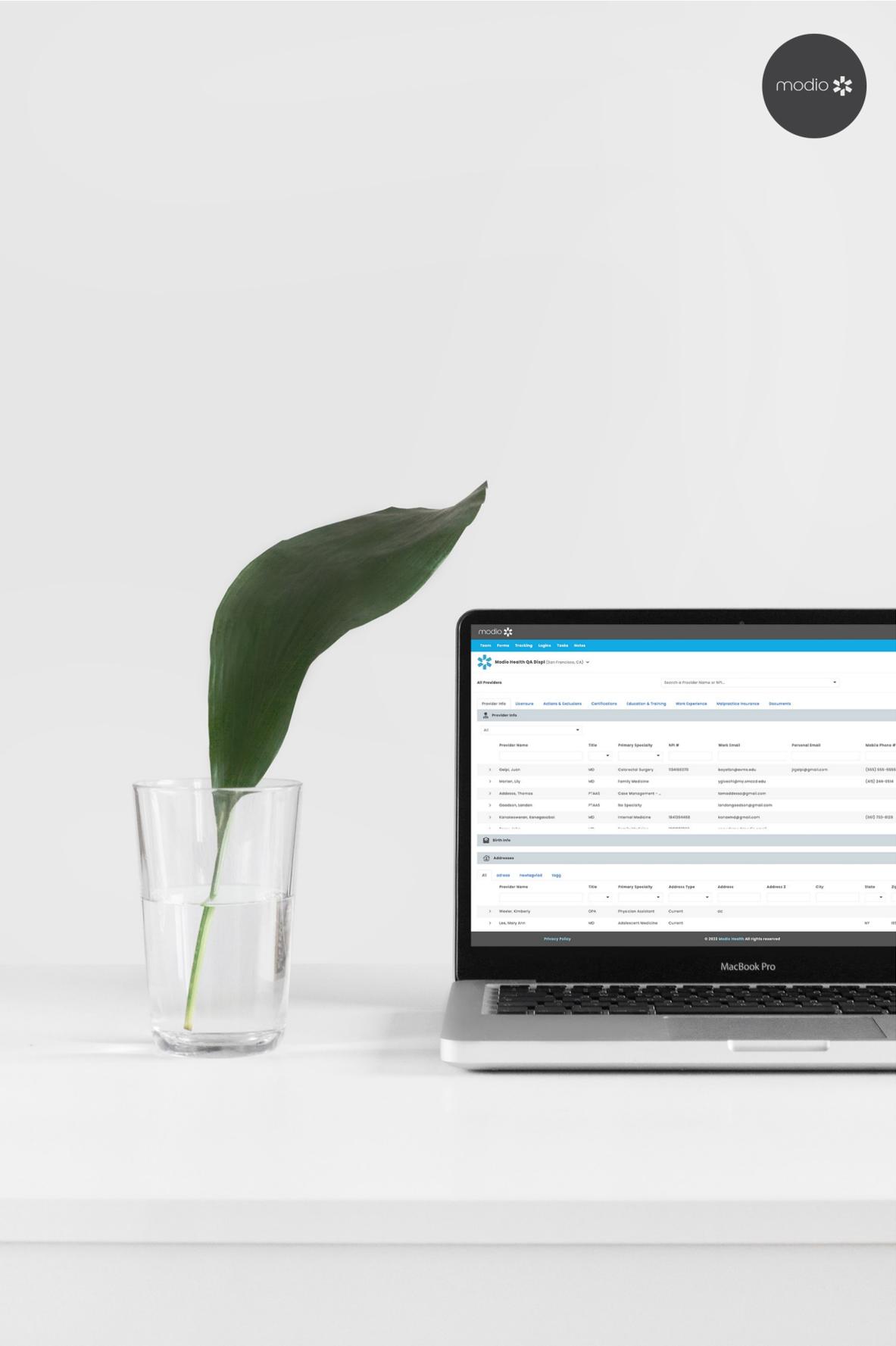
Are The Modio Verification Features Right For Me?

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.
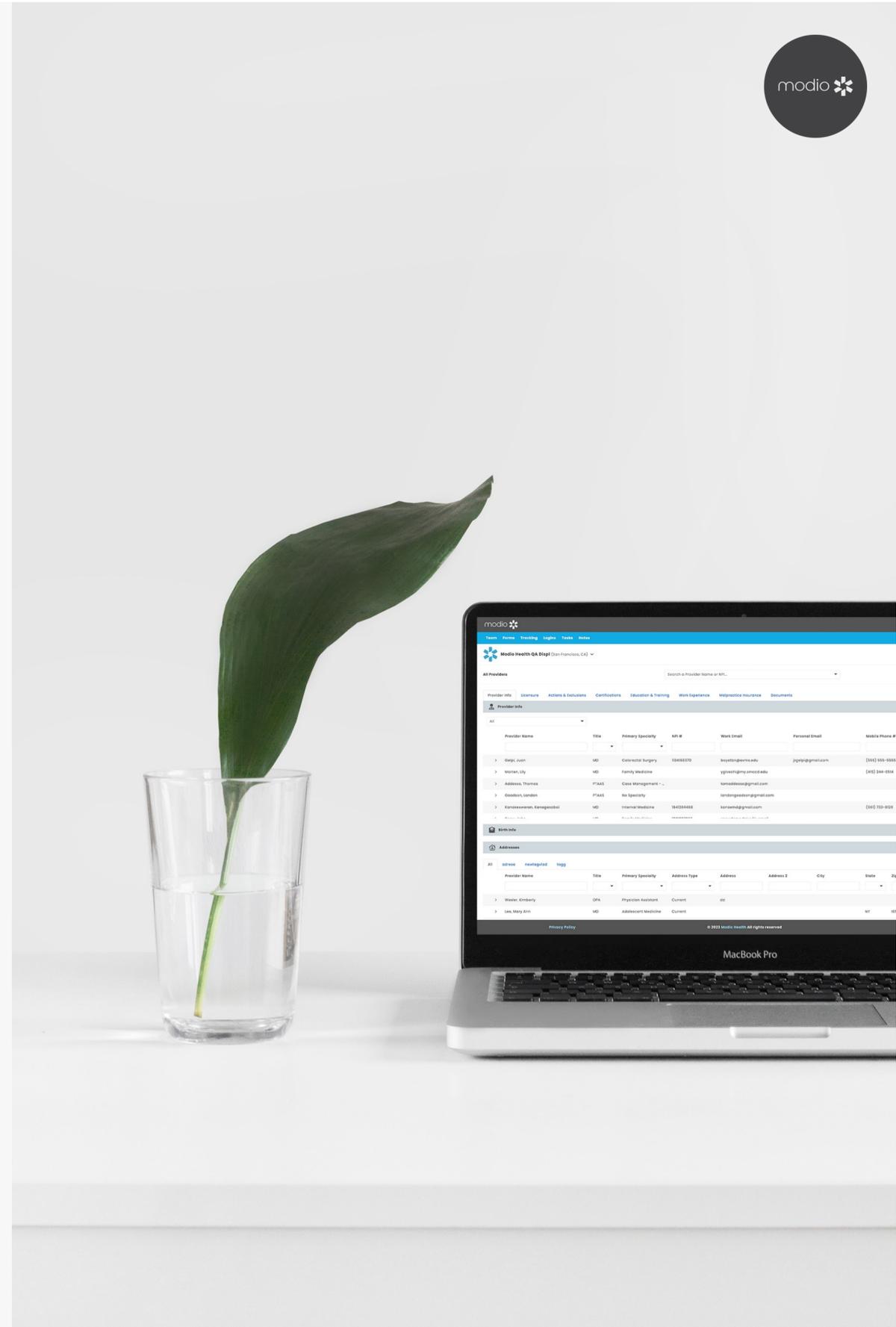
Current Limitations of OneView V2

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.
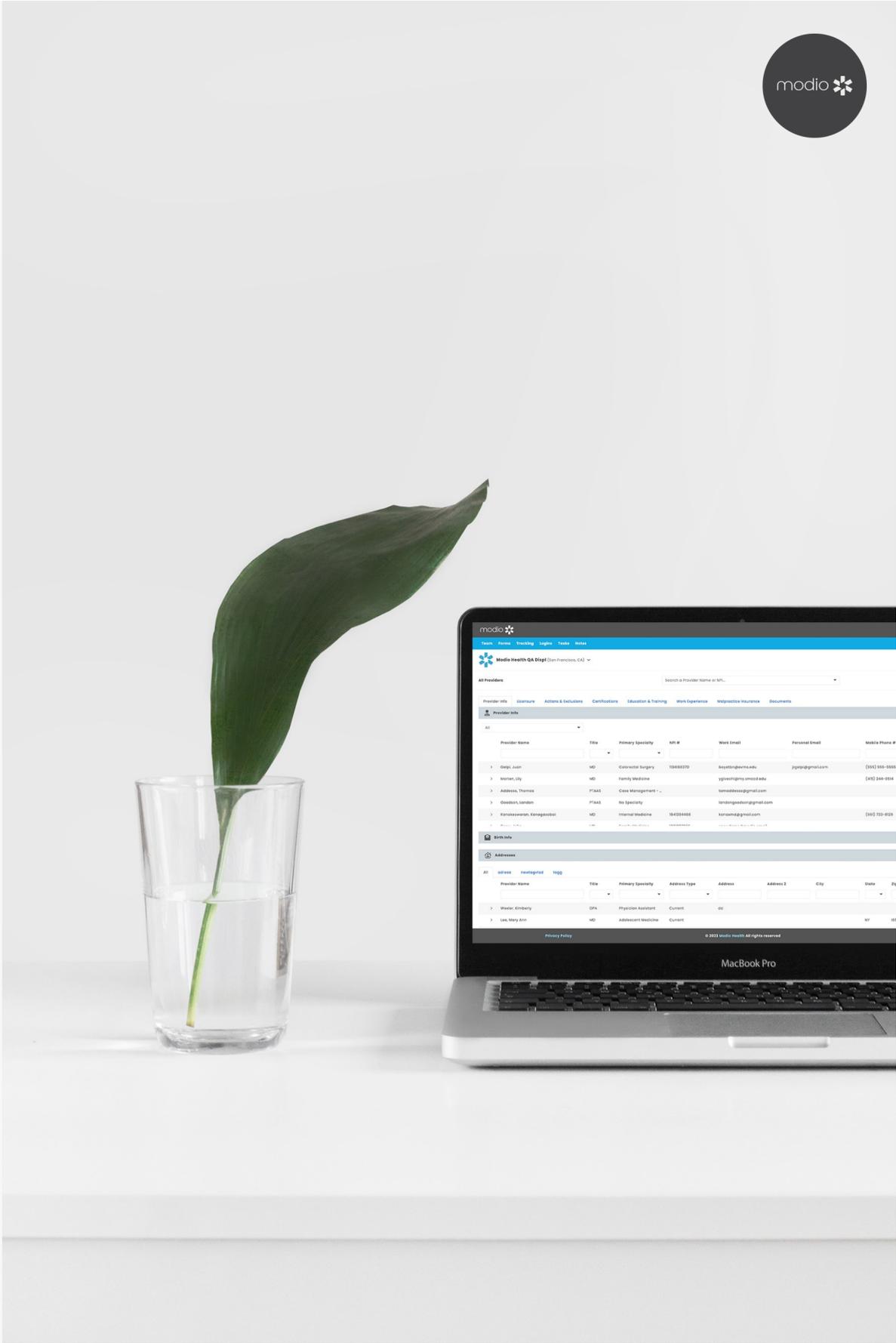
How verification data is stored – *"frozen in time"*

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.
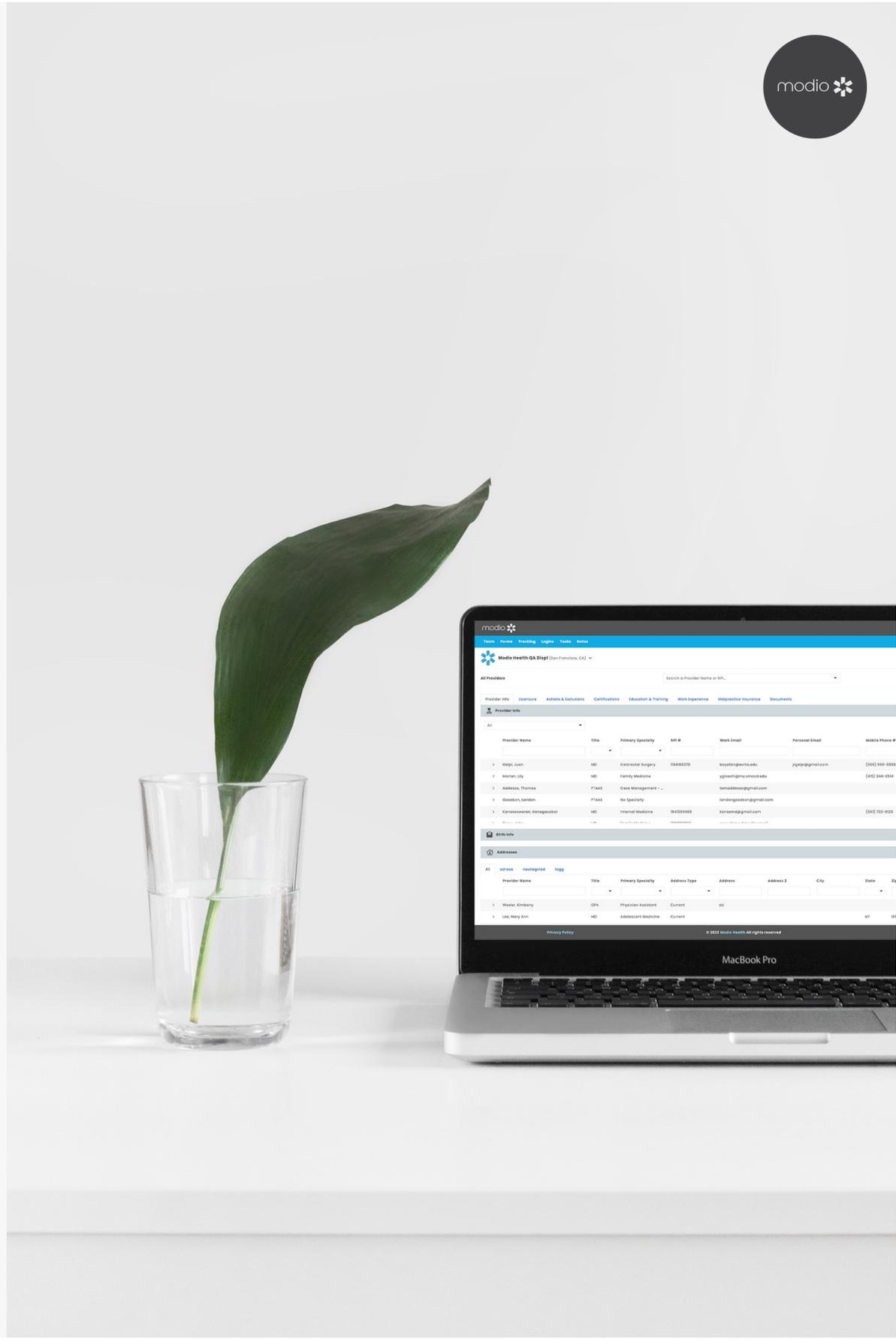
OneView V2 Common Terminology

- **OneView V2 Page Link:** www.modiohealth.com/oneview

- **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.
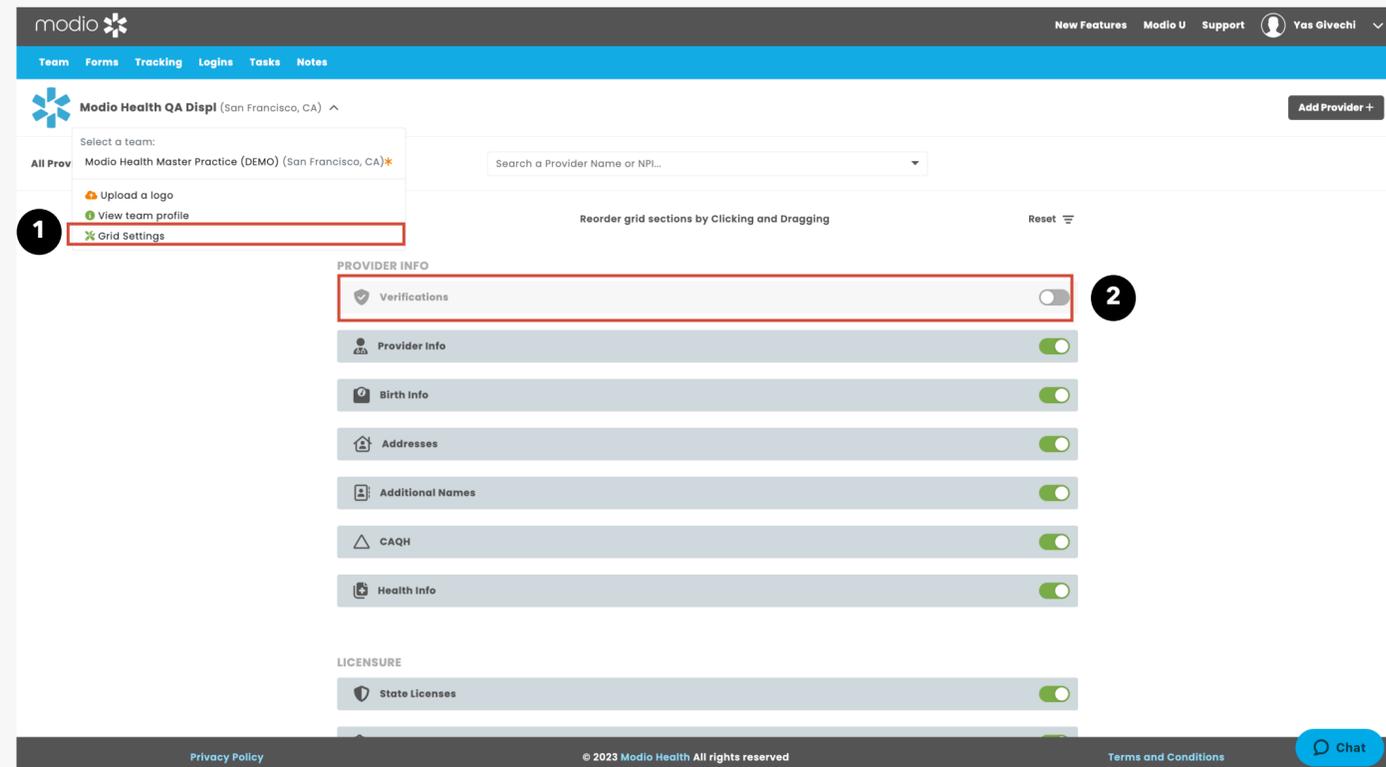
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Feature Overview

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**.
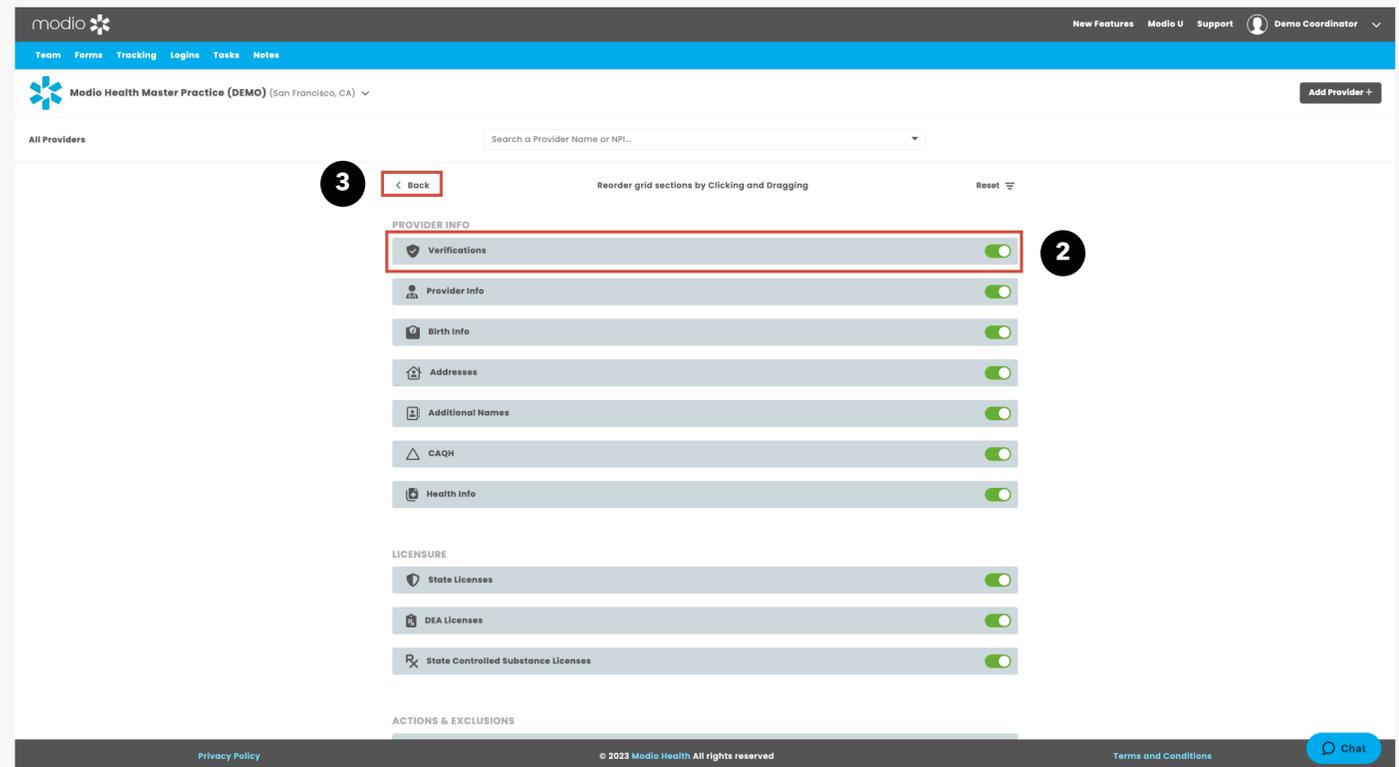
3. When you click "**Back**" to return to the main OneView V2 page, you will see the verifications grid and features.

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

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.

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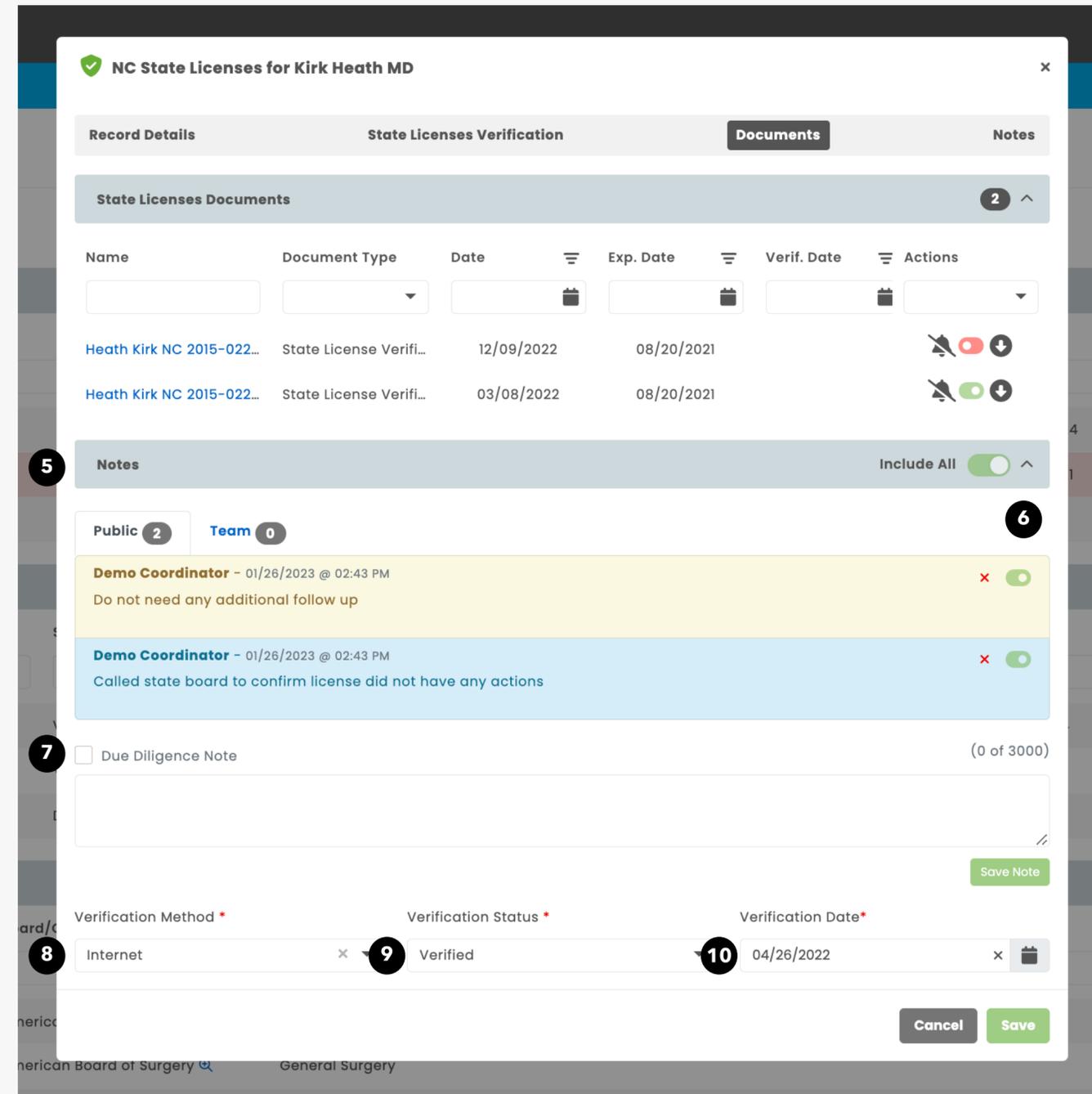
OneView V2 Feature Overview: Verification Details – Toggles for verification fields on Summary PDF

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.

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.

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:

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.

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.

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)

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

(4) BOARD CERTIFICATIONS

American Board of Surgery - General Surgery

Expiration Date:		**(6)** Status:	Verified
Indefinite?:	Yes	Verified Date:	01/26/2023
(5) Cert. Status:		**(7)** Verified By:	Demo Coordinator
Reverification Date:	12/31/2019	Verified How:	ABMS
MOC/OCC Status:	Participating		

EDUCATION & TRAINING

Medical School - Eastern Virginia Medical School

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

Internship - Eastern Virginia Medical School

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

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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

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
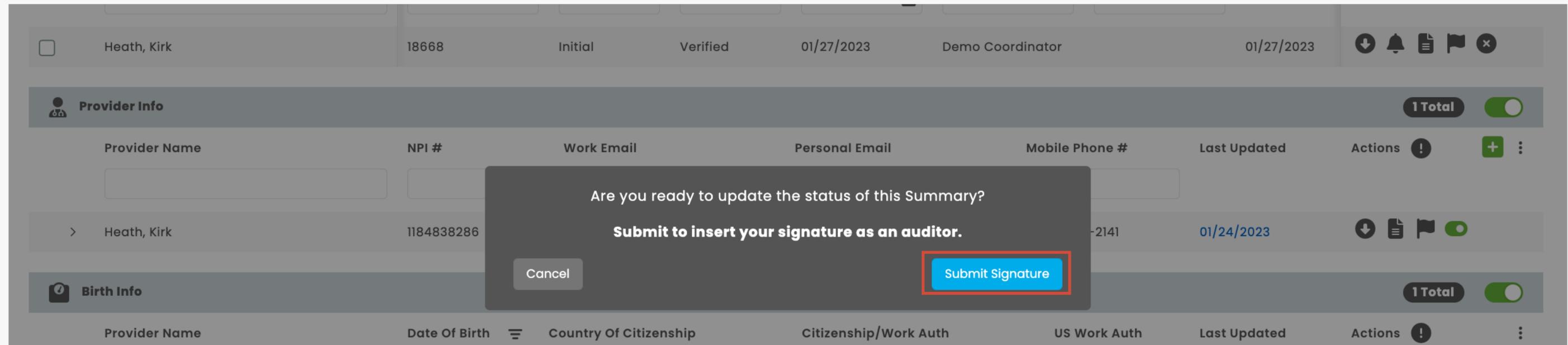
Verified by: Demo Coordinator   pg.4

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.

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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.

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

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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.

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 Recredredentialing 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.