



OneView[®]

OneView V2 Verification Features Overview Guide

Verification Features in OneView V2

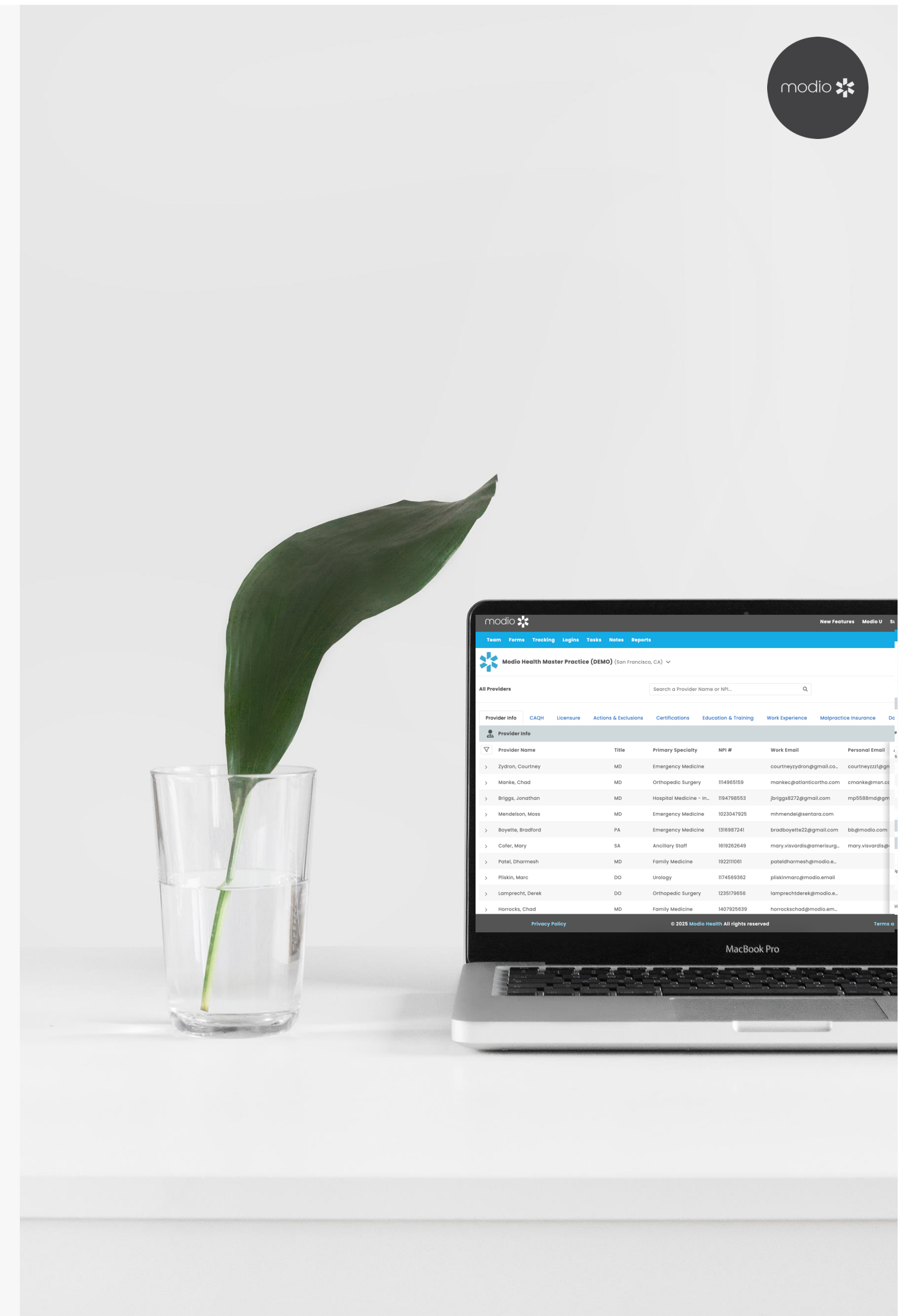
Document and store verification data, note and supporting documents

The screenshot displays the Modio OneView V2 interface. At the top, there is a navigation bar with the Modio logo, user profile (Yasi Givechi), and links for New Features, Modio U, and Support. Below this is a secondary navigation bar with options: Team, Forms, Tracking, Logins, Tasks, Notes, and Reports. The main content area is titled "Modio Health Master Practice (DEMO) (San Francisco, CA)" and includes an "Add Provider +" button. A search bar for "All Providers" is present, along with a "Sections" dropdown. The primary navigation tabs include: Provider Info, CAQH, Licensure, Actions & Exclusions, Certifications, Education & Training, Work Experience, Malpractice Insurance, and Documents. The "Provider Info" tab is active, showing a table of 134 providers. The table columns are: Provider Name, Title, Primary Specialty, NPI #, Work Email, Personal Email, and Actions. The footer contains links for Privacy Policy, Terms and Conditions, and a Chat button.

Provider Name	Title	Primary Specialty	NPI #	Work Email	Personal Email	Actions
> Zydron, Courtney	MD	Emergency Medicine		courtneyzydron@gmail.co...	courtneyzzl@gn	📄 🚩 🟢
> Manke, Chad	MD	Orthopedic Surgery	114965159	manke@atlanticortho.com	cmanke@msn.cc	📄 🚩 🟢
> Briggs, Jonathan	MD	Hospital Medicine - In...	1194798553	jbriggs8272@gmail.com	mp5588md@gm	📄 🚩 🟢
> Mendelson, Moss	MD	Emergency Medicine	1023047925	mhmendel@sentara.com		📄 🚩 🟢
> Boyette, Bradford	PA	Emergency Medicine	1316987241	bradboyette22@gmail.com	bb@modio.com	📄 🚩 🟢
> Cofer, Mary	SA	Ancillary Staff	1619262649	mary.visvardis@amerisurg...	mary.visvardis@	📄 🚩 🟢
> Patel, Dharmesh	MD	Family Medicine	192211061	pateldharmesh@modio.e...		📄 🚩 🟢
> Pliskin, Marc	DO	Urology	1174569362	pliskinmarc@modio.email		📄 🚩 🟢
> Lamprecht, Derek	DO	Orthopedic Surgery	1235179656	lamprechtderek@modio.e...		📄 🚩 🟢
> Horrocks, Chad	MD	Family Medicine	1407925639	horrockschad@modio.em...		📄 🚩 🟢

Topics

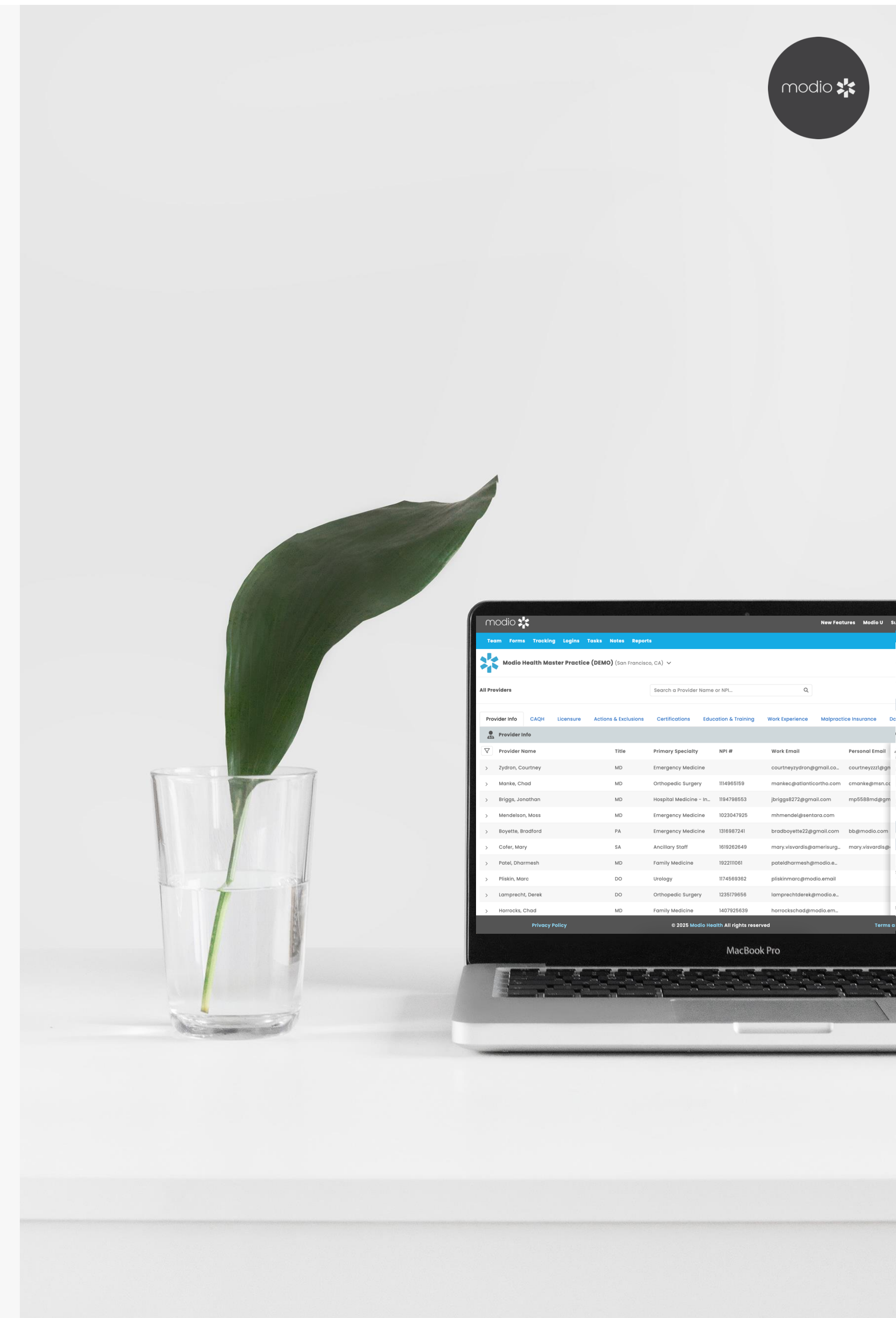
- What is the goal of these features?
- Are the verification features right for you?
- Current limitations
- How verification data is stored
- Verification feature terminology
- Full feature overview



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

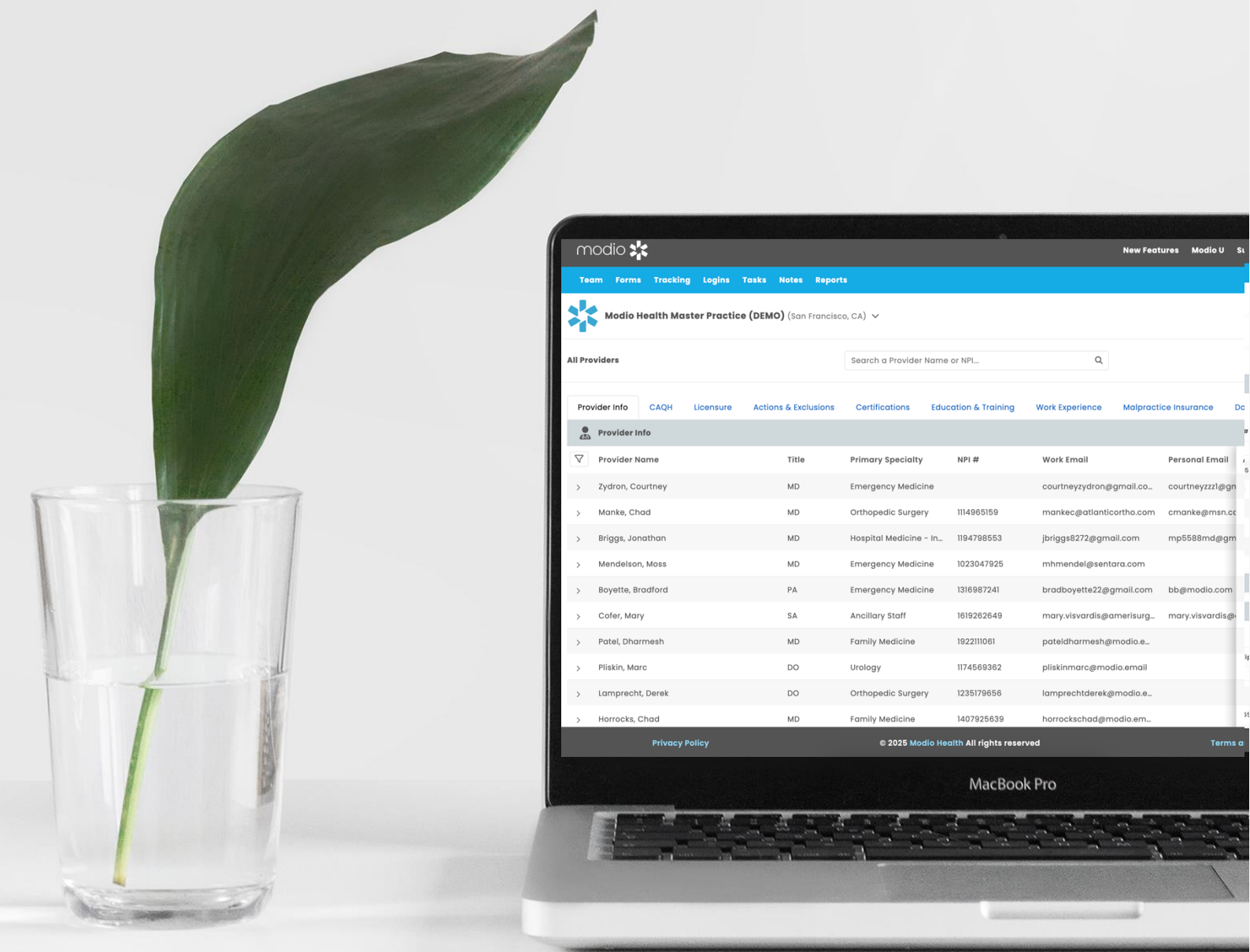


Are The Modio Verification Features Right For Me?

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.



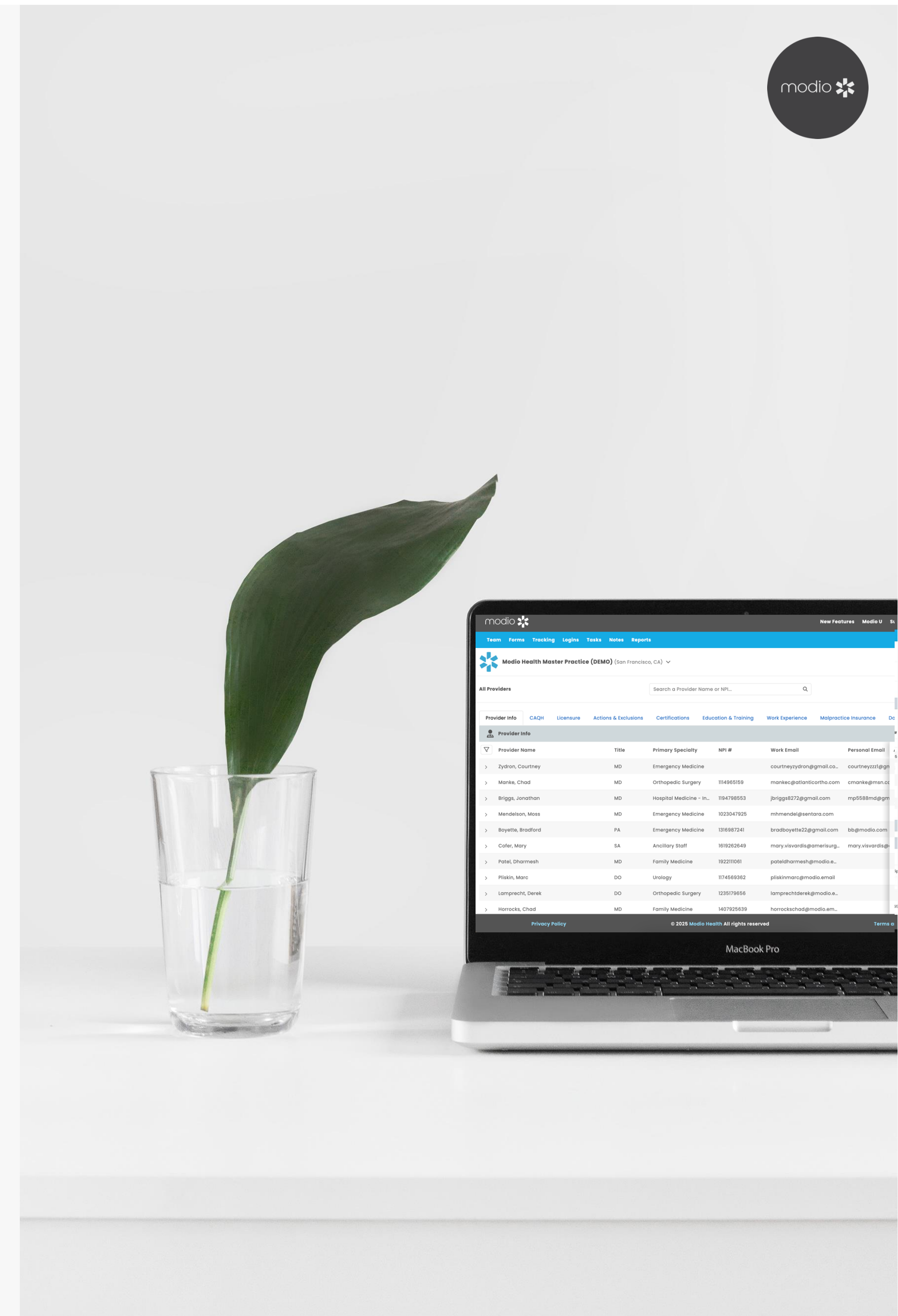
Current Limitations of OneView V2

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.



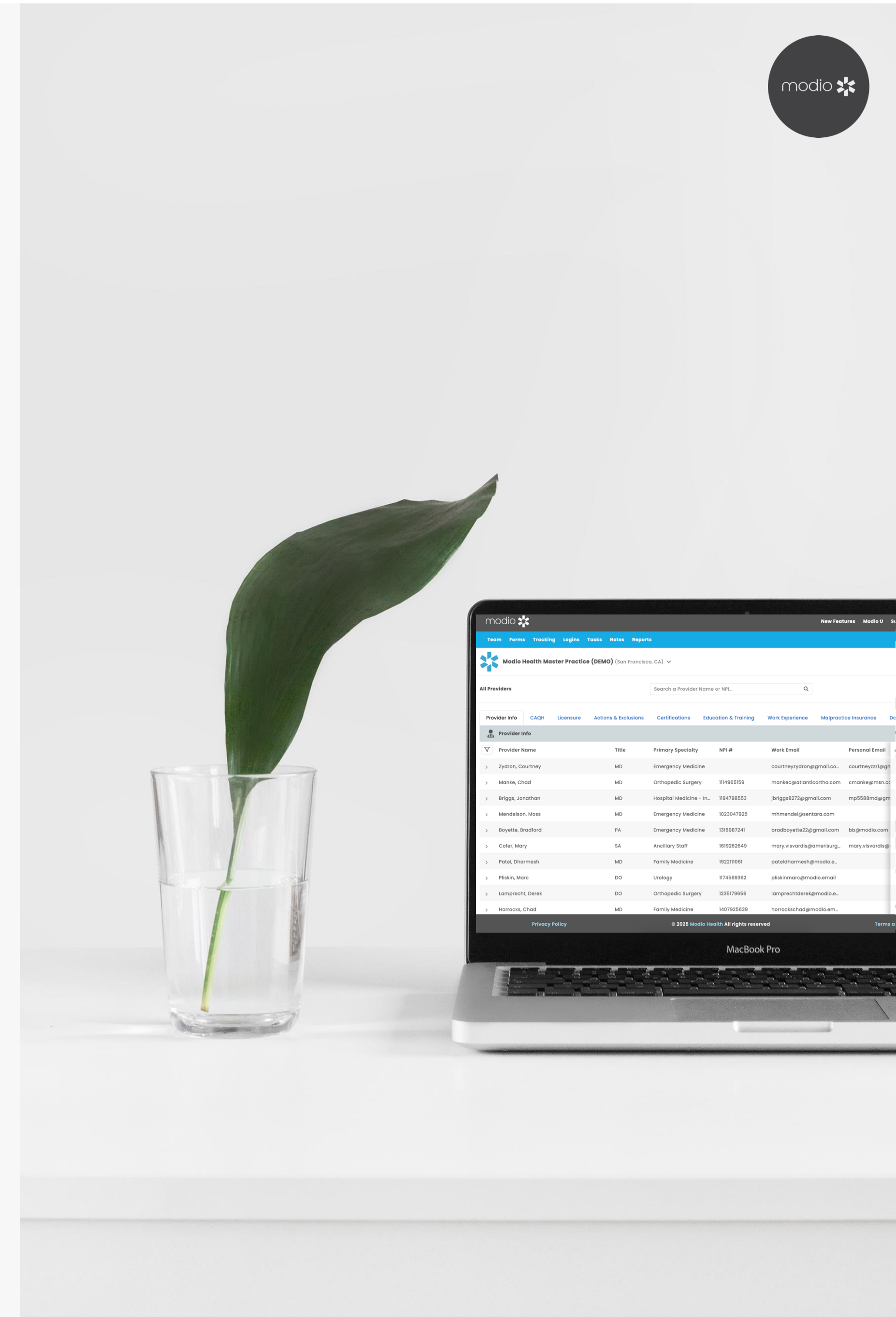
How verification data is stored – “frozen in time”

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
- **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

modio

New Features Modio U Support Yasi Givechi

Team Forms Tracking Logins Tasks Notes Reports

Modio Health Master Practice (DEMO) (San Francisco, CA) Add Provider +

All Providers Search a Provider Name or NPI... Sections

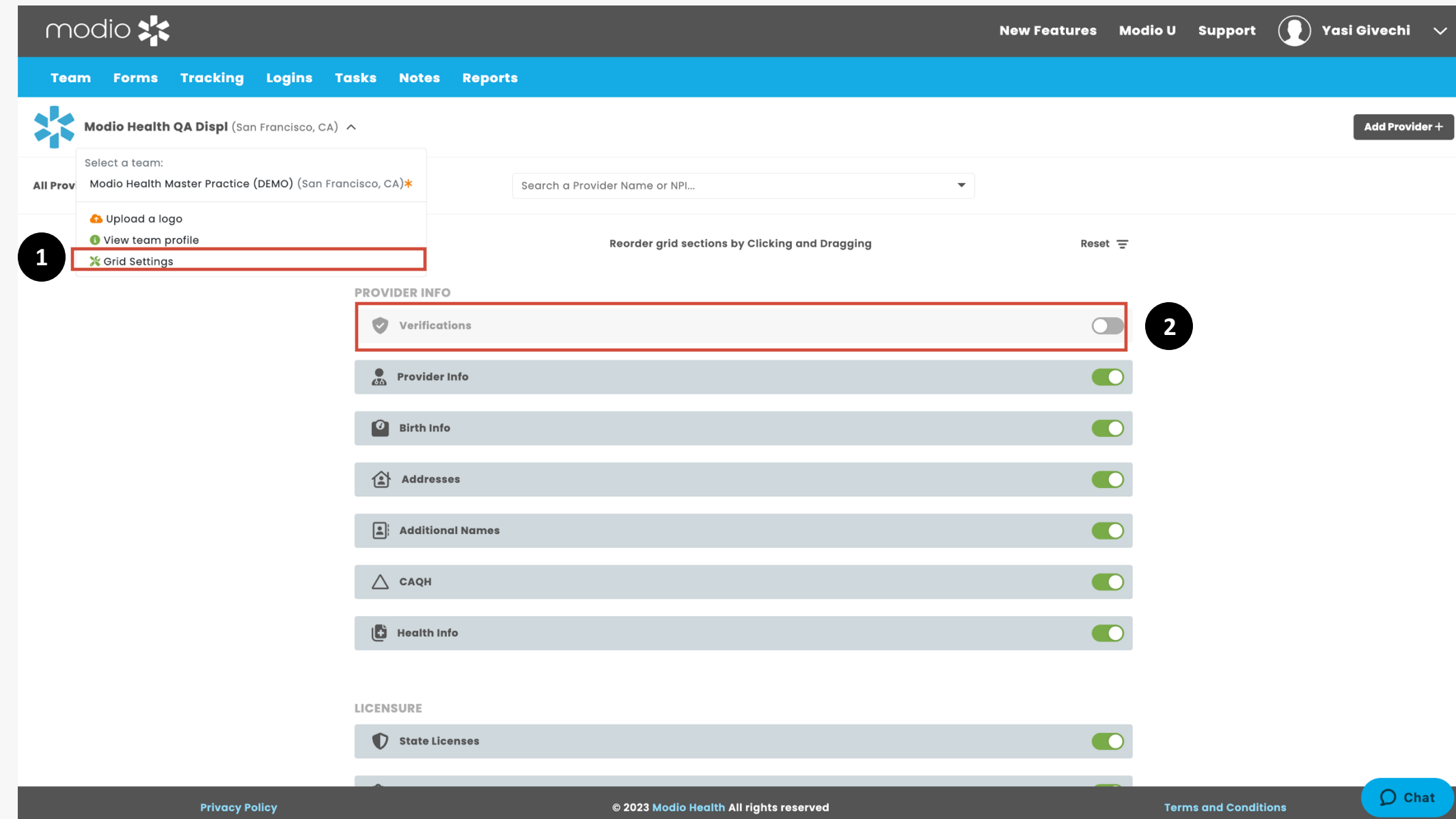
Provider Info CAQH Licensure Actions & Exclusions Certifications Education & Training Work Experience Malpractice Insurance Documents

Provider Info 134 Total

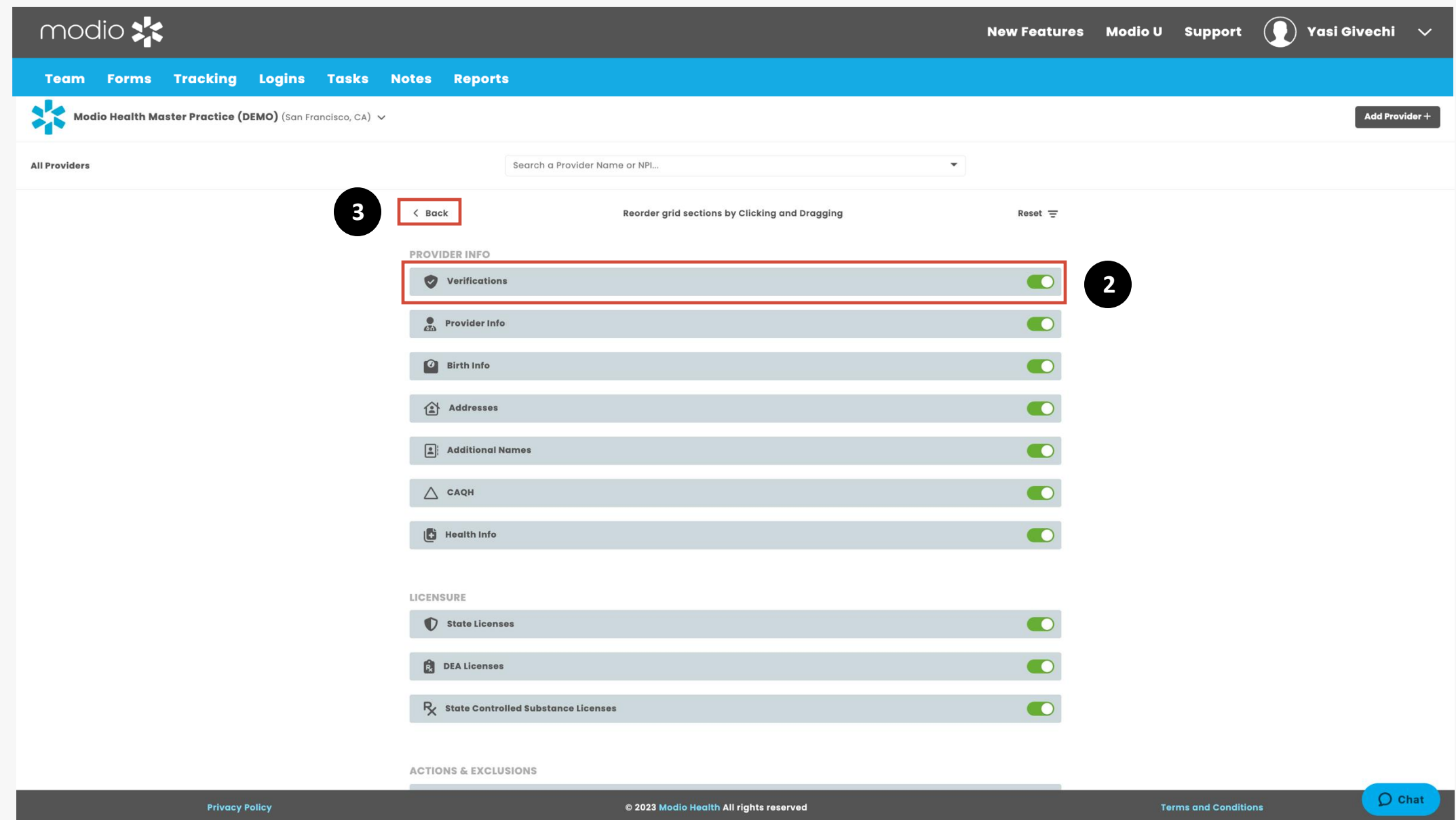
Provider Name	Title	Primary Specialty	NPI#	Work Email	Personal Email	Actions
Zy...		Emergency Med...		
Me...		Orthopedic Surg...	111...	
Briggs, Jonathan	MD	Hospital Medicine - In...	1194798553	jbriggs8272@gmail.com	mp5588md@gm...	
Mendelson, Moss	MD	Emergency Medicine	1023047925	mhmendel@sentara.com		
Boyette, Bradford	PA	Emergency Medicine	1316987241	bradboyette22@gmail.com	bb@modio.com	
Cofer, Mary	SA	Ancillary Staff	1619262649	mary.visvardis@amerisurg...	mary.visvardis@...	
Patel, Dharmesh	MD	Family Medicine	192211061	pateldharmesh@modio.e...		
Pliskin, Marc	DO	Urology	1174569362	pliskinmare@modio.email		
Lamprecht, Derek	DO	Orthopedic Surgery	1235179656	lamprechtderek@modio.e...		
Horrocks, Chad	MD	Family Medicine	1407925639	horrockschad@modio.em...		

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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 Yasi Givechi. The main navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', 'Notes', and 'Reports'. The current view is for 'Kirk Heath, MD - General Surgery' under 'Modio Health Master Practice (DEMO)'. Two sections are visible: 'Education & Training' (5 Total) and 'Facility Affiliations' (7 Total). Both sections have a table of records with various columns and an 'Actions' column. A red box highlights the 'Actions' column for the first five records in the 'Education & Training' section, showing verification icons: a green checkmark, a shield with a checkmark, a shield with an exclamation mark, a green checkmark, and a red shield with an exclamation mark.

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

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

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



In Progress - Updates Available



Verified - Updates Available



Ready for Recredentialing



Not Started



Restart



In Progress



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 displays the 'NC State Licenses for Kirk Heath MD' verification details. It features a top navigation bar with tabs for 'Record Details', 'State Licenses Verification', 'Documents', and 'Notes'. The 'Record Details' section is expanded, showing a form with the following fields:

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

The 'State Licenses Verification' section 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)

A 'See More' link is located below the comparison table. The 'State Licenses Documents' section contains a table of uploaded documents:

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. The footer of the page includes 'American Board of Surgery' and 'General Surgery'.

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

The screenshot displays 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'. Below this is a 'State Licenses Documents' section with a table containing two rows of data. The table columns are Name, Document Type, Date, Exp. Date, Verif. Date, and Actions. The first row shows 'Heath Kirk NC 2015-022...' with a date of 12/09/2022 and an expiration date of 08/20/2021. The second row shows the same name with a date of 03/08/2022 and an expiration date of 08/20/2021. Below the table is a 'Notes' section with an 'Include All' toggle and a list of notes. The first note is a public note from 'Demo Coordinator' dated 01/26/2023 at 02:43 PM, with the text 'Do not need any additional follow up'. The second note is a team note from the same coordinator with the text 'Called state board to confirm license did not have any actions'. Below the notes is a 'Due Diligence Note' checkbox. At the bottom, there are three dropdown menus: 'Verification Method' (Internet), 'Verification Status' (Verified), and 'Verification Date' (04/26/2022). The interface also includes 'Cancel' and 'Save' buttons.

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.

The screenshot displays the 'VA State Licenses for Kirk Heath MD' interface. It features a tabbed navigation system with 'Record Details', 'State Licenses Verification', 'Documents', and 'Notes'. The 'State Licenses Verification' tab is active, showing a table of verification fields with toggle switches. A red box highlights the toggle switches for 'Issue Date', 'Exp. Date', and 'License Status', which are currently turned on. Below this, the 'State Licenses Documents' section shows a table of documents with columns for Name, Document Type, Date, Exp. Date, Verif. Date, and Actions. The 'Notes' section at the bottom includes an 'Include All' toggle and a 'Public' count of 0. The interface also includes 'Cancel' and 'Save' buttons at the bottom right.

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

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"/>

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.

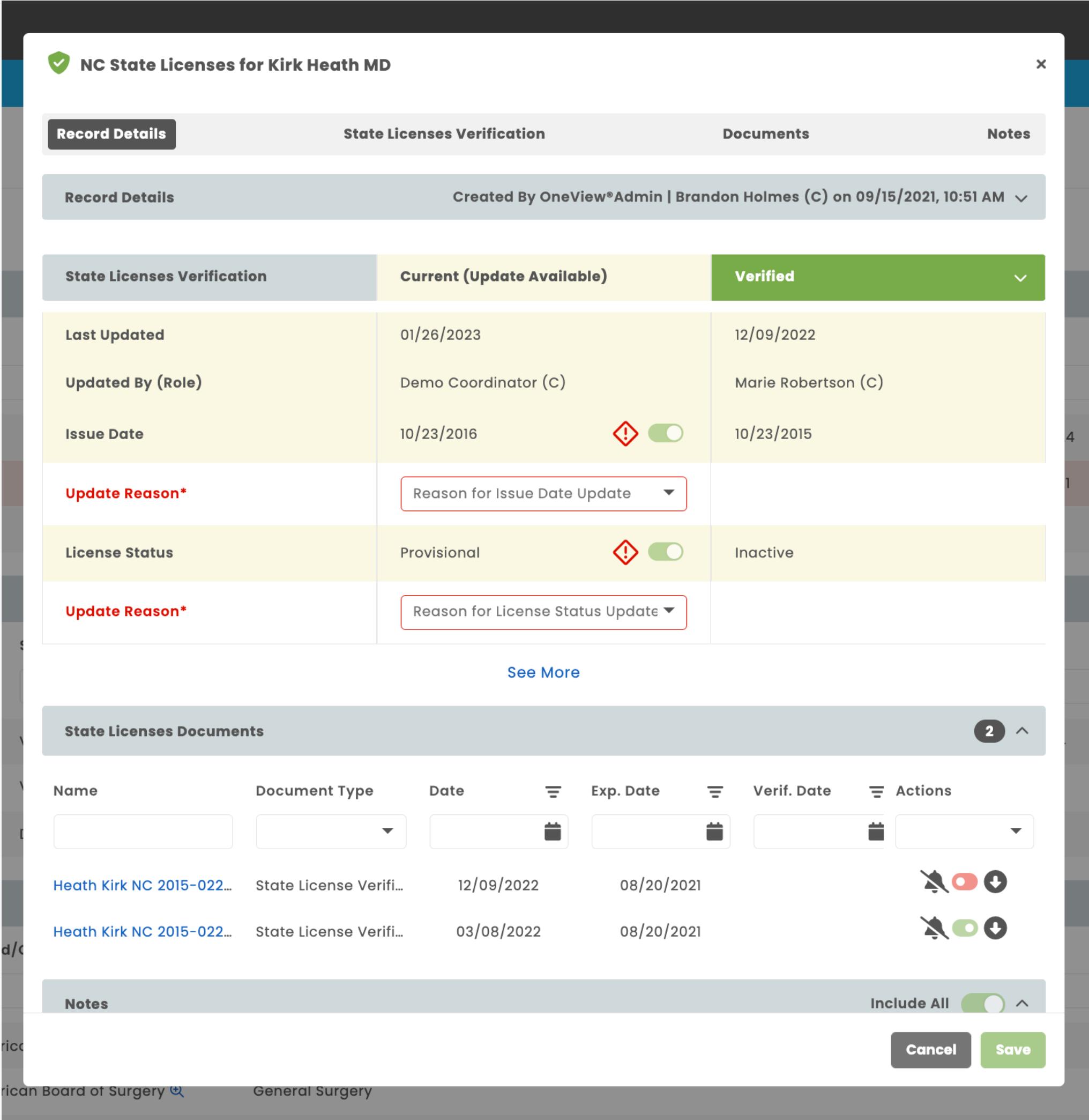
If changes have been made to verified data since the **last saved verification**, you will see the updates available icon.

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:

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	

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 OneView V2 interface. At the top, there is a navigation bar with the Modio logo, user name 'Yasi Givechi', and links for 'New Features', 'Modio U', and 'Support'. Below this is a secondary navigation bar with tabs for 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', 'Notes', and 'Reports'. The main content area shows a profile for 'Kirk Heath, MD - General Surgery' with a search filter 'Kirk Heath' and a 'Sections (19)' dropdown. A table of verifications is displayed, with columns for checkboxes, provider name, NPI, status, date, reviewer, and date. A context menu is open over a row, listing actions: 'Review', '+ Add', 'Remove', 'Bulk Status Change', 'Clear All Filters', 'Enable/Disable Selected Alerts', 'Enable Selected Alerts', 'Disable Selected Alerts', 'Copy', and 'Copy with Headers'. A red arrow points from the text on the left to the '+ Add' option. Below the table is a 'Provider Info' section with a '1 Total' toggle and a table with columns for Provider Name, NPI #, Work Email, Personal Email, Mobile Phone #, Last Updated, and Actions. The footer contains 'Privacy Policy', '© 2023 Modio Health All rights reserved', 'Terms and Conditions', and a 'Chat' button.

	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 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.

The screenshot displays the 'Verification Summary for Kirk Heath MD' interface. At the top, it shows 'Verified by Demo Coordinator (C) on 01/27/2023'. The 'Summary Details' section includes:

- Provider Name:** Kirk Heath (269)
- Record Status:** Radio buttons for All Records (selected), Active Records, and Inactive Records.
- Verification Types:** Buttons for Due Diligence, In Progress, Not able to verify, and Verified.
- Summary Type:** Radio buttons for Initial (selected), Recred, and Ad Hoc.
- Summary Status:** A dropdown menu currently set to Review.
- Dates:** Input fields for Received Date and Signature Date, both with MM/DD/YYYY format and calendar icons.

The 'Sections Included' section features a 'Select All' checkbox and a list of categories with checkboxes:

- 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

The 'Summary Notes' section has a text area with a character count '(0 of 3000)'. At the bottom, there are 'Download', 'Cancel', and 'Save' buttons.

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:					
<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

Expiration Date:		6 Status:	Verified
Indefinite?:	Yes	7 Verified Date:	01/26/2023
Cert. Status:		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		



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.

[Back to License Lookup](#)

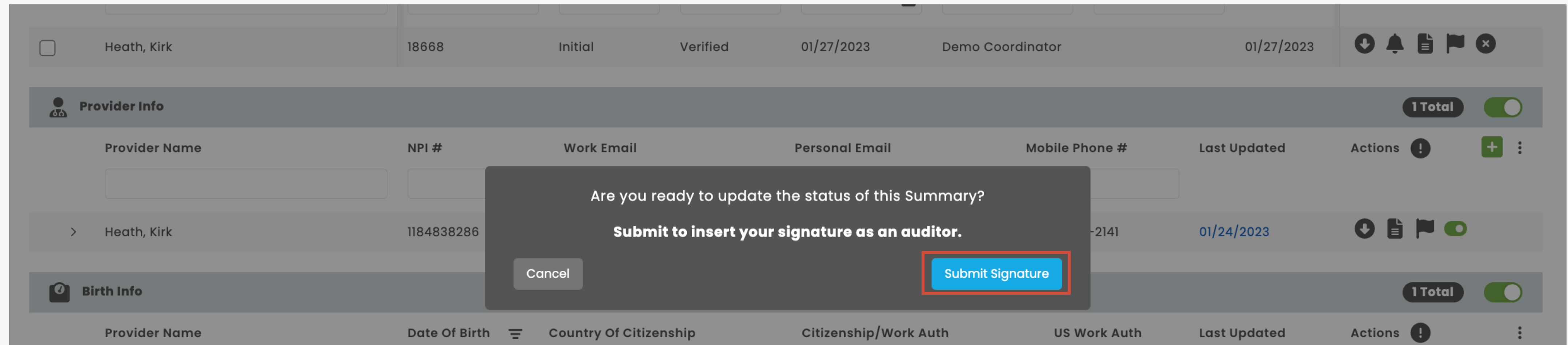
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119 West Broad St Richmond, VA 23220
[Contact Us](#)

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

Audited By:	Marie Robertson
Audit Date:	01/27/2023
Audit Status:	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. At the top, there is a navigation bar with the Modio logo and user information for Yasi Givechi. Below this is a secondary navigation bar with tabs for Team, Forms, Tracking, Logins, Tasks, Notes, and Reports. The main content area shows a verification grid for Kirk Heath, MD - General Surgery. The grid has columns for checkboxes, provider name, NPI #, status, review date, reviewer, and action icons. A context menu is open over the grid, listing options such as Add, Remove, Bulk Status Change, Clear All Filters, Enable/Disable Selected Alerts, Enable Selected Alerts, Disable Selected Alerts, Copy, and Copy with Headers. A red arrow points from the 'Bulk Status Change' option in the menu to the 'Bulk Status Change' option in the grid. A red line also points from the 'Bulk Status Change' option in the menu to the 'Provider Info' section below the grid. The 'Provider Info' section includes fields for Provider Name, NPI #, Work Email, Personal Email, Mobile Phone #, and Last Updated. At the bottom of the page, there is a footer with links for Privacy Policy, Terms and Conditions, and a Chat button.

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



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)
Record Status	<input checked="" type="radio"/> All Records <input type="radio"/> Active Records <input type="radio"/> Inactive Records
Verification Types	<input checked="" type="checkbox"/> Due Diligence <input checked="" type="checkbox"/> In Progress <input checked="" type="checkbox"/> Not able to verify <input checked="" type="checkbox"/> Verified +
Bulk Change To	<input checked="" type="radio"/> Ready for Recred <input type="radio"/> Restart

Sections Included Select All

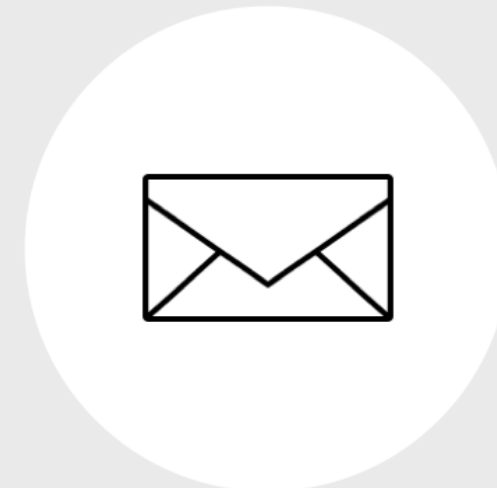
- Board Certification
- Education & Training
- Facility Affiliations
- FSMB
- State Licenses
 - NC - MD - 2015-02245
 - VA - MD - 0101241891
- DEA Licenses
- Controlled Substances
- OIG
- SAM
- NPDB
- Other Documents

Cancel **Change**

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346