



Modio **OneView**[®] Tip Guide

FACILITY MASTER RECORD AND
LOCATION MANAGEMENT

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Click [here](#) to Watch a 45-minute-deep dive into the Facility Master Record with several of our OneView® experts!

What is a Facility Master Record and how is it created and managed?

Facility Master Records are the unique location-based database entries that are used to build out a provider's profile. These master database records represent the physical addresses & service locations that a provider may practice at and/or are currently/ previously affiliated with. Facility Master Records are created in our OneView® master database and once established, these location records will be available for your team's use within OneView®.

The Facility Master Records correspond to & are added by the Coordinators on your Team to the below sections within your provider profiles:

- Education & Training
- Practice / Employer
- Facility Affiliations
- Work History
- Peer References

You can request a **Facility Master Record** creation by sending the pertinent data points to support@modiohealth.com.

The screenshot displays the 'Personal Info' section of a provider profile for John Snow MD. The interface includes a top navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The profile is last updated on 10/20/2021. A sidebar on the left lists various profile sections, with 'Personal Info', 'Education & Training', 'Practice / Employer', 'Facility Affiliations', 'Work History', and 'Peer References' checked. The main form contains the following fields:

- Personal Info:** Prefix (dropdown), First Name (John), Middle Name (Middle name), Last Name (Snow), Suffix (dropdown), More Names (0) (+), Save button.
- Provider Info:** Provider Title (MD - Medical Doctor), Specialty List (+), Telemed Exp. (dropdown), Fluent languages (Select languages...).
- Contact Information:** Work Email (snowdemo@modio.email), Personal Email (@), Home Phone #, Mobile Phone #, Emergency Contact (0) (+).
- Home Address:** Address (Home address), Address 2 (Home address 2), City (Home city), State/Province (dropdown), Zip/Postal Code, County (Home county), Country (United States of America), More Addresses (1) (+).
- Birth Information:** Gender (Male), Date of Birth (01/01/1953), Birth City (Birth city), Birth State/Province (Birth state), Birth County, Birth Country, Country of Citizenship, Citizenship/Work Authorization (checkbox), Chat button.

- Personal Info
- Education & Training
- Practice / Employer
- Facility Affiliations
- Work History
- Peer References
- Licensure
- Certifications
- Medical Malpractice
- Healthcare Payors
- Health Info
- Event Log
- CME
- Documents
- Summary

Five sections of your provider profiles are location based.

Two of those sections; "Practice/Employer" and "Facility Affiliations" - data entries must be added through the Master Record.

See the next pages for a how-to on the Facility Master Update report. Have additional locations added to the master record by submitting any edits or changes to existing locations by using this report.

Step 1 - Type the address into the text box. A list of potential matches will appear in a dropdown for you to select from. If the address does not generate a match, then try to search by name or keyword.

Step 2 - If you see your location in the dropdown select it by clicking once.

Step 3 - If you can't find a match for your location after searching by address and key words, a message will appear in blue.

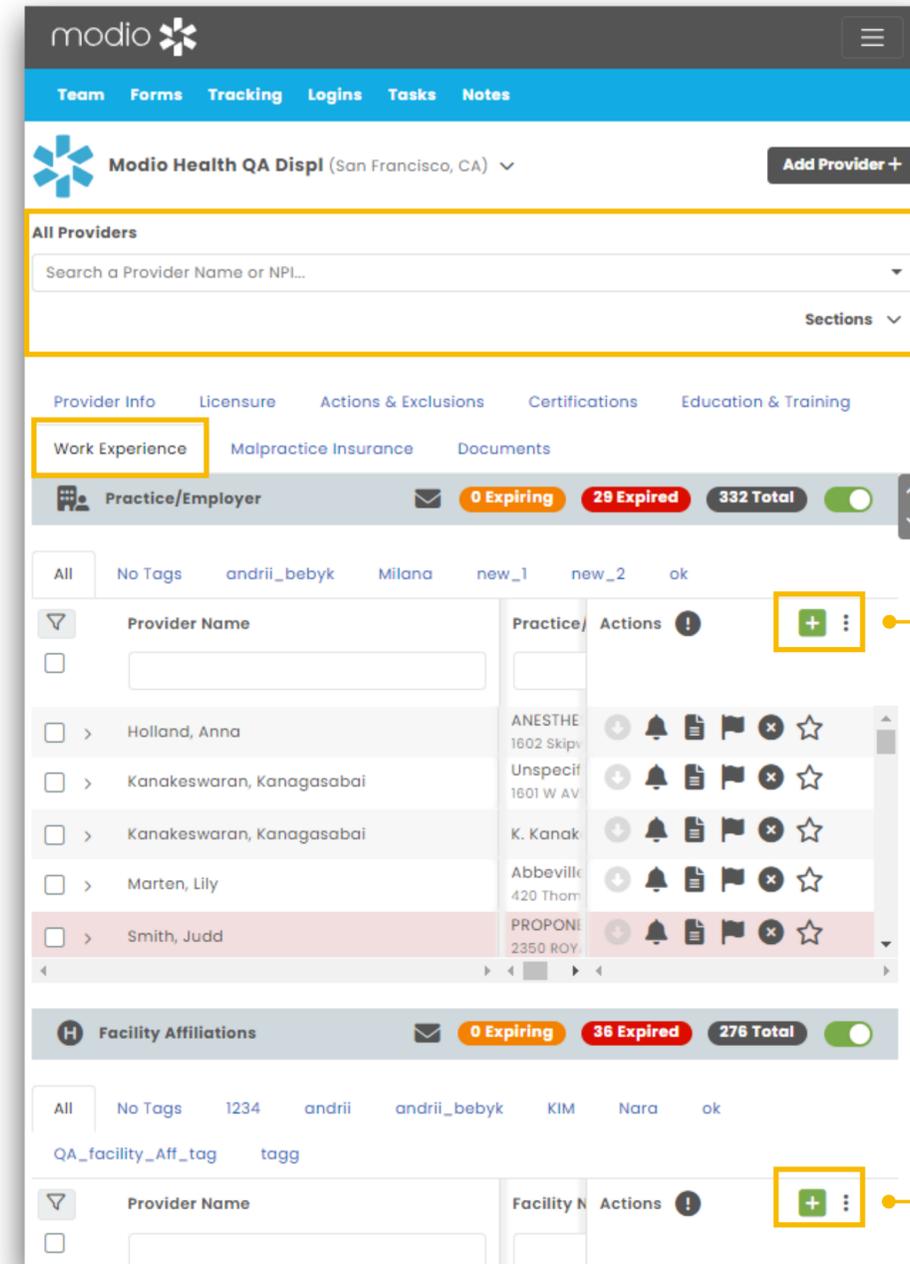
Step 4 - Have the new location quickly added to our database by the support team via Support@modiohealth.com.

Best Practice Tip #1 - Best practice is to always add locations from the Facility Master Record. The system will give you an option to add a location manually. If you add a location manually in either the "Practice/Employer" section or the "Facility Affiliations" section, you may run into issues in the future. These locations are connected to Reporting, Forms, Payors, Tracking and more!

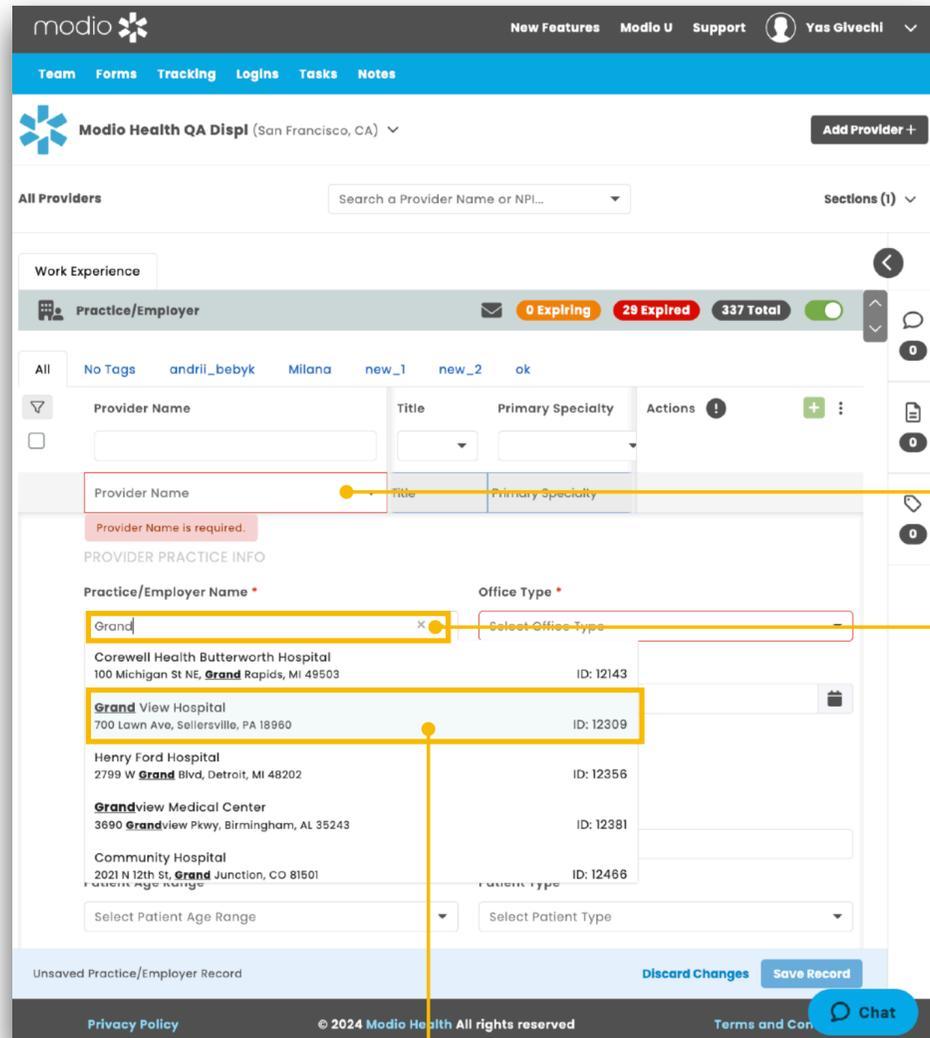
Best Practice Tip #2 - Education & Training and Work History sections are location based. Best practice is still to search the facility master record for existing locations, but it is OK to add data manually to these 2 sections.

Best Practice Tip #1 – Best practice is to always add locations from the Facility Master Record. The system will give you an option to add a location manually. If you add a location manually in either the “Practice/Employer” section or the “Facility Affiliations” section, you may run into issues in the future. These locations are connected to Reporting, Forms, Payors, Tracking and more!

Best Practice Tip #2 - Education & Training and Work History sections are location based. Best practice is still to search the facility master record for existing locations, but it is OK to add data manually to these 2 sections.



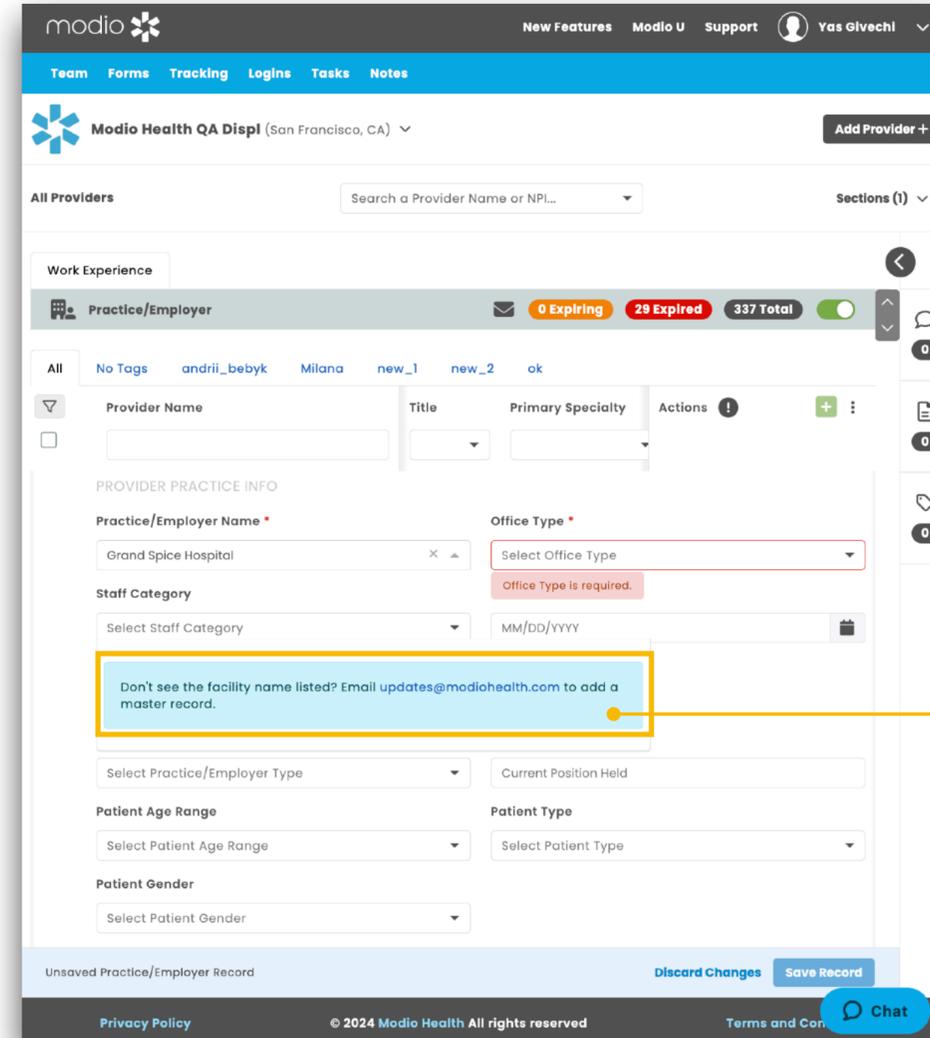
Location-based data can be added as shown here on our OneView V2 Dashboard. You can add this in **Single Provider View** or staying in grid view.



Step 3 - If you see your location in the dropdown select it by clicking once.

Step 1 - If you are in **individual provider** view, skip to step 2. If you are in grid view, start by searching for the provider's first or last name, you want to enter the record for.

Step 2 - Type the address into the text box. A list of potential matches will appear in a dropdown for you to select from. If the address does not generate a match, then try to search by name or keyword



Step 4 - If you can't find a match for your location after searching by address and key words, a message will appear in blue.

Step 5 - Have the new location quickly added to our database by the support team via Support@modiohealth.com

Step 6 - Once the location has been added to the record, navigate back to this original data entry and add it from the drop down.

Report: Facilities

- Provider Focused
- Used to QA Provider Profiles

Outcome: All unique locations associated with any provider on your team roster.

Use case example: View all your locations at a provider level. This includes:

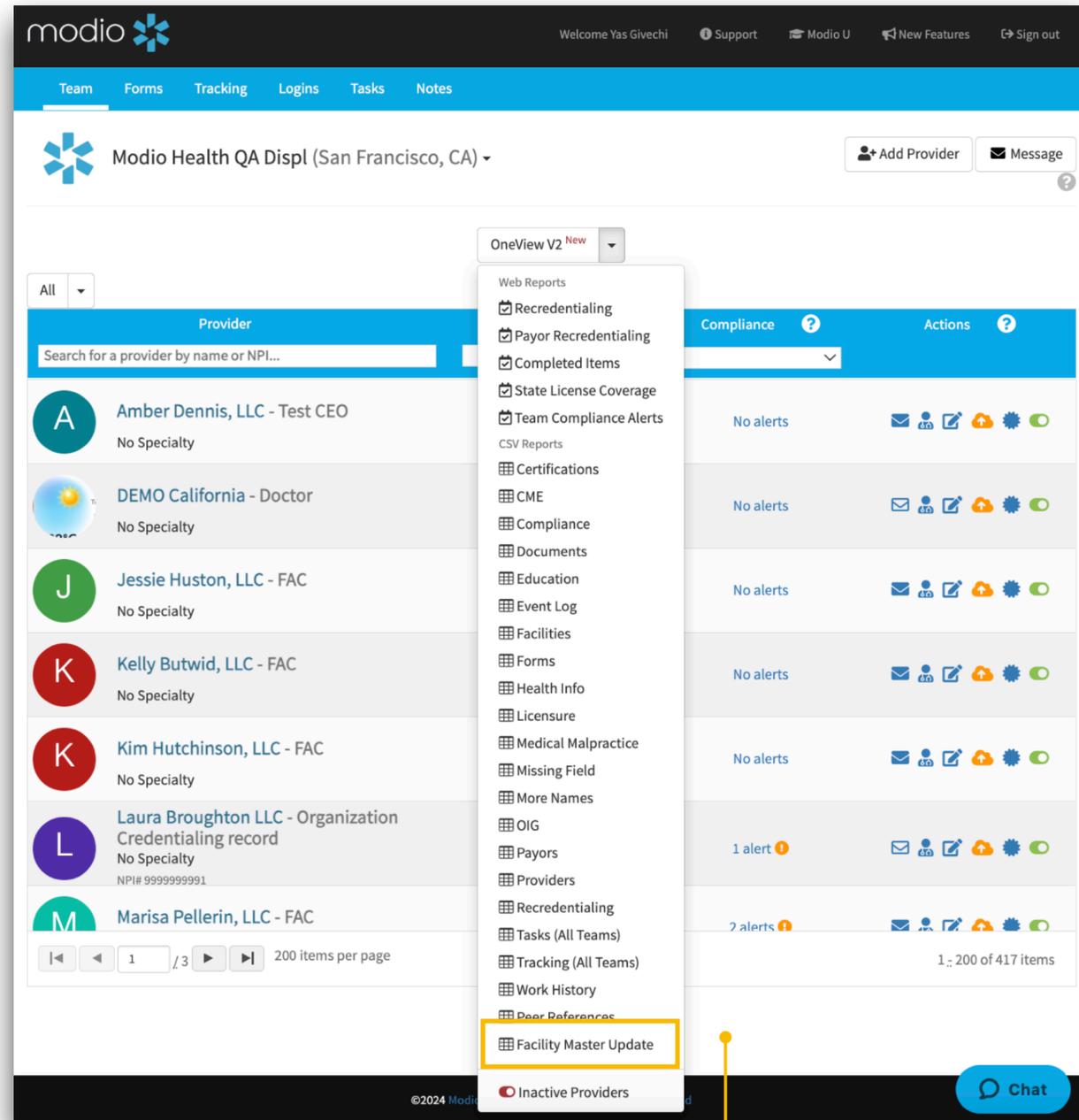
- locations that were added manually
- Address Info from Master Record if box is either checked or unchecked
- Locations that were added correctly through the Facility Master Record
- This report will not include Education & Training or Work History locations

See the next pages for a deep dive into the **Facility Master Update Report**.

The screenshot shows the Modio OneView V2 interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, the user is logged in as 'Yas Givechi'. The main area is titled 'Modio Health QA Displ (San Francisco, CA)'. On the left, there's a list of providers, including Amber Dennis, DEMO California, Jessie Huston, Kelly Butwid, Kim Hutchinson, Laura Broughton, and Marisa Pellerin. A dropdown menu is open over the 'Facilities' report, listing various report categories like 'Web Reports', 'Recertifying', 'Payor Recertifying', 'Completed Items', 'State License Coverage', 'Team Compliance Alerts', 'CSV Reports', 'Certifications', 'CME', 'Compliance', 'Documents', 'Education', 'Event Log', 'Forms', 'Health Info', 'Licensure', 'Medical Malpractice', 'Missing Field', 'More Names', 'OIG', 'Payors', 'Providers', 'Recertifying', 'Tasks (All Teams)', 'Tracking (All Teams)', 'Work History', 'Peer References', 'Facility Master Update', and 'Inactive Providers'. The 'Facilities' option is highlighted. On the right, a table shows facility data for the selected provider, with columns for Facility ID, Last Name, First Name, Work Email, Provider, Primary Specialty, Provider NPI#, Office Type, Staff Category, and Facility Name. The table shows 62 rows of data.

	B	C	D	E	F	G	H	Q	S	T
1	Facility ID	Last Name	First Name	Work Email	Provider	Primary Specialty	Provider NPI#	Office Type	Staff Category	Facility Name
5	40725	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice	Employed	Advanced Urology Institute
6	42167	Quinn	Michael	michael.q MD	Radiology	1568453348	1568453348	Other Practice		Meru Health Medical California, PC
7	39256	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		Active Family Healthcare
11	12192	Johnson	Dwayne	therock76 MD	Pediatrics	1841379187	1841379187	Primary Practice	Active	Abbott Northwestern Hospital
12	110457	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Primary Practice		Absolute Injury & Pain Physicians
13	22003	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Primary Practice	Active - Te	Cedars-Sinai Medical Center North Tower
15		Quinn	Michael	michael.q MD	Radiology	1568453348	1568453348	Primary Practice		Unspecified
18	36419	Heath	Kirk	kirk.heath MD	General Surgery	1184838286	1184838286	Primary Practice		AL - 299 - Hoover
19	21012	Scott	Michael	michael.si MD	Pediatric Surgery	5689412378	5689412378	Primary Practice		Sentara Surgery Specialists - Norfolk
24		Heath	Kirk	kirk.heath MD	General Surgery	1184838286	1184838286	Primary Practice		Unspecified
25	45890	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		Moonwalk Orthotix Inc
26	135987	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		CCSN Behavioral Health LLC
27	20764	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		Modio Health - OnDemand
28	140046	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		Professional Health Care of Pinellas - Central
30	37682	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		Central Arkansas Radiation Therapy, Inc - Dent
31	45658	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		Napa Valley Physical Therapy Center
32	118785	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		12 PPCP - Austin Kushner Purighalla
33	117368	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		ABC
46	20764	Heath	Kirk	kirk.heath MD	General Surgery	1184838286	1184838286	Other Practice		Modio Health - OnDemand
47	14445	Johnson	Dwayne	therock76 MD	Pediatrics	1841379187	1841379187	Other Practice	Active	AdventHealth Avista
49	14445	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice	Active	AdventHealth Avista
50	21122	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		One Medical - 02-08 Cobble Hill
51	12215	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		Sentara Careplex Hospital
52	37394	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		Jordan Valley Community Health Center
53	39256	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		Active Family Healthcare
54	124867	Abele	Jennifer	12345678 MD	Allergy and Immunology	1073502779	1073502779	Other Practice		MultiCare Urgent Care
56	31062	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice	Affiliate	Weil Foot and Ankle Institute
57	15139	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		Canyon Vista Medical Center
58	106832	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		Green Mountain Surgery Center
59	20945	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		AayuClinics Lakeview Immediate Care
60		Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		Test Record
61	42167	Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		Meru Health Medical California, PC
62		Abakporo	Theophine	theophoin HAD	General Dentistry	1972564813	1972564813	Other Practice		Audubon Pediatrics

Example of the Facilities Report. The locations are shown by provider. This is very helpful if you want a way to sort or view each location a certain provider is assigned to.



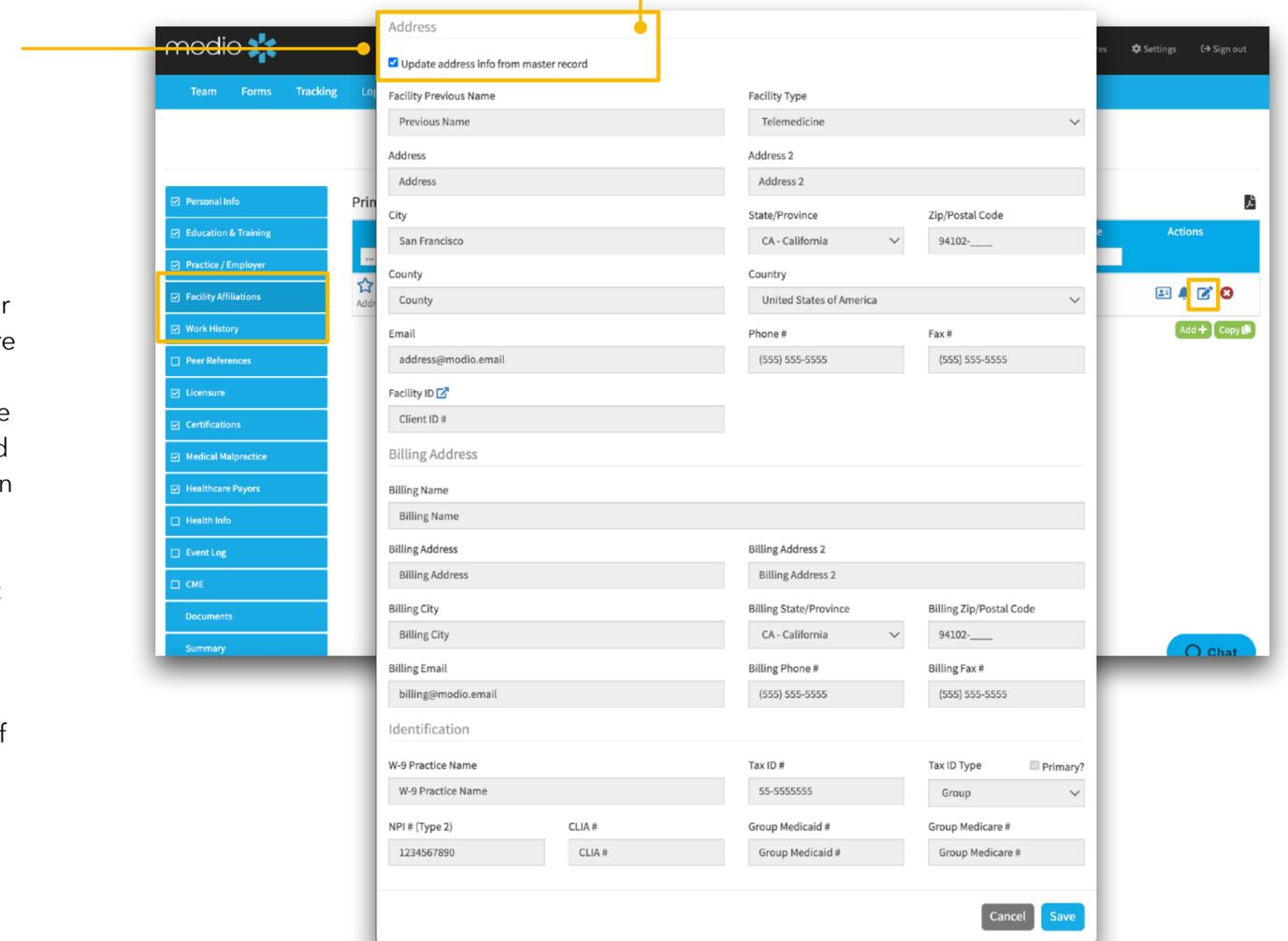
Report: Facility Master Update
 •Location/Facility Focused
 •Used to QA Locations and Facilities

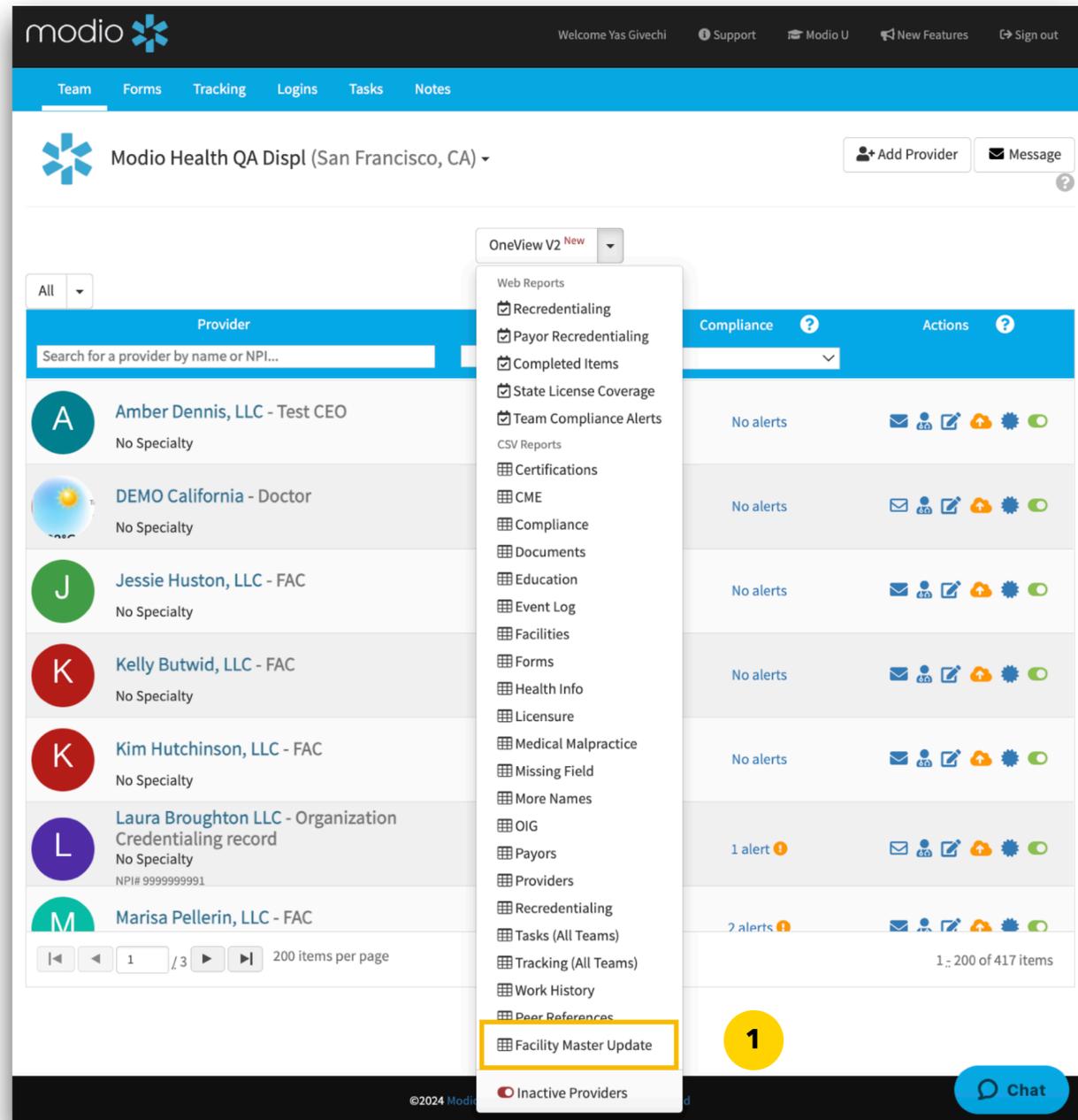
Outcome: All unique locations found within your provider profiles that are associated with the master database.

Use case example: View all locations that are stored in any of your provider profiles and are part of the Facility Master Record. Click the pen and paper icon and then scroll to the section labeled Address.

- These locations must have the “Updated address info from master record” box selected to be part of this report
- This report will not include Education & Training or Work History locations

Indicator in OneView: When the facility is added correctly the check boxes are checked in blue. This blue check keeps your location connected to the Facility Master Record. If the box has been unchecked - the facility is not being pulled from our master record or it was not added correctly (a manual entry).





Once you have run the Facility Master Update report you can start to make edits or changes. Follow these steps to start updating your locations:

Step 1 - Run the Facility Master Update Report from the reports dropdown

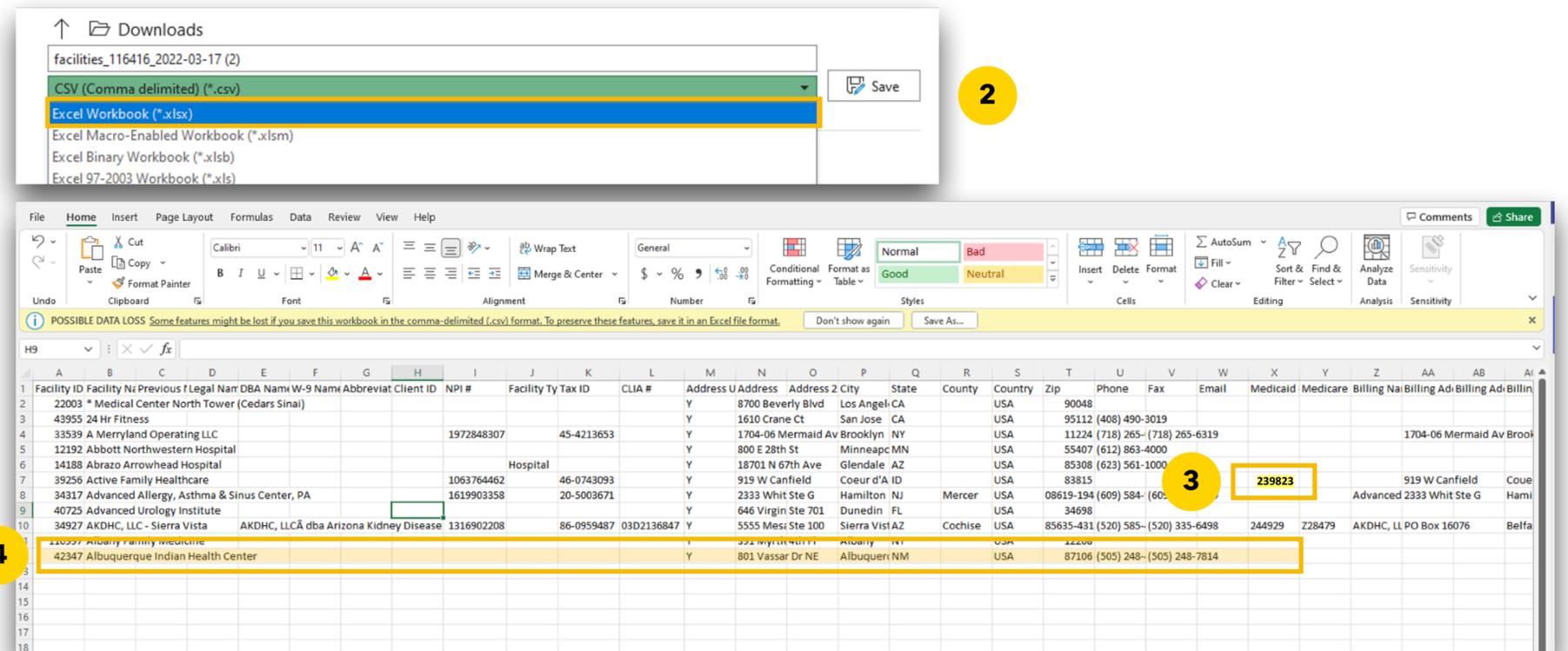
Step 2 - Important! Save the report as an Excel Workbook (*.xlsx)

Step 3 - Add or update any data for your existing locations and highlight those edits in yellow

Step 4 - Add any new locations that are not yet a part of the Facility Master Record and highlight in yellow at the bottom of the report

Step 5 - Email the Excel document to Support@ModioHealth.com

Step 6 - Once the location has been added to our record, navigate back to the original data entry and select it from the drop down. You want to ensure that the box is checked to update the address from the **Facility Master Record** as shown in the figure on page 8.



Use this report to make any updates or edits to your current locations. If you have a location that is not currently part of the Facility Master Record, add the information to this report, highlight it in yellow and email it to Support@modiohealth.com

Best Practice Tip #1 - Run this report every month and review to ensure all locations are up to date.

Facility ID	Facility Name	Previous Facility Name	Legal Name	DBA Name	W-9 Name	Abbreviation	Client ID	NPI #	Facility Type	Tax ID	CLIA #	Address 1	Address 2	City	State	County	Country	Zip	Phone	Fax	Email	Medicaid	Medicare	Billing Name	Billing Address
22003	* Medical Center North Tower		(Cedars Sinai)								123456789	8700 Beverly Blvd	Los Angeles	CA	Denver	USA	90048		123456789						
43955	24 Hr Fitness										123456789	1610 Crane Ct	San Jose	CA	Denver	USA	95112	(408) 490-3019				123456			
33539	A Merryland Operating LLC						1972848307			45-4213653	123456789	1704-06 Mermaid Av	Brooklyn	NY	Denver	USA	11224	(718) 265-0911	(718) 265-6319			123456		1704-06	Mermaid Av Brook
12192	Abbott Northwestern Hospital								Hospital		123456789	800 E 28th St	Minneapolis	MN	Denver	USA	55407	(612) 863-4000							
14188	Abrazo Arrowhead Hospital								Hospital		123456789	18701 N 67th Ave	Glendale	AZ		USA	85308	(623) 561-1000							
39256	Active Family Healthcare						1063764462		Hospital	46-0743093	123456789	919 W Canfield	Coeur d'Alene	ID		USA	83815		123456789					919 W Canfield	Coeur d'Alene
34317	Advanced Allergy, Asthma & Sinus Center, PA						1619903358		Hospital	20-5003671		2333 Whit Ste G	Hamilton	NJ	Mercer	USA	08619-194	(609) 584-9211	(609) 584-9299			123456		Advanced 2333 Whit Ste G	Hamilton
40725	Advanced Urology Institute								Hospital			646 Virgin Ste 701	Dunedin	FL		USA	34698								
34927	AKDHC, LLC - Sierra Vista		AKDHC, LLC	dba Arizona Kidney Disease & Hypertension			1316902208			86-0959487	03D2136847	5555 Mesa Ste 100	Sierra Vista	AZ	Cochise	USA	85635-431	(520) 585-4711	(520) 335-6498	244929	228479	AKDHC, LLC	PO Box 16076	Belfair	
110997	Albany Family Medicine											391 Myrtle 4th Fl	Albany	NY		USA	12208								
42347	Albuquerque Indian Health Center											801 Vassar Dr NE	Albuquerque	NM		USA	87106	(505) 248-4011	(505) 248-7814						
	Avista Adventist Hospital				AAH - 100			1619985942	Hospital	84-0405827		100 Health Park Driv	Louisville	CO	Denver	USA	80207	3031231236			123456	123456	AAH - 100	100 Health Park Driv	

Note: Report with Edits/Changes/New locations you added highlighted in yellow and saved as (*.xlsx)

Best Practice Tip #2 - When filling out the address, if the billing and/or mailing address is the same as the physical location - best practice is to include that on the report. Submitting complete data now will lead to success when using the Forms feature in the future!

Facility ID	Facility Name	Previous Facility Name	Legal Name	DBA Name	W-9 Name	Abbreviation	Client ID	NPI #	Facility Type	Tax ID	CLIA #	Address 1	Address 2	City	State	County	Country	Zip	Phone	Fax	Email	Medicaid	Medicare	Billing Name	Billing Address
22003	* Medical Center North Tower		(Cedars Sinai)									8700 Beverly Blvd	Los Angeles	CA		USA	90048								
43955	24 Hr Fitness											1610 Crane Ct	San Jose	CA		USA	95112	(408) 490-3019							
33539	A Merryland Operating LLC						1972848307			45-4213653		1704-06 Mermaid Av	Brooklyn	NY		USA	11224	(718) 265-0911	(718) 265-6319					1704-06	Mermaid Av Brook
12192	Abbott Northwestern Hospital											800 E 28th St	Minneapolis	MN		USA	55407	(612) 863-4000							
14188	Abrazo Arrowhead Hospital								Hospital			18701 N 67th Ave	Glendale	AZ		USA	85308	(623) 561-1000							
39256	Active Family Healthcare						1063764462		Hospital	46-0743093		919 W Canfield	Coeur d'Alene	ID		USA	83815							919 W Canfield	Coeur d'Alene
34317	Advanced Allergy, Asthma & Sinus Center, PA						1619903358		Hospital	20-5003671		2333 Whit Ste G	Hamilton	NJ	Mercer	USA	08619-194	(609) 584-9211	(609) 584-9299					Advanced 2333 Whit Ste G	Hamilton
40725	Advanced Urology Institute											646 Virgin Ste 701	Dunedin	FL		USA	34698								
34927	AKDHC, LLC - Sierra Vista		AKDHC, LLC	dba Arizona Kidney Disease			1316902208			86-0959487	03D2136847	5555 Mesa Ste 100	Sierra Vista	AZ	Cochise	USA	85635-431	(520) 585-4711	(520) 335-6498	244929	228479	AKDHC, LLC	PO Box 16076	Belfair	
110997	Albany Family Medicine											391 Myrtle 4th Fl	Albany	NY		USA	12208								
42347	Albuquerque Indian Health Center											801 Vassar Dr NE	Albuquerque	NM		USA	87106	(505) 248-4011	(505) 248-7814						

Note: Original Report (with no highlighting)

Q: I thought my facility was in the system, but I can't seem to find it. Are there other ways besides address and name I should try to search?

A: Try searching for the facility using a unique keyword or part of an address. For example, if you're looking for St Joseph Medical Center in Dallas, try searching "1717 J St" to narrow down the options.

Q: I tried all the searches, address, name, everything and I can't find my facility. What should I do?

A: Follow the steps outlined in this guide on Slide 8 and submit your request to support@modiohealth.com.

Q: My organization has a new facility that doesn't have an official name yet, but we need to have it entered in the system. Can we use a placeholder?

A: Yes, a placeholder name can be used, and it can be updated later when the official name is chosen.

Q: Does OneView® have a Primary Source Integration to verify a facility DEA?

A: Not currently.

Q: Can a location/practice be deleted?

A: To remove facilities from your Facility Master Update report, simply delete them from all provider profiles and they will no longer appear in the report. If you think you have a duplicate entry for a facility, please reach out to support@modiohealth.com. We are unable to completely delete facility records from our system, as they are accessible to all clients across our platform.

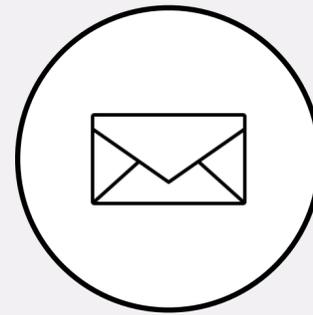
Q: How do I update a termed location?

A: <https://www.loom.com/share/db625f51b138401483a1304ff4b943b2>

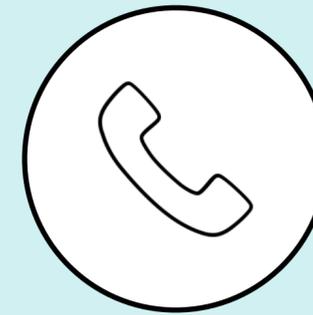
For additional questions or further training, contact the Modio Team via:



Online:
Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346