

# Modio **OneView**® Tip Guide

## FACILITY MASTER RECORD AND LOCATION MANAGEMENT

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Click <u>here</u> to Watch a 45-minute-deep dive into the Facility Master Record with several of our OneView<sup>®</sup> experts!



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

Facility Master Records are the unique locationbased 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<sup>®</sup> master database and once established, these location records will be available for your team's use within OneView<sup>®</sup>.

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.



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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.

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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.

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



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

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**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.

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6	42167	Quinn	Michael	michael.q	MD	Radiology	1568453348	Other Practice		Meru Health Medical California, PC
7	39256	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		Active Family Healthcare
11	12192	Johnson	Dwayne	therock76	MD	Pediatrics	1841379187	Primary Practice	Active	Abbott Northwestern Hospital
12	110457	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Primary Practice		Absolute Injury & Pain Physicians
13	22003	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Primary Practice	Active - Te	Cedars-Sinai Medical Center North To
15	j	Quinn	Michael	michael.q	MD	Radiology	1568453348	Primary Practice		Unspecified
18	36419	Heath	Kirk	kirk.heath	MD	General Surgery	1184838286	Primary Practice		AL - 299 - Hoover
19	21012	Scott	Michael	michael.s	MD	Pediatric Surgery	5689412378	Primary Practice		Sentara Surgery Specialists - Norfolk
24	1	Heath	Kirk	kirk.heath	MD	General Surgery	1184838286	Primary Practice		Unspecified
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26	i 135987	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Other Practice		CCSN Behavioral Health LLC
27	20764	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Other Practice		Modio Health - OnDemand
28	140046	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Other Practice		Professional Health Care of Pinellas
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31	45658	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		Napa Valley Physical Therapy Center
32	118785	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		12 PPCP - Austin Kushner Purighalla
33	117368	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		ABC
46	j 20764	Heath	Kirk	kirk.heath	MD	General Surgery	1184838286	Other Practice		Modio Health - OnDemand
47	14445	Johnson	Dwayne	therock76	MD	Pediatrics	1841379187	Other Practice	Active	AdventHealth Avista
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50	21122	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Other Practice		One Medical - 02-08 Cobble Hill
51	12215	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Other Practice		Sentara Careplex Hospital
52	37394	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Other Practice		Jordan Valley Community Health Cen
53	39256	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Other Practice		Active Family Healthcare
54	124867	Abele	Jennifer	12345678	MD	Allergy and Immunolo	1073502779	Other Practice		MultiCare Urgent Care
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57	7 15139	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		Canyon Vista Medical Center
58	106832	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		Green Mountain Surgery Center
59	20945	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		AayuClinics Lakeview Immediate Car
60		Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		Test Record
61	42167	Abakporo	Theophine	theophoir	HAD	General Dentistry	1972564813	Other Practice		Meru Health Medical California, PC
62	2	Abakporo	Theophine	theophoir	HAD	General Dentistry	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.









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## **Report: Facility Master Update**

- •Location/Facility Focused
- •Used to QA Locations and Facilities

**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).

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**Step 1** - Run the Facility Master Update Report from the reports dropdown Step 2 - Important! Save the report as an Excel Workbook (\*.xlxs )

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

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.

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

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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.

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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!

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

## **Note**: Original Report (with no highlighting)









**OneView: Support Guide** 

Frequently Asked Questions

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.

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

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 <u>support@modiohealth.com</u>. 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?

## 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?

## **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?

## **Q:** Does OneView<sup>®</sup> have a Primary Source Integration to verify a facility DEA?

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





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





Phone: 844.696.6346



