



OneView[®]

TIP GUIDE: MANAGING COMPLIANCE

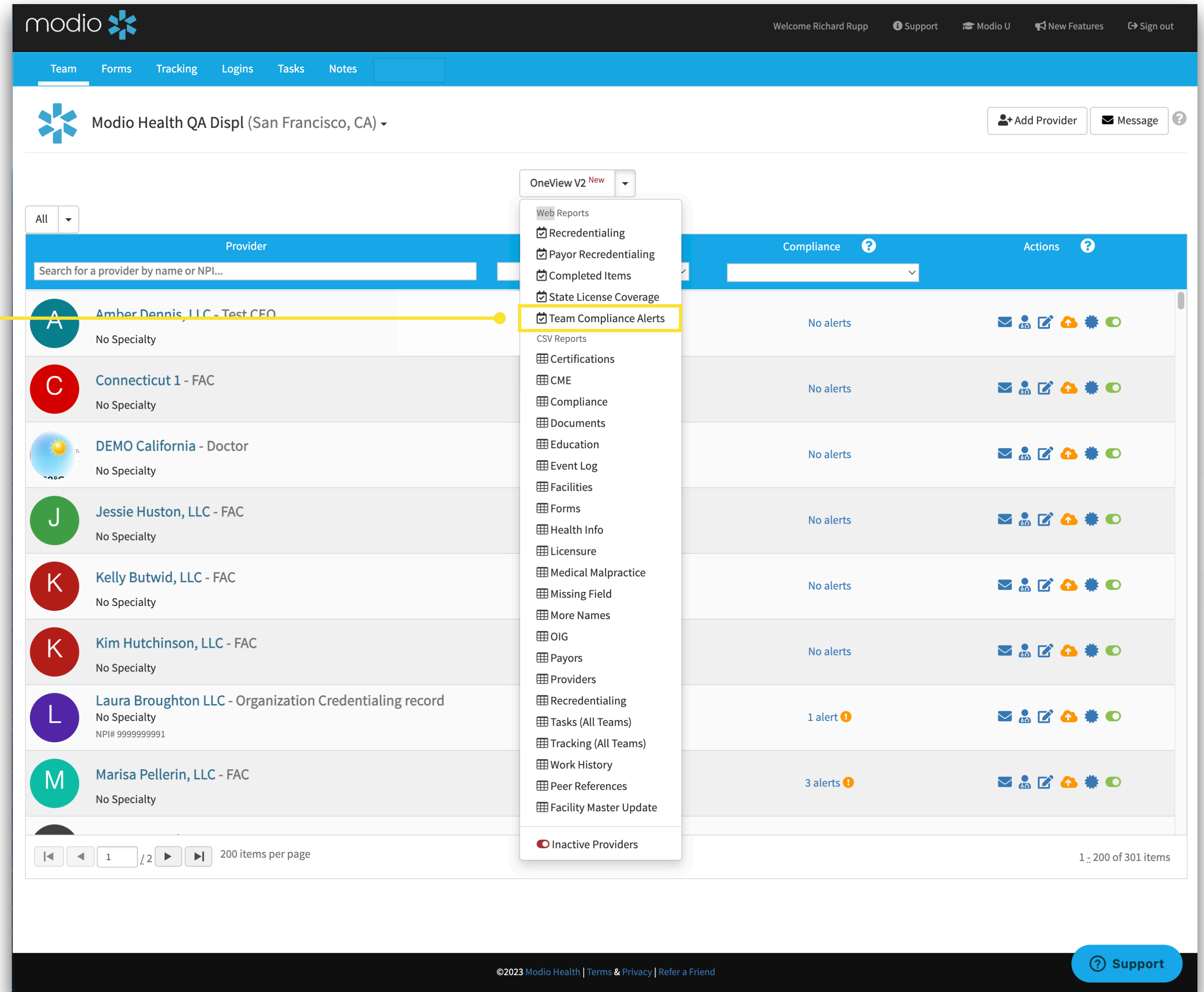
Tip Guide: Managing Compliance Replicating the Team Compliance Alerts Report

Our previous Alerts page allowed you to look at your population of providers and view records from certain section with upcoming expiration dates within the next 2 months where the alerts have not been silenced. This compliance functionality, called **Team Compliance Alerts report**, has recently been replaced with **OneView V2**. This has additional customization features that allow you to choose what sections you want to include, choose your own alert intervals, and run Carbon in bulk.

All and all, using OneView V2 will save you time and allow you to customize how you manage compliance..

Click on the **OneView V2** button from The Team page to access these new features.

Note that the Team Compliance Alerts report will still be available in our reports dropdown under web reports for a while if you need to continue to access it as we transition.



The screenshot displays the Modio Health QA Displ (San Francisco, CA) interface. The top navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. The main header shows 'Modio Health QA Displ (San Francisco, CA)' with 'Add Provider' and 'Message' buttons. A dropdown menu for 'OneView V2' is open, listing various reports under 'Web Reports' and 'CSV Reports'. The 'Team Compliance Alerts' option is highlighted. The main content area shows a list of providers with their names, specialties, and alert counts. The 'Compliance' section is visible, showing 'No alerts' for most providers and '1 alert' or '3 alerts' for others. The footer includes '©2023 Modio Health | Terms & Privacy | Refer a Friend' and a 'Support' button.

Provider	Specialty	Alerts
Amber Dennis, LLC - Test CEO	No Specialty	No alerts
Connecticut 1 - FAC	No Specialty	No alerts
DEMO California - Doctor	No Specialty	No alerts
Jessie Huston, LLC - FAC	No Specialty	No alerts
Kelly Butwid, LLC - FAC	No Specialty	No alerts
Kim Hutchinson, LLC - FAC	No Specialty	No alerts
Laura Broughton LLC - Organization Credentialing record	No Specialty NPI# 9999999991	1 alert
Marisa Pellerin, LLC - FAC	No Specialty	3 alerts

Tip Guide: Managing Compliance Replicating the Team Compliance Alerts Report

Before you get started on viewing your compliance records, we recommend you first customize your settings according to this [Quick Start Guide](#).

Start by customizing your grid settings.

- a. Click your **team name** in the top right corner and select **Grid Settings** from the drop-down menu.
- b. **Toggle off** the sections that you don't need to regularly monitor. Using this new view allows you to add additional sections you want to view for compliance, like Exams or SAM.
- c. To recreate the Team Compliance Alerts report, you can drag and drop sections into the following order:
 - State Licenses
 - DEA Licenses
 - State Controlled Substance Licenses
 - Board Certifications
 - Other Certifications
 - OIG
 - CAQH
 - Documents
 - Malpractice
 - NOTE: you can add additional available sections if you like, it does not have to match the prior report exactly.
- d. Once you have finished customizing your grids, click "**Back**." These settings are sticky, meaning they will persist every time you access OneView V2.

The image consists of two screenshots from the Modio Health Master Practice (DEMO) interface. The top screenshot shows the team selection menu with 'Grid Settings' highlighted (B) and the team name 'Modio Health Master Practice (DEMO)' (A). The bottom screenshot shows the 'Grid Settings' page for 'John Snow, MD - Family Medicine' (D), where various sections like 'Verifications', 'Provider Info', 'Birth Info', 'Addresses', 'Additional Names', 'CAQH', 'Health Info', 'State Licenses', and 'DEA Licenses' are listed with toggle switches (C).

Use the all-provider view to see all records for the providers on your team. To look at a subset of record, use the tabs across the top to view by grouped record types, or use the sections filter to choose which sections display

Use the sub-navigation to move between grids, which are grouped by type.

A

The screenshot shows the Modio Health QA Displ 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)' and has an 'Add Provider +' button. A search bar for 'Search a Provider Name or NPI...' is present. A 'Sections' filter dropdown is highlighted with a yellow box. Below this, there are tabs for 'Provider Info', 'Licensure', 'Actions & Exclusions', 'Certifications', 'Education & Training', and 'Work Experience'. A table of providers is shown with columns for 'Provider Name', 'Title', 'Primary Specialty', and 'ID'. Below the table, there's a 'Provider Info' section with a dropdown menu set to 'All'. Another table shows provider details with columns for 'Provider Name', 'Title', 'Primary Specialty', 'NPI #', 'Work Email', 'Personal Email', 'Mobile Phone #', and 'Last Up'. A 'Chat' button is visible in the bottom right corner.

B

Use the **Sections** filter to show one grid at a time.

Tip Guide: Managing Compliance Going Beyond the Team Compliance Alerts Report

You can also use the **envelope icon** at the top of each grid to send the records in the body of an email.

View a count of total records, as well as an indication of how many are expiring or expired at top of each grid. Click the count to filter to those records, or select Total to view all again.

The rows for any expired records will display as a light red. The default alert timeframe is set to **2 months**, just like the original Team Compliance Alerts report. If you would like to change this, see item D.

The screenshot displays the Modio Health Master Practice 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 Olivech'. The main content area shows three license grids: 'State Licenses', 'DEA Licenses', and 'State Controlled Substance Licenses'. Each grid has a header with a count of records (e.g., '12 Expiring', '98 Expired', '304 Total') and an envelope icon for email export. A grid menu is open for the 'State Licenses' grid, showing options like 'Show All Records', 'Show Inactive Records', 'Show Active Records', 'Show All Flags', 'Show Flagged Items', 'Show Unflagged Items', 'Show All Alerts', 'Show Enabled Alerts', 'Show Disabled Alerts', 'Alert 1 Month', 'Alert 2 Months', 'Alert 3 Months', 'Alert 4 Months', 'Alert 5 Months', 'Alert 6 Months', 'Show All Verifications', 'Show Not Started', 'Show In Progress', 'Show Ready for Recred', 'Show Restart', 'Show Verified', 'Show Not able to verify', 'Show Due Diligence', 'Export to Excel', 'Export to Csv', 'Export to Pdf', and 'Reset grid settings'. The grid rows are color-coded: light red for expired records and light yellow for records within the alert interval. The footer contains 'Privacy Policy', '© 2023 Modio Health All rights reserved', and 'Terms and Conditions'.

A

B

C

D

E

F

Each grid has a **Grid menu** that allows you to customize records displaying in that grid.

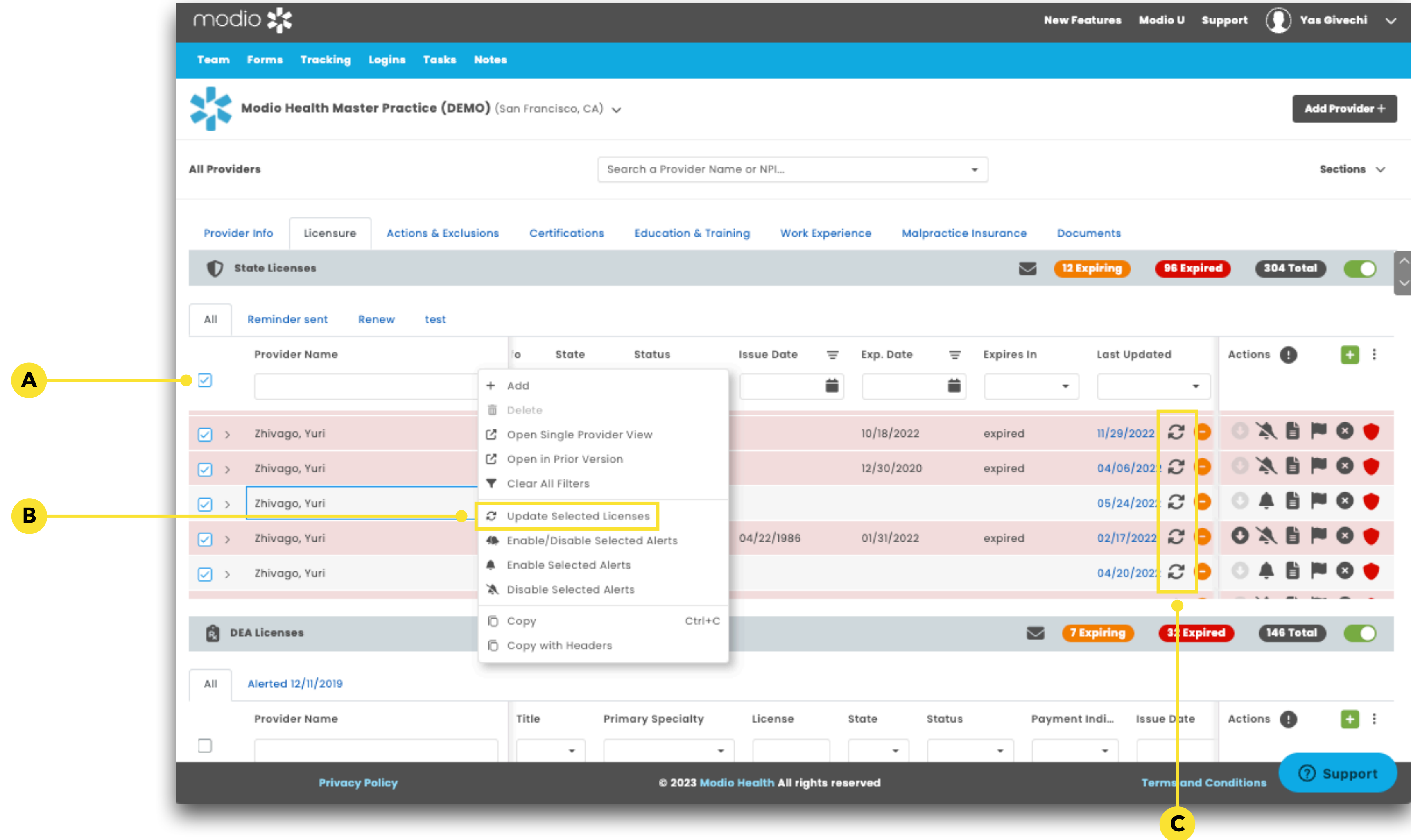
You can select the **table** icon to change which columns are displayed in each grid. These settings are sticky, meaning they will persist every time you access OneView V2. You can change the alert interval to change when a record is considered "expiring," set between **1 to 6 months**. Note: when the timeframe is changed, the counts for "Expiring" records will change at the top of the grid and any records within your set alert interval will be highlighted yellow..

You can **download** the information in that grid to Excel Workbook, CSV, or PDF files. What you download will reflect what is currently displayed in the grid according to your grid settings and filters.

OneView V2 allows you to run Carbon updaters on up to **10 records** at a time.

You can now run Carbon with one click, returning verified fields directly from the primary source websites and saving a PSV document automatically.

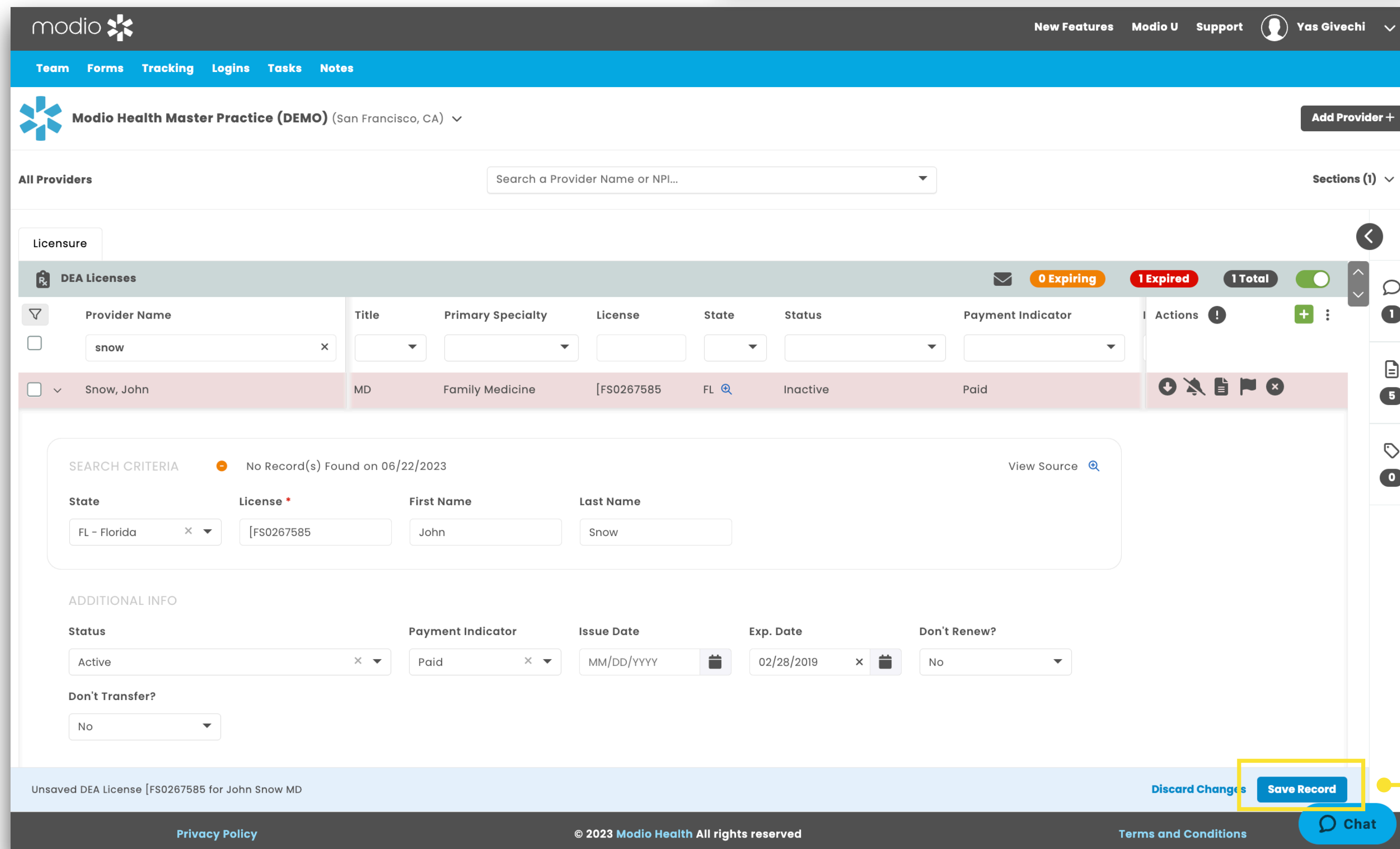
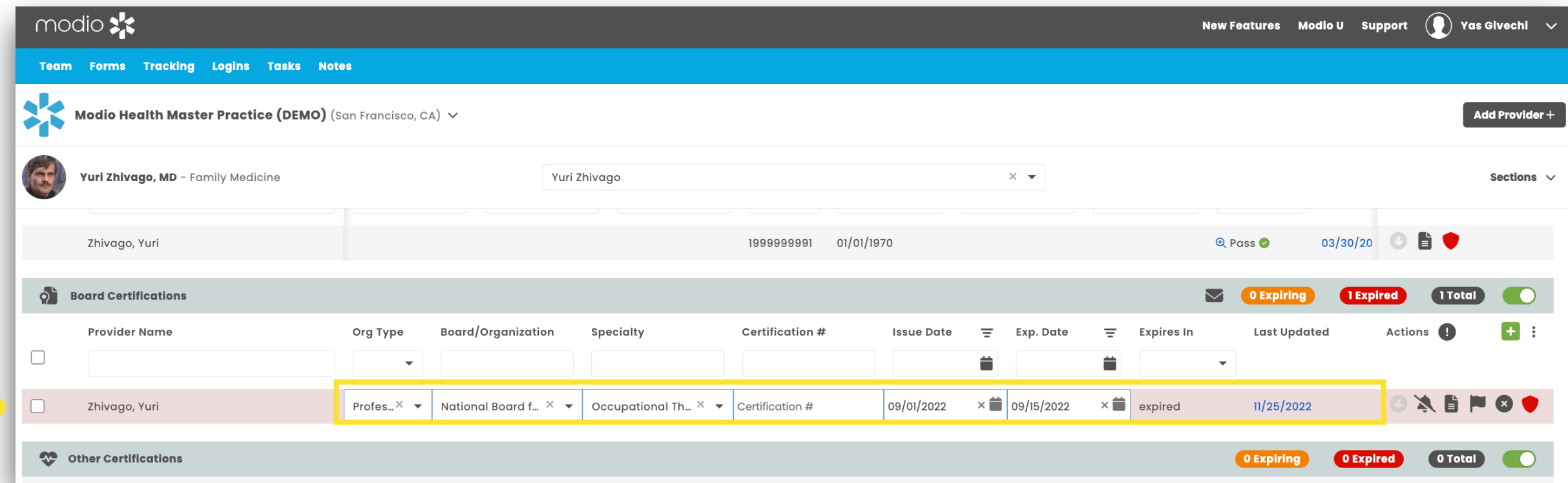
You can run **up to 10 Carbon** updaters at once. Select the records you want with the **checkboxes** to the left of the Provider Name column, then right click and select **“Update Selected Licenses”** from the right click menu.



You can also click on the **updater icons** one after another and they will all run concurrently.

You can edit records directly from OneView V2 without having to open a separate window.

Double-click into the row to use in-line editing. Once you click away, the update will automatically save.



Open the detail view to display all fields for the record. In the license records, you will see a section that displays what search criteria is used by Carbon, with the option to modify the data if the run was not successful.

Once you finish editing, make sure to **“Save Record”** at the bottom. If you try to leave without saving, OneView will remind you to save so you don't lose valuable work.

Click on the **'Last Updated'** date on any record to see a side-by-side comparison of the current record, and past versions of that record.

Use the date updated dropdown in the **Prior Record** column to choose which point in the past you'd like to compare to the current record.

For each point in time, you can see what the data was and who updated it. Differences between the current record and the selected prior record will be highlighted in yellow.

B

A

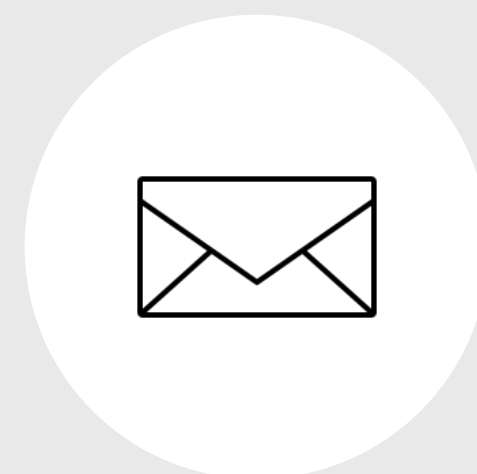
The screenshot displays the Modio Health Master Practitioner interface. A modal window titled "State License for John Snow MD" is open, showing record details and a comparison table. The record details include Record ID (800634), Provider Name (John Snow), Provider ID (11915), Identifier(s) (MD AK 2345234523453245), and Primary Source (https://www.commerce.alaska.gov/cbp/main/search/professional). The comparison table has two columns: "Prior Record" and "Current Record". The "Date Updated" row shows "02/01/2023, 4:56 AM" for the prior record and "03/29/2023, 5:51 PM" for the current record. The "Updated By (Role)" row shows "Vladimira Molcanova (C)" for the prior record and "Yasi Givechi (Admin)" for the current record. The "License #" row shows "2345234523453245" for both. The "License # Display" row is empty for both. The "State" row shows "Alaska (AK)" for both. The "License Type" row shows "MD - Medical Doctor" for the current record. The "Permit Type" and "Occupation" rows are empty for both. The "Specialties" row is empty for both. A dropdown menu for "Date Updated" is open, showing a list of dates: "06/10/2022", "03/29/2023", "03/20/2023", and "06/10/2022". A yellow box highlights the "Date Updated" dropdown and the "Prior Record" column. A yellow line points from the "Date Updated" dropdown to the "Date Updated" row in the comparison table. A yellow circle with the letter "A" is positioned above the "Date Updated" dropdown. A yellow circle with the letter "B" is positioned to the left of the "Date Updated" row in the comparison table.

State License History	Prior Record	Current Record
Date Updated	02/01/2023, 4:56 AM	03/29/2023, 5:51 PM
Revision ID	1-52370640	800634
Update Source	OneView V2	OneView V2
Updated By (Role)	Vladimira Molcanova (C)	Yasi Givechi (Admin)
License #	2345234523453245 *	2345234523453245 *
License # Display		
State	Alaska (AK)	Alaska (AK)
License Type		MD - Medical Doctor
Permit Type		
Occupation		
Specialties		

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



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