



GETTING STARTED GUIDE:  
ONEVIEW 2.0

## MEET THE NEW MODIO ONEVIEW LOOK AND EXPERIENCE

Our new optimized OneView 2.0 dashboard brings a fresh look and experience to credentials management. Built to save you time, you will now be able to manage your team of providers more efficiently and accurately than ever before. Everything you know and love about OneView is still here (including all your data) but our OneView 2.0 revamped technology will open access to new features and capabilities.



### **Tip: Navigating back to OneView 1.0**

We recommend bookmarking [www.modiohealth.com/oneview](http://www.modiohealth.com/oneview) so you can easily navigate back to OneView 1.0.

Click here to navigate to **Grid Settings**, where you can enable a grid which is hidden.

Need to focus on an individual provider? Search for them here.

**Bulk Licensure Updaters:** This checkbox will select up to 10 providers. Once checked, you can and run updates for licenses and controlled substance licenses by right clicking over the area. \* Click on the last updated date to view the most updated data.


Add **\*new\*** Providers to your team, we recommend having their **NPI** on file as we are integrated with LexisNexis.

Click **Sections** to quickly search for one or more grids you need to view. When you refresh the page, this will reset back to all grid view based on your settings.

**Hide** a grid from the page. You can re-enable it from the grid settings.


Send an **email alert summary** to yourself or to your providers. (These alerts are based on what you have custom filtered for each section.)

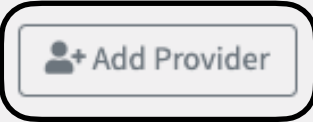
When this icon is **blue**, the latest primary sourced document is available for download.

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All Providers






















































 Search a Provider Name, Specialty, or NPI... 



State Licenses


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Provider Name	Title	Primary Specialty	License Type	License	Add'l Info	State	Status	Issue Date	Actions
<input type="checkbox"/> > Aaron, Joshua	MD	Pulmonary Medicine		D0047471 *	No	CO 	Active	03/03/2021	    
<input type="checkbox"/> > Aaron, Joshua	MD	Pulmonary Medicine	MD	46546	No	AK 	Active		    
<input type="checkbox"/> > Aaron, Joshua	MD	Pulmonary Medicine	MD	565656	No	AK 	Active		    
<input type="checkbox"/> > Aaron, Joshua	MD	Pulmonary Medicine	MD	12345678	No	CO 	Active Pendin...		    
<input type="checkbox"/> > Aaron, Joshua	MD	Pulmonary Medicine	MD	D47471	No	MD 	Active	06/06/1995	    
<input type="checkbox"/> > Aaron, Joshua	MD	Pulmonary Medicine	MD	MD067445L	No	PA 	Active	05/04/1999	    
<input type="checkbox"/> > Adams, Lan Le	MD	Obstetrics and Gynecology	MD	29536	No	OK 	Expired	11/01/2012	    
<input type="checkbox"/> > Aiginiti, Natalya	DO	Osteopathic Medicine	DPM	3463643... *	Yes	CO 	Active with C...		    
<input type="checkbox"/> > Aiginiti, Natalva	DO	Osteopathic Medicine		444777	No	MI	Active - In Lat...		    

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+ Add Provider



All Providers

 Search a Provider Name, Specialty, or NPI...

State Licenses

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	Provider Name	Title	Primary Specialty	License Type	License
<input type="checkbox"/>					
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine		D0047471
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	46546
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	565656
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	12345678
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	D47471
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	MD067445L
<input type="checkbox"/>	> Adams, Lan Le	MD	Obstetrics and Gynecology	MD	29536
<input type="checkbox"/>	> Aiginiti, Natalya	DO	Osteopathic Medicine	DPM	3463643...
<input type="checkbox"/>	> Aiginiti, Natalva	DO	Osteopathic Medicine		444777

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Search sections...

☐ Birth Info

☐ Addresses

☐ Add'l Names

☐ State Licenses

☐ DEA Licenses

☐ Controlled Substances

☐ OIG

☐ Event Log

☐ Board Certifications

☐ Other Certifications

☐ Education & Training

☐ Exams

☐ Health Info

☐ Facility Affiliations

☐ Peer References

☐ Malpractice Insurance

☐ CAQH

☐ Documents

Click **Sections** to check which of the 21 credentialing grids you want visible or hidden on your dashboard. To make a section visible again, just navigate back and remove the selected the section. Remember these settings are not permanent and will reset once the page is refreshed. \* You can also search for grids that were previously disabled in your settings.

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## All Providers

Search a Provider Name, Specialty, or NPI...

State Licenses

Provider Name	Title	Primary Specialty	License Type	License	Issue Date	Status	Alerts
Aaron, Joshua	MD	Pulmonary Medicine	D0047471		03/03/2021	Active	[X]
Aaron, Joshua	MD	Pulmonary Medicine	46546			Active	[X]
Aaron, Joshua	MD	Pulmonary Medicine	565656			Active	[X]
Aaron, Joshua	MD	Pulmonary Medicine	12345678			Active	[X]
Aaron, Joshua	MD	Pulmonary Medicine	D47471	No	MD	Active	[X]
Aaron, Joshua	MD	Pulmonary Medicine	MD067445L	No	PA	Active	[X]
Adams, Lan Le	MD	Obstetrics and Gynecology	29536	No	OK	Expired	[X]
Aiginiti, Natalya	DO	Osteopathic Medicine	3463643...	Yes	CO	Active with C...	[X]
Aiginiti, Natalva	DO	Osteopathic Medicine	444777	No	MI	Active - In Lat...	[X]

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**Provider Records View:**

- Show All Records:** Shows inactive and active records
- Show Inactive Records:** Only view soft-deleted records
- Show Active Records:** Default view, shows only active records.

**Red Flag Risks:**

- Show all Flags:** Default view shows all records.
- Show Flagged Items:** Shows flagged items which need attention. These are highlighted in red.
- Show Unflagged Items:** View non-flagged items.

**Direct Export:** Download reports directly in the format of an Excel, CSV, or PDF document.

**Grid Settings:**

- Click the **three dots** to customize your grid settings.
- Group Alert Actions:** Select if you want to view all line items, ones with alerts enabled or those which are disabled. Default view is set to enabled alerts. Changes to these alerts will be visible by all team members.
- Set it & Forget it:** Set alerts based on your own monthly range preference. This means you can choose between a 1-6 month time frame for alert notifications.
- Reset Grid Settings:** Reset your custom settings. This will only affect your coordinator account.

View your providers last updated status or click the update icon to update.

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**All Providers**

Search a Provider Name, Specialty, or NPI...

Sections

Birth Info 310

Addresses 38

Additional Names 57

State Licenses 636

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Provider Name	Specialty	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date	Expires In	Last Updated	Actions
Aaron, Joshua	Medicine	MD	565656	No	AK	Active				03/24/2021	[Icons]
Aaron, Joshua	Medicine	MD	12345678	No	CO	Active Pending		03/24/2021	0 days	03/19/2021	[Icons]
Aaron, Joshua	Medicine	MD		No	MD	Active	06/06/1995	09/30/2022		03/23/2021	[Icons]
Aaron, Joshua	Medicine	MD		No	PA	Active	05/04/1999	12/31/2022		03/22/2021	[Icons]
Aaron, Joshua	Medicine	MD		No	OK	Expired	11/01/2012	11/01/2019	expired	03/11/2021	[Icons]
Aaron, Joshua	Medicine	DDS	3463643...	Yes	CO	Active with C...				03/24/2021	[Icons]
Aaron, Joshua	Medicine	DDS	444777	No	QC	Active - In Lat...				03/24/2021	[Icons]
Aaron, Joshua	Medicine	DDS		No	QC	Active - In Lat...				03/09/2021	[Icons]

**Add:** Add a new provider from your team.

**Alerts:** Eliminate a ton of clicks and save time with this new feature which lets you enable or disable alerts for up to 10 providers at once.


**Copy / Copy with Headers:** Copy the data (with or without headers) from OneView directly into excel.

**Organize Columns:** Customize and resize your columns by selecting what you want to view or hide. This will help you maximize your screen-space and let you focus on exactly what you need to see. Just click, hold and drag the columns to organize your columns.

Select **Actions** to find the function for each of the icons on your dashboard.

**Click & Directly Edit:** Directly click, edit, and add details to any line item without having to navigate into their respective credentialing sections. This will save you a ton of time since you can add credentialing information directly from one location.

**Drag and Drop:** Upload documents directly to a providers line item with the new auto-file feature. Files will now be sorted into the appropriate document library. These documents can still be accessed from the Documents tab.

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Add Provider

All Providers














































Search a Provider Name, Specialty, or NPI...

Sections

State Licenses

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	Provider Name	Title	Primary Specialty	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date	Actions ?
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine		D0047471 *	No	CO	Active	03/03/2021	03/23/2021	    
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	46546	No	AK	Active			    
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD - Me...	565656	No	AK - ...	Active	MM/DD/YYYY	MM/DD/YYYY	    
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	12345678	No	CO	Active Pendin...		03/24/2021	    
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	D47471	No	MD	Active	06/06/1995	09/30/2022	    
<input type="checkbox"/>	> Aaron, Joshua	MD	Pulmonary Medicine	MD	MD067445L	No	PA	Active	05/04/1999	12/31/2022	    
<input type="checkbox"/>	> Adams, Lan Le	MD	Obstetrics and Gynecology	MD	29536	No	OK	Expired	11/01/2012	11/01/2019	    
<input type="checkbox"/>	> Aiginiti, Natalya	DO	Osteopathic Medicine	DPM	3463643... *	Yes	CO	Active with C...			    
<input type="checkbox"/>	> Aipiniti, Natalya	DO	Osteopathic Medicine		444777	No	MI	Active - In Lat...			    


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	Provider Name	Title	Primary Specialty	Last Name	First Name	Middle Name	NPI Number	Date Of Birth	Exclusion Type	Ac
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Chat


 Download  
Download the latest document.


 Alert  
Hide less important records.


 Edit  
Edit Tags, Notes, or Documents.


 Flag  
Flag records that require attention.


 Add  
Restore a soft deleted record.


 Remove  
Soft delete a record.

 Toggle  
Temporarily hide an item from view.

 Update  
Update provider data.

 Asterisk  
Denotes a primary record.

 Multi-State  
Indicates multi-state compact licenses.

 Search  
Links to external reference websites.

The latest document can also be downloaded here.


Navigate directly to the provider's primary sourced verification website by clicking the magnification icon, when available.

Click the **arrow** if a section allows for expanding and directly edit your providers credentialing information. Don't forget to click **save**.

**Filtering:** Filter dates based on:


- Equals
- Greater than
- Less than
- Not equal
- In range

**Save** any edits made or **cancel** if you don't need to save it.

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Add Provider



























All Providers

Search a Provider Name, Specialty, or NPI...



Sections 

State Licenses  637 

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	Provider Name	Title	Primary Specialty	License Type	License	Add'l Info	State	Status	Issue Date	Expiration Date	Actions	
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	Adams, Lan Le	MD	Obstetrics and Gynecology	MD	29536	No	OK 	Expired	11/01/2012	11/01	    	
<div>Don't renew?Primary?Multi-state?Taxonomy Code </div> <div><div>No</div><div>No</div><div>No</div><div>Select specialty code(s)...</div></div>												
<input type="checkbox"/>	> Aiginiti, Natalya	DO	Osteopathic Medicine	DPM	3463643... 	Yes	CO 	Active with C...				    
<input type="checkbox"/>	> Aiginiti, Natalya	DO	Osteopathic Medicine	DPM	444777	No	MI	Active - In Lat...				    
<input type="checkbox"/>	> Aiginiti, Natalya	DO	Osteopathic Medicine	DPM	987654325kk	No	AZ 	In Renewal	02/01/2017			    

CancelSave

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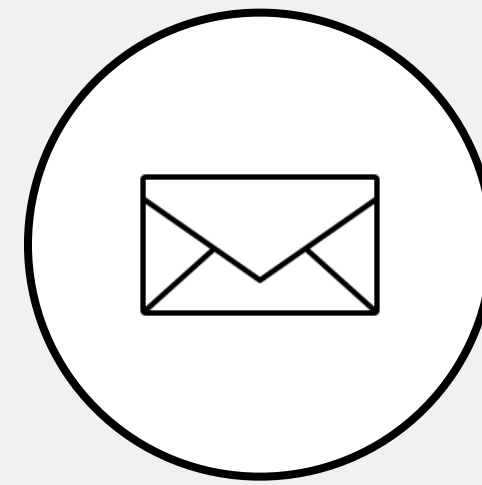
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For additional questions or further training, contact the Modio Team via:

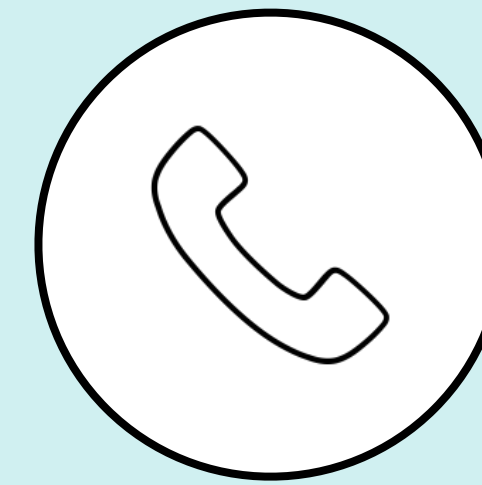
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**Online:**  
Chat Support



**Email:**  
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844.696.6346