modio

OneView™

PROVIDER VERIFICATIONS

The OneView **Dashboard**

Logins:

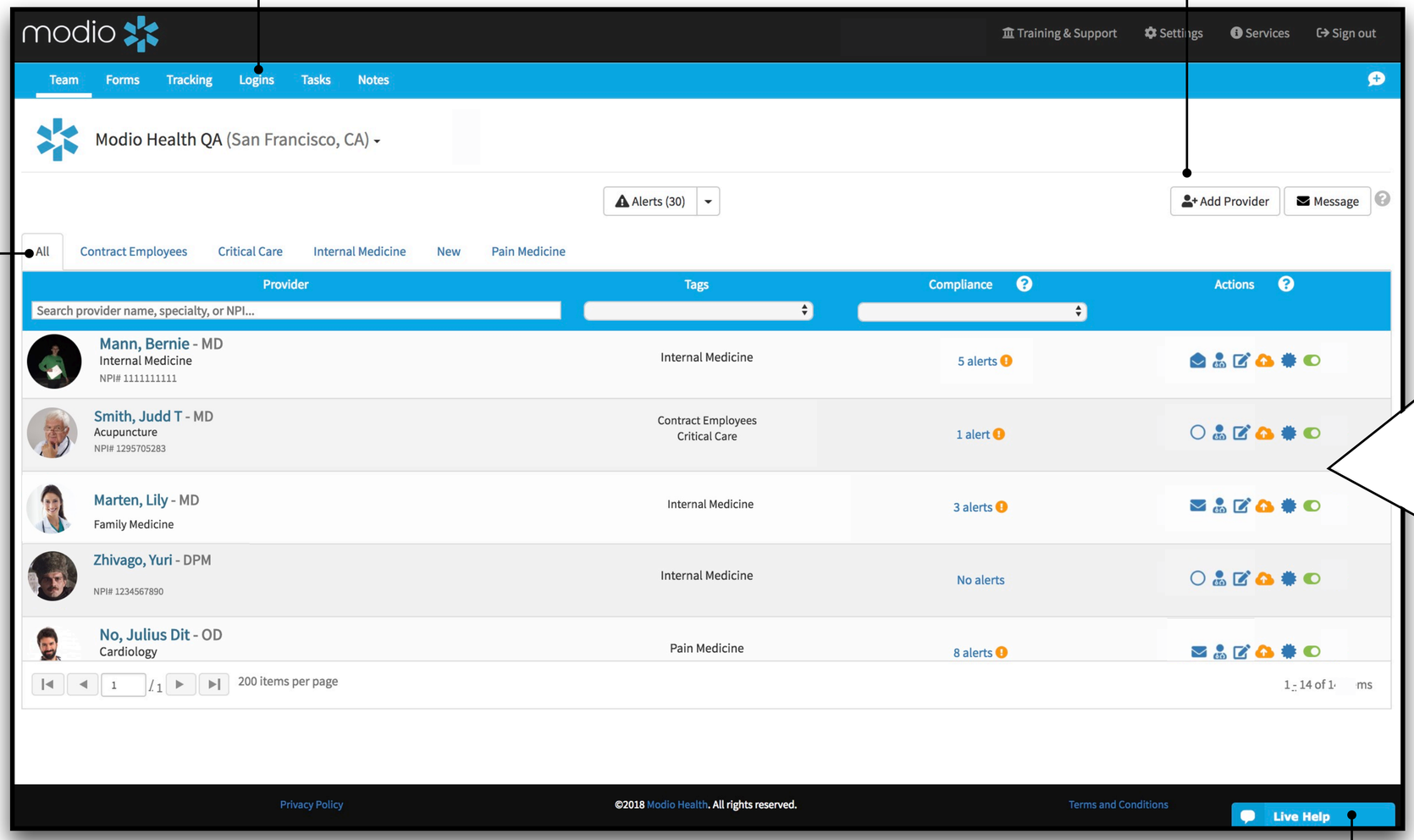
View & store sensitive credentials like PECOS passwords.

Add Provider:

Simply Add a provider to your dashboard.

Teams:

Manage multiple teams under different tabs



Icon Key:

Manage Credentials:
Securely manage a provider's credentials

Edit:
Edit provider Department Tag(s), Job Title, Team(s), Specialty List, and Notes

Upload Documents:
Securely upload & manage documents from your desktop

CME tacking:
Track provider CME goals and credits

Active/Inactive:
Make a provider active or inactive (does not delete them). View inactive providers under the "Issues" tab

Live chat support

Starting a new **Verification Process**

First click Add Provider **on the main dashboard to add a provider who needs verification.**

Team(s) : the associated provider group should be pre-populated.

Tag(s) : tag with the location your provider belongs to.

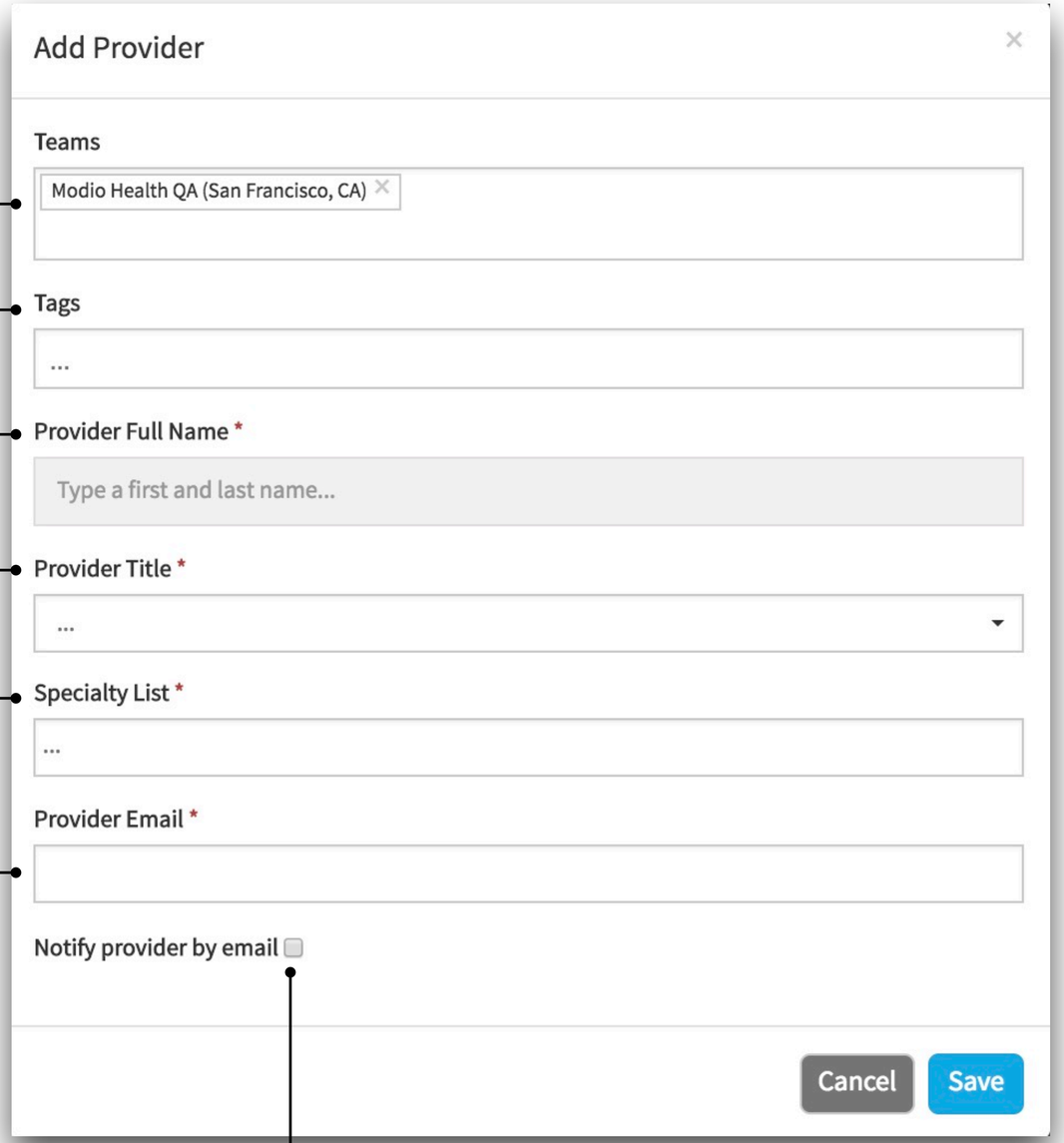
Provider Name : find a provider by name or select "not listed".* Don't see a profile listed? Scroll to the bottom and select "**Click here to skip profile claim."**

Provider Title : select the provider's title/degree (e.g .MD).

Specialty List : type and select "Pharmacy" as the primary specialty.

Provider Email : The email is a unique identifier for the provider, which for the Carbon® verification service, does not serve the traditional role of email. It simply identifies the provider record in our system. We will be moving away from this requirement in the near future, but currently, a value must be entered. The providers unique email will include the providers first initial, last name, last 4 digits of their NPI, your pharmacy name and ".email".

Example: 1. **J**ohn **Smith**
2. NPI #1234**5678**
3. **CV** Pharmacy
Final email: JSmith5678@CV.email



Notify provider by email: do not check this option. You can now click save.

Editing a Provider Profile

First click on the main dashboard under the actions column to update or edit a select provider's basic department information.

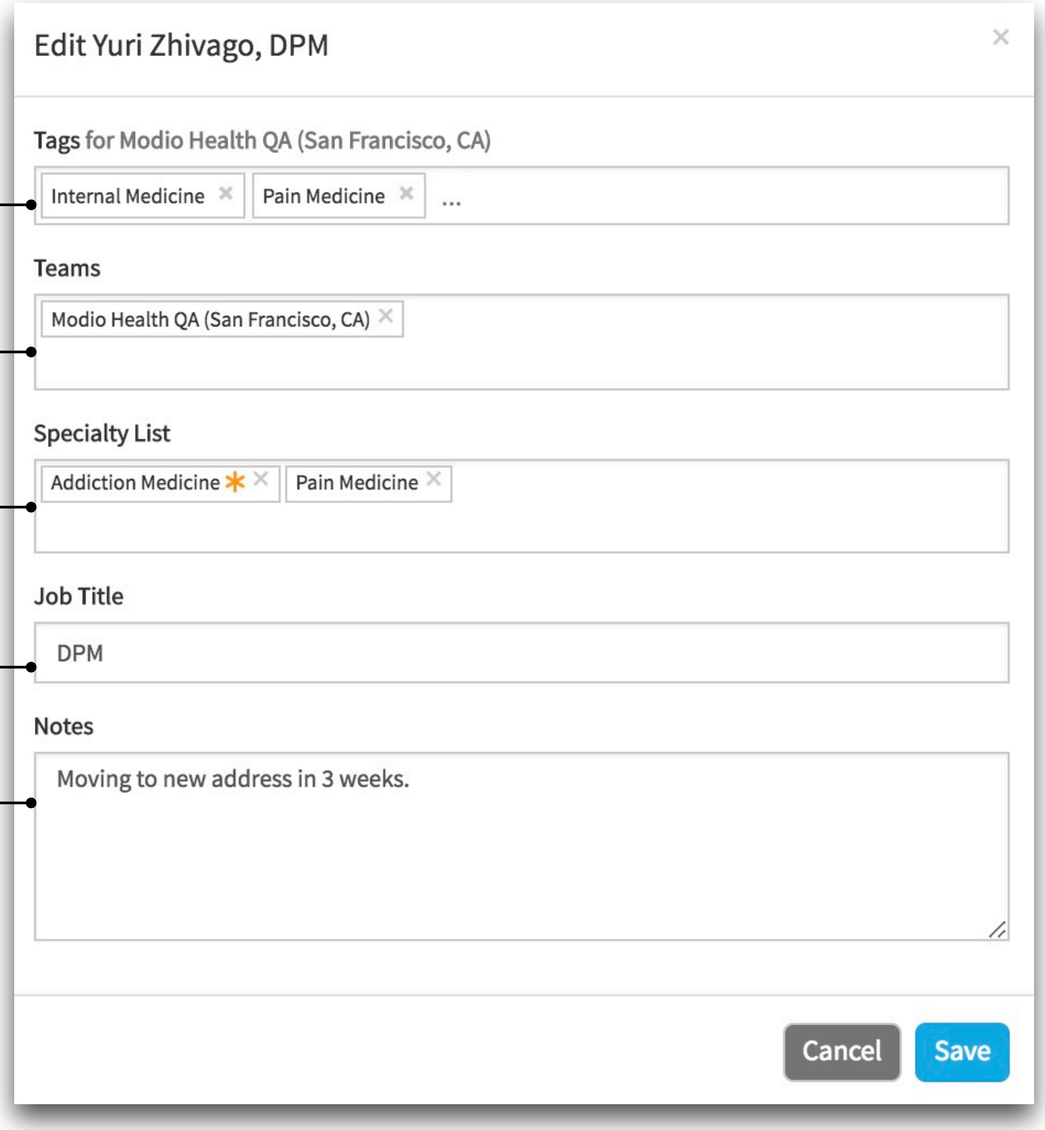
Tags:
Edit tag(s) and Modio will update after "Verification".

Teams:
Edit a provider's team(s) .

Specialty List:
Edit this to override the default title/degree.

Job Title:
Enter the provider's title/degree (e.g .MD)

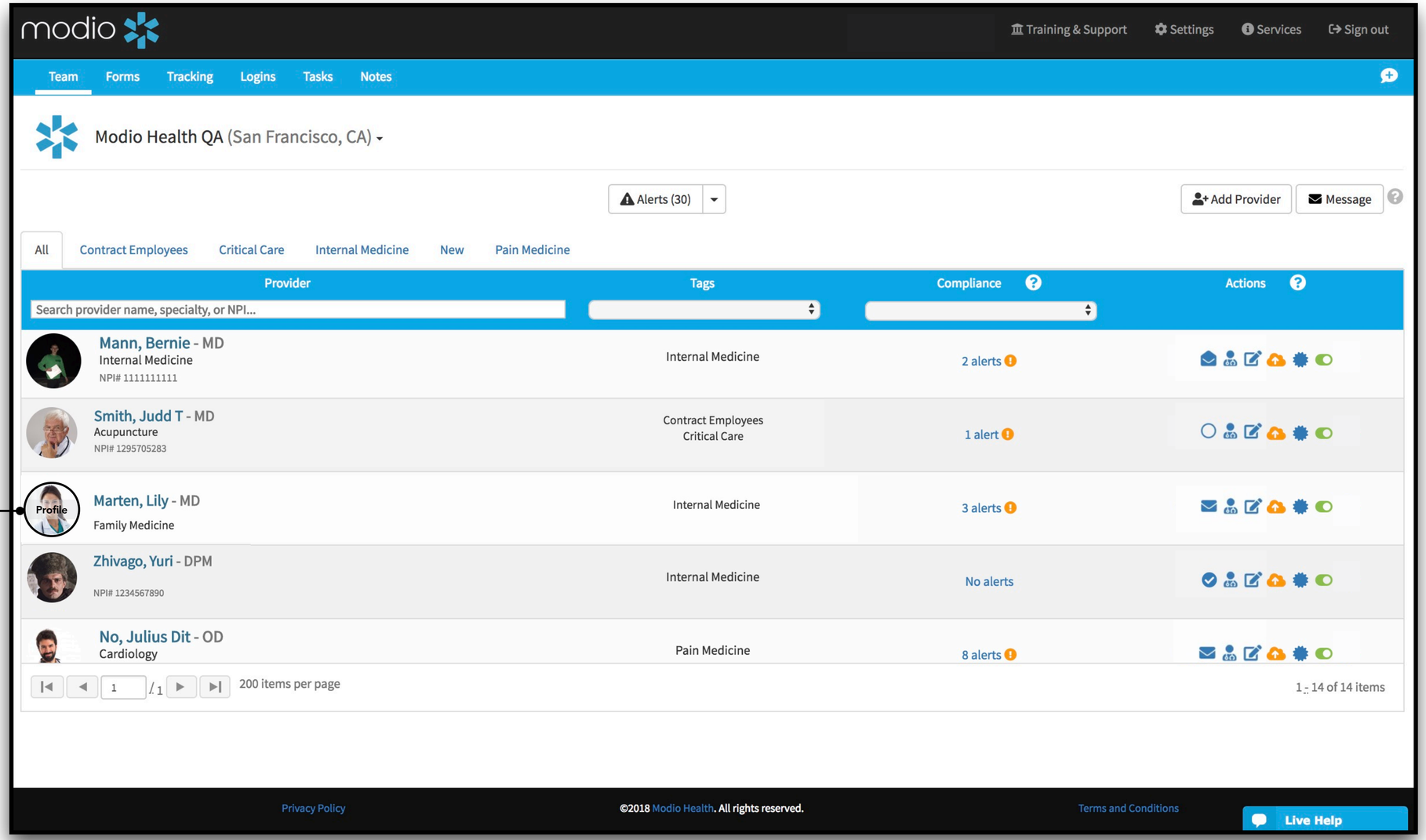
Notes:
Store general provider notes here.



Viewing a **Verified** Profile

Provider Profiles:

To view a provider's profile, hover over the providers initials and click **"profile".**



Viewing a **Verified** Profile Part 2

Notes:

Use the Edit action on the dashboard to update the provider notes displayed here.

NPI #:

Click on the NPI updates button to get NPPES data in seconds. Accept the updates for practice address, state licenses, payors, education and more. NPPES Search – the NPPES search will return:

- Current Practice Address – displays practice address
- Current License Info – displays licenses found
- Current Healthcare Payor Info – displays payors found

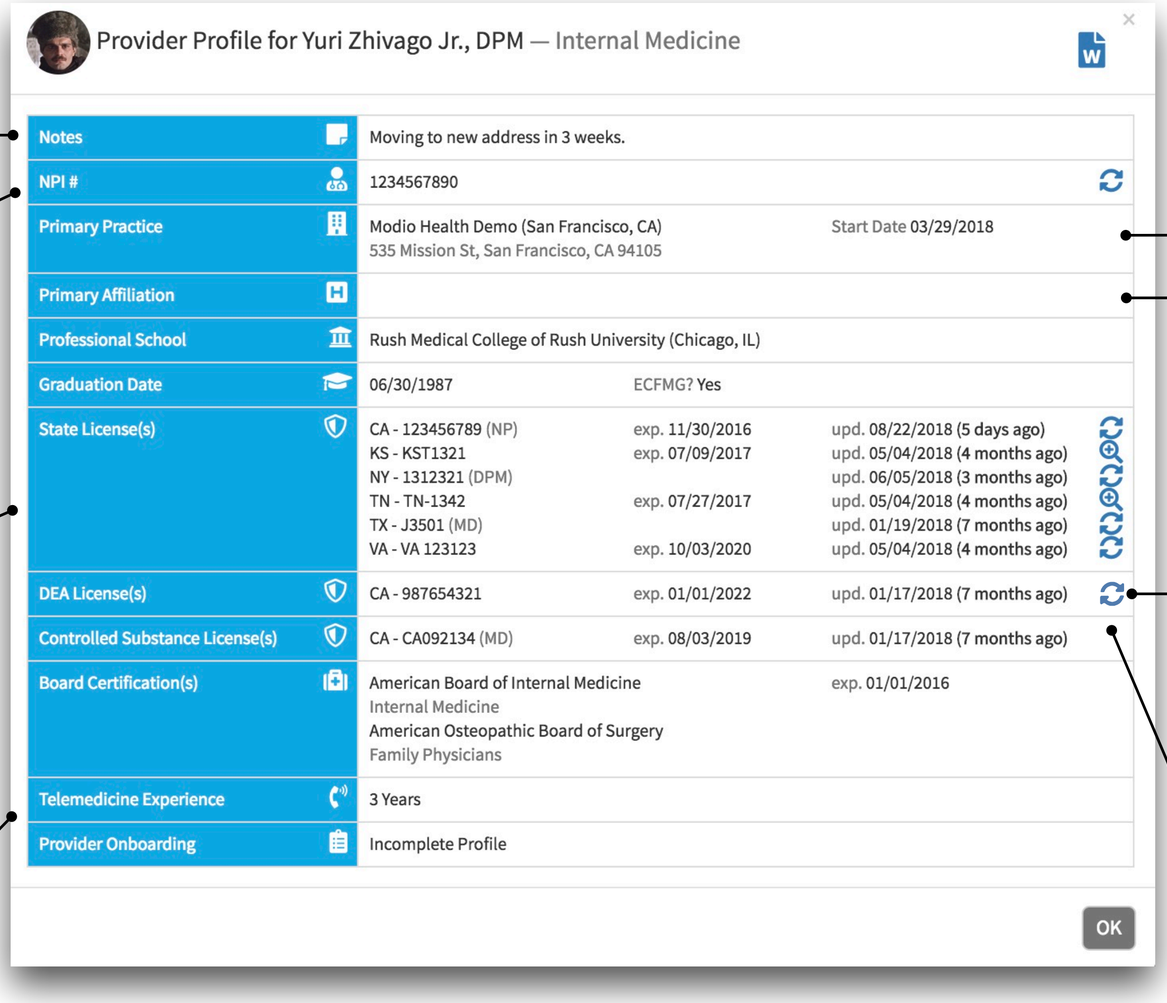
State Licenses:

View the provider's **state licenses** by state, number and last date updated.

- **Primary Source Links** – click on the magnification glass to access state primary source sites. Modio will also run these searches on behalf of a client.
- **Info**: State abbrev. – number (type), expiration, last updated – use the "update" date value to verify when the data was last verified.

Telemedicine Experience:

Optional field found in Personal Info.



Primary Practice :

Lists primary practice from Practice/ Employer section.

Primary Affiliation:

Lists primary affiliation from Practice/ Employer section.

DEA Licenses:

Add DEA license(s) to auto update from deanumber.com. for a DEA Update – click on the update icon to run a DEA search for:

- Current DEA Info
- Primary Source Digital Certificate

Controlled Substance License(s):

Lists CSL license(s) from Licensure. For Primary Source Links – use links (when available) to verify licenses.

Accessing a **Primary Sourced PDF**

Step 1:

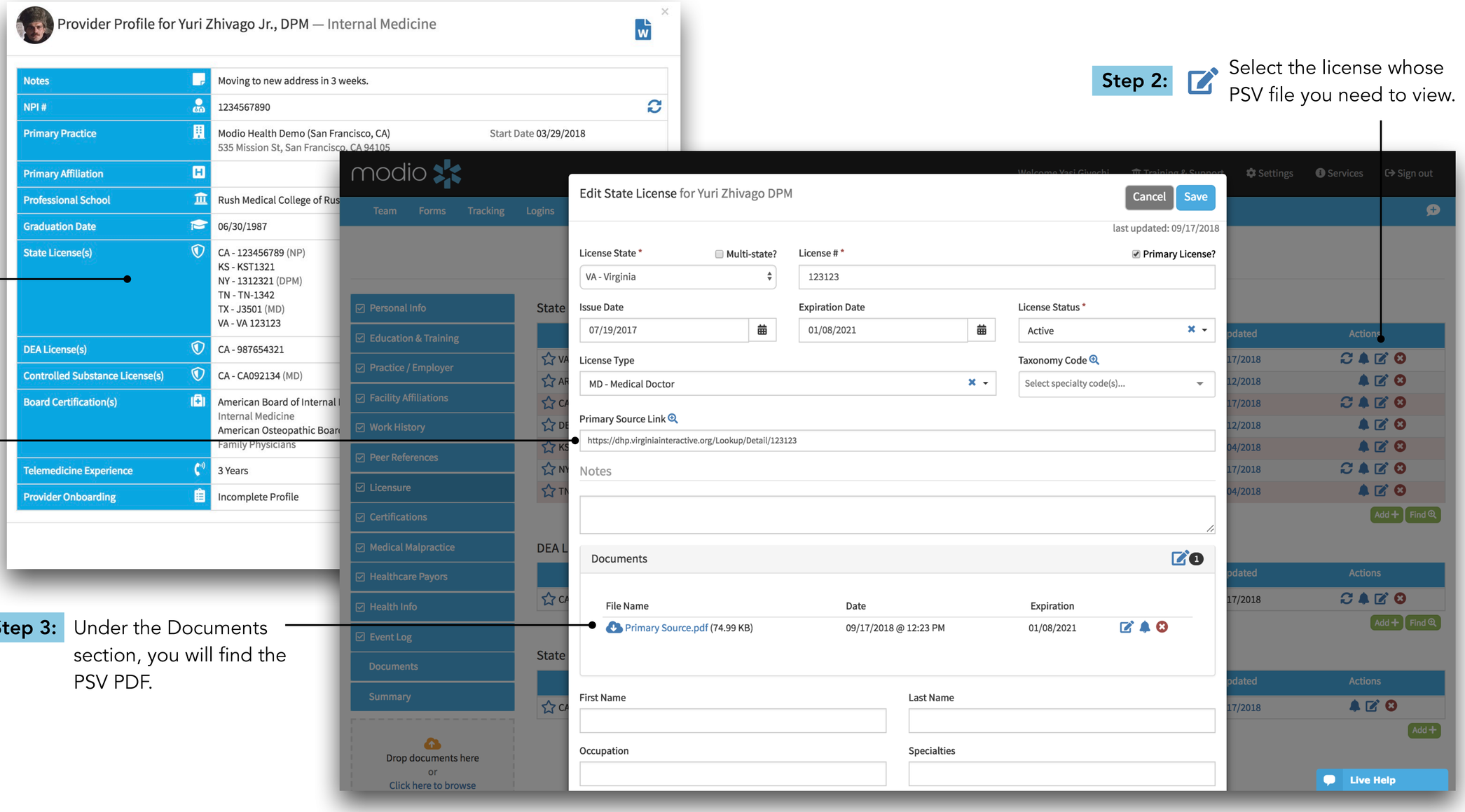
Click on the **State License** Section.

Primary Source Link

Click the magnification glass to get directed to the states page.

Step 3: Under the Documents section, you will find the PSV PDF.

Step 2: Select the license whose PSV file you need to view.



Compliance and Team **Reports**

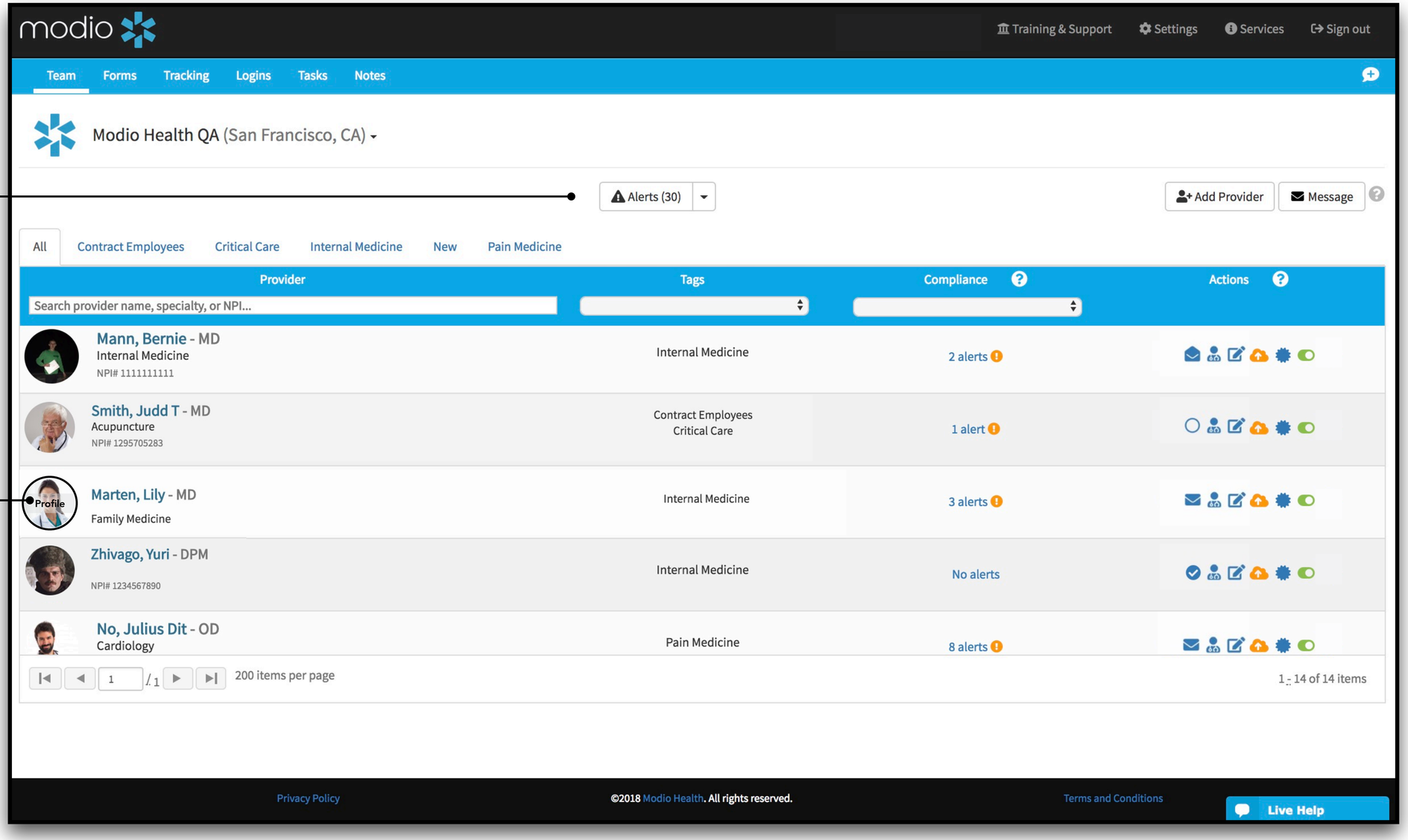
View your entire team's compliance report and see expired or expiring items.

Team Report :

View a team report for all providers.

Provider Report:

View an individual report for each provider.



Compliance and Team **Reports** Part 2

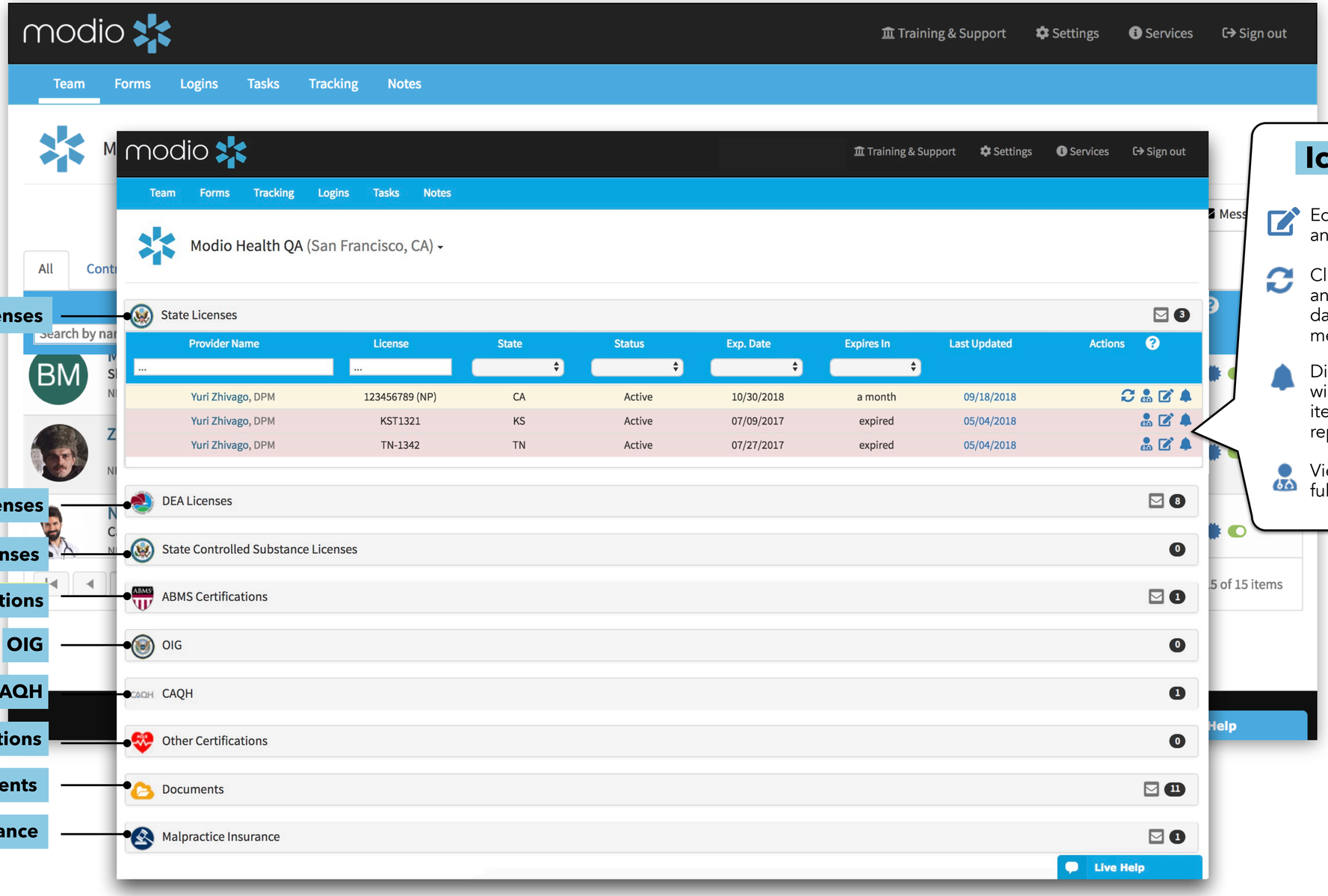
Color coded indicators:

Yellow:

There are 60 or fewer days until the license expires.

Red:

The license has expired.



State Licenses

DEA Licenses

State Controlled Substance Licenses

ABMS Certifications

OIG

CAQH

Other Certifications

Documents

Malpractice Insurance

Icon Key:

- Edit provider Tag(s) and add Notes.
- Click here to verify and update licensure data from state medical boards.
- Disabling an alert will remove the item from the report completely.
- View the providers full credentials.

Viewing **Logins**

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Account Owner

Choose an Account Owner from the drop-down list. This is the person to whom the login details belong, and can be either a coordinator or provider on your team.

Site Name:

View the site name (in this case the PECOS website) .

Registration URL:

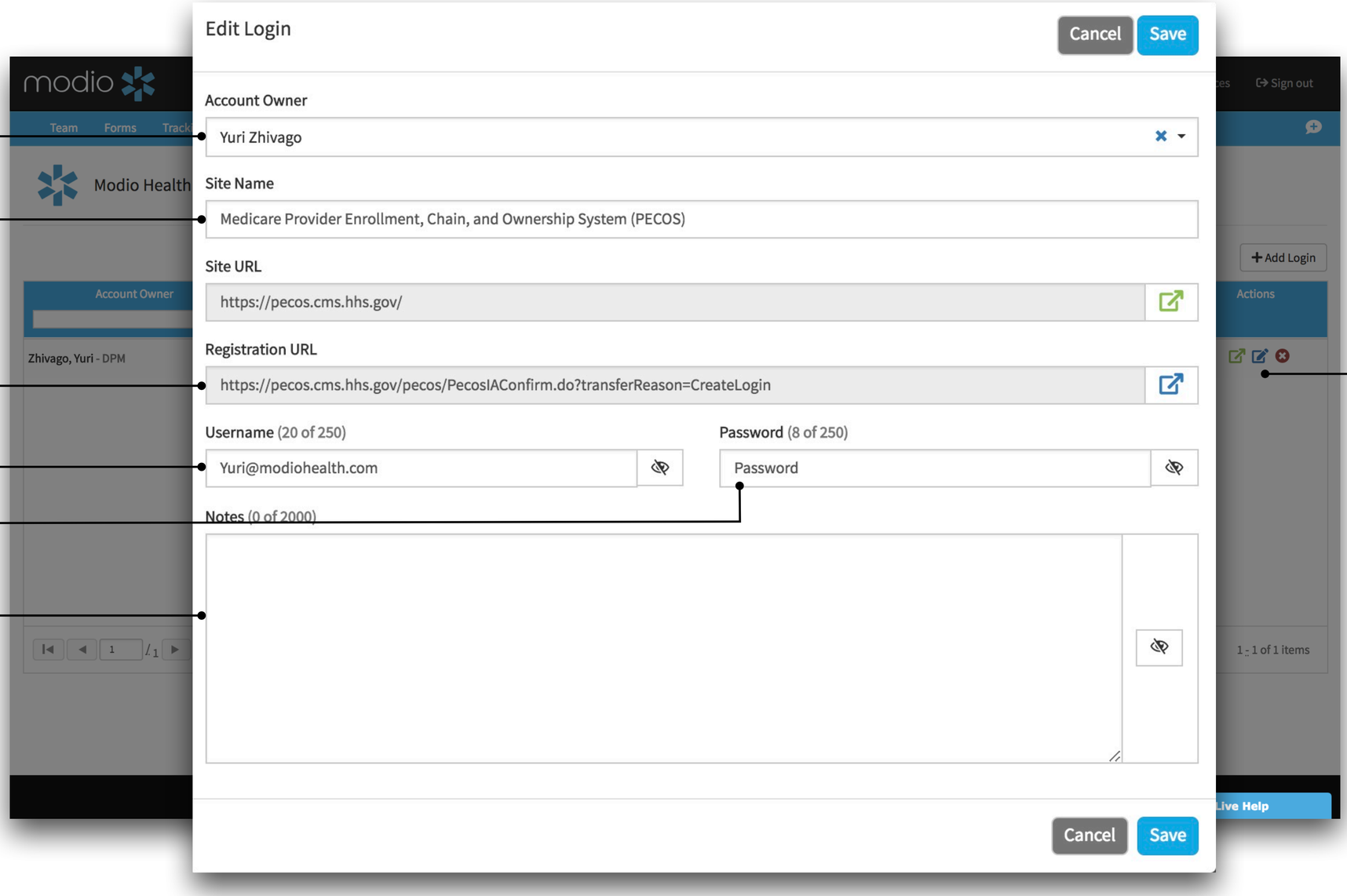
Click the blue arrow box to be directed to the registration page.

Username & Password

Click the eye icon to reveal the username and password.

Notes

Jot down any helpful notes, these will be encrypted.



Start here:

To view an existing login, click the **Edit** icon in the Actions column.

FAQ

- **I can’t find a provider when I enter in the name, what do I do?**

  If you don’t see a profile listed, scroll to the last option of the list and select “**Click here to skip profile claim.**”

- **Why isn’t the license updater present?**

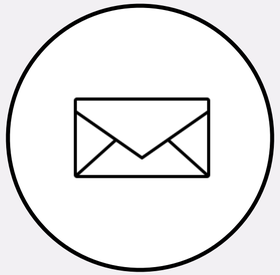
  First make sure the license number and license type are valid.
  If you are still not seeing the updater icon , just reach out to our live chat to get more information on when it will be available.

- **Where do I get help?**

  There’s a blue “**Live Help**” box on the bottom right hand of the screen. Click here to chat with a Modio representative.

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

Online:
Live Chat Support



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