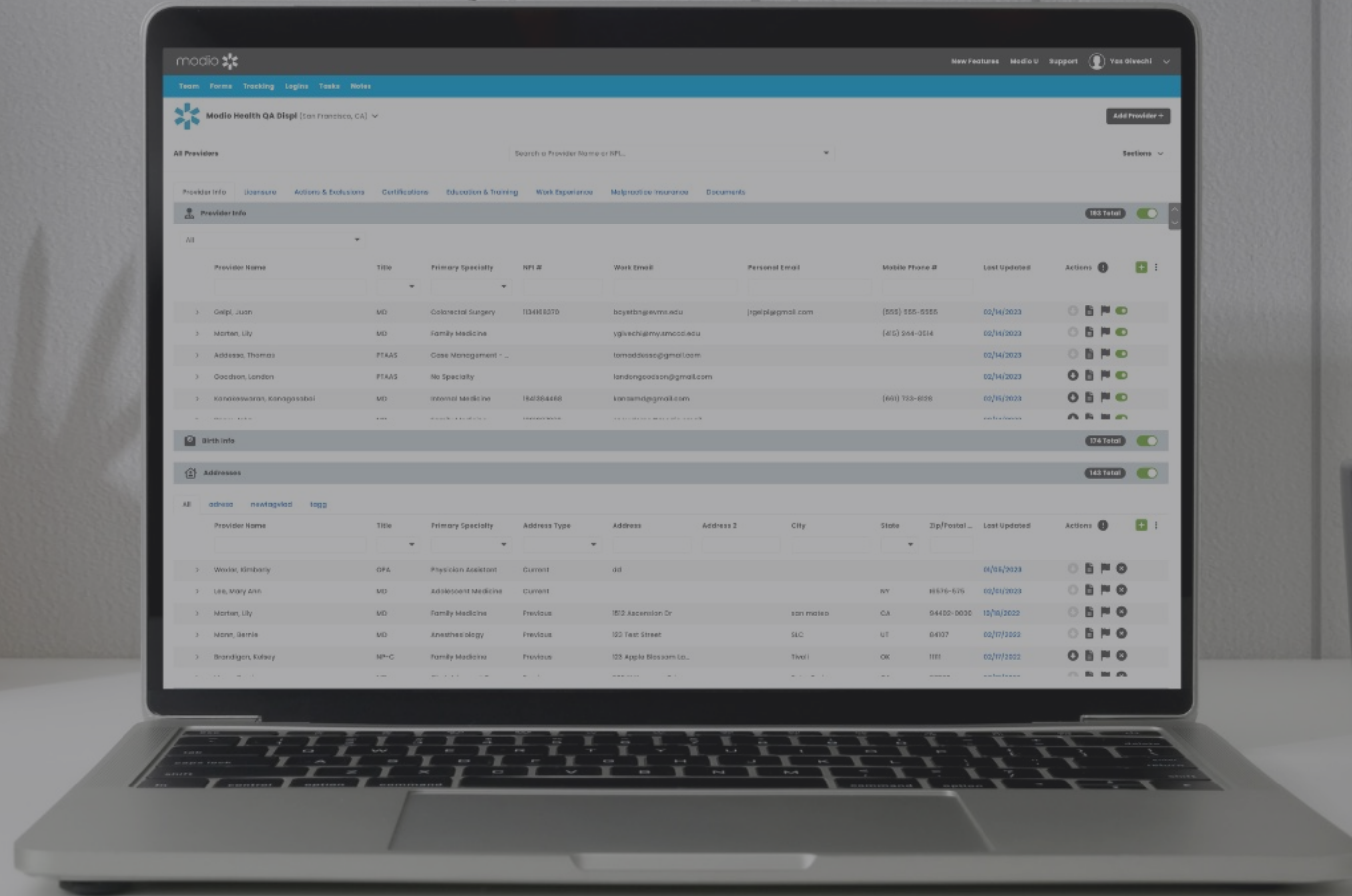# OneView©

OneView V2 Complete Overview Guide

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Introducing Modio OneView V2

A new way to add and enhance provider profiles

Introducing OneView V2

What is OneView V2?
Modio has developed a new page to customize how you view and manage credentialing data: OneView V2. This page is built on newer technology, which allows Modio to include:
• New features like access to audit history
• The ability to restore inactive records
• The ability to customize the page to fit your personal workflow

Is it a separate platform?
No. OneView V2 has all the same content as the traditional OneView profile, but it has additional functionality and looks different. The data on this new page is the same as the data you manage on our other OneView pages, just presented in a new way (and with some new and improved features!). The design of OneView V2 is intended to empower users to view and edit data with minimal clicks, and to allow for updating data both quickly and in bulk.
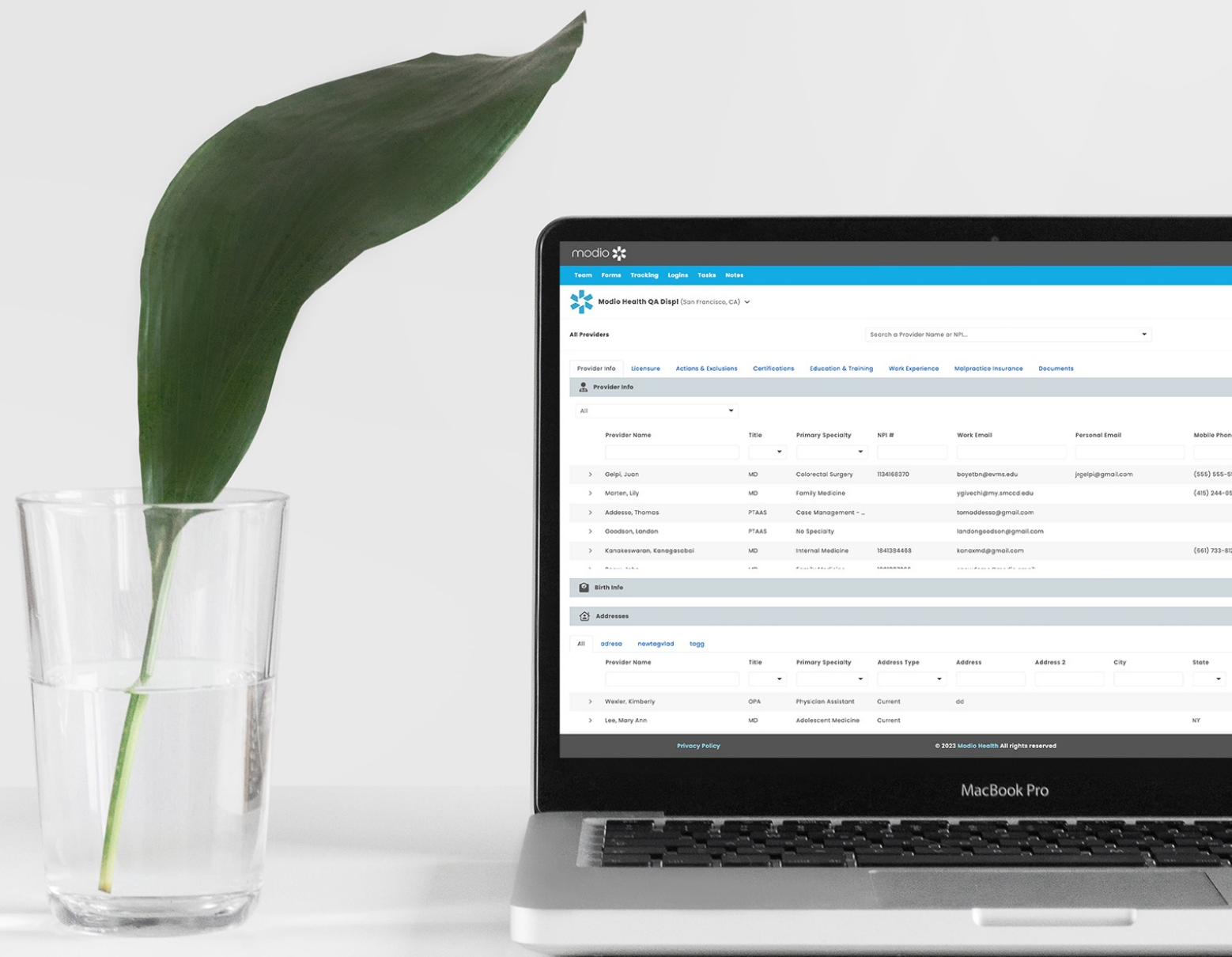
Do I use the same log in?
Correct – No separate log in is needed

How do I access it?
Once you are logged in, click on the "OneView V2" button on the Team page to access it.

How do I get back to the original OneView pages?
Click on the main sections on the top blue bar to go back (Team, Tracking, Forms, Tasks, Notes).

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Glossary of OneView V2 Terminology

OneView V2: Page accessed by clicking ""OneView V2" from the Team page

Single provider view: When OneView V2 is filtered to view a single provider Access this by searching provider NPI or name in the top search bar, or by right clicking on any provider record and selecting "Open single provider view."

All provider view: When OneView V2 displays all providers. If you are in single provider view, return to all provider view by clicking the "x" in the search bar.

Grid: Category of provider data that is represented as a distinct section on the OneView V2 page. Examples of grids include State Licenses, Facility Affiliations, and Work History.

In-line editing row: Differing per grid, these high-use fields are in the top row of data for each record. Double click in any cell in the in-line editing row to edit data.

Detail view: Shows all fields associated with the record. Access by clicking the caret to the left of the provider name on a record.

Grid Settings: Page for customizing what OneView V2 should look like. Your personal grid settings are saved and will remain the same if you leave of OneView then log back in.

Sections filter: Option for filtering only the sections you want to see at the current moment. For example, if you want to update state licenses, select State Licenses within the sections filter and you will see only that grid. Clear your selections if you want to return to viewing all grids at once.
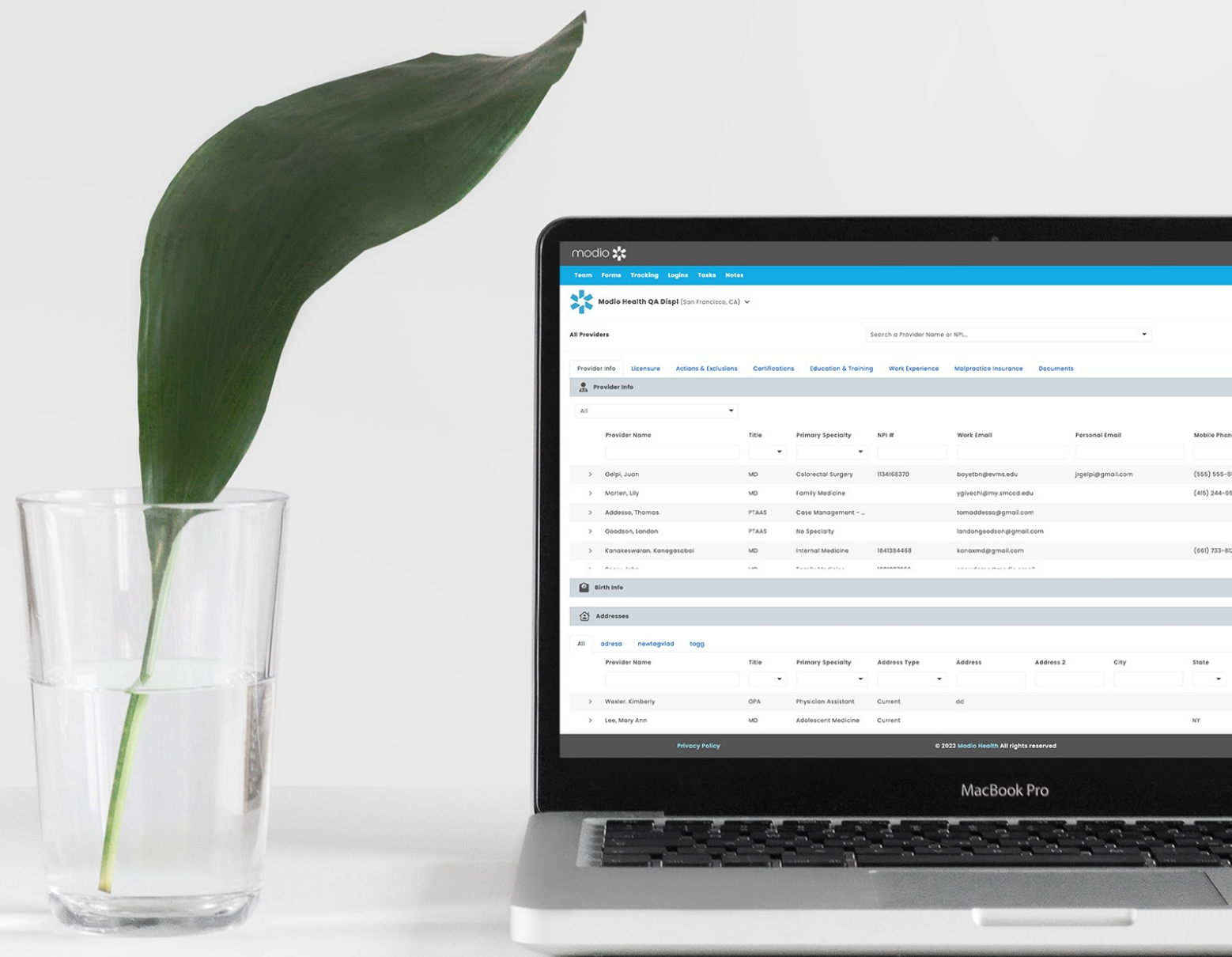
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Tip Guide: OneView V2 – Getting Started

Let's Get Started

1. Log into OneView as you normally would - go to modiohealth.com and click "**sign in**" or follow your organizations protocol.

2. Click on the **OneView V2** button located on the top middle of your dashboard.

3. You'll arrive on the all-provider view of the OneView V2 page, which lists all providers within your team. Their data is grouped by section into grids.

View Customization

Customize which grids appear and in what order

Click on the Teams dropdown at the top left. Scroll to the bottom of the dropdown and click on "Grid Settings".

View Customization

Customize which grids appear and in what order

Use the toggles next to each grid to enable/disable the grid. If it is toggled on, you will see the grid. If it's toggled off, you will not see the grid on your OneView V2 page.

You can also **drag and drop** the grids into the order that best fits your workflow. For example, if you always update affiliations first, drag that grid to the top of the list so it appears first on your page.

Once you are satisfied with your changes, click "**Back**."
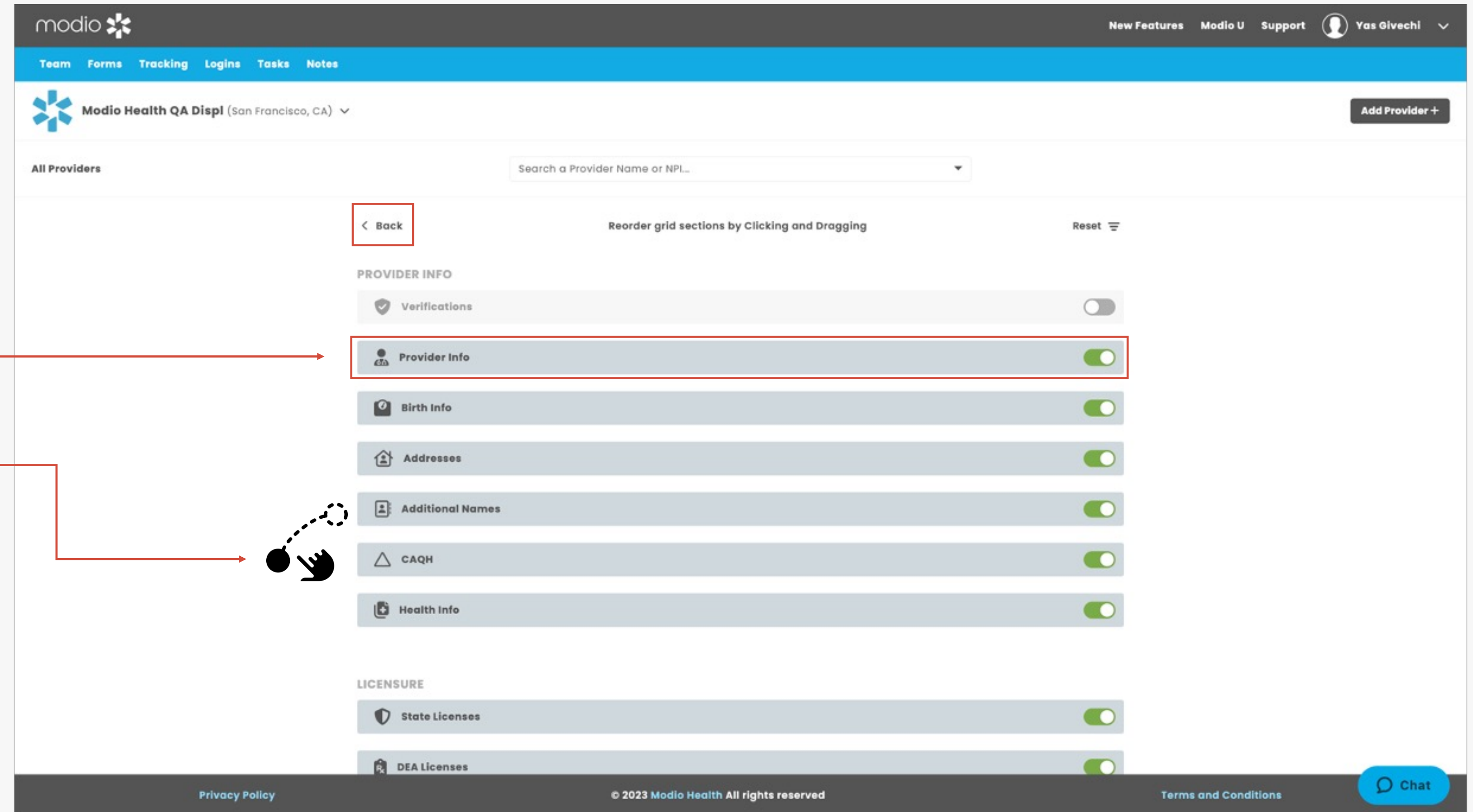
Tip Guide: OneView V2 – Dashboard View Settings: View Customization

Customize which grids appear in each grid

You can choose to customize which columns are visible in the in-line editing row, by accessing the columns section of the grid menu.

Uncheck or check columns to set which ones you want to appear in the grid.

You can also drag columns in each grid to re-order them.

Tip Guide: OneView V2 – Dashboard View Settings: Customization
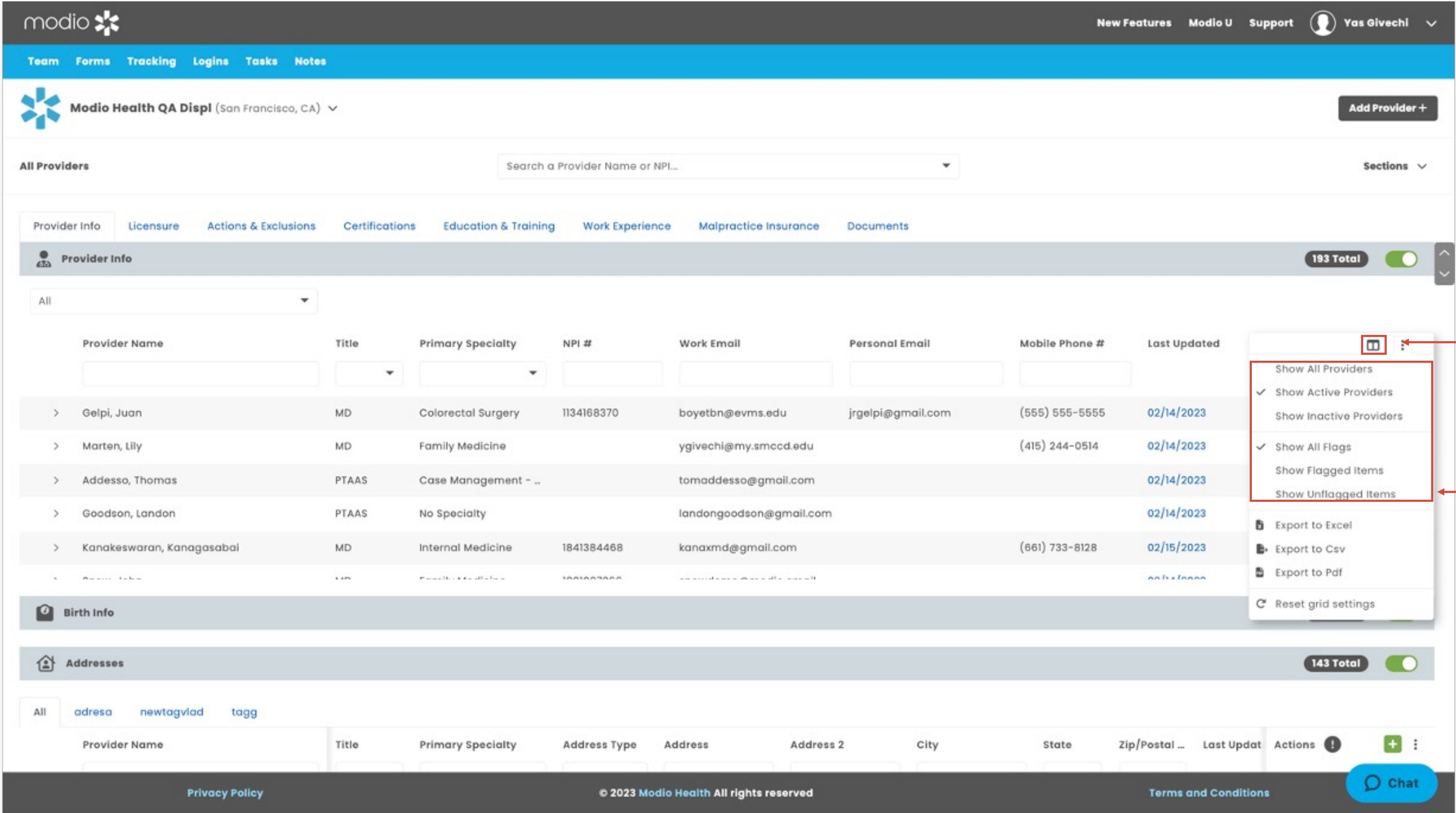
View Customization

Customize which records appear by record status

OneView V2 gives users the ability to view inactive records – you also can now restore formerly inactivated records to active status.

In the grid menu for each grid, you can select if you want **Active** records, **Inactive** records, or **All** Records to display in the grid.

View Customization

Customize your alert interval for records in each grid

OneView V2 gives users the ability to customize their alert interval in each section – Records in each grid with expirable items turn red when expired and turn yellow based on the specified alert interval. The alert interval can be set to 1-6 months.

The specified alert interval also impacts the Expiring counts in orange at the top of each grid. This will give you an idea of how many records are expiring soon according to the interval you set.

Alert intervals are set by each individual user and are specific to each grid. I.e., you can set a 6-month alert interval for a licensing board you know needs a lot of lead time, and a 1-month interval for malpractice renewals that have a faster turnaround time.

Tip Guide: OneView V2 – Page Feature Overview

On both single provider view and all provider view, there are some core elements of the OneView V2 page.

1 **Sections Filter:** Use this filter to select which grid(s) you want to see right now. Click the "x" to clear your selection.

2 **In-line editing row:** Double click in the row of visible data for each record to quickly update data.

3 **Column filters:** Type in the filter box or select from the dropdown to filter the column below. Click on a column header to sort by the column. Click again to sort in reverse order.

Tip Guide: OneView V2 – Page Feature Overview Continued

On both single provider view and all provider view, there are some core elements of the OneView V2 page.

4

Expiration Counts: These counts at the top of each grid will show you the # of expiring records (based on the alert interval you set in grid settings), the # of expired records, and the # of total records in the grid.

5

Grid Menu: Each grid has a menu to customize records displayed in the grid, export summaries/reports, and reset grid settings back to default.

6

Detail View:

To view additional fields for each record, click on the caret at the left of the row to open detail view.

Tip Guide: OneView V2 – Page Feature Overview Continued

On both single provider view and all provider view, there are some core elements of the OneView V2 page.

7. Find Licenses: In single provider view, you will see a magnifying glass icon in the state license and DEA grids. Click this to search for licenses that are not already in OneView using FSMB for state licenses and USDOJ for DEA.

8. Add Records: Each grid has a green "+" button to add a new record. You can also right click anywhere in the grid and choose "Add" to do the same.

9. Audit History: Click on the Last Updated Date for any record to view the audit history.

10. Actions: Action icons are at the far right of each record row. Run updaters, download documents, silence alerts, access notes, flag items, and inactivate records.

Tip Guide: OneView V2 - Adding a Provider

You may want to start by checking if the provider is already in OneView. Do this by searching their NPI (if they have one) or their name in the top search bar.

If the provider does not exist, add them to OneView by clicking "**Add Provider**" at the top right of the screen.

Select the provider with the correct NPI from the dropdown list. Modio uses the NPI to pull in licenses and certification data from LexisNexis.

Start Here

Tip Guide: OneView V2 – NPPES Updater

Additional records can be added from the NPPES NPI registry to enhance profiles. To access this information, select "Run Update" next to the NPI field in the detail view of the Provider Info grid. If an NPI does not yet exist on the profile, it will display all related name matches for you to select the correct NPI.

Next, the modal will display available records. You can choose to toggle on or off each section or select individual records. Records already on the profile will be greyed out, to avoid duplicates.

Select "Update Selected" to add the chosen records. This will also update the Last Updated date to note when data was last pulled from NPPES.

Tip Guide: OneView V2 – Updating Provider Data

1 **Find your provider, or manage all at once**: If desired, go to single-provider view by searching for your provider in the top search bar. If you are working on your full provider population, stay in all provider view (clear any selected provider from the top search bar).

2 **Use the sections filter to target what you are working on:** Filter for the section(s) you want to work on using the sections filter. You can select one or multiple grids at a time. Use this feature to quickly display only the grids you currently need.

Tip Guide: OneView V2 – Updating Provider Data – Adding New Records

3 Add new records as needed. There are a few ways to do this:

a. Empty grids will display a large green add record button

b. Grids with records will have a smaller green "+" button

c. You can also right click in the grid and select "**Add**" from the right click menu

Tip Guide: OneView V2 – Updating Provider Data: Updating Existing Records

4 **There are a few ways to update existing records.**

Data in the in-line editing rows can be changed by simply **double-clicking** on the field. Data will be automatically saved when you click away from the field.

If the field you are looking for is not shown in the in-line editing row, you can access all fields available for the record in detail view. Open this by clicking on the **caret** to the left of the provider name (shown right).

After making changes in the detail view, make sure to click **Save**.

⑤ Add Notes, Tags and Documents to Records

Tags can be added to provider records in any section within this modal. If you want to add tags at the provider level, do so in the Provider Info grid. Tags in other grids will be specific to each individual record.

A shortcut for document upload: You can also drag and drop documents from your computer onto any row of data to upload them to the specified row.

Click on **the document icon** to open the modal with record notes, tags and documents.

Tip Guide: OneView V2 – Updating Provider Data: Running Multiple License Updates

6 **Run Carbon when available – for up to 10 records at a time.**

b. 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

c. Next 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.

a. Once you've added licenses and some other record types, you may see an **updater icon**. When this is visible, a Carbon integration is available for the record.

Clicking on icon will run Carbon, returning verified fields directly from the primary source websites and saving a PSV document automatically.

Tip Guide: OneView V2 – Viewing Record Audit History

Here is how to check record audit history:

OneView V2 allows you to look up the history of changes on each record yourself.

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**.

Start Here:
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.

State License for Kirk Heath MD

Record Details — Created By Kathy Hager (Admin) on 03/08/2022, 12:15 PM

Record ID	814856
Provider Name	Kirk Heath
Provider ID	269
Identifier(s)	MD VA 0101241891
Primary Source	https://dhp.virginiainteractive.org/Lookup/Detail/0101241891

Doctor License | Supervisors

State License History	Prior Record	Current Record
Date Updated	02/15/2023, 9:22 AM	02/16/2023, 1:24 PM
Revision ID		814856
Update Source		OneView V1
Updated By (Role)		Brandon Holmes	OneView® Trainer (C)
License #		0101241891 ✱
License # Display		
State	–	Virginia (VA)
License Type	MD – Medical Doctor	MD – Medical Doctor
Permit Type		
Occupation	Medicine	Medicine
Specialties	Surgery	Surgery

Date Updated dropdown: 02/16/2023 / 02/16/2023, 1:24 PM / 02/15/2023 / 02/15/2023, 9:22 AM / 02/06/2023

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Tip Guide: OneView V2 - Viewing & Restoring Inactive Records

OneView V2 allows you to view and restore records that were previously made inactive.

In each grid's grid menu, you can choose to show Active records, Inactive records or All records. In Inactive or All records view, you will be able to view inactive records.

Inactive records will have a green "**+**" icon where the "**x**" icon usually is to the far right of the record row.

Click the green icon to restore the inactive record back to active status.

X Deactivate records

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

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