

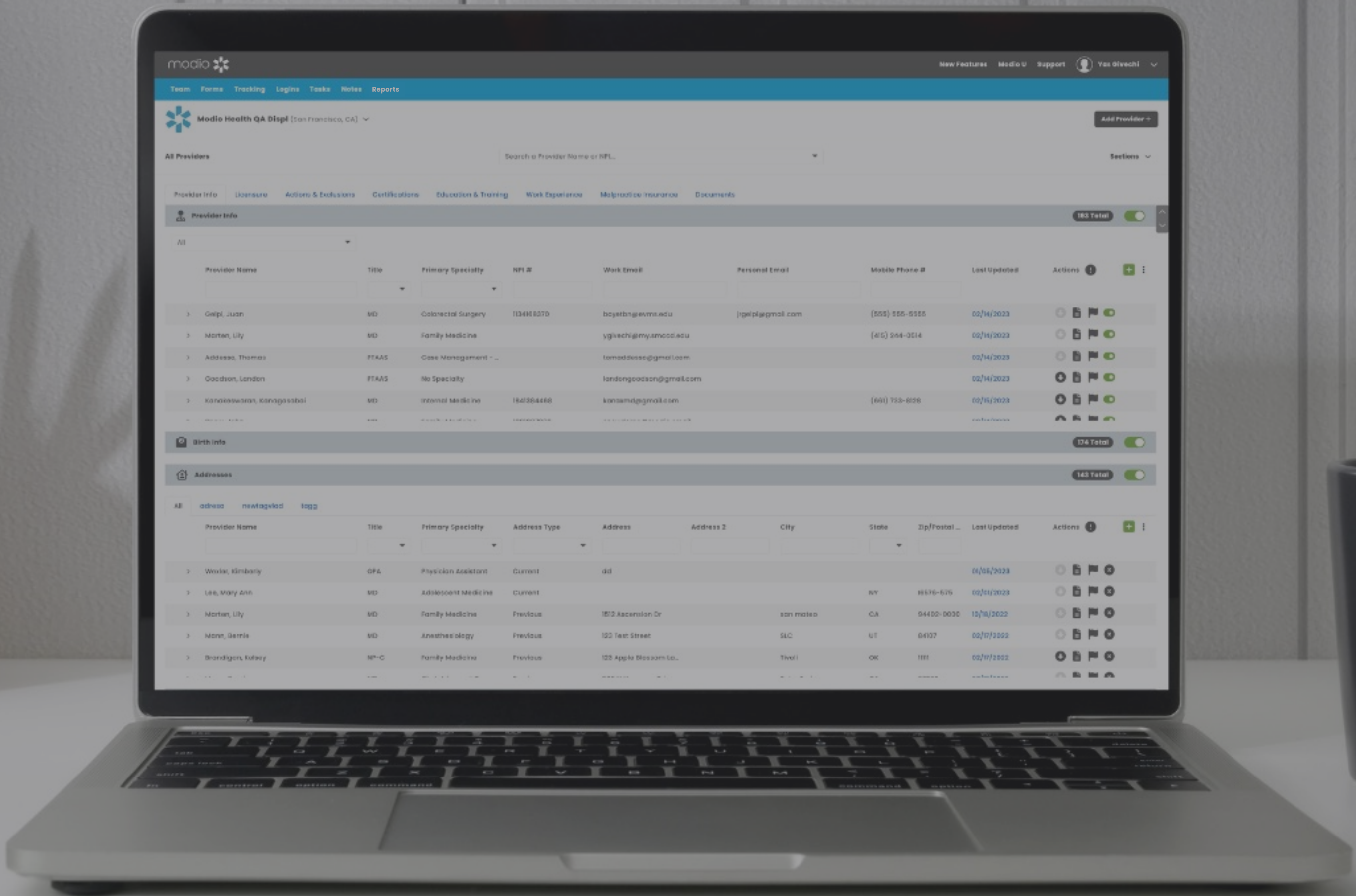


OneView[®]

Overview Guide: OneView V2

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?

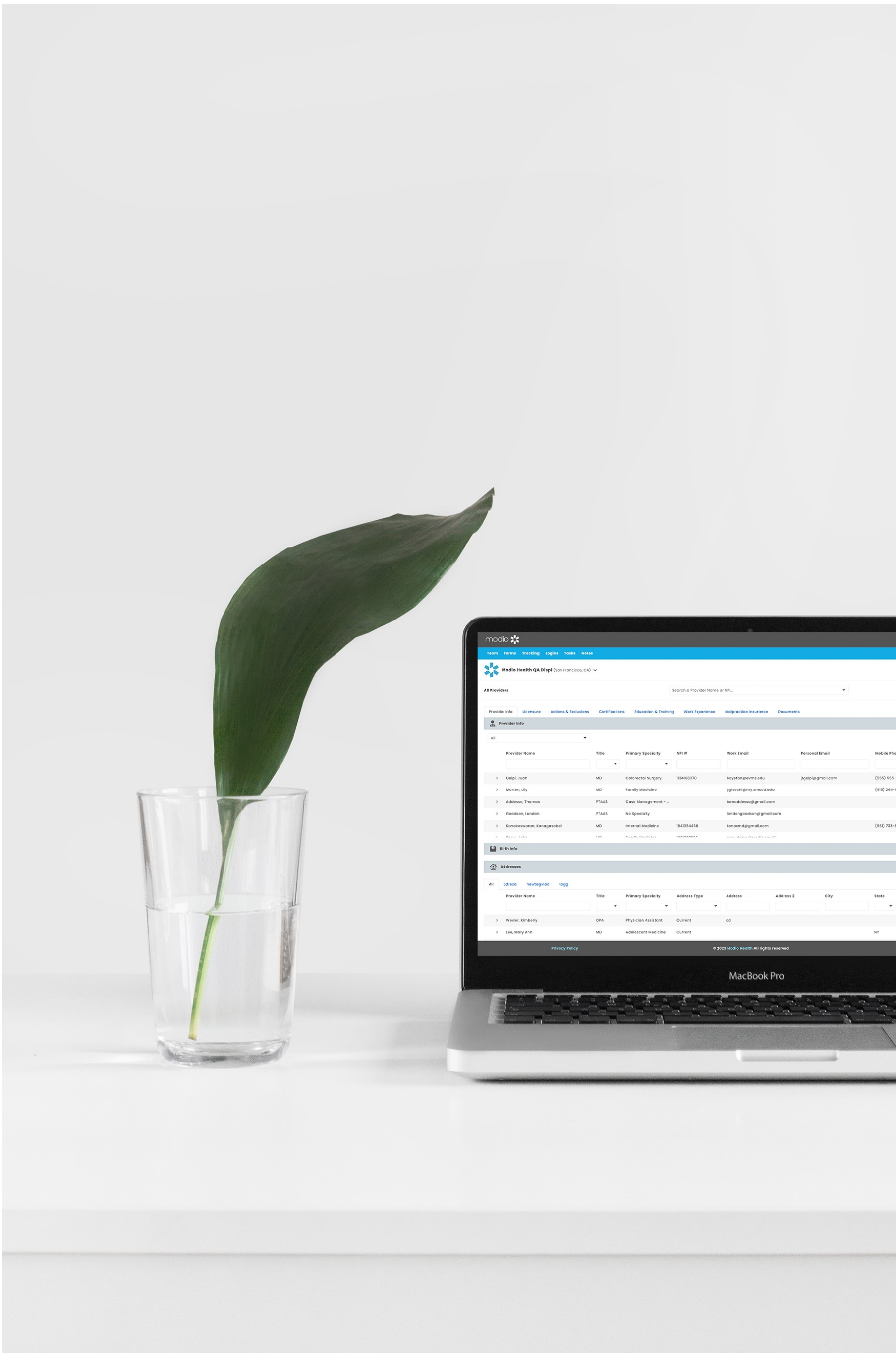
Correct - No separate log in is needed

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).



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.

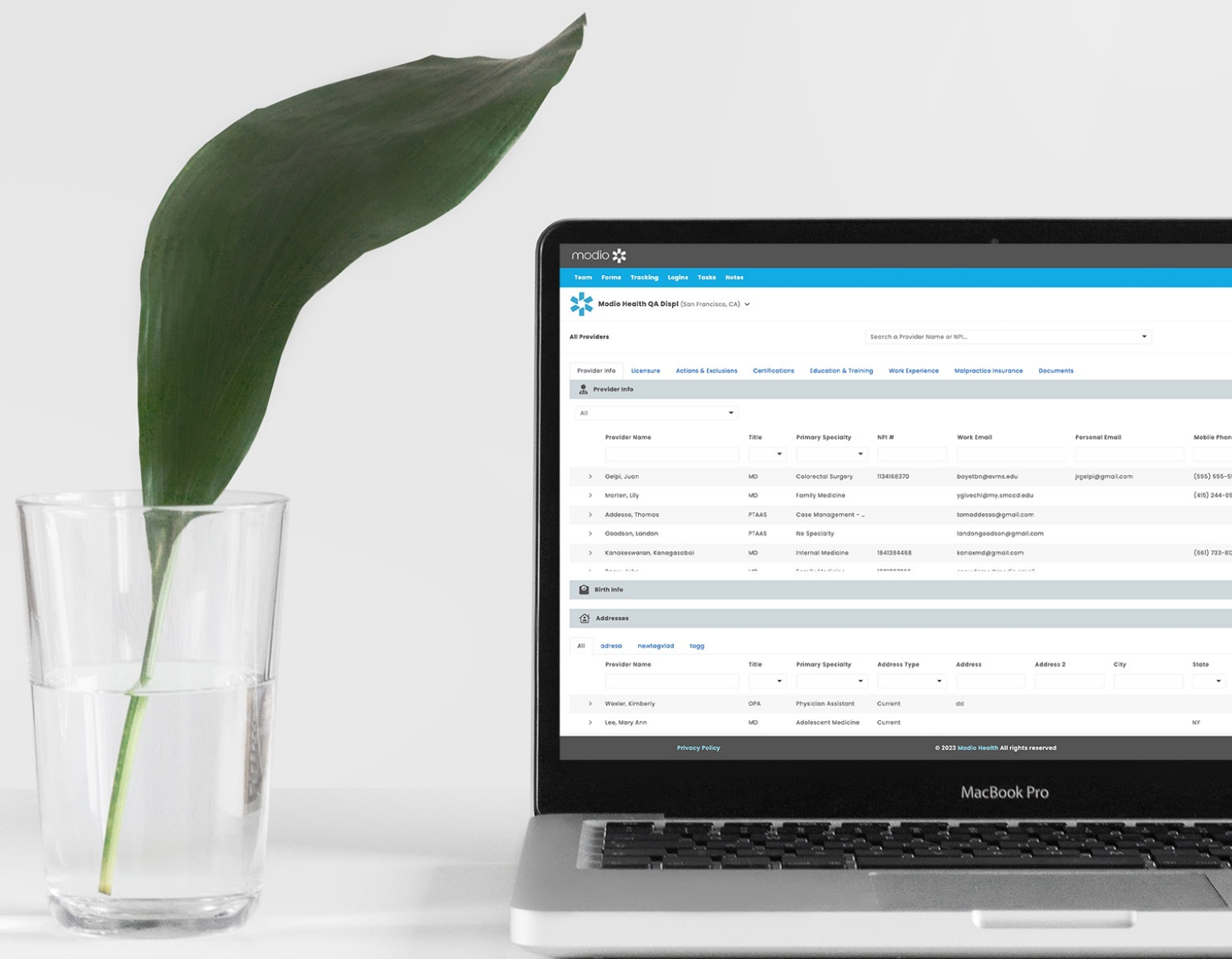
Grid: Category of provider data that is represented as a distinct section on the OneView V2 page. Examples of grids include State Licenses, Facility Affiliations, and Work History.

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.



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.

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Add Provider +

All Providers

Search a Provider Name or NPI...

Sections

Provider Info

CAQH

Licensure

Actions & Exclusions

Certifications

Education & Training

Work Experience

Malpractice Insurance

Documents

Provider Info

60 Total

Provider Name	Title	Primary Specialty	NPI #	Work Email	Tags	Last Updated	Actions
> Mouse, Minnie	DC	Clinical		minnie.mouse@modio.email		04/15/2025	
> Kahlo, Frida	LPATA	Art Therapy		Frida.Kahlo@gmail.com		04/15/2025	
> Doorbell, Jane	MD	Internal Medicine		Jane.Doorbell@modio.email		04/15/2025	
> EFT, Mendez Counseling Centers, PLLC	FAC	Multi-Specialty Group		mendezcounselingcenterspllc@modio.email		04/15/2025	
> Holmes, Brandon	MD	Anesthesiology		brandon.holmes@modiohelath.email		04/15/2025	
> Lewis, Cody	MD	Dermatology		cody.lewis@modio.email		04/15/2025	
> Services	FAC	No Specialty		services@modio.email	West Coast	04/15/2025	
> Lee, Danessa	MD	Acupuncture		danessa0613@gmail.com		04/15/2025	
> edwin, rebecca	DC	Acute Care Nurse Pra...		rebecca.edwin@modio.email.com	Brandon	04/15/2025	
> ZYX FACILITY	FAC	No Specialty		zyxfacility@modio.email	East Coast	04/15/2025	

Birth Info

46 Total

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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**”.

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▼

All Providers

Select a team:

Modio Health Master Practice (DEMO) (San Francisco, CA)*

Modio Health QA (San Francisco, CA)*

Modio Health UAT (Midvale, UT)

Upload a logo

View team profile

Grid Settings

Search a Provider Name or NPI...

Sections

Provider Info

60 Total

Provider Name	Title	Primary Specialty	NPI #	Work Email	Tags	Last Updated	Actions
Mouse, Minnie	DC	Clinical		minnie.mouse@modio.email		04/15/2025	
Kahlo, Frida	LPATA	Art Therapy		Frida.Kahlo@gmail.com		04/15/2025	
Doorbell, Jane	MD	Internal Medicine		Jane.Doorbell@modio.email		04/15/2025	
EFT, Mendez Counseling Centers, PLLC	FAC	Multi-Specialty Group		mendezcounselingcenterspllc@modio.email		04/15/2025	
Holmes, Brandon	MD	Anesthesiology		brandon.holmes@modiohelath.email		04/15/2025	
Lewis, Cody	MD	Dermatology		cody.lewis@modio.email		04/15/2025	
Services	FAC	No Specialty		services@modio.email	West Coast	04/15/2025	
Lee, Danessa	MD	Acupuncture		danessa0613@gmail.com		04/15/2025	
edwin, rebecca	DC	Acute Care Nurse Pra...		rebecca.edwin@modio.email.com	Brandon	04/15/2025	
ZYX FACILITY	FAC	No Specialty		zyxfacility@modio.email	East Coast	04/15/2025	

Birth Info

46 Total

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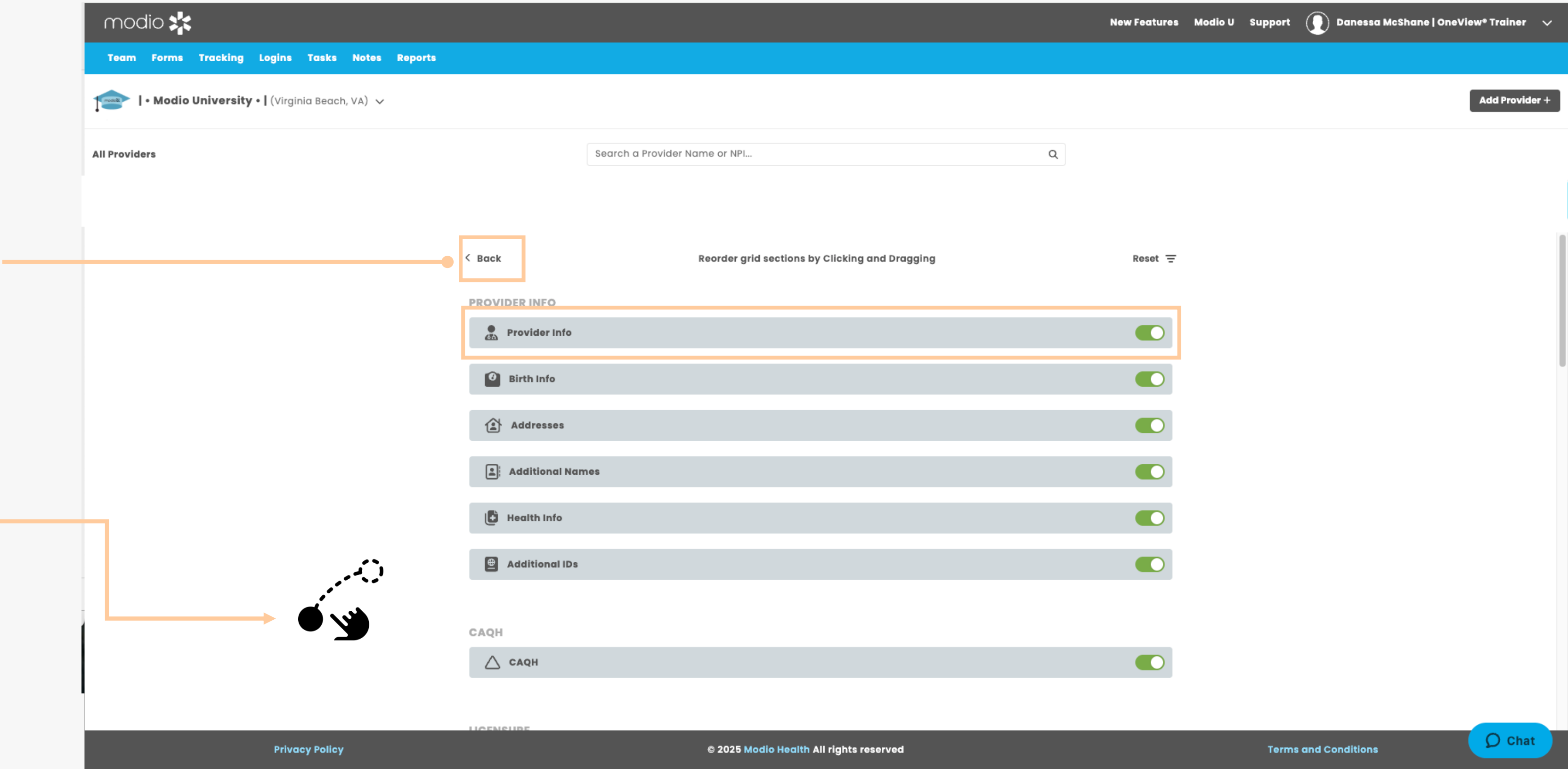
View Customization

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

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Add Provider +

All Providers

Search a Provider Name or NPI...

Sections

Provider InfoCAQHLicensureActions & ExclusionsCertificationsEducation & TrainingWork ExperienceMalpractice InsuranceDocuments

Provider Info

60 Total

Provider Name	Title	Primary Specialty	NPI #	Work Email	Tags	Last Updated
> Mouse, Minnie	DC	Clinical		minnie.mouse@modio.email		04/15/2025
> Kahlo, Frida	LPATA	Art Therapy		Frida.Kahlo@gmail.com		04/15/2025
> Doorbell, Jane	MD	Internal Medicine		Jane.Doorbell@modio.email		04/15/2025
> EFT, Mendez Counseling Centers, PLLC	FAC	Multi-Specialty Group		mendezcounselingcenterspllc@modio.email		04/15/2025
> Holmes, Brandon	MD	Anesthesiology		brandon.holmes@modiohelath.email		04/15/2025
> Lewis, Cody	MD	Dermatology		cody.lewis@modio.email		04/15/2025
> Services	FAC	No Specialty		services@modio.email	West Coast	04/15/2025
> Lee, Danessa	MD	Acupuncture		danessa0613@gmail.com		04/15/2025
> edwin, rebecca	DC	Acute Care Nurse Pra...		rebecca.edwin@modio.email.com	Brandon	04/15/2025
> ZYX FACILITY	FAC	No Specialty		zyxfacility@modio.email	East Coast	04/15/2025

Search...

☐ Provider ID

☒ Provider Name

☒ Title

☒ Primary Specialty

☒ NPI #

☐ Mobile Phone #

☒ Work Email

☐ Personal Email

☒ Tags

☒ Last Updated

☒ Actions

Birth Info

46 Total

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Customize which columns 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.



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Add Provider +

All Providers

Search a Provider Name or NPI...

Sections

Provider InfoCAQHLicensureActions & ExclusionsCertificationsEducation & TrainingWork ExperienceMalpractice InsuranceDocuments

Provider Info

60 Total

Provider Name	Title	Primary Specialty	NPI #	Work Email	Tags	Last Updated	
> Mouse, Minnie	DC	Clinical		minnie.mouse@modio.email		04/15/2025	
> Kahlo, Frida	LPATA	Art Therapy		Frida.Kahlo@gmail.com		04/15/2025	
> Doorbell, Jane	MD	Internal Medicine		Jane.Doorbell@modio.email		04/15/2025	
> EFT, Mendez Counseling Centers, PLLC	FAC	Multi-Specialty Group		mendezcounselingcenterspllc@modio.email		04/15/2025	
> Holmes, Brandon	MD	Anesthesiology		brandon.holmes@modiohelath.email		04/15/2025	
> Lewis, Cody	MD	Dermatology		cody.lewis@modio.email		04/15/2025	
> Services	FAC	No Specialty		services@modio.email	West Coast	04/15/2025	
> Lee, Danessa	MD	Acupuncture		danessa0613@gmail.com		04/15/2025	
> edwin, rebecca	DC	Acute Care Nurse Pra...		rebecca.edwin@modio.email.com	Brandon	04/15/2025	
> ZYX FACILITY	FAC	No Specialty		zyxfacility@modio.email	East Coast	04/15/2025	

Show All Providers

✓ Show Active Providers

Show Inactive Providers

✓ Show All Flags

Show Flagged Items

Show Unflagged Items

Export to Excel

Export to CSV

Export to PDF

Reset Grid Settings

✓ + 📄 🚩 🔍

✉ + 📄 🚩 🔍

✉ + 📄 🚩 🔍

Birth Info

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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.



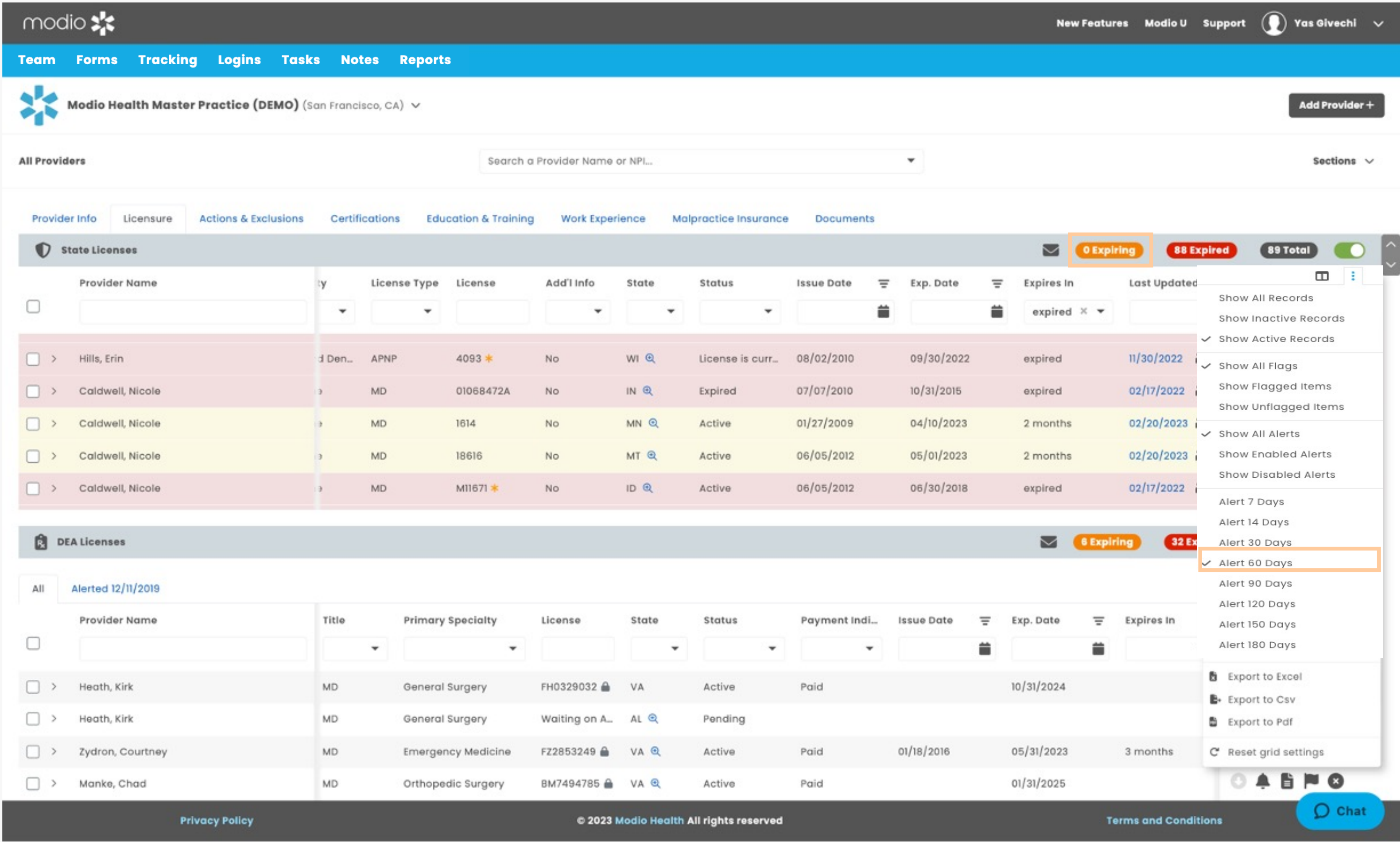
View Customization

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.



2. 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.

3. In-line editing row:

Double click in the row of visible data for each record to quickly update data.

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Kirk Heath, MD - NPI 1184838286
General Surgery

x Q

Add Provider

State Licenses

▼	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date
☐							
☐	>	1234	No	CA 🔍	Active		
☐	>	DO	2015-02245 📄	NC 🔍	Inactive	10/23/2015	08/20/2021
☐	>	NP	341645	CO 🔍	Unencumbered (full unrest...		
☐	>	C196848 📄	No	CA 🔍	License Renewed & Current	06/11/2024	08/31/2026

DEA Licenses

▼	License	State	Status	Payment Indicator	Issue Date	Exp. Date
☐						
☐	>	FH0329032 ⭐📄	VA 🔍	Active	Paid	10/31/2027
☐	>	MBI036107 📄	VA 🔍	Inactive		

State Controlled Substance Licenses

▼	License Type	License	State	Status	Issue Date	Exp. Date	Expires Within	Tags	Last Updated	Actions !
☐	>	MD	133433	VA 🔍	Active				04/24/2025 🔄 -	🔍 ⬇️ 🚫 🗑️ ☆

x Provider Info
x Birth Info
x State Licenses
x DEA Licenses
x State Controlled Substance Licenses
Search...
Clear

1

- Provider Info

- ☒ Provider Info
- ☒ Birth Info
- ☐ Addresses
- ☐ Add'l Names
- ☐ Health Info
- ☐ Additional IDs
- ☐ CAQH
- ☒ Licensure
 - ☒ State Licenses
 - ☒ DEA Licenses
 - ☒ Controlled Substances

Actions & Exclusions

- ☐ Event Log
- ☐ OIG
- ☐ SAM
- ☐ FSMB Actions
- Certifications**
 - ☐ Board Certifications
 - ☐ Other Certifications
- Education & Training**
 - ☐ Education & Training
 - ☐ Exams

Work Experience

- ☐ Practice/Employer
- ☐ Facility Affiliations
- ☐ Work History
- ☐ Peer References
- ☐ Military Experience
- ☐ Malpractice Insurance
- Documents**
 - ☐ Documents
 - ☐ Sent Forms

04/10/2025 🔄 ✓
⬇️ 🔍 🚫 🗑️ ☆

State Controlled Substance Licenses

✉️ 0 Expiring 0 Expired 1 Total
☒

▼	License Type	License	State	Status	Issue Date	Exp. Date	Expires Within	Tags	Last Updated	Actions !
☐	>	MD	133433	VA 🔍	Active				04/24/2025 🔄 -	🔍 ⬇️ 🚫 🗑️ ☆

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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.

6

6. Detail View:

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

4

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

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.

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Kirk Heath, MD - NPI 1184838286General Surgery

Kirk Heath

Sections (3)

State Licenses0 Expiring2 Expired3 Total

License Type	License	Add'l Info	State	Status	Don't Renew?	Issue Date	Exp. Date	Expires Within	Tags	Last Updated
MD	0101241891	No	VA	Active	Renew (No)	06/04/2007	04/30/2022	Expired		07/07/2025
MD	0116015075	No	VA	Expired	Renew (No)	06/25/2002	06/30/2007	Expired	New Test	07/10/2025
MD	2015-02245	No	NC	Active	Renew (No)	06/10/2025	04/21/2026	245 days		06/25/2025

SEARCH CRITERIARecord(s) Found on 06/25/2025

StateNC - North Carolina

License TypeMD - Medical Doctor

License2015-02245

First NameKirk

Last NameHeath

ADDITIONAL INFO

StatusActive

Issue Date06/10/2025

Exp. Date04/21/2026

Don't Renew?Renew (No)

Primary?No

Multi-state?No

Taxonomy CodeSurgery (208600000X)

Enrolled in PDMP?Enrolled in PDMP?

Fee ExemptionSelect Fee Exemption

DEA Licenses0

License	State	Status	Payment Indicator	Issue Date	Exp. Date	Expires Within	Tags	Last Updated
FH0329032		Active			10/31/2021	Expired		07/10/2025
FH5687112		Inactive			10/31/2018	Expired		10/18/2023

State Controlled Substance Licenses0 Expiring0 Expired0 Total

No Records found for Kirk Heath, MD

Add Record +

Cancel

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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.

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Modio University(Virginia Beach, VA)

Add Provider +

Kirk Heath, MD - General Surgery

Kirk Heath

Sections (4)

State Licenses

0 Expiring1 Expired2 Total

Provider Name	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date	Expires In	Last Updated	Actions
☐										
☐ >	MD	0101241...	No	VA	Current Active	06/04/2007	04/30/2024		01/19/2023	
☐ >	MD	2015-02245	No	NC	Inactive	10/23/2015	08/20/2021	expired	12/14/2022	

DEA Licenses

0 Expiring0 Expired2 Total

Provider Name	License	State	Status	Payment Indicator	Issue Date	Exp. Date	Expires In	Last Updated	Actions
☐									
☐ >	MD	VA	Active	Paid		10/31/2024		12/16/2022	
☐ >	Waiting on A...	AL	Pending					12/20/2022	

Education & Training

5 Total

Provider Name	Education Type	School/Institution	Degree	Specialty/Major	Start Date	End Date	Complete	Last U	Actions
☐									
☐ >	Medical School	Eastern Virginia Medical School 825 Fairfax Ave, Ste 310, Norfolk, VA ...	MD		09/01/1998	05/31/2002	Completed	02/17/...	
☐ >	Residency	Eastern Virginia Medical School 825 Fairfax Ave, Ste 310, Norfolk, VA ...		General Surgery	07/01/2002	06/30/2007	Completed	02/17/...	
☐ >	Internship	Eastern Virginia Medical School 825 Fairfax Ave, Ste 310, Norfolk, VA ...		General Surgery	07/01/2002	07/01/2007	Completed	02/17/...	
☐ >	Nursing School	University Of North Carolina At ... 321 S Columbia St, Chapel Hill, NC 2...	BS	Business	01/06/2022	06/24/2022		02/17/...	
☐ >	PostGrad	Old Dominion University 5115 Hampton Blvd, Norfolk, VA 23529			01/04/2022	03/26/2022		02/17/...	

Exams

0 Total

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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

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Team Forms Tracking Logins Tasks Notes Reports

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All Providers

Join us to Dive into Facility

Provider Info

CAQH

Licensure

Actions & Exclusions

Certification

Provider Info

Provider Name	Title	Primary
Mouse, Minnie	DC	Clinical
Kahlo, Frida	LPATA	Art Ther
Doorbell, Jane	MD	Internal
EFT, Mendez Counseling Centers, PLLC	FAC	Multi-Sp
Holmes, Brandon	MD	Anesthe
Lewis, Cody	MD	Dermatology
Services	FAC	No Specialty
Lee, Danessa	MD	Acupuncture
edwin, rebecca	DC	Acute Care Nurse Pra...
ZYX FACILITY	FAC	No Specialty

Birth Info

Add Provider

Teams

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Tags

Add Tag(s) to all selected Teams

Provider Name *

Type a provider name or NPI...

Add a Facility Name instead

NPI #

Provider Title *

Specialty List *

Provider Email *

Cancel

Save

Add Provider +

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Tip Guide: OneView V2 - NPPES Updater

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Kirk Heath, MD – General Surgery

Kirk Heath

CONTACT INFO

Work EmailPersonal EmailMobile P

@kwheath@testgmail.com@email@example.com(804) 2

EMERGENCY CONTACT

Emergency Contact NameEmailPhone #

Tara Heathe@mail@example.com(444) 4

IDENTIFICATION

Social Security # ?NPI #Last UpdatedEnumeration

..... 🔒12345678912/11/2023🔄 Run Update01/30/1978

Driver License or ID # ?Statue IssuedIssue DateExpiration D

..... 🔒UT - Utah × MM/DD/YYYY 📅01/12/2080

Updating NPPES Info for Kirk Heath

Last SavedUpdate From Source

Provider NameKirk HeathKirk Heath

NPI Number11848382861184838286

Last UpdatedOneView from Updater12/11/202312/11/2023

Select which item(s) to add/update:

NPPES Dates

☐ Enumeration Date05/09/200705/09/2007

☒ Last UpdatedNPPES NPI Registry03/17/201803/16/2018

Addresses

☒ Practice Address

Meru Health Medical California, PC
(San Mateo, CA) ★
19 S B St
Ste 3
San Mateo CA 94401 USA
Ph: (650) 240-4850 • Fax:

Unspecified
1120 First Colonial Rd
Suite 203
Virginia Beach VA 234542418 USA
Ph: (757) 481-4424 • Fax: (757) 481-3820

State Licenses

☒ State LicenseNC 2015-02245 208600000X
Surgery

State LicenseVA 0101241891 208600000X
SurgeryVA 0101241891 208600000X
Surgery

CancelUpdate Selected

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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

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TeamFormsTrackingLoginsTasksNotesReports

Modio Health Master Practice (DEMO) (San Francisco, CA)

Add Provider +

All Providers

1Search a Provider Name or NPI...

Sections (3) ^

Licensure

State Licenses

	Provider Name	ty	License Type	License	Add'l Info	State	Status
☐							
☐ >	Hills, Erin	d Den...	APNP	4093 *	No	WI	ons
☐ >	Caldwell, Nicole		MD	01068472A	No	IN	pire
☐ >	Caldwell, Nicole		MD	1614	No	MN	Active
☐ >	Caldwell, Nicole		MD	18616	No	MT	Active
☐ >	Caldwell, Nicole		MD	M11671 *	No	ID	Active

DEA Licenses

2

x State Licensesx DEA Licensesx State Controlled Substance Licenses

Search...Clear

☐ Provider Info☐ Birth Info☐ Addresses☐ Add'l Names☐ Health Info☐ Additional IDs☐ CAQH☒ Licensure☒ State Licenses☒ DEA Licenses☒ Controlled Substances☐ Actions & Exclusions☐ Event Log☐ OIG☐ SAM☐ FSMB Actions☐ Certifications☐ Board Certifications☐ Other Certifications☐ Education & Training☐ Education & Training☐ Exams☐ Work Experience☐ Practice/Employer☐ Facility Affiliations☐ Work History☐ Peer References☐ Military Experience☐ Malpractice Insurance☐ Documents☐ Documents☐ Sent Forms

AllAlerted 12/11/2019

	Provider Name	Title	Primary Specialty	License	State	Status	Payment Indi...	Issue Date	Exp. Date	Expires In	Actions
☐											
☐ >	Heath, Kirk	MD	General Surgery	FH0329032	VA	Active	Paid		10/31/2024		
☐ >	Heath, Kirk	MD	General Surgery	Waiting on A...	AL	Pending					
☐ >	Zydron, Courtney	MD	Emergency Medicine	FZ2853249	VA	Active	Paid	01/18/2016	05/31/2023	3 months	
☐ >	Manke, Chad	MD	Orthopedic Surgery	BM7494785	VA	Active	Paid		01/31/2025		

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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

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New FeaturesModio USupportYas Givechi

TeamFormsTrackingLoginsTasksNotesReports

Modio Health QA Displ (San Francisco, CA)

Add Provider +

Kirk Heath, MD - General SurgeryKirk Heath

Sections

Birth Info1 Total

Provider Name	Date Of Birth	Country Of Citizenship	Citizenship/Work Auth	US Work Auth	Last Updated	Actions
Heath, Kirk		United States of America		No	02/14/2023	+⌵

Addresses1 Total

Provider Name	Address Type	Address	Address 2	City	State	Zip/Postal ...	Last Updated	Action
Heath, Kirk							02/17/2022	+🔔📄🚩✕

Additional Names0 Total

No Records found

CAQH1 Total

Provider Name	CAQH Provider ID	Account Status	Reattestation...	Reattestation In	Last Updated	Actions
Heath, Kirk		Pending			02/14/2023	📄

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

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

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

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



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's name (shown right).

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

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Modio University(Virginia Beach, VA)

Add Provider +

Kirk Heath, MD - General Surgery

Kirk Heath

Sections (9)

Provider Info

1 Total

Provider Name	NPI #	Work Email	Personal Email	Mobile Phone #	Last Updated	Actions
> Heath, Kirk	1184838286	kwheath@testgmail.com		(804) 270-2141	02/15/2023	

Birth Info

1 Total

Provider Name	Date Of Birth	Country Of Citizenship	Citizenship/Work Auth	US Work Auth	Last Updated	Actions
Heath, Kirk		United States of America		No	02/15/2023	

Date Of Birth

Country Of Citizenship

Citizenship/Work Auth

US Work Auth

Birth City

Birth State

Birth County

Birth Country

Gender

Identifies as transgender?

Hair Color

Eye Color

Height (inches)

Weight (lbs)

Ethnicity

MM/DD/YYYY

United States of ...

Select Citizenship/Work Auth

No

Exeter

NH - New Hamps...

Birth County

United States of America

Male

No

Select Hair Color

Select Eye Color

FeetftInchesin

Weight (lbs)

White/Caucasian

Discard Changes

Save Record

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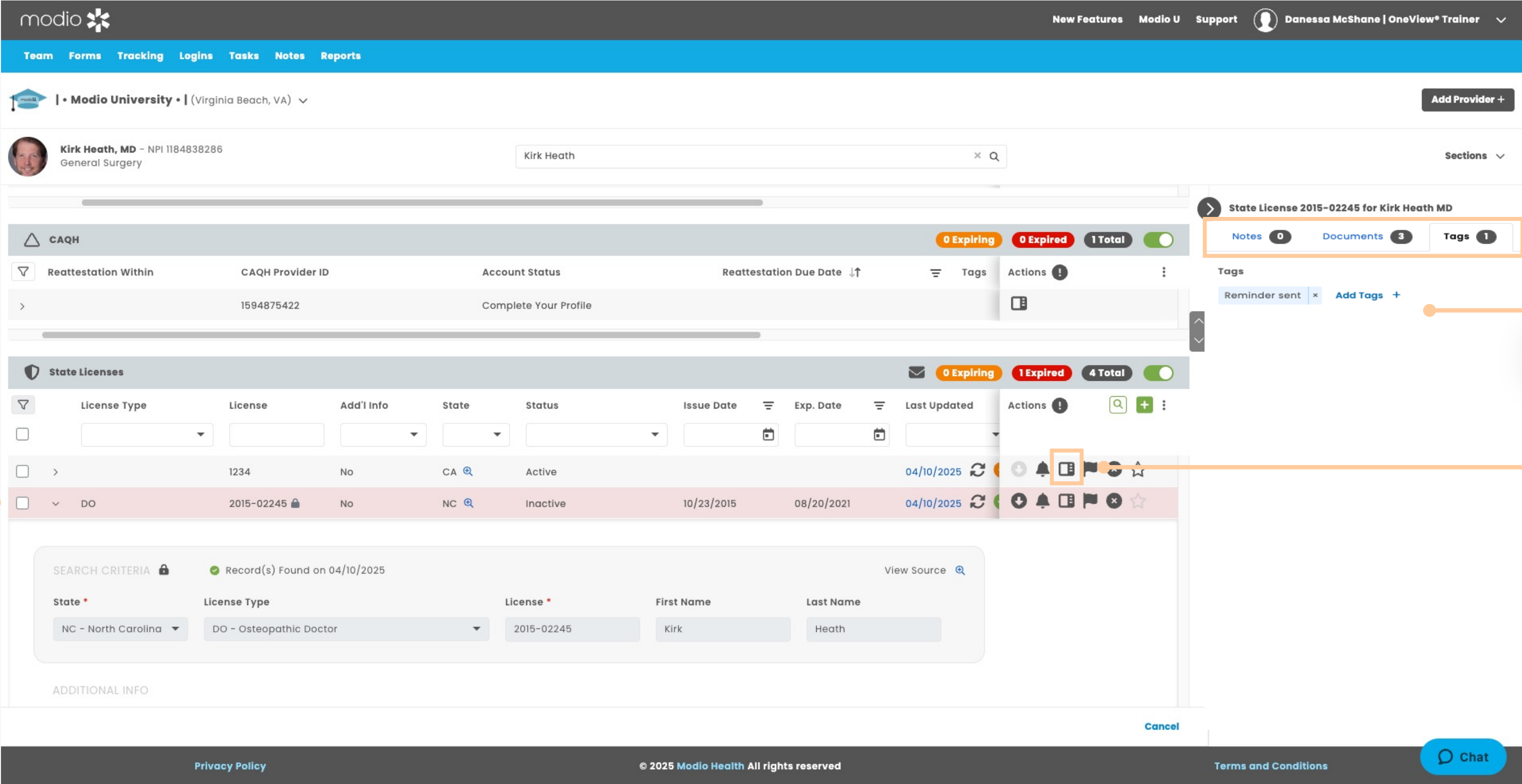
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Tip Guide: OneView V2 - Updating Provider Data: Adding Notes, Tags, and Documents

5. Add Notes, Tags and Documents to Records

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.



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.

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

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

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.

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Reports

Modio Health Master Practice (DEMO) (San Francisco, CA)

Add Provider +

Kirk Heath, MD - General Surgery

Kirk Heath

x

Sections (9)

>

Heath, Kirk

Immunizations

Influenza

Complete

02/02/2018

02/02/2019

expired

02/17/2022

>

Heath, Kirk

Immunizations

Covid-19 Vaccine

Complete

02/17/2022

>

Heath, Kirk

Immunizations

Covid-19 Vaccine

Complete

02/17/2022

State Licenses

0 Expiring

1 Expired

2 Total

Provider Name	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date	Expires In	Last Updated	Actions
> Heath, Kirk									02/16/2023	
> Heath, Kirk				VA	Current Active	06/04/2007	04/30/2024		02/16/2023	
> Heath, Kirk				NC	Inactive	10/23/2015	08/20/2021	expired	02/06/2023	

+ Add

Open in Prior Version

Clear All Filters

Update Selected Licenses

Enable/Disable Selected Alerts

Enable Selected Alerts

Disable Selected Alerts

Copy

Copy with Headers

DEA Licenses

0 Expiring

0 Expired

2 Total

Provider Name	Payment Indicator	Issue Date	Exp. Date	Expires In	Last Updated	Actions
> Heath, Kirk	Paid		10/31/2024		02/16/2023	
> Heath, Kirk					12/20/2022	

Rx

State Controlled Substance Licenses

0 Expiring

0 Expired

0 Total

No Records found for Kirk Heath, MD

Add Record +

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

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 the updater 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**.

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Modio University

(Virginia Beach, VA)

Kirk Heath, MD

NPI 1184838286

General Surgery

1594875422

State Licenses

License Type	License	Add'l Info
>	1234	No
> DO	2015-02245	No
> NP	341645	No
>	C196848	No

DEA Licenses

License	State	Status
>	VA	Active
> MB1036107	VA	Inactive

State Controlled Substance Licenses

State License for Kirk Heath MD

Record Details

Created By OneView*Admin | Brandon Holmes (C) on 09/15/2021, 11:51 AM

Record ID	688591
Provider Name	Kirk Heath
Provider ID	325407
Identifier(s)	MD NC 2015-02245
Primary Source	https://portal.ncmedboard.org/verification/search.aspx
Record Link	https://www.modiohealth.com/oneview/report/facility/40073/provider/325407/state-licenses/688591

Doctor License Supervisors

State License History

	Prior Record	Current Record
Date Updated	04/09/2025, 2:29 PM	04/10/2025, 11:04 AM
Revision ID	04/10/2025	688591
Data Source	04/10/2025, 11:04 AM	https://portal.ncmedboard.org/verification/search.aspx
Update Source	04/09/2025	OneView V2
Updated By (Role)	04/09/2025, 2:29 PM	Marie Robertson (Admin)
License #	02/20/2025	2015-02245
License # Display		
State	North Carolina (NC)	North Carolina (NC)
License Type	DO - Osteopathic Doctor	DO - Osteopathic Doctor
Permit Type		

04/25/2025

0 Expiring 1 Expired 4 Total

Tags

Actions

0 Expiring 0 Expired 2 Total

Last Updated

04/10/2025

04/10/2025

0 Expiring 0 Expired 1 Total

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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.



Tip Guide: OneView V2 – Viewing & Restoring Inactive Records

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Modio Health Master Practice (DEMO) (San Francisco, CA)Add Provider +

Kirk Heath, MD – General Surgery

Kirk Heath

Sections (20)

Health Info0 Expiring5 Expired7 Total

	Provider Name	Type	Test/Immunizati...	Questionnaire Ty...	Status	Completion D...	Exp. Date	Expires In	Last Updated
☐									
☐	> Heath, Kirk	Testing & Reports	PPD Test Results		Negative	08/06/2018	08/06/2019	expired	02/17/2022
☐	> Heath, Kirk	Testing & Reports	Drug Test		Negative	01/29/2019	02/15/2019	expired	02/17/2022
☐	> Heath, Kirk	Testing & Reports	Drug Test		Negative	03/11/2019	11/02/2019	expired	02/17/2022
☐	> Heath, Kirk	Immunizations	Influenza		Complete		04/21/2018	expired	02/17/2022
☐	> Heath, Kirk	Immunizations	Influenza		Complete	02/02/2018	02/02/2019	expired	02/20/2023
☐	> Heath, Kirk	Immunizations	Covid-19 Vaccine		Complete				02/17/2022
☐	> Heath, Kirk	Immunizations	Covid-19 Vaccine		Complete				02/17/2022

State Licenses0 Expiring2 Expired

	Provider Name	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date	Expires In	Last Updated
☒										
☒	> Heath, Kirk	MD	0101241...	No	VA	Current Active	06/04/2007	04/30/2024		02/16/2023
☒	> Heath, Kirk	MD	2015-02245	No	NC	Inactive	10/23/2015	08/20/2021	expired	02/06/2023
☒	> Heath, Kirk	NNP-BC	2015-02245	No	NC	Inactive	10/23/2015	08/20/2021	expired	06/22/2022
☒	> Heath, Kirk		MB1036107	No	NE	Other Action				01/24/2023
☒	> Heath, Kirk		pending - 1	No	AL	Pending				02/20/2023

Show All RecordsShow Inactive RecordsShow Active RecordsShow All FlagsShow Flagged ItemsShow Unflagged ItemsShow All AlertsShow Enabled AlertsShow Disabled AlertsAlert 7 DaysAlert 14 DaysAlert 30 DaysAlert 60 DaysAlert 90 DaysAlert 120 DaysAlert 150 DaysAlert 180 DaysExport to ExcelExport to CsvExport to PdfReset grid settings

+X

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.
- Deactivate records



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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346