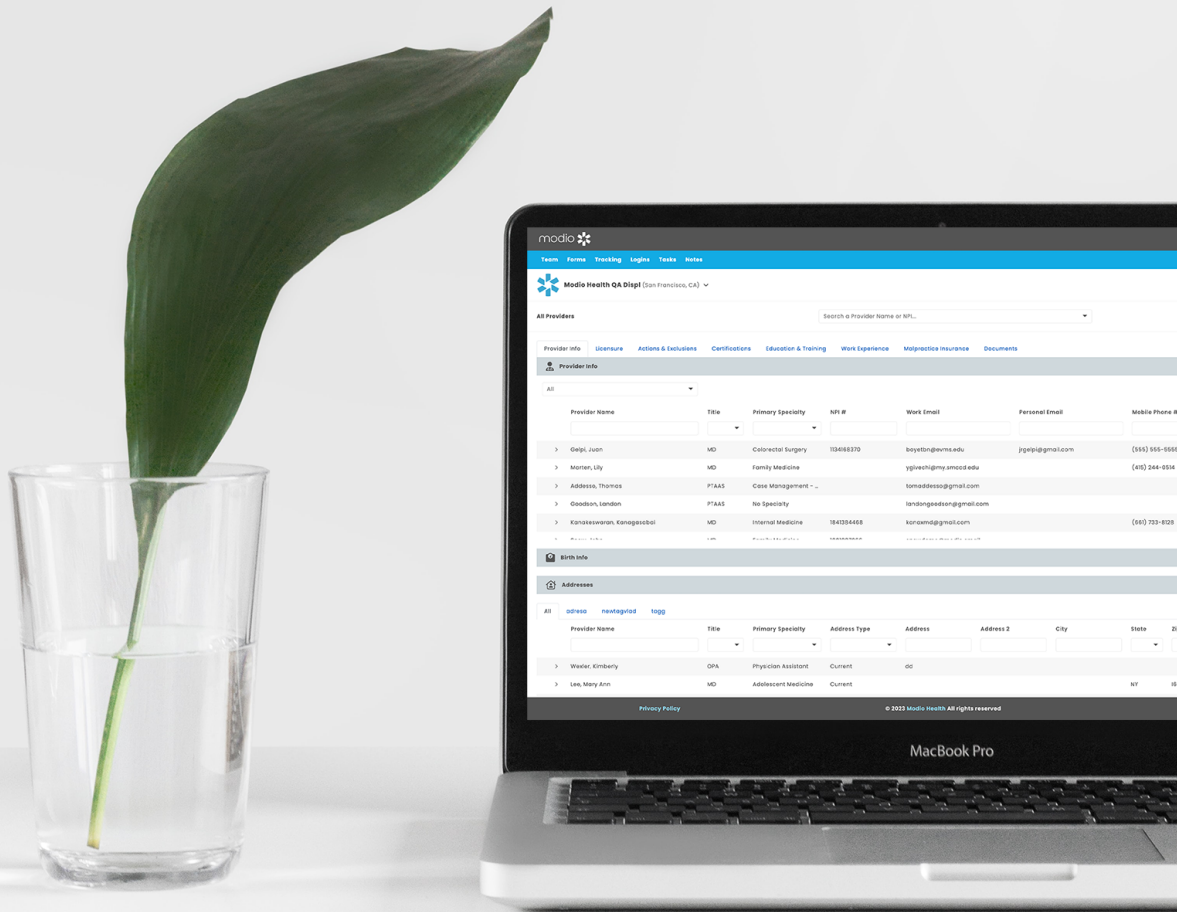


# OneView V2

## FAQ Guide



QUESTION	ANSWER
<b>How do I view inactive records in V2?</b>	In the grid menu for each grid, you can choose to view all records, active records, or inactive records. Select inactive records to view records that have been made inactive. You can click on the green plus icon at the right of each record to restore it to active status.
<b>How do I view audit history in V2?</b>	At the far right of the row for any record in V2, you will see the Last Updated Date column. The date in this column is a hyperlink and if you click on it you can view audit history for the record.
<b>Does changing my grid sections change the view for other users (credentialers/coordinators)?</b>	Personalized grid sections and columns views are unique to the individual user (coordinator). Actions such as flagging, alerts, and removing a provider record will impact all users.
<b>Will my custom settings be saved when I log out of OneView V2?</b>	Yes. Your settings, columns, and custom sorting preferences will all be saved when you log out and back into OneView V2.
<b>Can you pull a provider roster in OneView V2?</b>	Yes, use the provider info grid to export provider-level data. Simply go to the grid menu and choose to export to excel or CSV.
<b>Are primary source documents autosaved when running bulk licenses?</b>	Yes. PSV documents will automatically save to the respective license. This will save you time - you no longer need to opt-in to saving PDFs. As a reminder, the alerts are automatically set as disabled and you can enable as needed.
<b>I don't see the "team tags" tabs. Are those a part of the filtering?</b>	Team tags (tags at the provider level) are included in the provider info section.
<b>Should I add providers using V1 or V2? Does it matter?</b>	We have made updates so both OneView V1 and V2 use the same integration with LexisNexis (LN) to bring in data for new providers. You can add providers through whichever page is most convenient.
<b>Where is the LN add provider integration data pulled from? Is it current and verified?</b>	Our data points come in from LexisNexis. With our integrations, the provider license must be in OneView in order for Carbon to verify it. LN offers a license number for providers (so no need to look up license numbers) and which can then be verified using our Carbon technology.
<b>What are the list of data elements being pulled from LexisNexis?</b>	We are currently bringing in the 3 types of licenses (state license, DEA and CDS) and board certifications if LexisNexis has them available for the provider. We may also bring in some demographic info if available, like middle name and specialty.
<b>How are the notes displayed? Are there team notes or just individual notes?</b>	There are both team and individual notes in V2. You can access notes through what we call the "side drawer." When you open a record, this will slide out from the right side of your screen and contain notes, tags and documents associated with the record. You can choose to close this if you like.

QUESTION	ANSWER
<p><b>How do I use the SAM integration that is available only in V2?</b></p>	<p>In V2 grid settings, make sure the SAM grid is enabled. SAM looks for exclusion data similar to OIG. SAM status will be pass (no result found), fail (exclusions found) or scheduled (SAM has not been run yet). You may choose to run SAM, and have an option to include up to 15 aliases.</p>
<p><b>When pulling in the license/NPI will it populate the taxonomy number for the licenses?</b></p>	<p>Not at this time. We are investigating additional data sources currently, which will likely include taxonomy data.</p>
<p><b>Can I set my own alert intervals for licenses and other records that expire (like 1 month, 2 months etc)? And can I export a report with these records?</b></p>	<p>Yes, you can set your own alert intervals for each individual grid based on how your organization likes to track those specific expirables. You can export data based on your grid settings as well.</p>
<p><b>Can you set an email reminder for specific monthly alerts?</b></p>	<p>We do not offer automated email reminders as part of the initial rollout, but we plan to address this need in the future. For now, continue to log into OneView and manage alerts according to your personalized alert intervals.</p>
<p><b>If bringing back an inactive provider that is returning, can OneView run a LexisNexis lookup to update all the provider's data with anything new?</b></p>	<p>LexisNexis is used when adding new providers, but is not available to run for existing active or inactive providers. If you reactivate a provider, remember to run carbon on existing licenses, and you can use our license find features to look up any new DEA or state licenses.</p>
<p><b>How can I find providers with data missing in V2?</b></p>	<p>In any of the grids, if there is a data element you want to check, click the column header to sort. If you sort in descending order, blanks will sort to the top. For example, if you want to find providers missing an NPI, sort the NPI column in the provider info grid in descending order and records without NPIs will appear first. Note you can still also do this using CSV reports as well.</p>
<p><b>Can I view documents without downloading them in V2?</b></p>	<p>Yes. If you would like to do this, enable our Adobe PDF viewer - this is a checkbox above the Documents grid in Grid Settings. If this checkbox is checked, when you click on documents they will open but not download. Once open, you can choose to download if needed.</p>
<p><b>Are you able to run a report that combines all of the OneView V2 tabs? For example, could you run a single report including State Licenses, DEA, and Board Certifications?</b></p>	<p>No - any custom reports will still exist in OneView V1. These will still contain the same data points and not be affected by the introduction of OneView V2. We are in the process of evaluating an enterprise reporting solution, so stay tuned!</p>
<p><b>Can you add sub-specialty under provider profiles?</b></p>	<p>Yes - the provider info section will allow you to multi-select specialties and set a primary specialty.</p>
<p><b>Does OneView V2 have the ability to enter a provider's term date? In the current version I have not been able to locate where I can do this.</b></p>	<p>We would recommend reaching out to our support team about best practices for storing term date. They may recommend adding this to your organization's practice or affiliation record in the provider's profile.</p>