

OneView[™]

Tip Guide: 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

The screenshot shows the Modio OneView dashboard interface. At the top, there is a navigation bar with the Modio logo and links for Training & Support, Settings, Services, and Sign out. Below this is a secondary navigation bar with tabs for Team, Forms, Tracking, Logins, Tasks, and Notes. The main content area displays a list of providers for 'Modio Health QA (San Francisco, CA)'. The list includes columns for Provider, Tags, Compliance, and Actions. Each provider entry shows a profile picture, name, specialty, NPI number, and a set of action icons. The providers listed are: Mann, Bernie - MD (Internal Medicine, 5 alerts), Smith, Judd T - MD (Acupuncture, 1 alert), Marten, Lily - MD (Family Medicine, 3 alerts), Zhivago, Yuri - DPM (Internal Medicine, No alerts), and No, Julius Dit - OD (Cardiology, 8 alerts). A search bar and filters are visible above the list. At the bottom, there is a footer with Privacy Policy, ©2018 Modio Health, Terms and Conditions, and a Live Help button.

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 tracking:** 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  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.

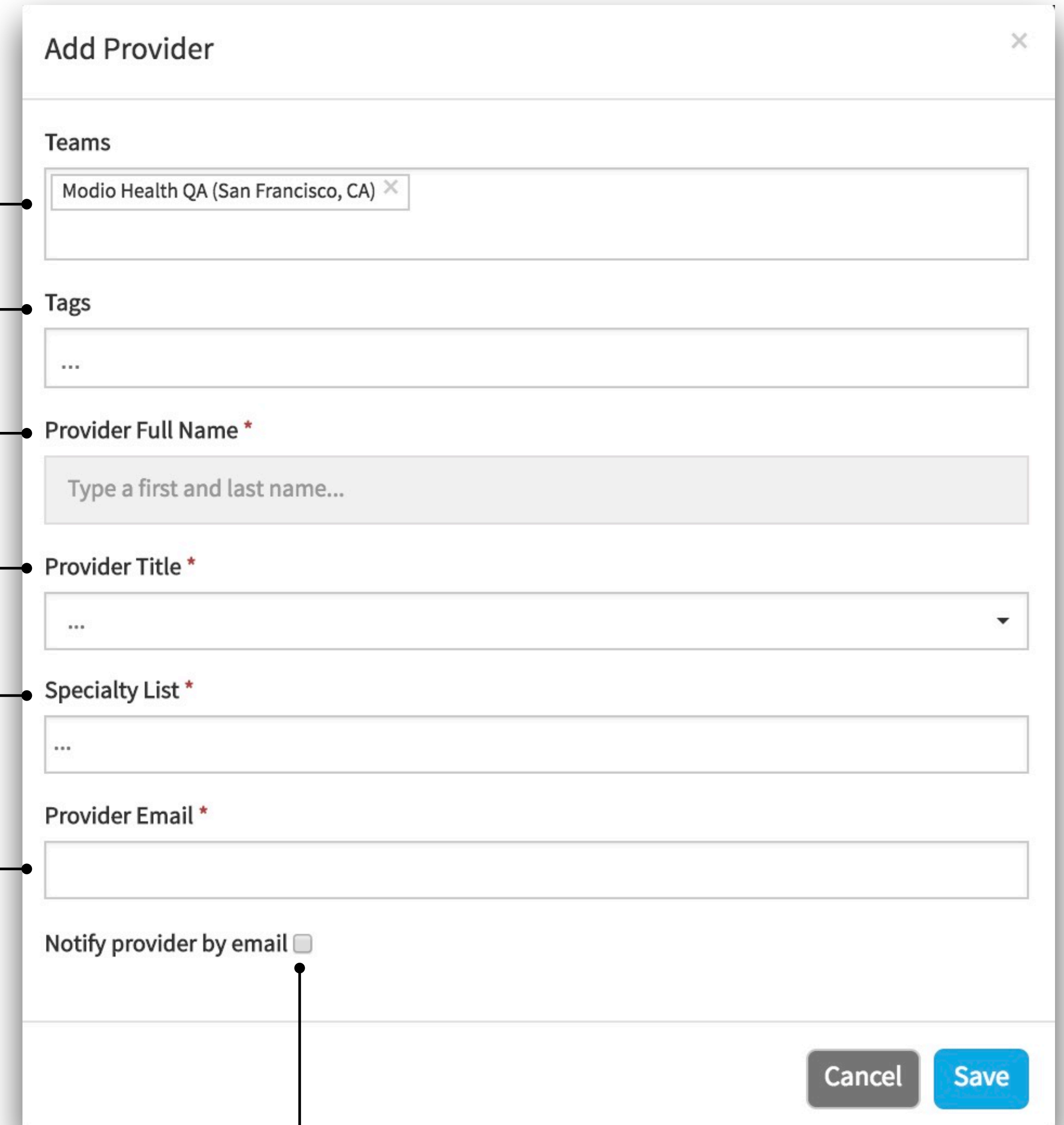
Provider Name: find a provider by name or select "not listed".* Don't see a profile listed? Scroll to the bottom and select "**Click here to skip profile claim.**"

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. John Smith
2. NPI #12345678
3. CV Pharmacy
Final email: JSmith5678@CV.email




The screenshot shows the 'Add Provider' form with the following fields and annotations:

- Teams**: A dropdown menu with 'Modio Health QA (San Francisco, CA)' selected. An annotation line points from the 'Team(s)' text to this field.
- Tags**: A text input field containing '...'. An annotation line points from the 'Tag(s)' text to this field.
- Provider Full Name ***: A text input field with the placeholder 'Type a first and last name...'. An annotation line points from the 'Provider Name' text to this field.
- Provider Title ***: A dropdown menu with '...' selected. An annotation line points from the 'Provider Title' text to this field.
- Specialty List ***: A text input field with '...' entered. An annotation line points from the 'Specialty List' text to this field.
- Provider Email ***: A text input field. An annotation line points from the 'Provider Email' text to this field.
- Notify provider by email**: A checkbox that is currently unchecked. An annotation line points from the 'Notify provider by email' text to this checkbox.

At the bottom right of the form are 'Cancel' and 'Save' buttons.

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

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.

Edit Yuri Zhivago, DPM

Tags for Modio Health QA (San Francisco, CA)

Internal Medicine × Pain Medicine × ...

Teams

Modio Health QA (San Francisco, CA) ×

Specialty List

Addiction Medicine * × Pain Medicine ×

Job Title

DPM

Notes

Moving to new address in 3 weeks.

Cancel Save

Viewing a Verified Profile

The screenshot shows the Modio Health QA interface. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', and 'Notes'. Below that, the organization name 'Modio Health QA (San Francisco, CA)' is displayed. A search bar and filters for 'OneView V2', 'Add Provider', and 'Message' are present. A list of providers is shown with columns for 'Provider', 'Tags', 'Compliance', and 'Actions'. The providers listed are Mann, Bernie - MD (Internal Medicine, 2 alerts), Smith, Judd T - MD (Acupuncture, 1 alert), Marten, Lily - MD (Family Medicine, 3 alerts), Zhivago, Yuri - DPM (Internal Medicine, No alerts), and No, Julius Dit - OD (Cardiology, 8 alerts). A 'Profile' button is highlighted over the 'Marten, Lily - MD' profile. At the bottom, there are pagination controls and a footer with 'Privacy Policy', '©2018 Modio Health. All rights reserved.', 'Terms and Conditions', and a 'Live Help' button.

Provider	Tags	Compliance	Actions
 Mann, Bernie - MD Internal Medicine NPI# 1111111111	Internal Medicine	2 alerts	
 Smith, Judd T - MD Acupuncture NPI# 1295705283	Contract Employees Critical Care	1 alert	
 Marten, Lily - MD Family Medicine	Internal Medicine	3 alerts	
 Zhivago, Yuri - DPM NPI# 1234567890	Internal Medicine	No alerts	
 No, Julius Dit - OD Cardiology	Pain Medicine	8 alerts	

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.



Provider Profile for Yuri Zhivago Jr., DPM — Internal Medicine

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Notes	Moving to new address in 3 weeks.			
NPI #	1234567890			
Primary Practice	Modio Health Demo (San Francisco, CA) 535 Mission St, San Francisco, CA 94105		Start Date 03/29/2018	
Primary Affiliation				
Professional School	Rush Medical College of Rush University (Chicago, IL)			
Graduation Date	06/30/1987	ECFMG? Yes		
State License(s)	CA - 123456789 (NP) exp. 11/30/2016 upd. 08/22/2018 (5 days ago) KS - KST1321 exp. 07/09/2017 upd. 05/04/2018 (4 months ago) NY - 1312321 (DPM) exp. 06/05/2018 (3 months ago) TN - TN-1342 exp. 07/27/2017 upd. 05/04/2018 (4 months ago) TX - J3501 (MD) exp. 01/19/2018 (7 months ago) VA - VA 123123 exp. 10/03/2020 upd. 05/04/2018 (4 months ago)			    
DEA License(s)	CA - 987654321 exp. 01/01/2022 upd. 01/17/2018 (7 months ago)			
Controlled Substance License(s)	CA - CA092134 (MD) exp. 08/03/2019 upd. 01/17/2018 (7 months ago)			
Board Certification(s)	American Board of Internal Medicine Internal Medicine American Osteopathic Board of Surgery Family Physicians		exp. 01/01/2016	
Telemedicine Experience	3 Years			
Provider Onboarding	Incomplete Profile			

OK

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

Provider Profile for Yuri Zhivago Jr., DPM — Internal Medicine

Notes	Moving to new address in 3 weeks.
NPI #	1234567890
Primary Practice	Modio Health Demo (San Francisco, CA) 535 Mission St, San Francisco, CA 94105 Start Date 03/29/2018
Primary Affiliation	
Professional School	Rush Medical College of Rus
Graduation Date	06/30/1987
State License(s)	CA - 123456789 (NP) KS - KST1321 NY - 1312321 (DPM) TN - TN-1342 TX - J3501 (MD) VA - VA 123123
DEA License(s)	CA - 987654321
Controlled Substance License(s)	CA - CA092134 (MD)
Board Certification(s)	American Board of Internal Internal Medicine American Osteopathic Board Family Physicians
Telemedicine Experience	3 Years
Provider Onboarding	Incomplete Profile

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.

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Welcome Yuri Zhivago Jr. Training & Support Settings Services Sign out

Edit State License for Yuri Zhivago DPM

last updated: 09/17/2018

License State * Multi-state? License # * Primary License?


VA - Virginia License # 123123





Issue Date 07/19/2017 Expiration Date 01/08/2021 License Status * Active

License Type MD - Medical Doctor Taxonomy Code Select specialty code(s)...

Primary Source Link <https://dhp.virginiainteractive.org/Lookup/Detail/123123>

Notes

Documents  1

File Name	Date	Expiration	
 Primary Source.pdf (74.99 KB)	09/17/2018 @ 12:23 PM	01/08/2021	  

First Name Last Name

Occupation Specialties

Drop documents here or Click here to browse

Live Help

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.

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Training & Support Settings Services Sign out

Team Forms Tracking Logins Tasks Notes

Modio Health QA (San Francisco, CA)

OneView V2

Add Provider Message

All Contract Employees Critical Care Internal Medicine New Pain Medicine

Provider	Tags	Compliance	Actions
Mann, Bernie - MD Internal Medicine NPI# 1111111111	Internal Medicine	2 alerts	
Smith, Judd T - MD Acupuncture NPI# 1295705283	Contract Employees Critical Care	1 alert	
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No, Julius Dit - OD Cardiology	Pain Medicine	8 alerts	

1 / 1 200 items per page 1 - 14 of 14 items

Privacy Policy ©2018 Modio Health. All rights reserved. Terms and Conditions Live Help

Color coded indicators:

Yellow:

There are 60 or fewer days until the license expires.

Red:

The license has expired.

The screenshot shows the Modio web application interface for 'Modio Health QA (San Francisco, CA)'. The main content area displays a list of provider licenses and certifications. The 'State Licenses' section is expanded, showing a table with the following data:

Provider Name	License	State	Status	Exp. Date	Expires In	Last Updated	Actions
Yuri Zhivago, DPM	123456789 (NP)	CA	Active	10/30/2018	a month	09/18/2018	[Refresh] [Edit] [Alert]
Yuri Zhivago, DPM	KST1321	KS	Active	07/09/2017	expired	05/04/2018	[Edit] [Alert]
Yuri Zhivago, DPM	TN-1342	TN	Active	07/27/2017	expired	05/04/2018	[Edit] [Alert]

Below the table, there are several other sections: DEA Licenses (8 items), State Controlled Substance Licenses (0 items), ABMS Certifications (1 item), OIG (0 items), CAQH (1 item), Other Certifications (0 items), Documents (11 items), and Malpractice Insurance (1 item). A 'Live Help' button is visible at the bottom right of the interface.

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.

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.

Edit Login Cancel Save

Account Owner
Yuri Zhivago

Site Name
Medicare Provider Enrollment, Chain, and Ownership System (PECOS)

Site URL
https://pecos.cms.hhs.gov/

Registration URL
https://pecos.cms.hhs.gov/pecos/PecosIAConfirm.do?transferReason=CreateLogin

Username (20 of 250)
Yuri@modiohealth.com

Password (8 of 250)
Password

Notes (0 of 2000)

Cancel Save

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.

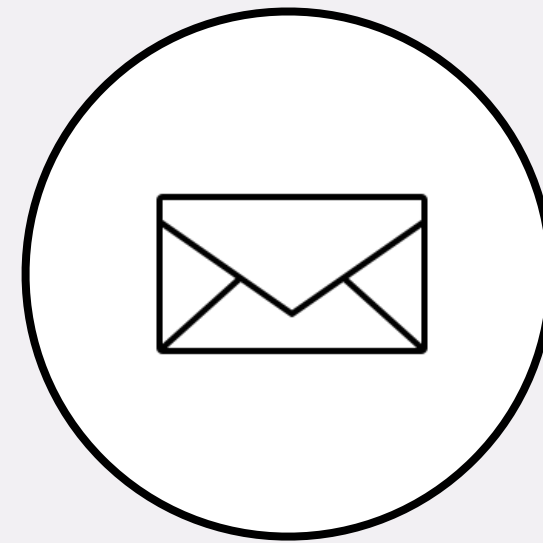
- **Where do I get help?**

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

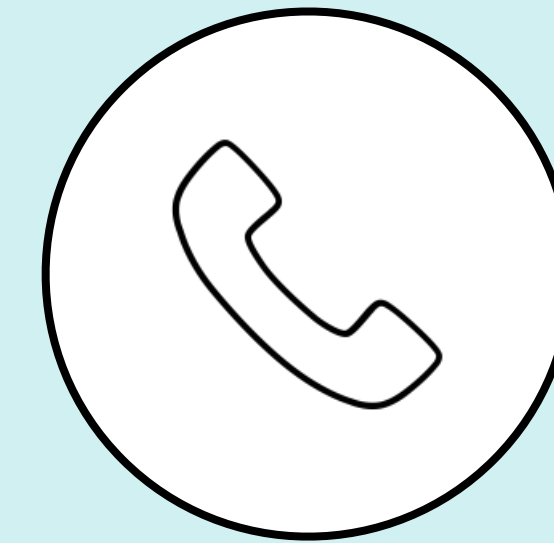
For additional questions or further training,
contact the Modio Team via:



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346