

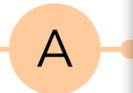


**OneView**<sup>®</sup>

Tip Guide - Creating CV Job Aid

Where in the platform can you access the CV generator? V1 has two locations to generate a CV from.

**Option 1 - The Provider Profile Card.**  
To access it, click on the provider profile indicated in the image, either where the profile picture is within the circle or on the initials. This will open the modal box shown to the right. In the top right corner click on the word document icon.



**Provider Profile for Theophine Abakporo, MD — Acupuncture**

Notes	Sunder Sandhu - licensed only in TX
NPI #	1972564813 Updated: 04/18/2024
OIG	Pass DOB: 03/06/2024 Updated: 04/15/2024
Home Address	103 Station Place Way, 2545 Peshurst Way, Virginia Beach, VA 23456 Mobile: (757) 939-3939 Email: theophoine.test@gmail.com
Primary Practice	Medical Center North Tower (Cedars Sinai) 8700 Beverly Blvd, Los Angeles, CA 90048 Start Date: 01/23/2022 Status: testcomplete
Primary Affiliation	* Medical Center North Tower (Cedars Sinai) (Los Angeles, CA) 8700 Beverly Blvd, Los Angeles, CA 90048
Professional School	Harvard Medical School (Boston, MA)
Graduation Date	
State Licenses	IA 56456456 exp. 04/30/2025 upd. 03/28/2024 (a month ago) NY 201140 upd. 03/07/2024 (2 months ago)
DEA Licenses	CA 12345678978945 upd. 11/09/2023 (6 months ago) UT B23984734 upd. 03/28/2023 (a year ago)
Controlled Substance	
Board Certifications	
Telemed Exp.	4 Years
Provider Onboarding	★ Complete Profile - Coordinator Completed: 06/05/2023

Word document icon in top right corner.



Where in the platform can you access the CV generator? V1 has two locations to generate a CV from.

**Option 2** - Summary Section of a Profile. Open the provider profile and navigate to the Summary tab. In the upper right-hand corner, click on the document icon as shown in the image.

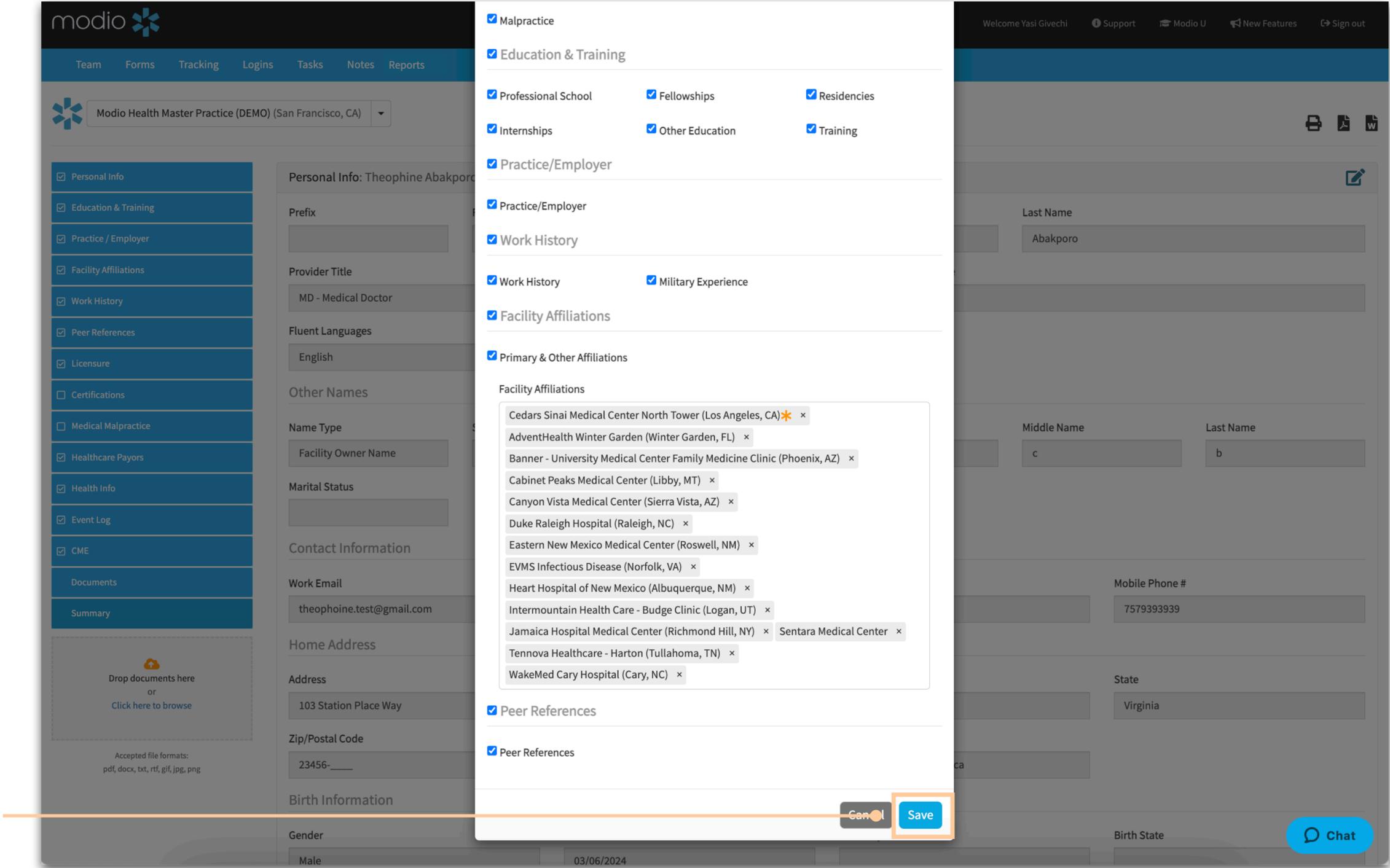


The screenshot shows the Modio platform interface. At the top, there is a navigation bar with the Modio logo and user information: "Welcome Yasi Givechi", "Support", "Modio U", "New Features", and "Sign out". Below this is a secondary navigation bar with "Team", "Forms", "Tracking", "Logins", "Tasks", "Notes", and "Reports". The main header area displays "Modio Health Master Practice (DEMO) (San Francisco, CA)" and "Theophine Abakporo MD Summary". In the top right corner of the main content area, there are three icons: a printer, a document, and a document with a 'W' icon, which is highlighted by an orange box labeled 'B'. On the left side, there is a sidebar with a list of profile sections: Personal Info, Education & Training, Practice / Employer, Facility Affiliations, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Healthcare Payors, Health Info, Event Log, CME, Documents, and Summary. The 'Summary' section is highlighted with an orange box labeled 'A'. The main content area is titled "Personal Info: Theophine Abakporo MD" and contains several form fields: Prefix, First Name (Theophine), Middle Name (David), Last Name (Abakporo), Provider Title (MD - Medical Doctor), Telemedicine Experience (4 Years), Fluent Languages (English), Other Names (with columns for Name Type, Start Date, End Date, First Name, Middle Name, Last Name), Marital Status, Contact Information (with columns for Work Email, Personal Email, Home Phone #, Mobile Phone #), and Home Address. A "Chat" button is located in the bottom right corner.



Now that you have selected to generate the CV, a pop-up window will appear. There are checkbox options for you to customize what information to include or exclude on the CV. This image is an example of how the options will display in V1.

By checking or unchecking the boxes shown here, customize what is or isn't included in the CV. When you are ready to generate the CV, simply click **save**, and it will be generated as a Word document.



**V2 has one location to generate a CV.**

**Step 1 - Open V2.**

**Step 2 - Navigate to the Provider info Tab in the Provider Info Grid.**

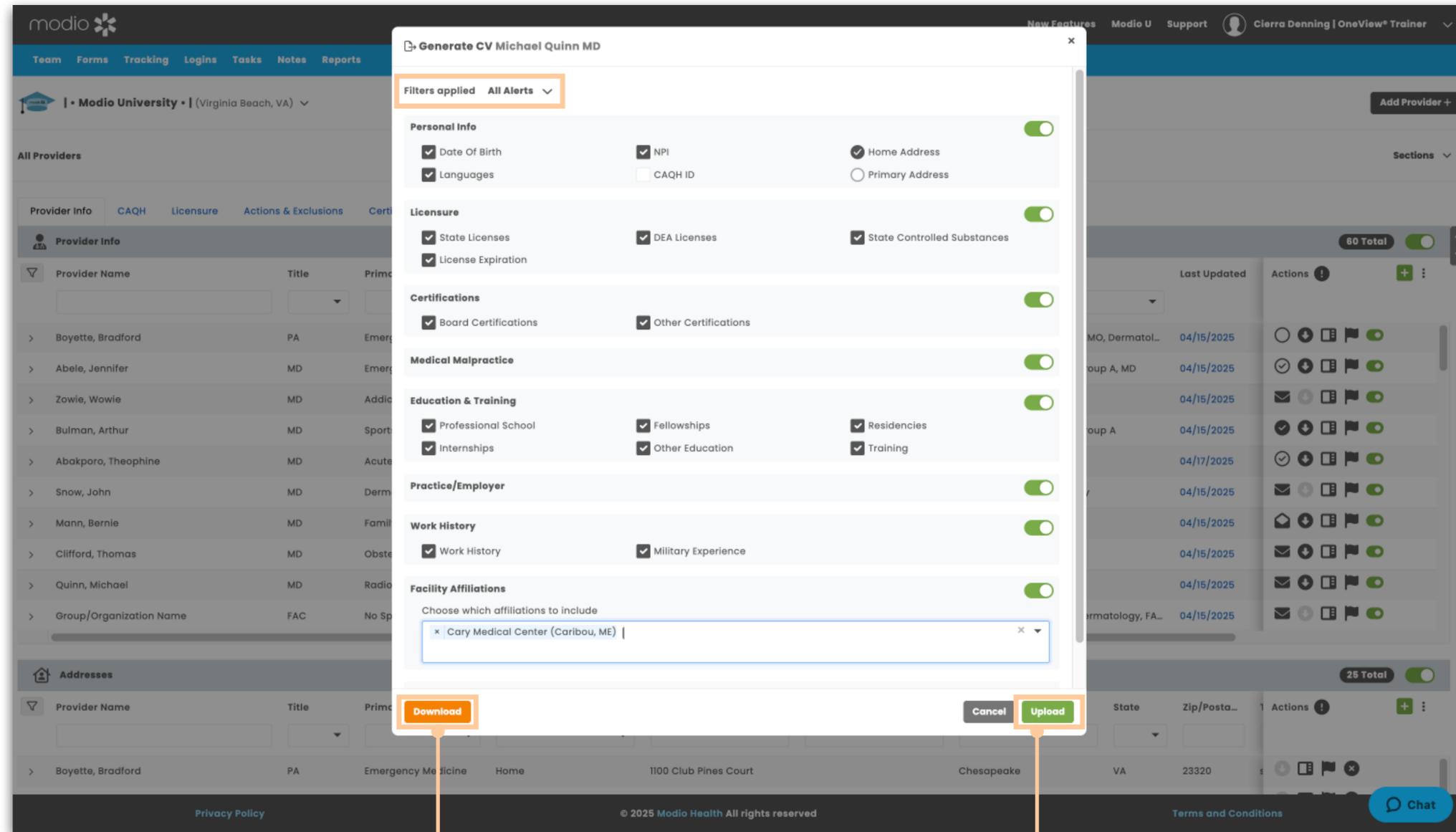
**Step 3 - Right-click on the provider's name for whom you wish to generate the CV, and select the appropriate option from the menu as shown in the image.**

The screenshot shows the Modio V2 interface. At the top, there is a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', 'Notes', and 'Reports'. Below this is a header for 'Modio University' (Virginia Beach, VA) with an 'Add Provider +' button. The main area is titled 'All Providers' and contains a search bar and a 'Sections' dropdown. A tabbed interface is visible with 'Provider Info' selected. Below the tabs is a grid of provider information. A context menu is open over the row for 'Quinn, Michael', with 'Generate CV' highlighted. The grid columns include Provider Name, Title, Primary Specialty, NPI #, Work Email, Personal Email, Mobile Phone #, Tags, and Actions.

Provider Name	Title	Primary Specialty	NPI #	Work Email	Personal Email	Mobile Phone #	Tags	Actions
> Snow, John	MD	Dermatology	1801007265	john.snow@modio.email			Dermatology	[Icons]
> Mann, Bernie	MD	Family Medicine	1999999991	bjseholmes@gmail.com		(111) 111-1111		[Icons]
> Clifford, Thomas	MD	Obstetrics and Gynec...	1659311579	tom.clifford@modio.email	Test@gmail.com		Brandon	[Icons]
> Quinn, Michael	MD	Radiology	1568453348	michael.quinn@modio.em...		(212) 222-2222		[Icons]
> Group/Organization Name		Specialty	1111111111	modiouiversitymaster@m...	thomas.addresso@modioh...	(111) 111-1111	Colorado, Derm	[Icons]
> Holmes, Brandon		eral Surgery	9999999999	testing99823@gmail.com	brandon.holmes@modioh...	(801) 546-2136	Brandon	[Icons]
> Boy, Tommy		ily Nurse Practitio...	8888888888	tommy.boy@modiohealth...	tommyemail@fake.email	(801) 258-6580	FNP, Mid-Level P	[Icons]
> Parker, Jennifer		ily Medicine	1235332255	123456@email.com				[Icons]
> Mtuwa, George		ndant Care	7777666665	goldenpathhs@gmail.com	goldenpathhs@gmail.com	(317) 333-0740	Danessa	[Icons]
> Heath, Kirk		eral Surgery	1184838286	kirk.heath123@modio.email			Onboarding, Lo	[Icons]
> Johnson, Dwayne		iatrics	1841379187	therock76587578@modio.e...	brandon@gmail.com	(801) 888-8888		[Icons]

### V2 has one location to generate a CV (Cont.)

After selecting the option to generate the CV, a pop-up window will appear. This window includes checkbox options for customizing the information to be included or excluded on the CV. Once you have made your selections, you may choose either options A or B.



A. **"Download"** to generate the CV as a Word document, or select

B. **"Upload"** to save the CV directly to the provider's profile. Examples shown in image.

### Filters and Customizations

"Filters Applied" - The default setting will include all alerts. Use the dropdown to filter Between All Alerts, Enabled Alerts and Disabled alerts.

Reminder:  
 Enabled Alert  
 Disabled Alert

Use the green toggle to remove any unnecessary sections from your CV before selecting Upload or Download.

### CV Feature Tips (V2)

There are a few areas within the CV feature where additional clarification can help. One common example is selecting whether to include the **provider's home address or primary practice address**. The **Primary Practice Address** is pulled from the practice marked as "primary" in the **Practice/Employer** section of the provider's profile.

**Please note:** the system requires an email address to be listed in the primary practice record before the option to select the practice address becomes available. If the email is missing, it must be added through the facility record update report.

In the example images, the first shows a missing email, while the second shows the field after the email has been successfully added.



Facility Link

http://onemedical.com

Address

Update address info from master record

Mailing Address?

Address

Address 2

City

State/Province

Zip/Postal Code

County

Country

Email

Phone #

Fax #



Facility Link

https://www.modiohealth.com

Address

Update address info from master record

Mailing Address?

Address

Address 2

City

State/Province

Zip/Postal Code

County

Country

Email

Phone #

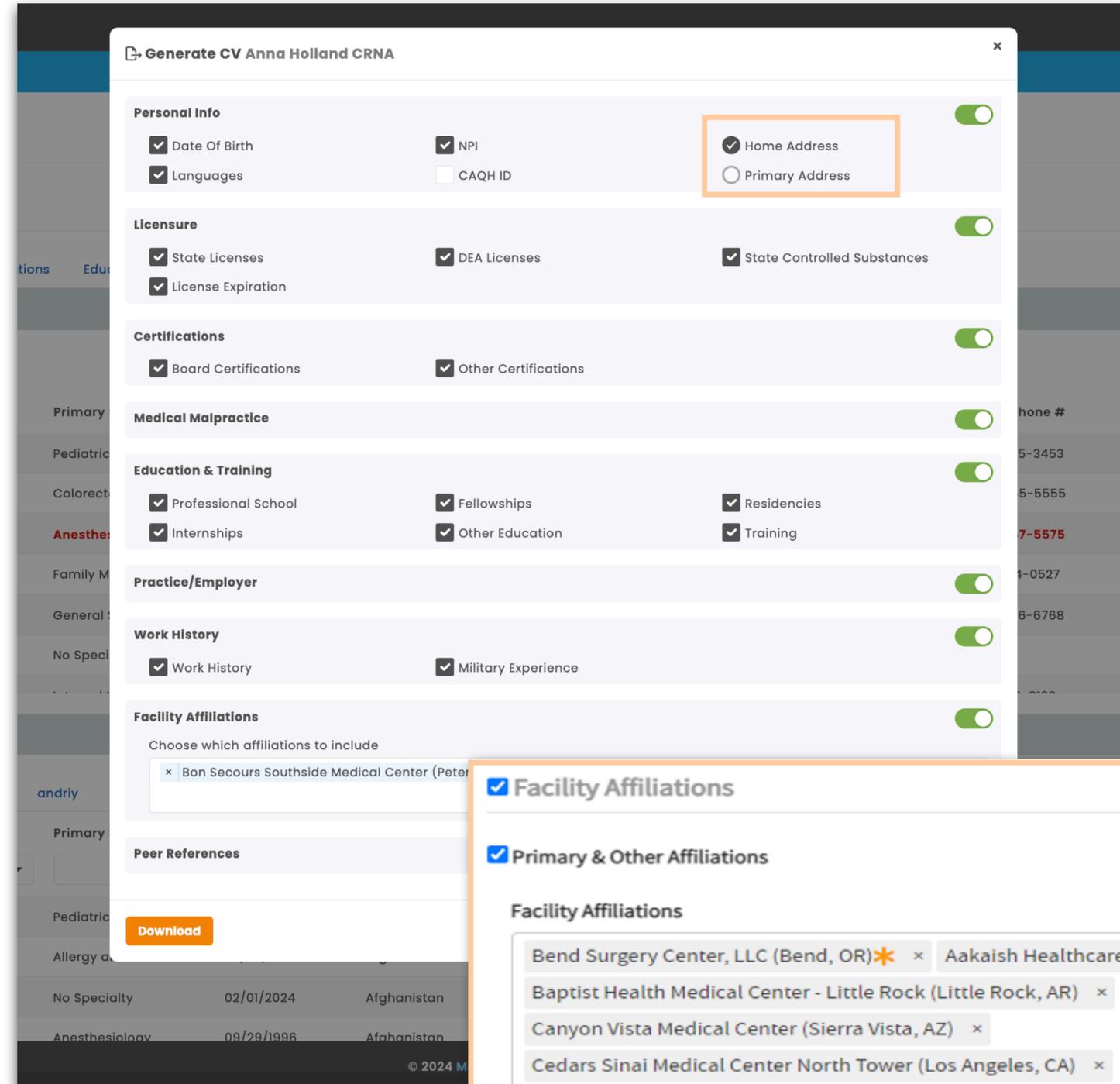
Fax #

## CV Feature Tips (V2)

In V2, you'll notice a slight change in terminology. While the selection works the same way, the address is pulled from the facility marked as the Primary Practice Address in the profile. The label in V2 has been simplified to "Primary Address", as shown in the example below.

You can also choose which Facility Affiliations are included on the CV. These are pulled from the Facility Affiliation section of the provider profile and appear as a list with an 'x' next to each entry. To exclude an affiliation, simply click the 'x' to remove it from the CV.

**Pro Tip:** The key to generating a complete and accurate CV is maintaining a detailed provider profile. The more up-to-date the information, the more robust the final CV output will be.

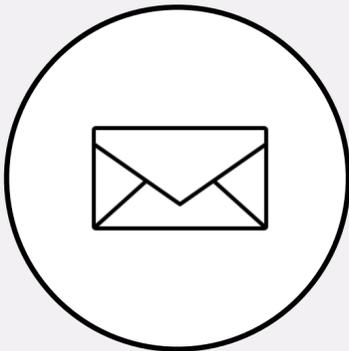


For additional questions or further training,  
contact the Modio Team:

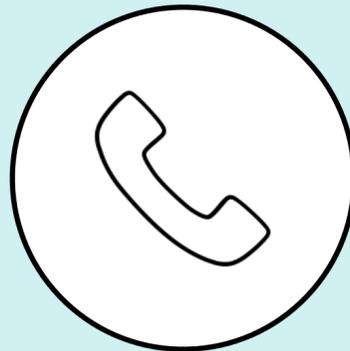
---



**Online:**  
Live Chat Support



**Email:**  
[support@modiohealth.com](mailto:support@modiohealth.com)



**Phone:**  
844.696.6346