



Tip Guide: Facility Master Record & Location Management

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Click [here](#) to Watch a 45-minute-deep dive into the Facility Master Record with several of our OneView® experts!

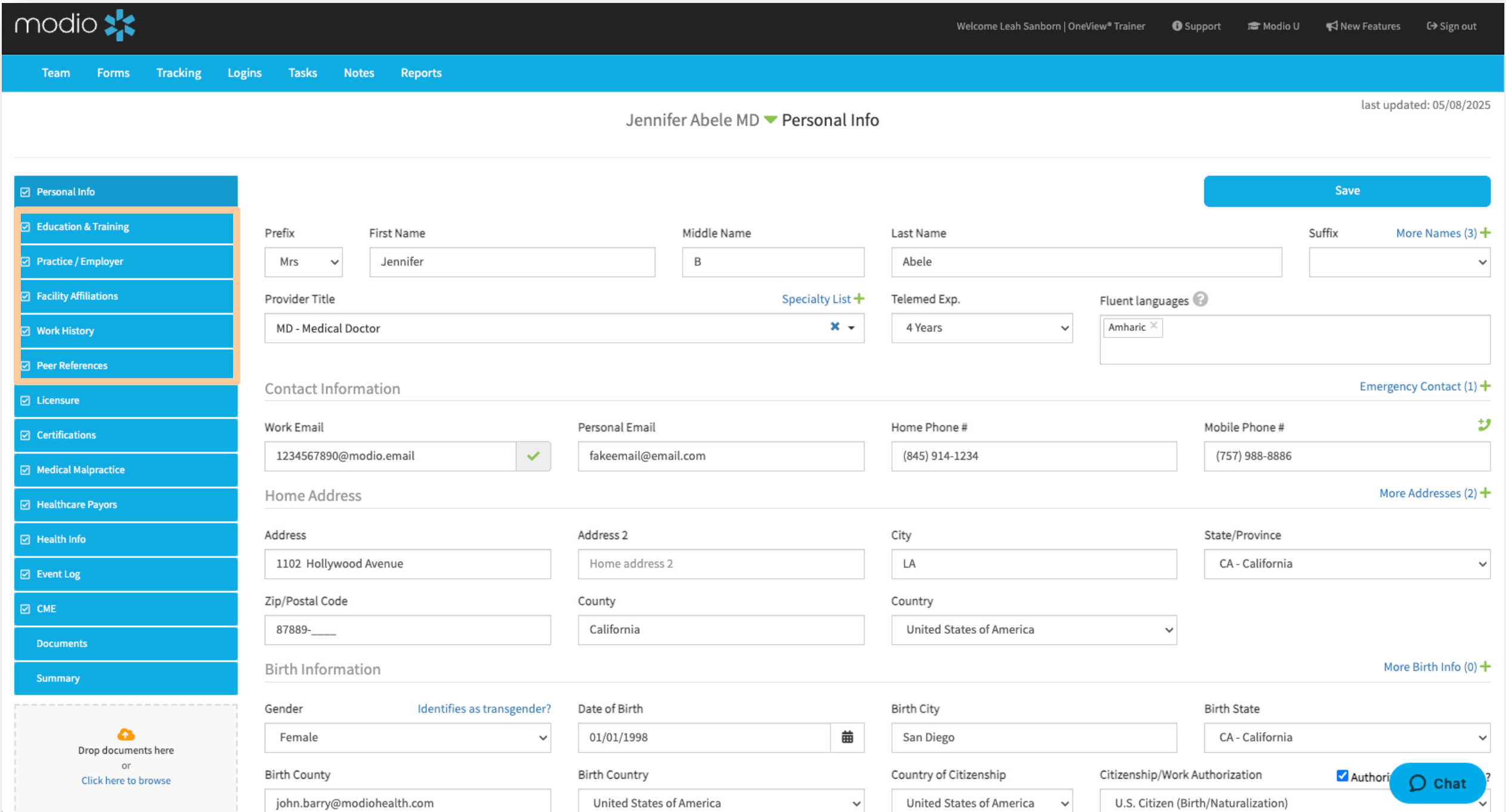
What is a Facility Master Record and how is it created and managed?

Facility Master Records are the unique location-based database entries that are used to build out a provider's profile. These master database records represent the physical addresses & service locations that a provider may practice at and/or are currently/ previously affiliated with. Facility Master Records are created in our OneView® master database and once established, these location records will be available for your team's use within OneView®.

The Facility Master Records correspond to & are added by the Coordinators on your Team to the below sections within your provider profiles:

- *Education & Training*
- *Practice / Employer*
- *Facility Affiliations*
- *Work History*
- *Peer References*

You can request a **Facility Master Record** creation by sending the pertinent data points to support@modiohealth.com.



Personal Info

Education & Training

Practice / Employer

Facility Affiliations

Work History

Peer References

Licensure

Certifications

Medical Malpractice

Healthcare Payors

Health Info

Event Log

CME

Documents

Summary

Five sections of your provider profiles are location based.

Two of those sections; **“Practice/Employer”** and **“Facility Affiliations”** – data entries must be added through the Master Record.

See the next pages for a how-to on the Facility Master Update report. Have additional locations added to the master record by submitting any edits or changes to existing locations by using this report.

Step 1 – Type the address into the text box. A list of potential matches will appear in a dropdown for you to select from. If the address does not generate a match, then try to search by name or keyword.

Step 2 – If you see your location in the dropdown select it by clicking once.

Step 3 – If you can’t find a match for your location after searching by address and key words, a message will appear in blue.

Step 4 – Have the new location quickly added to our database by the support team via Support@modiohealth.com.

Jennifer Abele MD Practice / Employer

Add Practice/Employer for Jennifer Abele MD

Current Practice/Employer Name *

100 Health Park

Avista Adventist Hospital
100 Health Park Dr, Louisville, CO 80027

Memorial Healthcare Family Medicine - Health Park
100 Health Park Dr, Ste 101, Owosso, MI 48867

Office Type *

Practice/Employer Type

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

Staff Category

Select...

List this Practice/Employer in:

Practice/Employer Only

Patient Age Range

Patient Type

Accepting new patients?

Case Load

Dwayne Johnson MD Practice / Employer

Add Practice/Employer for Dwayne Johnson MD

Current Practice/Employer Name *

100 Main street

Don't see the facility name listed? Email updates@modiohealth.com to add a master record.

Office Type *

Practice/Employer Type

Start Date

mm/dd/yyyy

End Date

mm/dd/yyyy

Staff Category

Select...

List this Practice/Employer in:

Practice/Employer Only

Patient Age Range

Patient Type

Accepting new patients?

Case Load

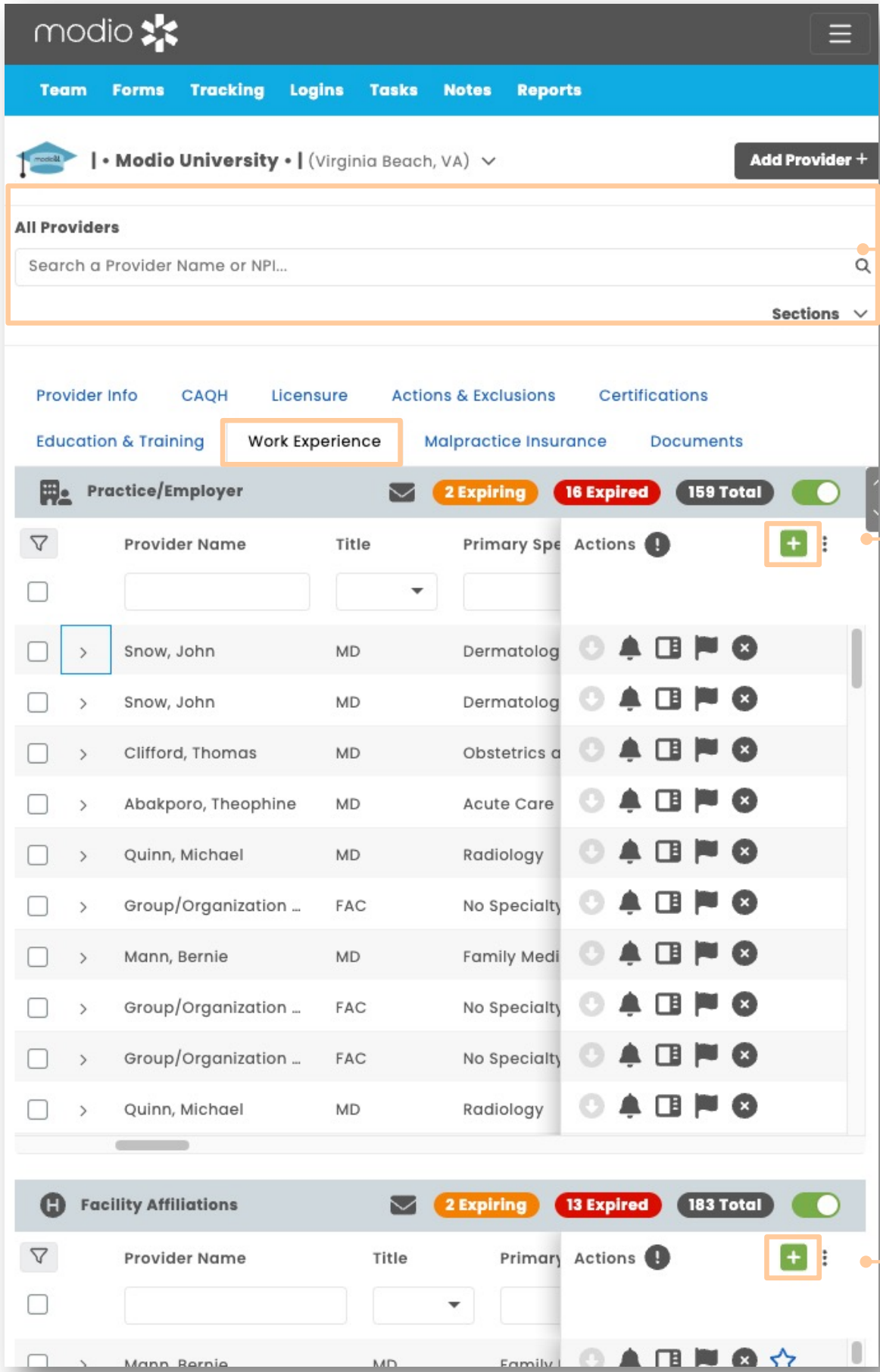
Credentialing Dates

Best Practice Tip #1 – Best practice is to always add locations from the Facility Master Record. The system will give you an option to add a location manually. If you add a location manually in either the “Practice/Employer” section or the “Facility Affiliations” section, you may run into issues in the future. These locations are connected to Reporting, Forms, Payors, Tracking and more!

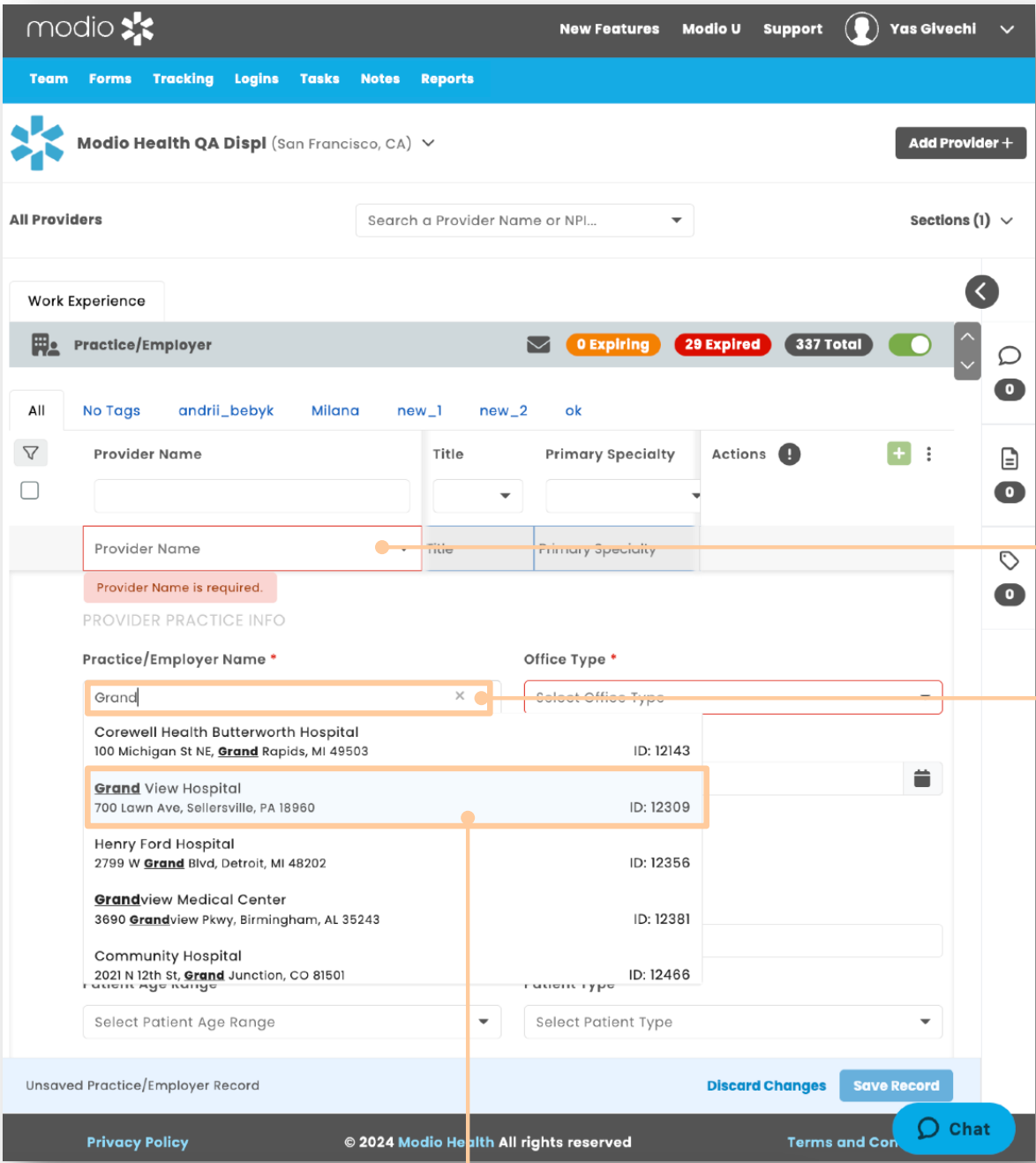
Best Practice Tip #2 - Education & Training and Work History sections are location based. Best practice is still to search the facility master record for existing locations, but it is OK to add data manually to these 2 sections.

Best Practice Tip #1 – Best practice is to always add locations from the Facility Master Record. The system will give you an option to add a location manually. If you add a location manually in either the “Practice/Employer” section or the “Facility Affiliations” section, you may run into issues in the future. These locations are connected to Reporting, Forms, Payors, Tracking and more!

Best Practice Tip #2 - Education & Training and Work History sections are location based. Best practice is still to search the facility master record for existing locations, but it is OK to add data manually to these 2 sections.



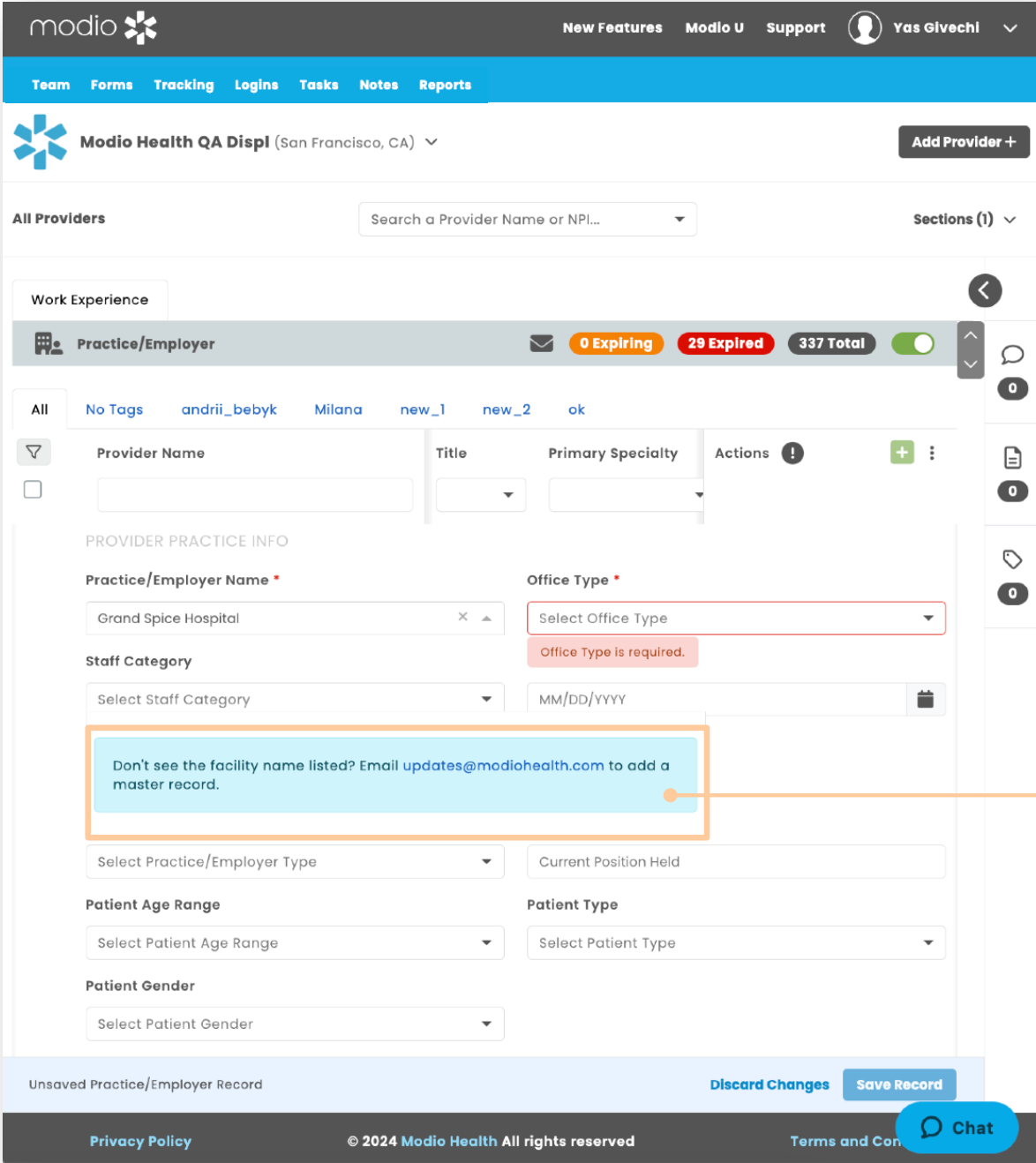
Location-based data can be added as shown here on y our OneView V2 Dashboard. You can add this in **Single Provider View** or staying in **All Provider** view.



Step 1 - If you are in **individual provider** view, skip to step 2. If you are in grid view, start by searching for the provider's first or last name, you want to enter the record for.

Step 2 - Type the address into the text box. A list of potential matches will appear in a dropdown for you to select from. If the address does not generate a match, then try to search by name or keyword

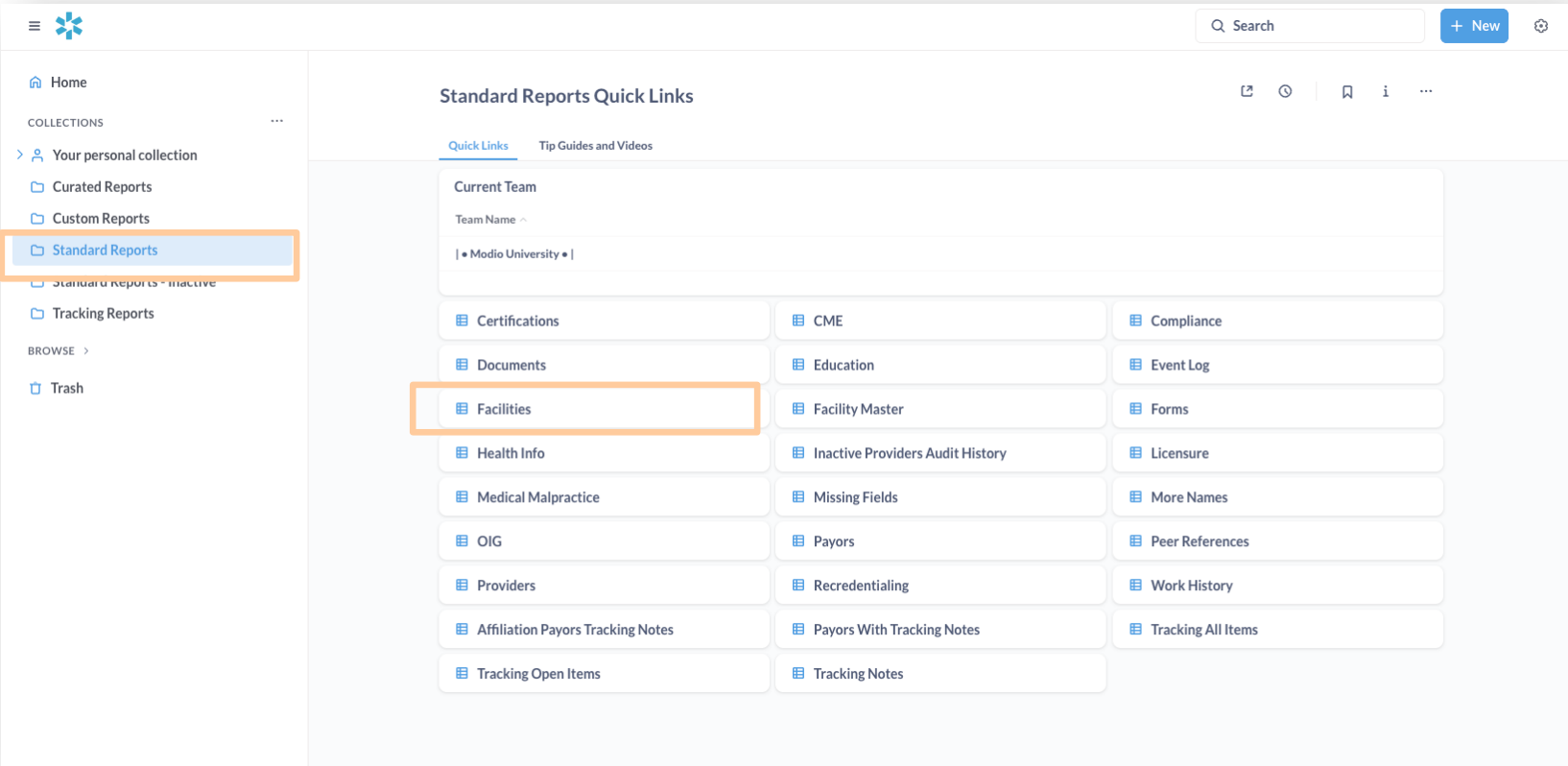
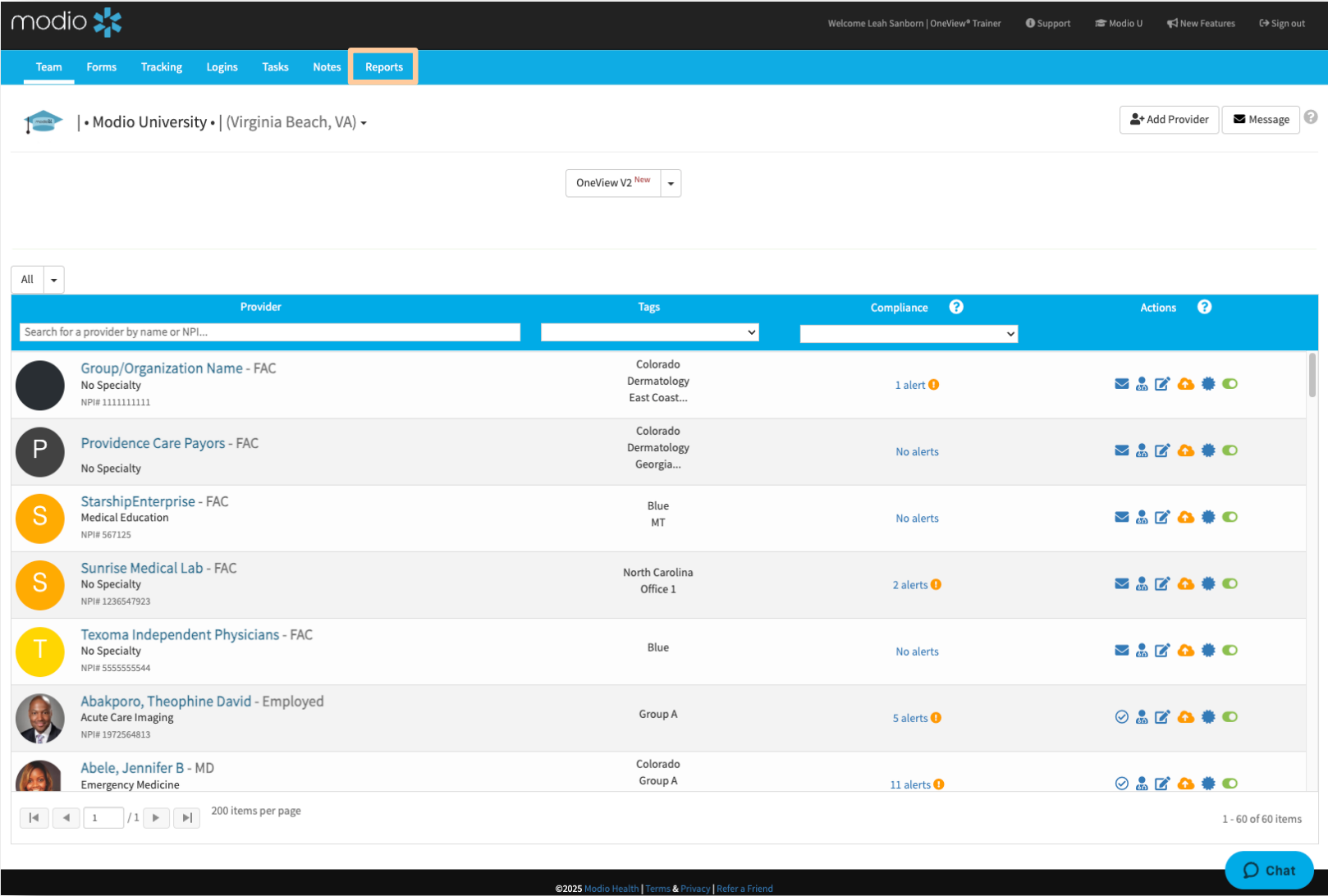
Step 3 - If you see your location in the dropdown select it by clicking once.



Step 4 - If you can't find a match for your location after searching by address and key words, a message will appear in blue.

Step 5 - Have the new location quickly added to our database by the support team via Support@modiohealth.com

Step 6 - Once the location has been added to the record, navigate back to this original data entry and add it from the drop down.



Report: Facilities

- Provider Focused
- Used to QA Provider Profiles

Outcome: All unique locations associated with any provider on your team roster.

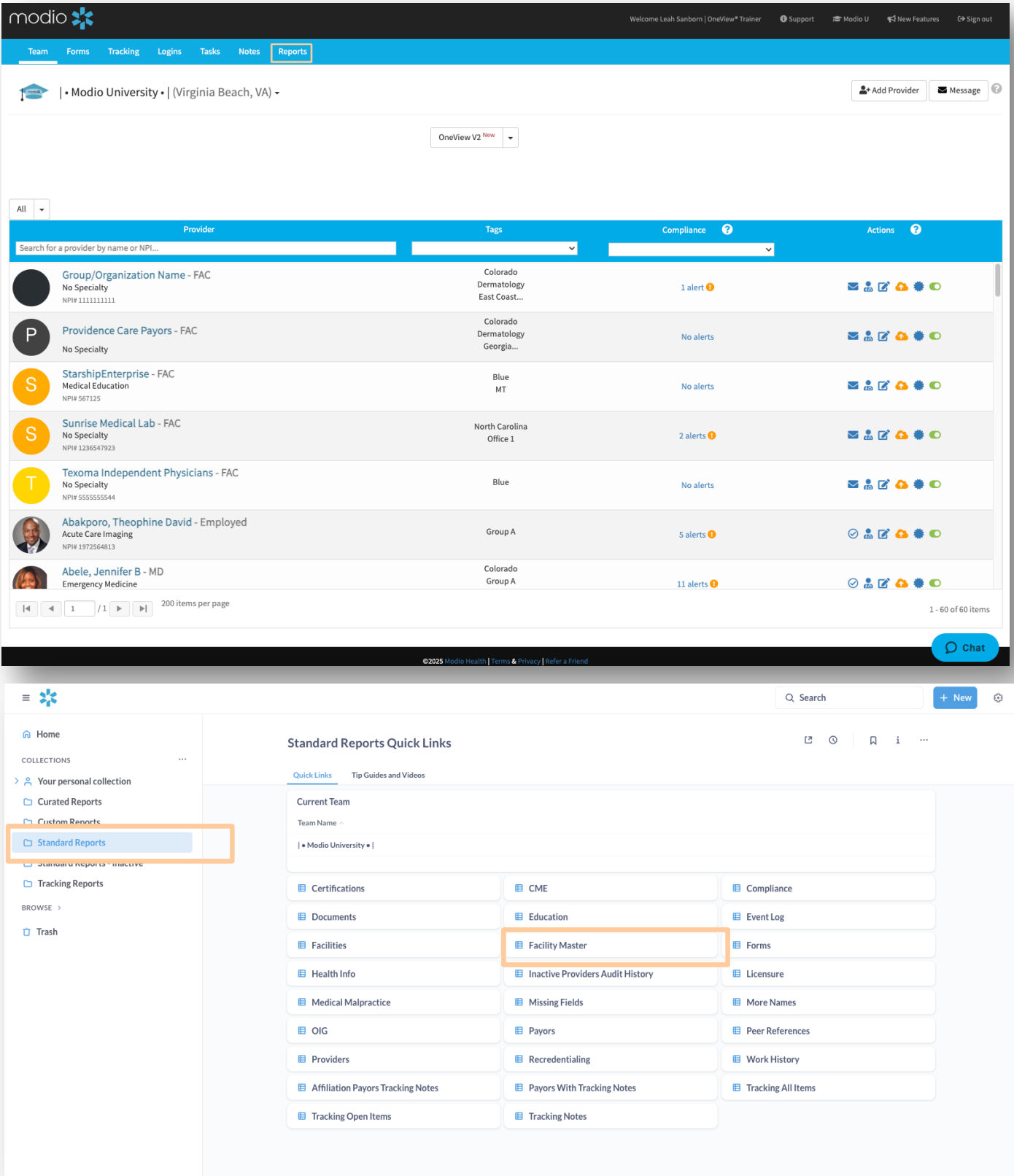
Use case example: View all your locations at a provider level. This Includes:

- locations that were added manually
- Address Info from Master Record if box is either checked or unchecked
- Locations that were added correctly through the Facility Master Record
- This report will not include Education & Training or Work History locations

See the next pages for a deep dive into the **Facility Master Update Report**.

The screenshot shows the 'OneView DW / Facilities' report table. The table has columns for 'Provider ID', 'Facility ID', 'Facility Name', 'Last Name', 'First Name', 'Work Email', 'Provider Type', 'Primary Specialty', 'Provider NPI#', 'CAQH ID', and 'Start Date'. The table lists various facilities associated with providers, including 'One Medical - 02-08 Cobble Hill', 'Jamaica Hospital Medical Center', 'Active Family Healthcare', 'Sentara Medical Center', 'Meru Health Medical California, PC', 'Test Record', 'Eastern New Mexico Medical Center', 'Practice A', 'EVMS Advanced Gynecological Surgical Center', 'Medexpress Urgent Care - Parkersburg', 'Jordan Valley Community Health Center', 'Fake Location', 'Active Family Healthcare', 'Ascension St Joseph - Chicago', 'Rogers Memorial Hospital - Oconomowoc', 'KNR Therapy', 'No Facility Affiliations', 'Rogers Memorial Hospital - Oconomowoc', 'Sentara Princess Anne Hospital', 'Northwell - North Shore University Hospital', 'CCSN Behavioral Health LLC', 'Cedars Sinai Medical Center North Tower', and 'Penn Highlands Brookville'. The table is filtered by 'Provider ID' and 'Facility ID'. A 'Filter' button is visible at the top right. The bottom of the table shows 'Showing 341 rows' and '3.6s'.

Example of the Facilities Report. The locations are shown by provider. This is very helpful if you want a way to sort or view each location a certain provider is assigned to.

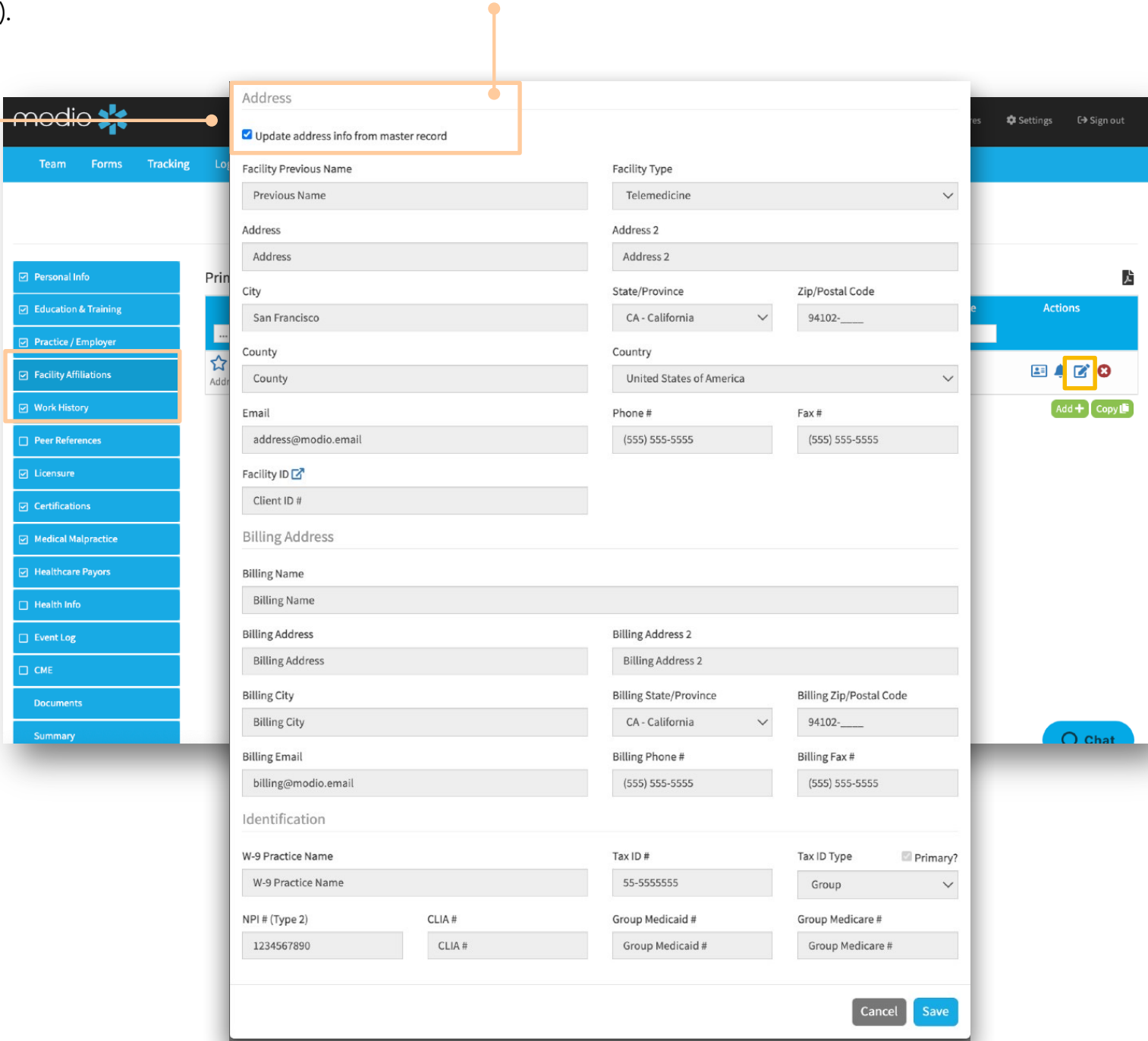


Indicator in OneView: When the facility is added correctly the check boxes are checked in blue. This blue check keeps your location connected to the Facility Master Record. If the box has been unchecked – the facility is not being pulled from our master record or it was not added correctly (a manual entry).

Outcome: All unique locations found within your provider profiles that are associated with the master database.

Use case example: View all locations that are stored in any of your provider profiles and are part of the Facility Master Record. Click the pen and paper icon and then scroll to the section labeled Address.

- These locations must have the “Updated address info from master record” box selected to be part of this report
- This report will not include Education & Training or Work History locations



Report: Facility Master Update

- Location/Facility Focused
- Used to QA Locations and Facilities

Once you have run the Facility Master Update report you can start to make edits or changes. Follow these steps to start updating your locations:

Step 1 – Run the Facility Master Update Report from the standard Reports folder

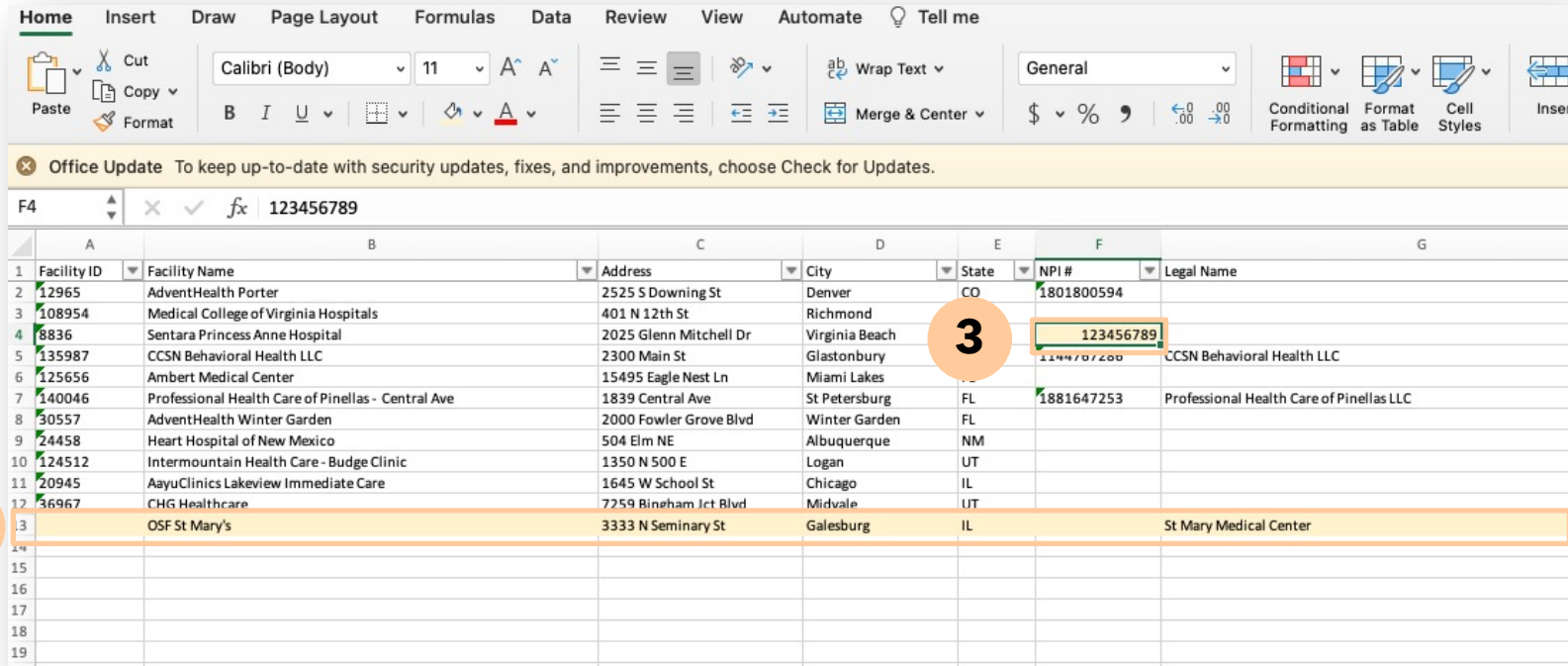
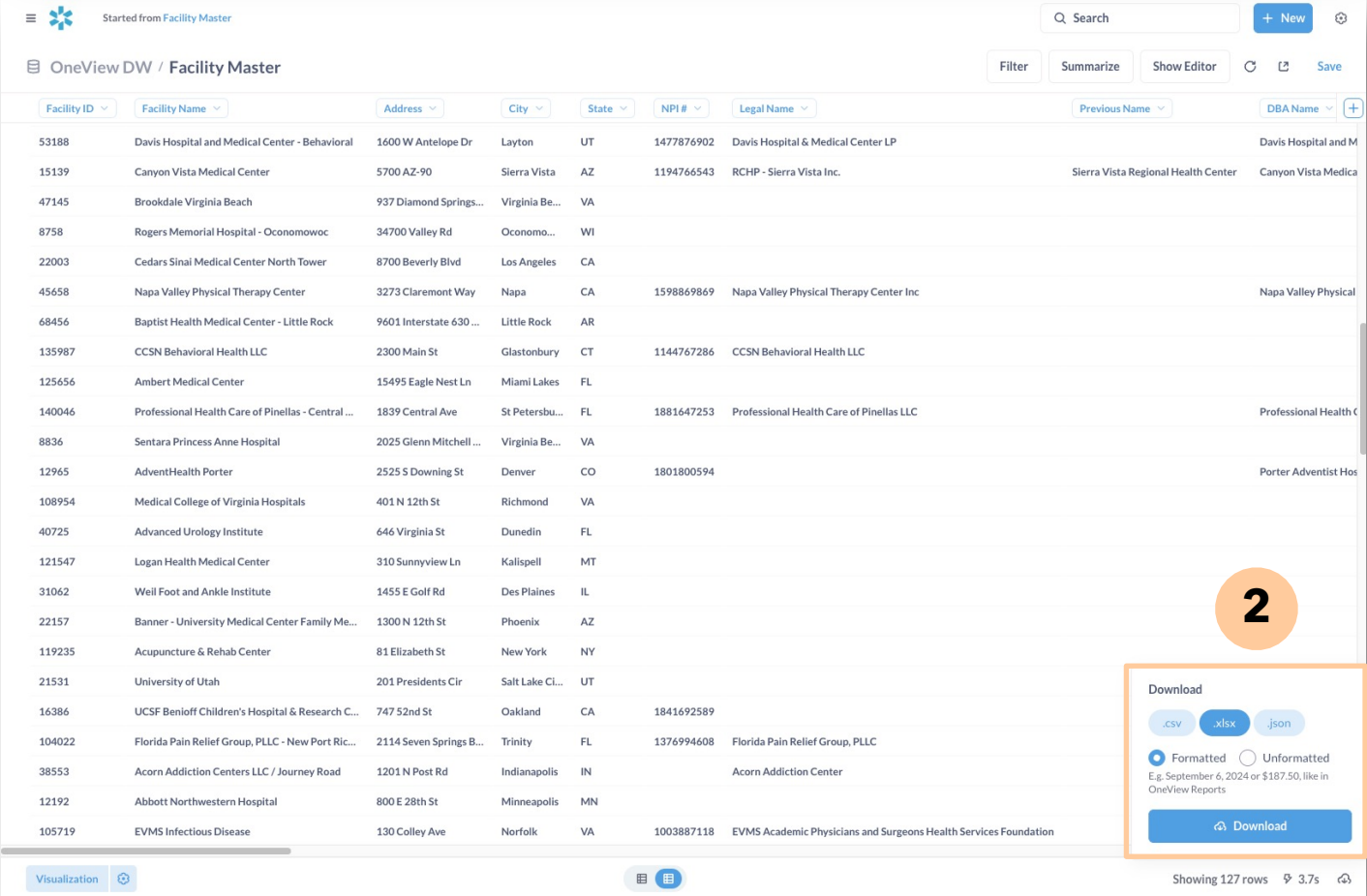
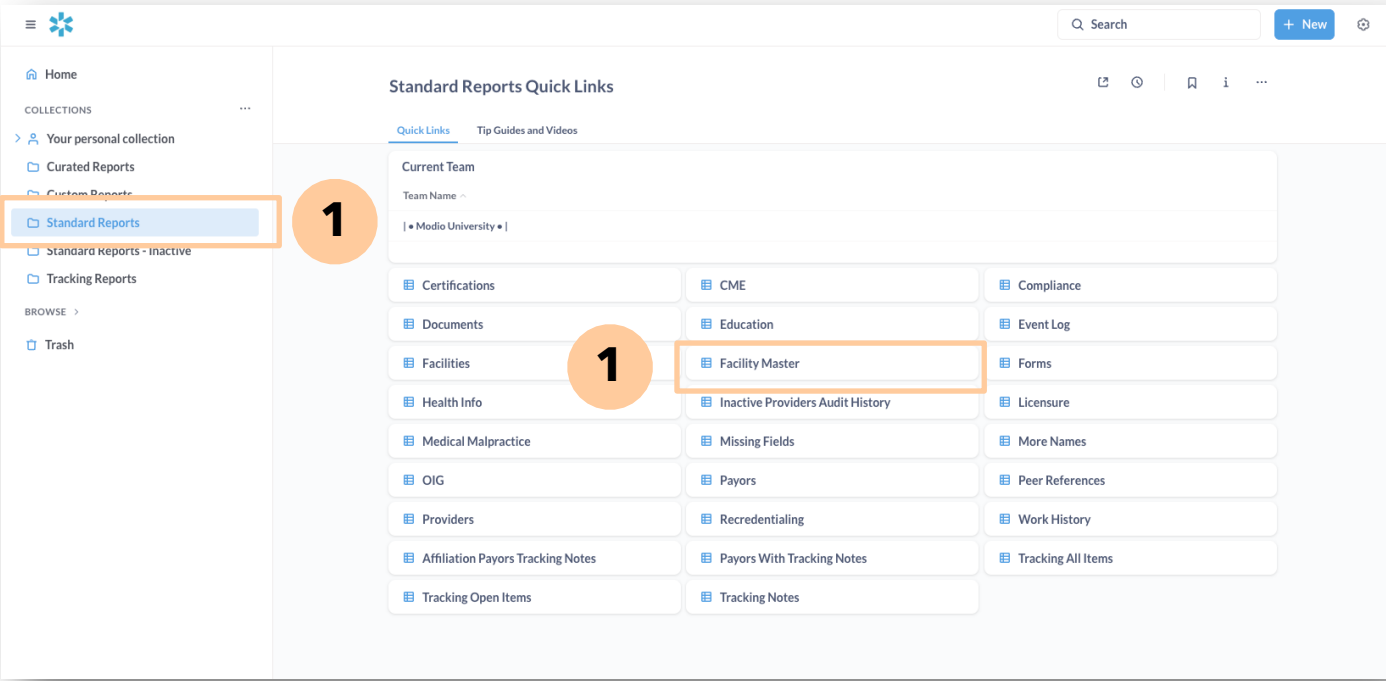
Step 2 – Important! Export and Save the report as an Excel Workbook (*.xlsx)

Step 3 – Add or update any data for your existing locations and highlight those edits in yellow

Step 4 – Add any new locations that are not yet a part of the Facility Master Record and highlight in yellow at the bottom of the report (The Facility ID column will remain blank for new facility requests)

Step 5 – Email the Excel document to Support@ModioHealth.com

Step 6 – Once the location has been added to our record, navigate back to the original data entry and select it from the drop down. You want to ensure that the box is checked to update the address from the **Facility Master Record** as shown in the figure on page 8.



Use this report to make any updates or edits to your current locations. If you have a location that is not currently part of the Facility Master Record, add the information to this report, highlight it in yellow and email it to Support@modiohealth.com

Best Practice Tip #1 –

Run this report every month and review to ensure all locations are up to date.

Best Practice Tip #2 –

When filling out the address, if the billing and/or mailing address is the same as the physical location - best practice is to include that on the report.

Submitting complete data now will lead to success when using the Forms feature in the future!

Note: Report with Edits/Changes/New locations you added highlighted in yellow and saved as (*.xlsx)

Note: Original Report (with no highlighting)

AutoSave

Off

facilities_40073_2022-03-17

Search (Alt+Q)

Leah Sanborn

FileHomeInsertPage LayoutFormulasDataReviewViewHelp

Undo

Redo

Paste

Format Painter

Cut

Copy

Clipboard

Font

Calibri

11

A⁺

A⁻

B

I

U

Font Color

Background Color

Alignment

Left

Center

Right

Justify

Wrap Text

Merge & Center

Number

General

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0.00

100%

Conditional Formatting

Format as Table

Normal

Bad

Good

Neutral

Cells

Insert

Delete

Format

Editing

AutoSum

Fill

Clear

Sort & Filter

Find & Select

Analysis

Analyze Data

Sensitivity

Sensitivity

Comments

Share

POSSIBLE DATA LOSS Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

Don't show again

Save As...

X8

123456

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
1	Facility ID	Facility Name	Previous Facility Name	Legal Name	DBA Name	W-9 Name	Abbreviation	Client ID	NPI #	Facility Type	Tax ID	CLIA #	Address 1	Address 2	City	State	County	Country	Zip	Phone	Fax	Email	Medicaid	Medicare	Billing Name	Billing Address	
2	22003	* Medical Center North Tower (Cedars Sinai)										123456789	Y	8700 Beverly Blvd	Los Angeles	CA	Denver	USA	90048		123456789						
3	43955	24 Hr Fitness										123456789	Y	1610 Crane Ct	San Jose	CA	Denver	USA	95112	(408) 490-3019			123456				
4	33539	A Merryland Operating LLC							1972848307		45-4213653	123456789	Y	1704-06 Mermaid Av	Brooklyn	NY	Denver	USA	11224	(718) 265-091	(718) 265-6319			123456			1704-06
5	12192	Abbott Northwestern Hospital										123456789	Y	800 E 28th St	Minneapolis	MN	Denver	USA	55407	(612) 863-4000							
6	14188	Abrazo Arrowhead Hospital								Hospital		123456789	Y	18701 N 67th Ave	Glendale	AZ		USA	85308	(623) 561-1000							
7	39256	Active Family Healthcare							1063764462	Hospital	46-0743093	123456789	Y	919 W Canfield	Coeur d'Alene	ID		USA	83815		123456789					919 W Canfield	
8	34317	Advanced Allergy, Asthma & Sinus Center, PA							1619903358	Hospital	20-5003671		Y	2333 Whit Ste G	Hamilton	NJ	Mercer	USA	08619-194	(609) 584-921	(609) 584-9299			123456		Advanced	2333 Whit Ste G
9	40725	Advanced Urology Institute								Hospital			Y	646 Virgin Ste 701	Dunedin	FL		USA	34698								
10	34927	AKDHC, LLC - Sierra Vista								AKDHC, LLC dba Arizona Kidney Disease & Hyperten			Y	5555 Mesa Ste 100	Sierra Vista	AZ	Cochise	USA	85635-431	(520) 585-47	(520) 335-6498	244929	228479	AKDHC, LLC	PO Box		
11	110997	Albany Family Medicine											Y	391 Myrtle 4th Fl	Albany	NY		USA	12208								
12	42347	Albuquerque Indian Health Center											Y	801 Vassar Dr NE	Albuquerque	NM		USA	87106	(505) 248-401	(505) 248-7814						
13		Avista Adventist Hospital											Y	100 Health Park Driv	Louisville	CO	Denver	USA	80207	3031231236				123456	123456	AAH - 100	100 Health Park Driv
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File

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Insert

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Formulas

Data

Review

View

Help

Cut

Paste

Copy

Format Painter

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11

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A⁻

Wrap Text

General

Conditional Formatting

Format as Table

Normal

Bad

Good

Neutral

Insert

Delete

Format

Σ AutoSum

Fill

Clear

Sort & Filter

Find & Select

Analyze Data

Sensitivity

Undo

Clipboard

Font

Alignment

Number

Styles

Cells

Editing

Analysis

Sensitivity

POSSIBLE DATA LOSS

Some features might be lost if you save this workbook in the comma-delimited (.csv) format. To preserve these features, save it in an Excel file format.

Don't show again

Save As...

H9

Frequently Asked Questions

Q: I thought my facility was in the system, but I can't seem to find it. Are there other ways besides address and name I should try to search?

A: Try searching for the facility using a unique keyword or part of an address. For example, if you're looking for St Joseph Medical Center in Dallas, try searching "1717 J St" to narrow down the options.

Q: I tried all the searches, address, name, everything and I can't find my facility. What should I do?

A: Follow the steps outlined in this guide on Slide 8 and submit your request to support@modiohealth.com.

Q: My organization has a new facility that doesn't have an official name yet, but we need to have it entered in the system. Can we use a placeholder?

A: Yes, a placeholder name can be used, and it can be updated later when the official name is chosen.

Q: Does OneView® have a Primary Source Integration to verify a facility DEA?

A: Not currently.

Q: Can a location/practice be deleted?

A: To remove facilities from your Facility Master Update report, simply delete them from all provider profiles and they will no longer appear in the report. If you think you have a duplicate entry for a facility, please reach out to support@modiohealth.com. We are unable to completely delete facility records from our system, as they are accessible to all clients across our platform.

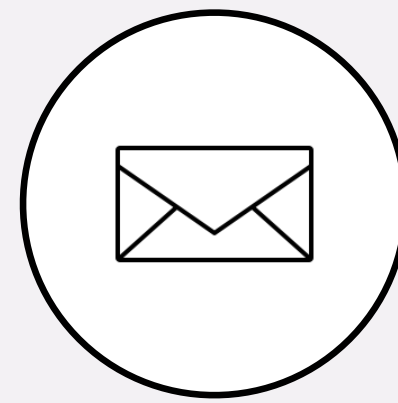
Q: How do I update a termed location?

A: <https://www.loom.com/share/db625f51b138401483a1304ff4b943b2>

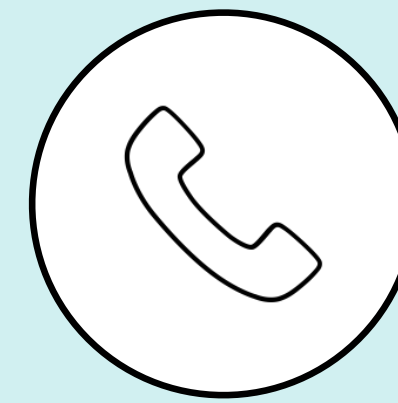
For additional questions or further training, contact the Modio Team via:



Online:
Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346