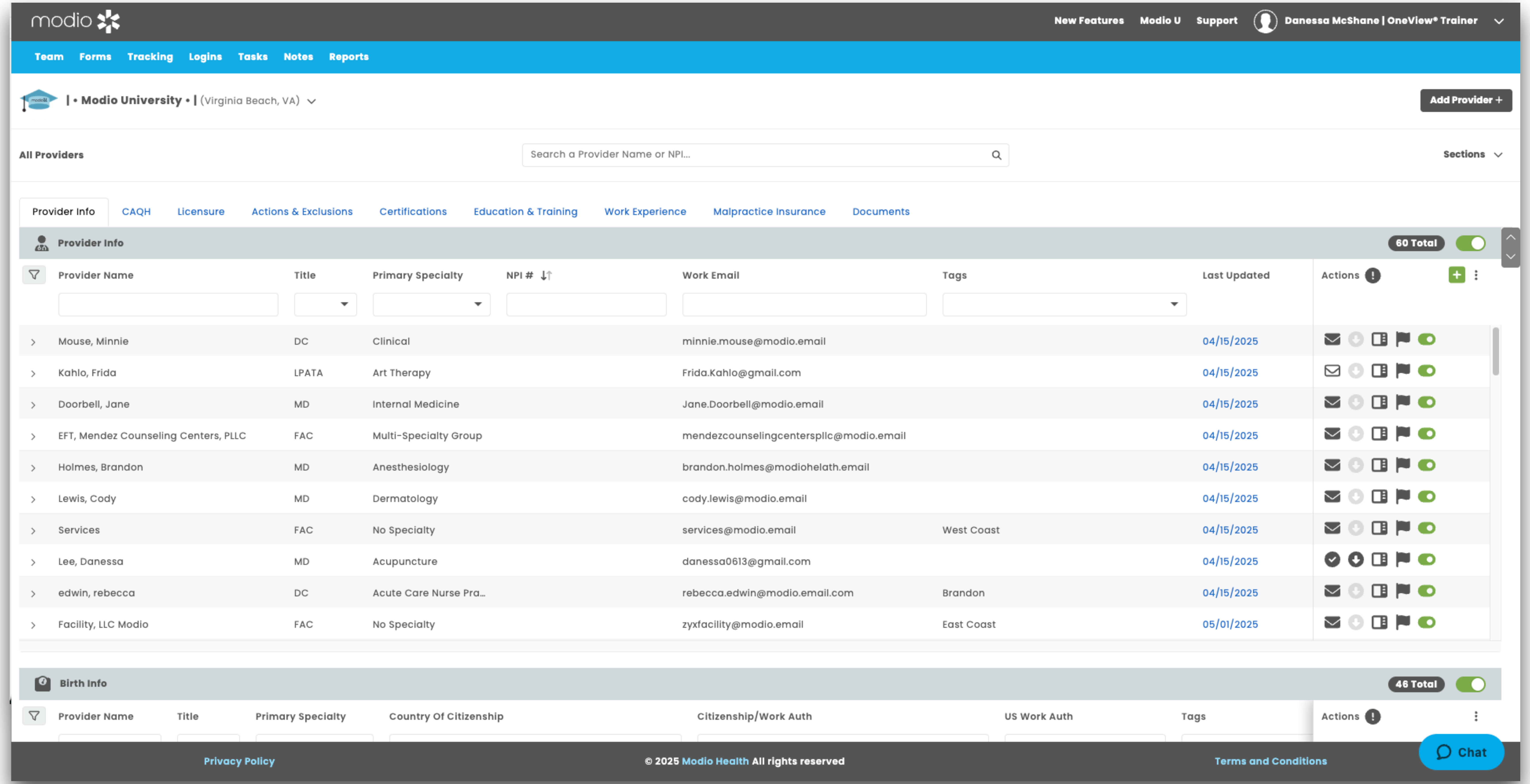
OneView®

Tip Guide: Getting Started in OneView V2

OneView V2

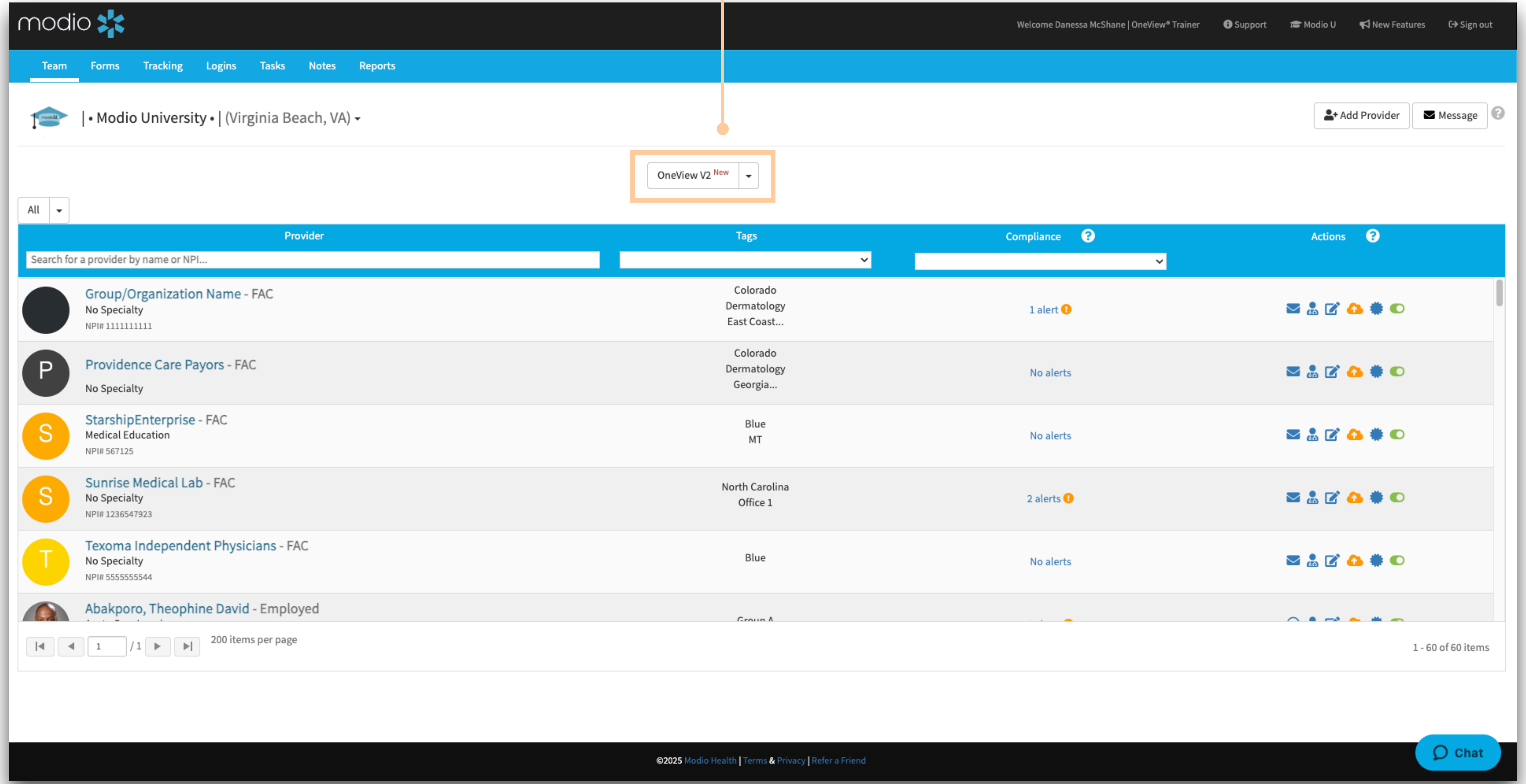
Our new optimized OneView V2 dashboard brings a fresh look and experience to credentials management. Built to save you time, you will now be able to manage your team of providers more efficiently and accurately than ever before. Everything you know and love about OneView is still here (including all your data) but our OneView V2 revamped technology will open access to new features and capabilities.



OneView V2 can be accessed from the Teams page.

Accessing OneView V2

The new features can be accessed via a button on the Teams page.



All **Provider View vs.** ***Single*** **Provider View**

OneView V2 can be used to view all providers in your team (All Provider View) or to view one provider's data at a time (Single Provider View).

All Provider View is helpful for managing compliance, searching for which providers are a part of a certain facility or practice, or seeing which providers are missing data. Any time you want to look across the full group of providers on your team, this is a good tool.

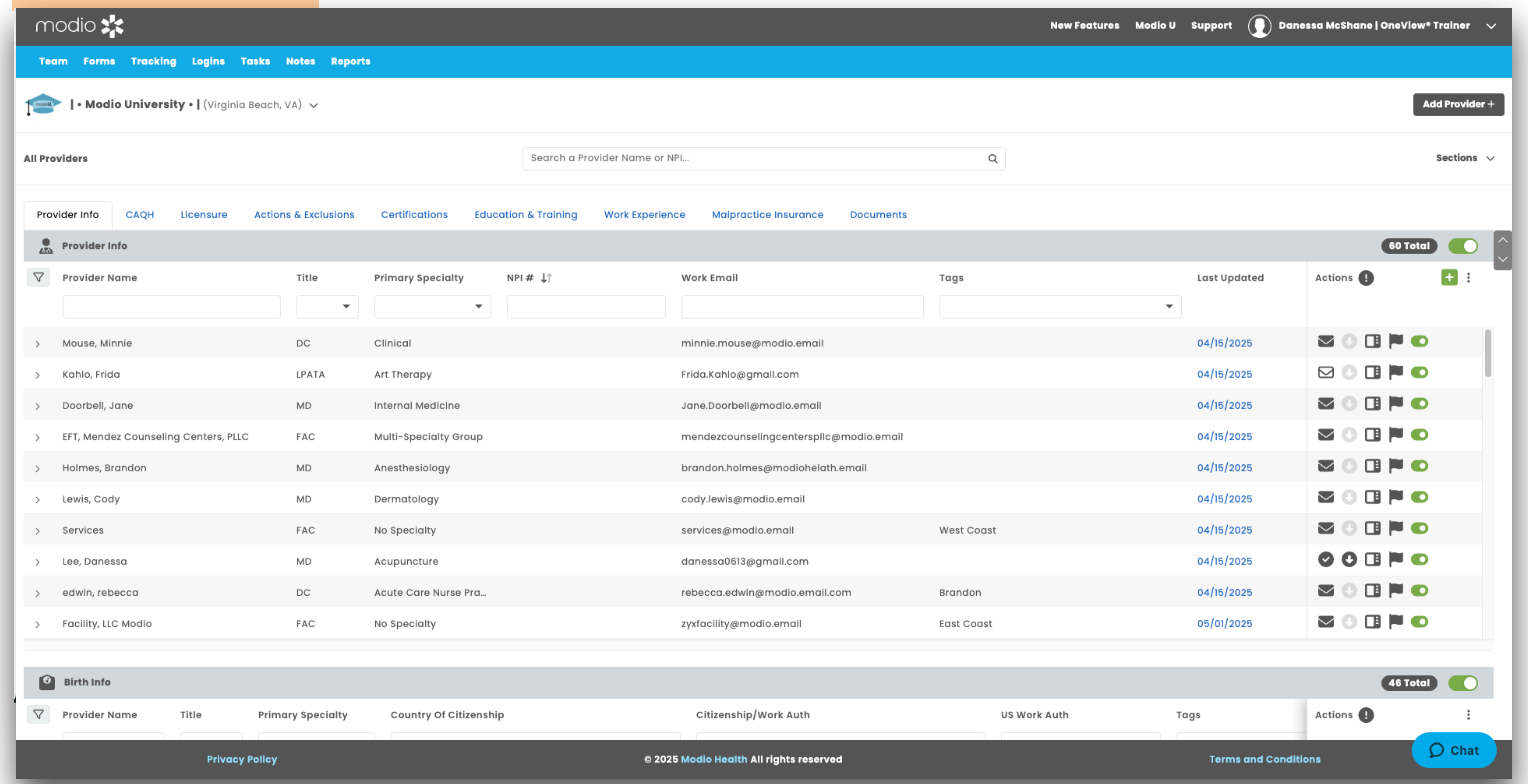
Single provider view lets you see just one provider at a time in the new OneView V2 format. This is like a provider profile and is helpful for if you are working on updating data for one specific provider.

You can use whichever works best for your workflow; most users use both throughout their day depending on what they are working on

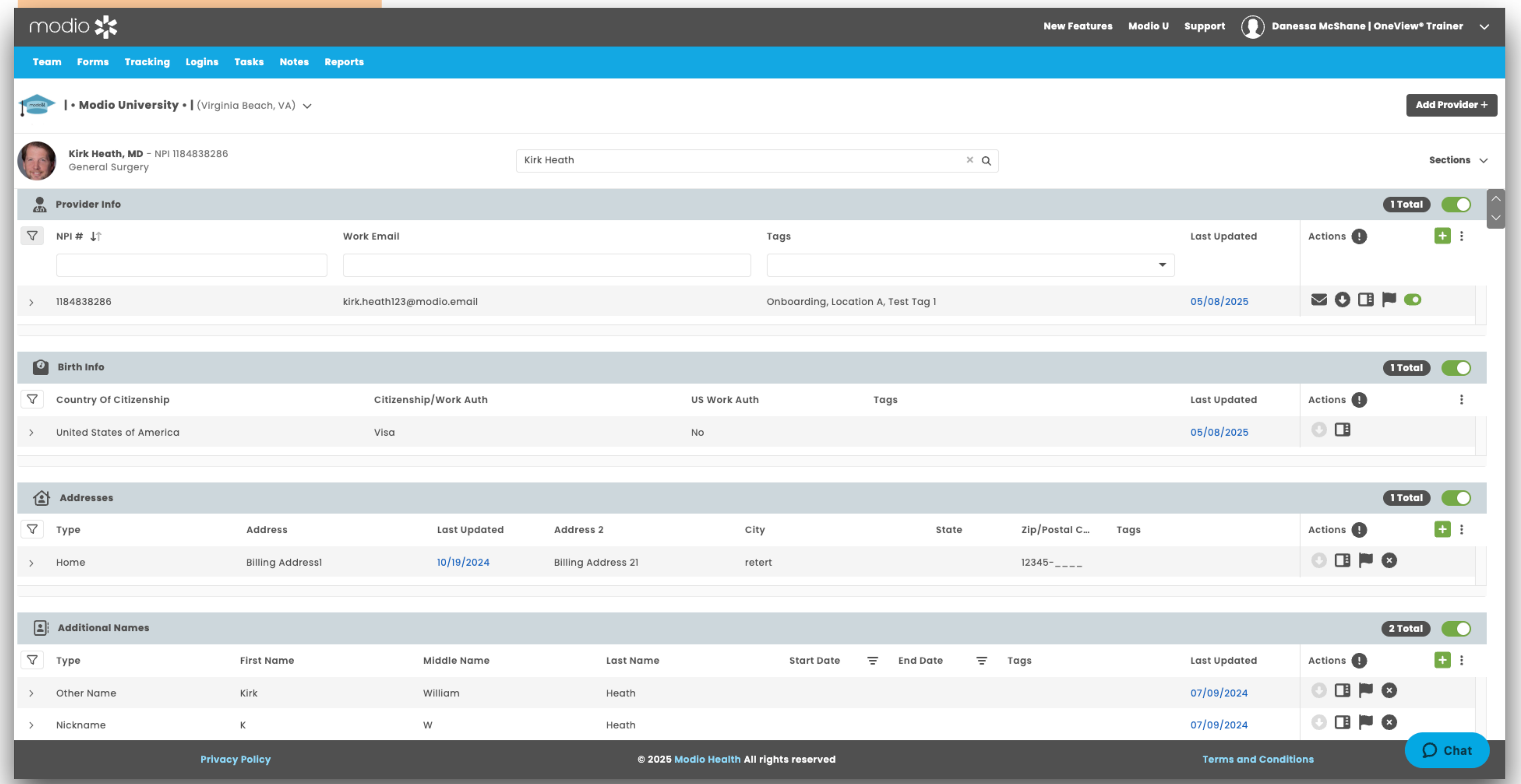
Customizing your view

One of the benefits of OneView V2 is it can be customized to each user's preferences. On the next pages of this guide we will review how to personalize V2 so you only see the data and sections you want.

All Provider View



Single Provider View

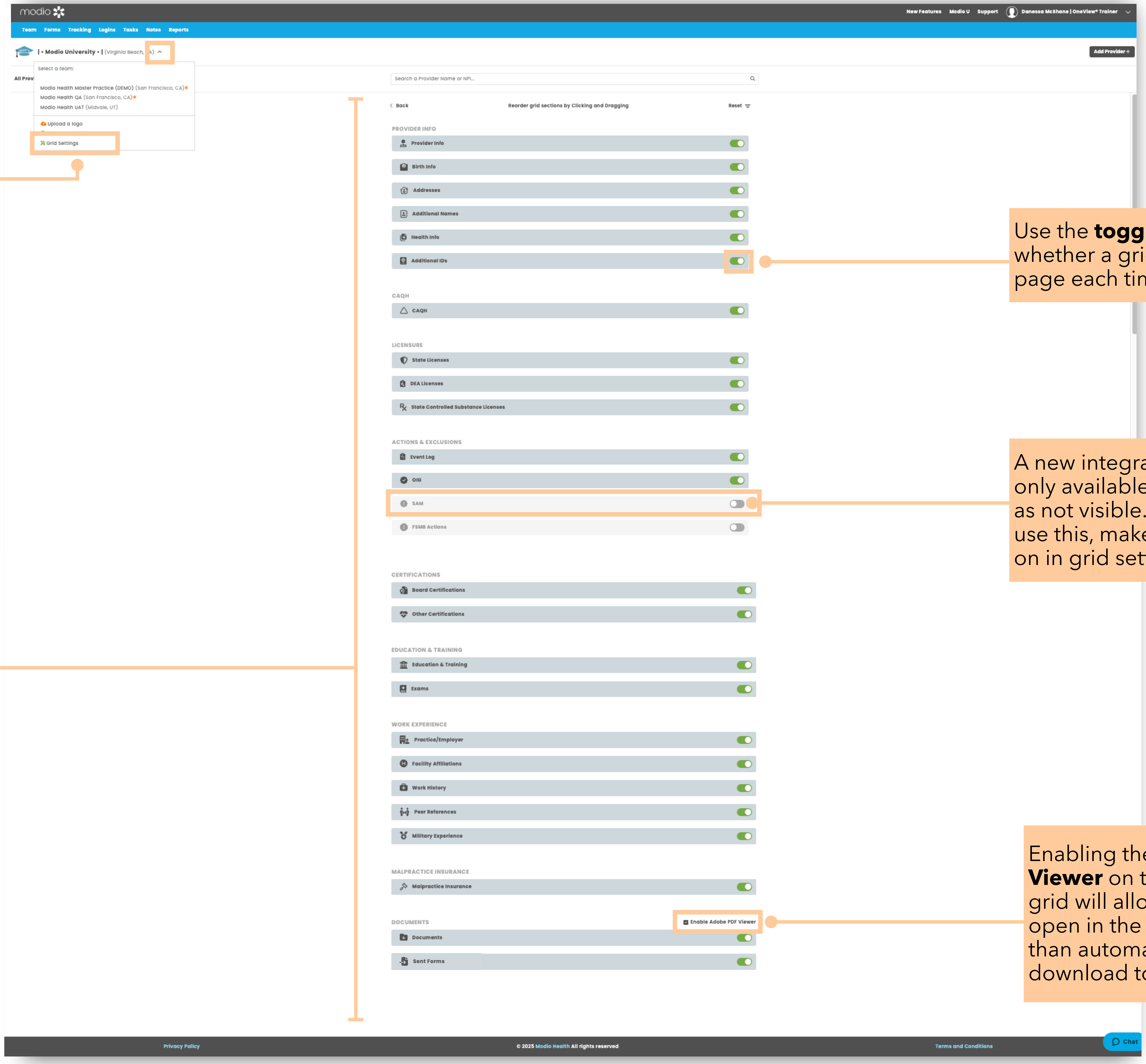


Personalizing Grid Settings

Using the Grid Settings menu, you can change the visibility and order of all grids in OneView V2. These settings are **sticky**, which means they <u>will be saved</u> every time you log in unless you choose to reset.

Access grid settings by clicking on your team's name at the top left and selecting **Grid Settings** from the dropdown.

You can **drag and drop** full sections into a different order, or just reorder one grid at a time.



Use the **toggle** to determine whether a grid is visible on the page each time you access.

A new integration for **SAM**, only available in V2, will default as not visible. If your team will use this, make sure to toggle on in grid settings.

Enabling the **Adobe PDF Viewer** on the documents grid will allow documents to open in the browser rather than automatically download to your computer.

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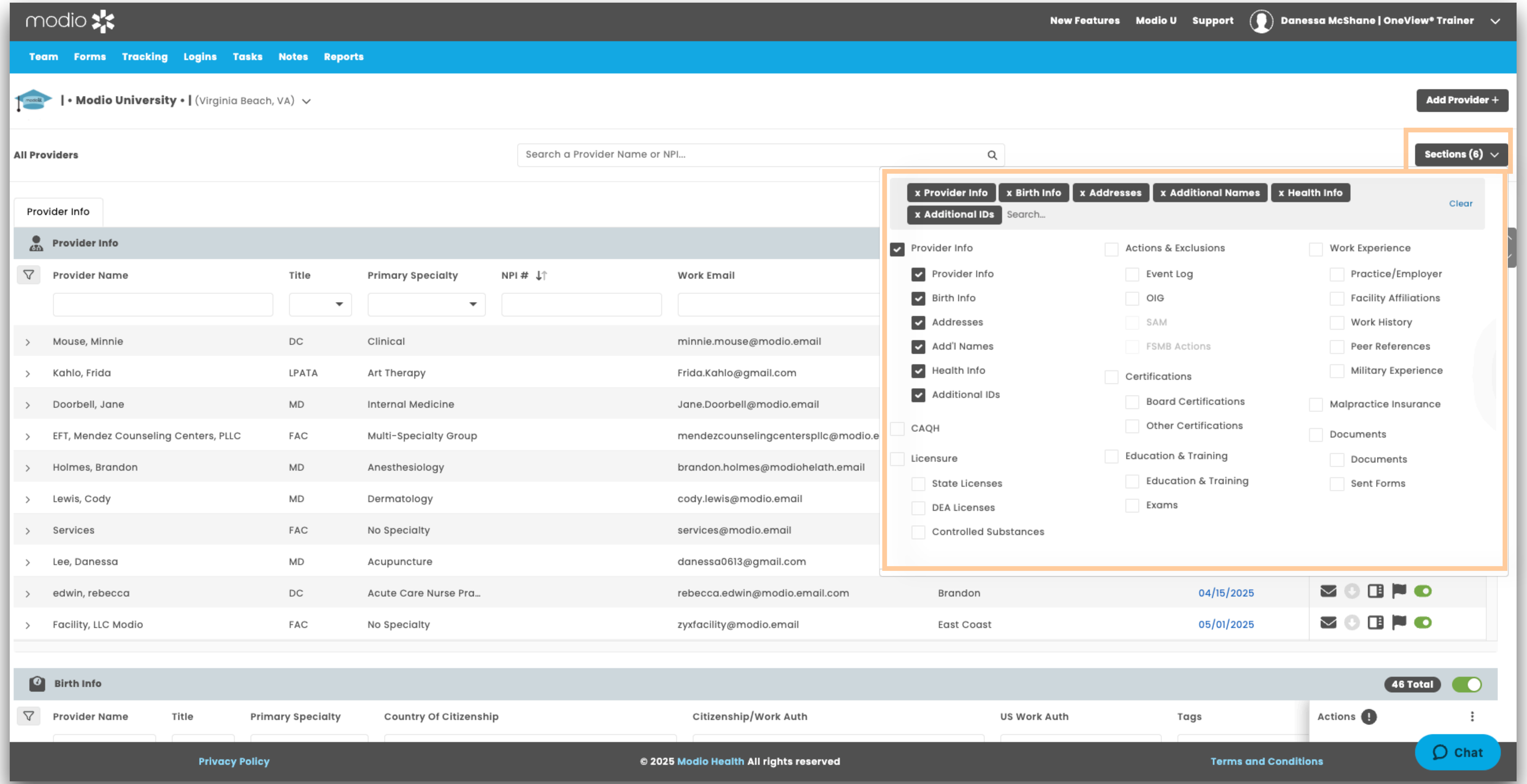
Filters

Use the **Sections Filter** to simplify your view. This is a key tool for filtering OneView V2 down to exactly what you are working on.

Note: This selection will reset every time you refresh the page



Click **Sections** to open our sections filter. Use this to see which credentialing grids you want visible or hidden on your dashboard. Check the box for the section (or sections) you are working on in real time to filter down what you see. This selection will reset every time you refresh the page.

Note: If you **disable** a grid in settings, it will appear greyed out, but you can still select and view it as needed through the sections filter.

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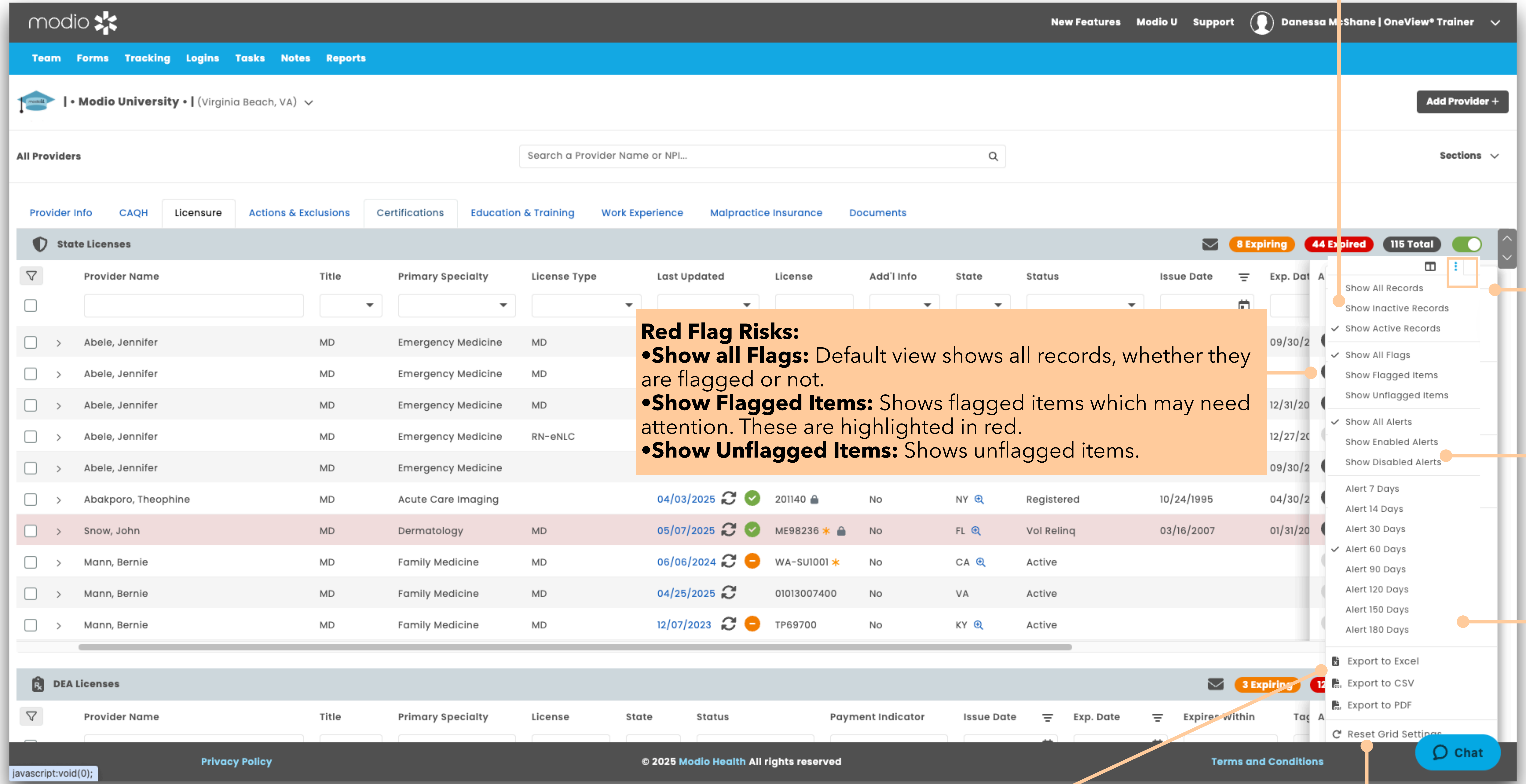
Personalizing your Grid Menu

Use the grid menu to set exactly what you want to see in each grid.

Provider Records View:
- **Show All Records:** Shows inactive and active records
- **Show Inactive Records:** Only view soft-deleted, inactive records
- **Show Active Records:** Default view, shows only active records

Note: Within the Provider Info grid, this filter determines if you see active or inactive providers on your team.



Red Flag Risks:
- **Show all Flags:** Default view shows all records, whether they are flagged or not.
- **Show Flagged Items:** Shows flagged items which may need attention. These are highlighted in red.
- **Show Unflagged Items:** Shows unflagged items.

Click the **three dots** to open the grid menu and customize your grid settings. Settings are unique to each grid. Keep in mind that these selections will be saved for you each time you log in, although choosing to view inactive records will revert to default view upon refresh.

Group Alert Actions: Select record visibility based on alert status. Default view is set to both enabled & disabled alerts. Your visibility settings are personal to you, but changes to alerts (i.e., silencing the bell) for each record will be visible by all team members.

Set it & Forget it: Set an alert interval based on your own monthly range preference (between 7 and 180 days).

Direct Export: Download reports as an Excel, CSV, or PDF document. Information in the export will match what displays in your grid including filters and grid menu selections.

Reset Grid Settings: Reset your custom settings to the Modio default.

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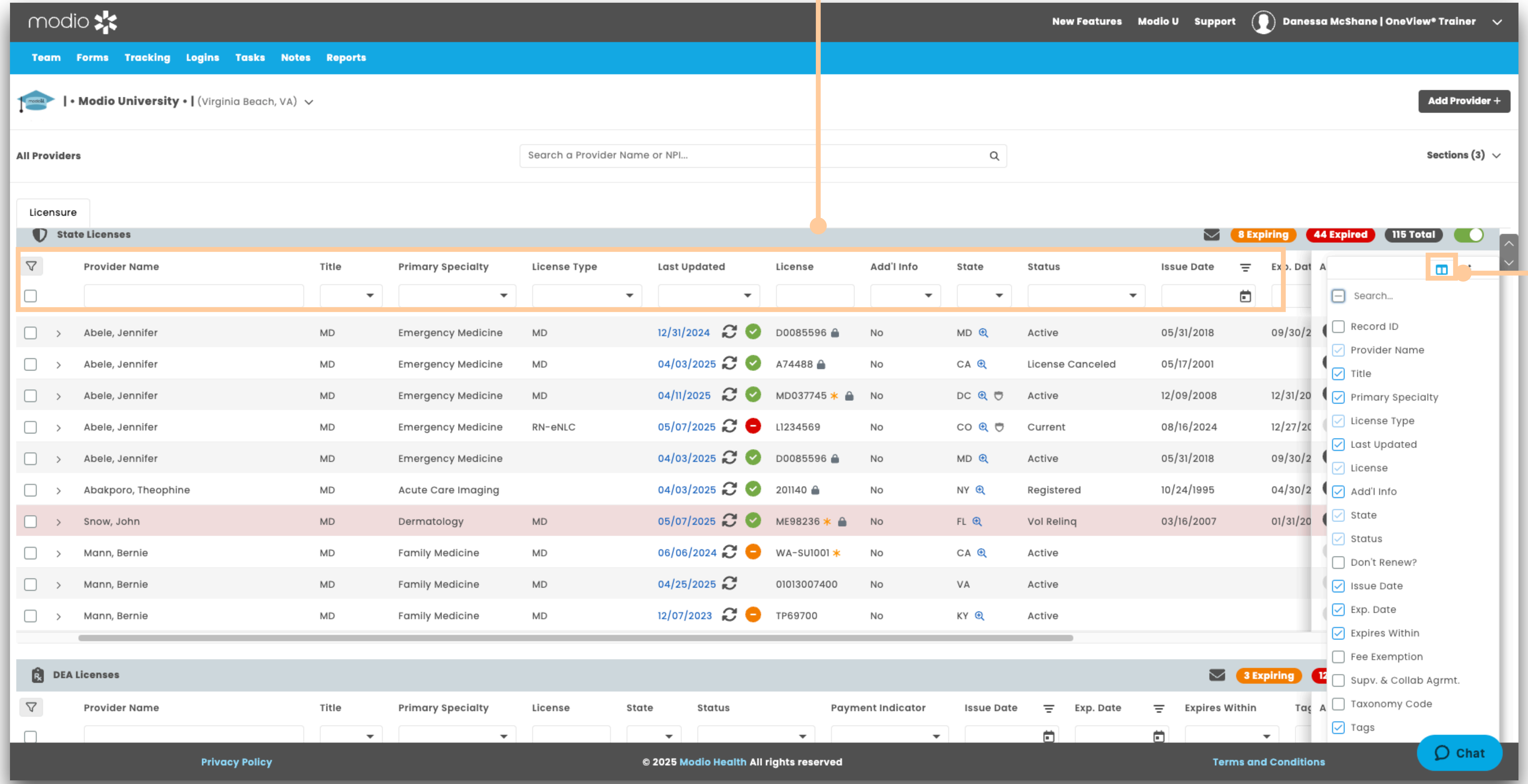
Resize and Reorder Columns:
Adjust your columns by selecting what you want to view first. This will help you maximize your screen-space and let you focus on exactly what you need to see. Just click, hold and drag the columns to organize your columns or click between columns to resize them.

Personalizing your Grid Columns

Adjust your grid columns to personalize your grid view.



Enable or Disable Columns:
Click on the column icon in the grid menu to adjust which columns you can see. Select what you want to view or hide using the checkboxes. This will help you maximize your screen-space and let you focus on exactly what you need to see.

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Getting Started: Features and Navigation

In the remainder of this guide, we will take a look at the most commonly used features on the new OneView V2 pages and how to use them.

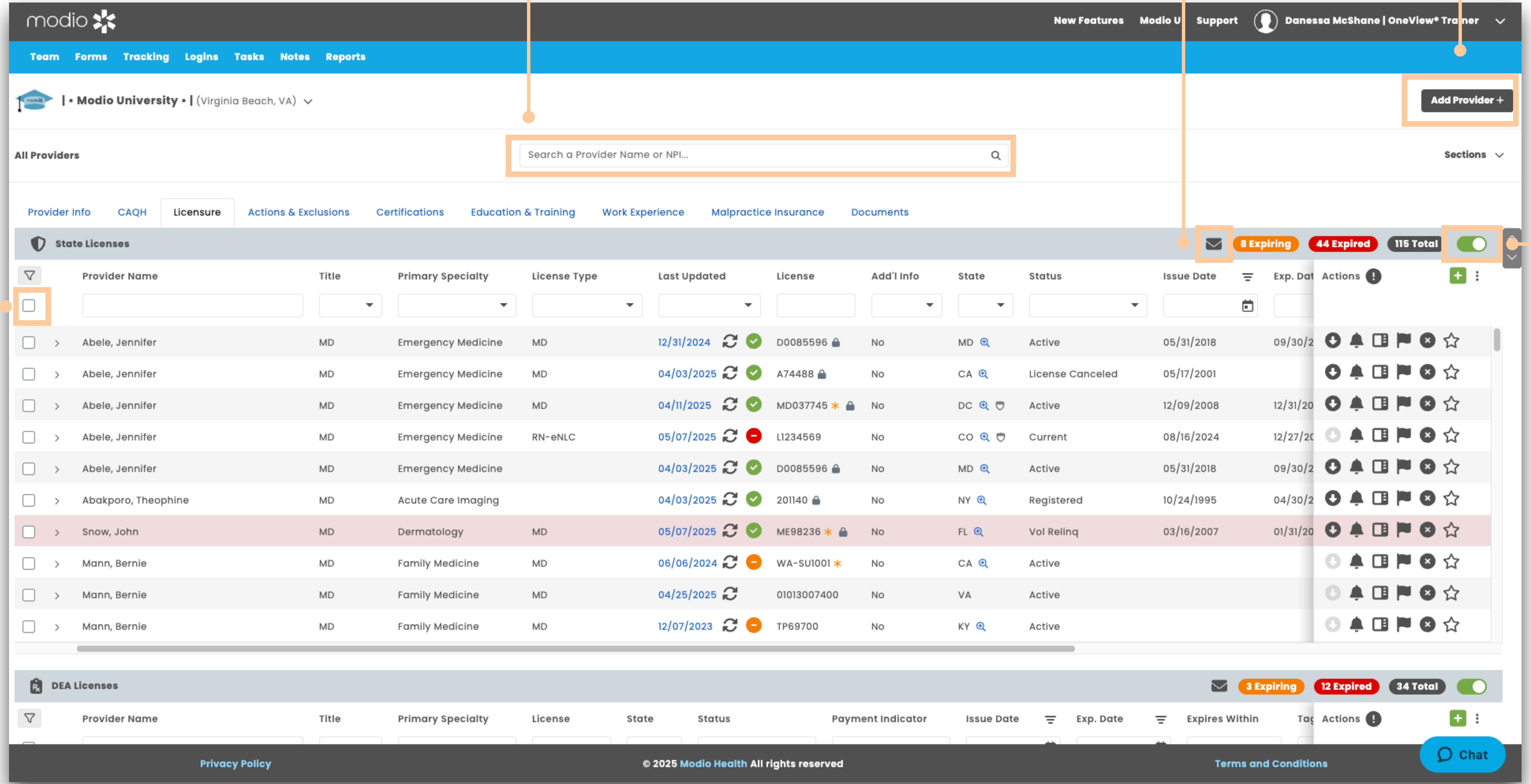
Bulk Licensure Updaters: This checkbox will select all visible providers in your grid. You can also manually select checkboxes for licenses you want to run.. Once checked, you can run updates for up to **10 licenses** by right clicking over the area and choosing "update selected licenses."

Need to focus on an **individual provider**? Search for them here.

Send an **email alert summary** to yourself, your team, and/or to your providers.

Add *New* Providers to your team. We recommend having their NPI ready – If you use NPI we can look up data from LexisNexis to get you started.

Hide a grid from the page. You can re-enable it from the grid settings.



Tip Guide: Getting Started in OneView V2 - More Features and Navigation

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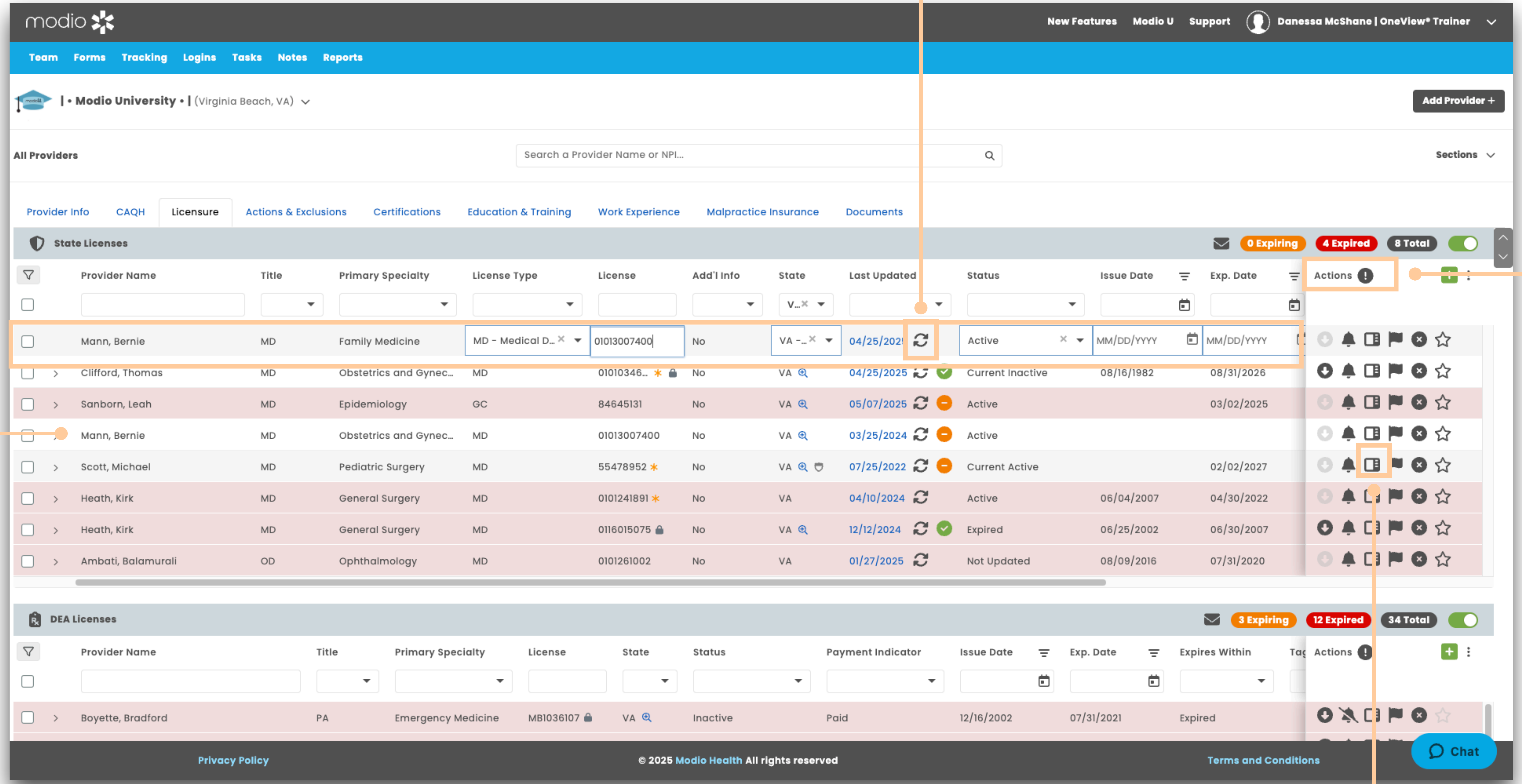
Click the updater icon to run Carbon. You can click on them one after another to run multiple (up to 10) at once.

Update data quickly
Double click in any field to edit a visible field with inline editing, then click out of the cell to save. This will save you a ton of time since you can add credentialing information directly from one location.

Drag and Drop Document Upload:
Upload documents directly to a record with the new auto-file feature. Just drag and drop a document onto the row you want it associated with. Documents will be sorted into the appropriate document library based on name and can be accessed from the side drawer or Documents grid.



Select **Actions** to find the function for each of the icons on your dashboard.

- **Download** – Download the latest document.
- **Alert** – Hide less important records.
- **Side Panel** – View/Edit Notes, Documents, Tags.
- **Flag** – Flag records that require attention.
- **Add** – Restore a soft deleted record.
- **Remove** – Soft delete a record.
- **Update** – Update provider data.
- **Asterisk** – Denotes a primary record.
- **Multi-State** – Indicates multi-state compact licenses.
- **Search** – Links to external reference websites.
- **Link to Tracking** – Link to related Tracking report.

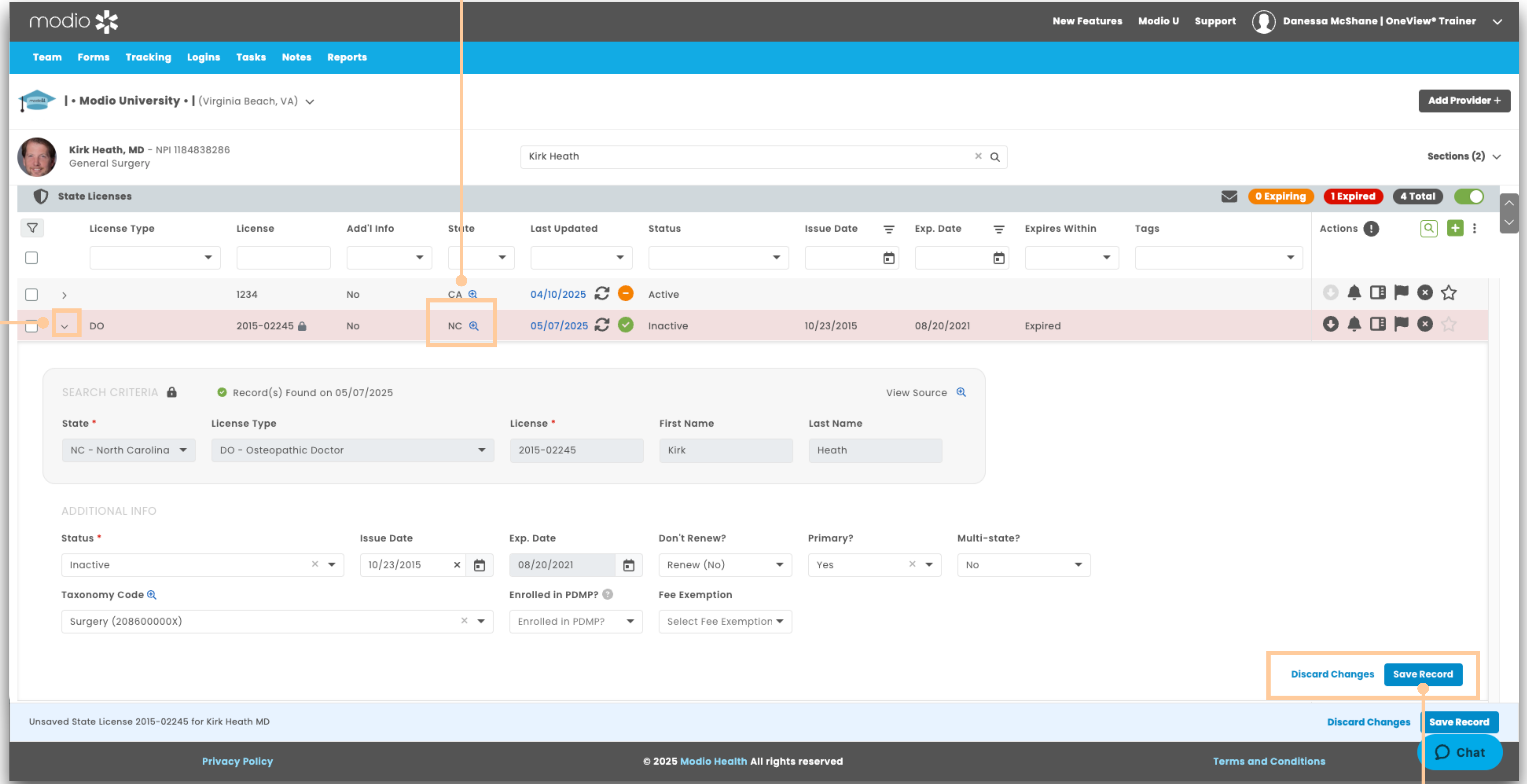
Quickly **download** the latest document associated with the record (if available). In V2, Carbon now auto-saves PSV documents!

Tip Guide: Getting Started in OneView V2 - More Features and Navigation

Navigate directly to verification websites by clicking the **magnification icon**, when available. This will open the primary source site in a new tab.

Update additional data using **Detail View.**

Click the **arrow** next to a record to view additional fields of data in detail view. Use it to edit more detailed credentialing information, beyond what is visible in the in-line editing row.



Save any edits made or **Discard Changes** if you don't need to save it. OneView will remind you to save if you forget to.

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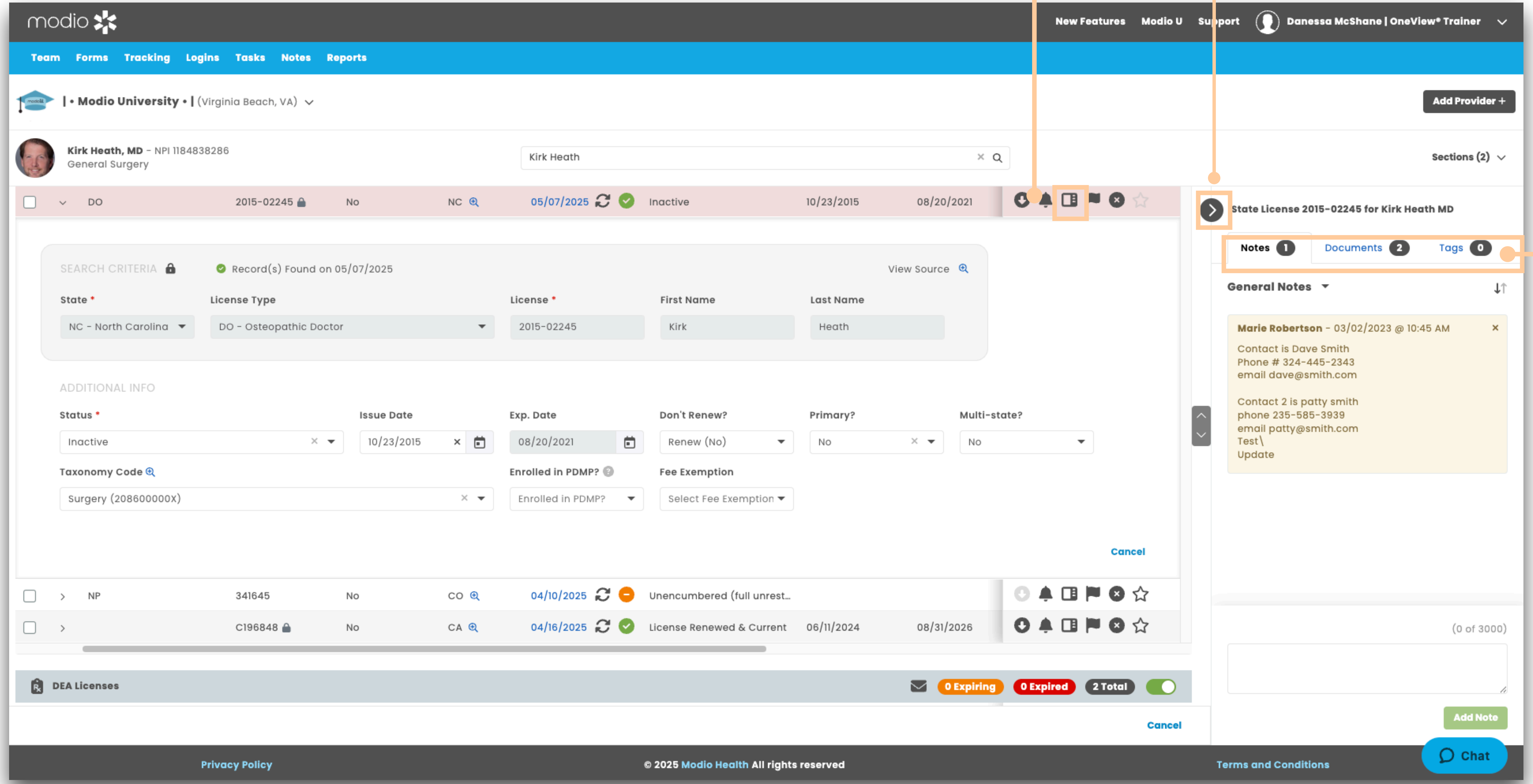
View the side panel: You can do this by clicking on the **panel icon** to quickly open the side panel

Opening the side panel Click the **grey arrow** to open/close the side panel. ***Note*** – the side panel will remember its last setting. If you frequently add docs, notes or tags, you may want to leave it open. If you do not, leave it closed.



Click on the tab you want to view.

Notes – view general and team notes as a thread. You can also add a new note.

Documents – View documents linked to the record. Default view shows active documents – remove the filter to display inactive documents. Mouse over a document to see the full file name.

Tags – View record tags or add new ones.

Note – the Provider Info grid has an additional tab for Teams. This is where you can see and change team memberships.

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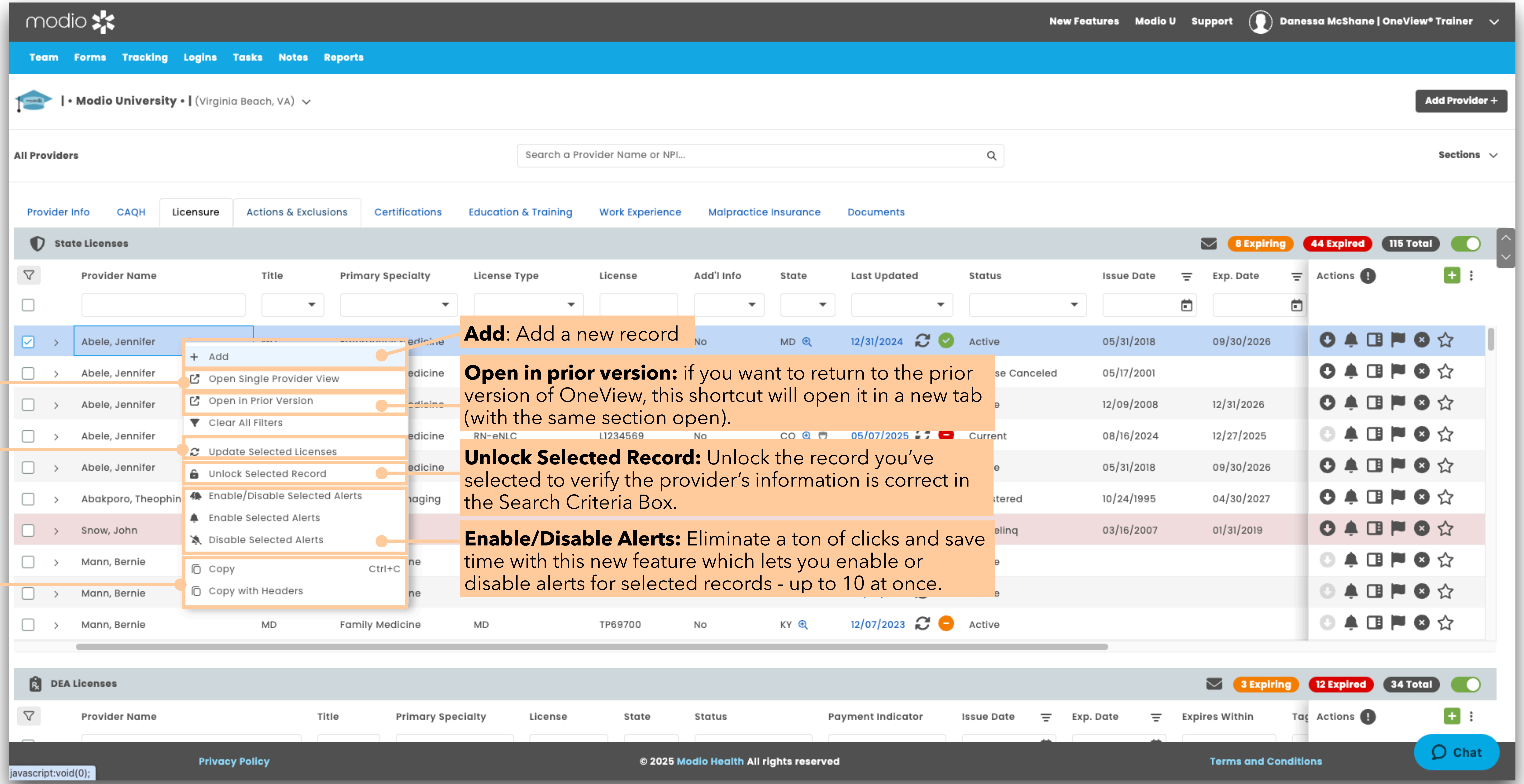
Right-Click Menu

Right-click anywhere on a record to see actions you can take.

Open in single provider view: Leave all provider view and go to the single provider's credentialing profile.

Update Selected Licenses: Update Carbon for the license(s) of the provider(s) selected. You can do this for up to 10 at once.

Copy / Copy with Headers: Copy the data from OneView directly into another tool.



Add: Add a new record

Open in prior version: if you want to return to the prior version of OneView, this shortcut will open it in a new tab (with the same section open).

Unlock Selected Record: Unlock the record you've selected to verify the provider's information is correct in the Search Criteria Box.

Enable/Disable Alerts: Eliminate a ton of clicks and save time with this new feature which lets you enable or disable alerts for selected records - up to 10 at once.

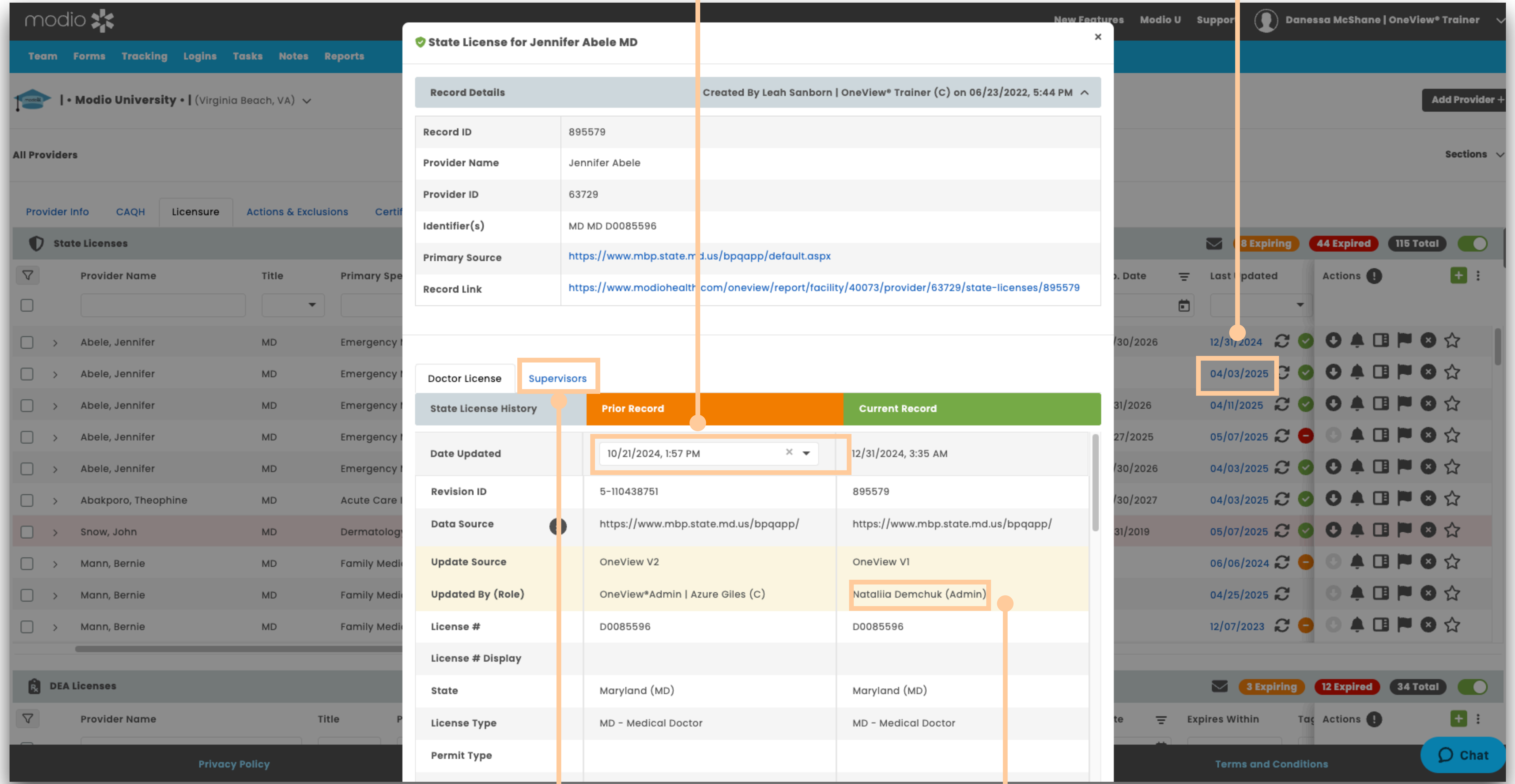
Last Updated Date and Audit History

You can easily see when a record was last updated using the Last Updated Date. Click on this date to view **Audit History** for the record.

Audit history compares a prior record (the center orange column) to the current record (the right green column). By default, it will show the most recent record, but you can change this and choose any prior record to compare to the current record.

Select the "**Date Updated**" you want to see. By default, the most recent prior update is selected. Choose another record from this dropdown to look at a different prior record.

Last Updated Date: This date indicates when the record was most recently updated. Clicking the date will open Audit History so you can view more details.



Additional tabs: Some grids (like provider info and licenses) may contain multiple tabs. If you don't see the field you are looking for when you scroll down, check if there are more tabs.

Select the "**Date Updated**" you want to see. By default, the most recent prior update is selected. Choose another record from this dropdown to look at a different prior record.

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

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