



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.

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New FeaturesModio USupportDanessa McShane | OneView® Trainer

TeamFormsTrackingLoginsTasksNotesReports

Modio University | (Virginia Beach, VA)

Add Provider +

All Providers

Search a Provider Name or NPI...

Sections

Provider InfoCAQHLicensureActions & ExclusionsCertificationsEducation & TrainingWork ExperienceMalpractice InsuranceDocuments

Provider Info

60 Total

| Provider Name                          | Title | Primary Specialty       | NPI # | Work Email                              | Tags       | Last Updated | Actions |
|----------------------------------------|-------|-------------------------|-------|-----------------------------------------|------------|--------------|---------|
| > Mouse, Minnie                        | DC    | Clinical                |       | minnie.mouse@modio.email                |            | 04/15/2025   |         |
| > Kahlo, Frida                         | LPATA | Art Therapy             |       | Frida.Kahlo@gmail.com                   |            | 04/15/2025   |         |
| > Doorbell, Jane                       | MD    | Internal Medicine       |       | Jane.Doorbell@modio.email               |            | 04/15/2025   |         |
| > EFT, Mendez Counseling Centers, PLLC | FAC   | Multi-Specialty Group   |       | mendezcounselingcenterspllc@modio.email |            | 04/15/2025   |         |
| > Holmes, Brandon                      | MD    | Anesthesiology          |       | brandon.holmes@modiohelath.email        |            | 04/15/2025   |         |
| > Lewis, Cody                          | MD    | Dermatology             |       | cody.lewis@modio.email                  |            | 04/15/2025   |         |
| > Services                             | FAC   | No Specialty            |       | services@modio.email                    | West Coast | 04/15/2025   |         |
| > Lee, Danessa                         | MD    | Acupuncture             |       | danessa0613@gmail.com                   |            | 04/15/2025   |         |
| > edwin, rebecca                       | DC    | Acute Care Nurse Pra... |       | rebecca.edwin@modio.email.com           | Brandon    | 04/15/2025   |         |
| > Facility, LLC Modio                  | FAC   | No Specialty            |       | zyxfacility@modio.email                 | East Coast | 05/01/2025   |         |

Birth Info

46 Total

| Provider Name | Title | Primary Specialty | Country Of Citizenship | Citizenship/Work Auth | US Work Auth | Tags | Actions |
|---------------|-------|-------------------|------------------------|-----------------------|--------------|------|---------|
|---------------|-------|-------------------|------------------------|-----------------------|--------------|------|---------|

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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.

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Welcome Danessa McShane | OneView® Trainer | Support | Modio U | New Features | Sign out

Team | Forms | Tracking | Logins | Tasks | Notes | Reports

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Add Provider | Message ?

All ▾

OneView V2 <sup>New</sup> ▾

Provider | Tags | Compliance ? | Actions ?

Search for a provider by name or NPI... | | ▾

|                                                                                     |                                                                        |                                          |                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------------|------------------------------------------|------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Group/Organization Name - FAC<br>No Specialty<br>NPI# 1111111111       | Colorado<br>Dermatology<br>East Coast... | 1 alert     |                   |
|    | Providence Care Payors - FAC<br>No Specialty                           | Colorado<br>Dermatology<br>Georgia...    | No alerts                                                                                      |                   |
|  | StarshipEnterprise - FAC<br>Medical Education<br>NPI# 567125           | Blue<br>MT                               | No alerts                                                                                      |       |
|  | Sunrise Medical Lab - FAC<br>No Specialty<br>NPI# 1236547923           | North Carolina<br>Office 1               | 2 alerts  |       |
|  | Texoma Independent Physicians - FAC<br>No Specialty<br>NPI# 5555555544 | Blue                                     | No alerts                                                                                      |       |
|  | Abakporo, Theophine David - Employed                                   | Group A                                  |                                                                                                |       |

  1 / 1  

200 items per page

1 - 60 of 60 items

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# 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.

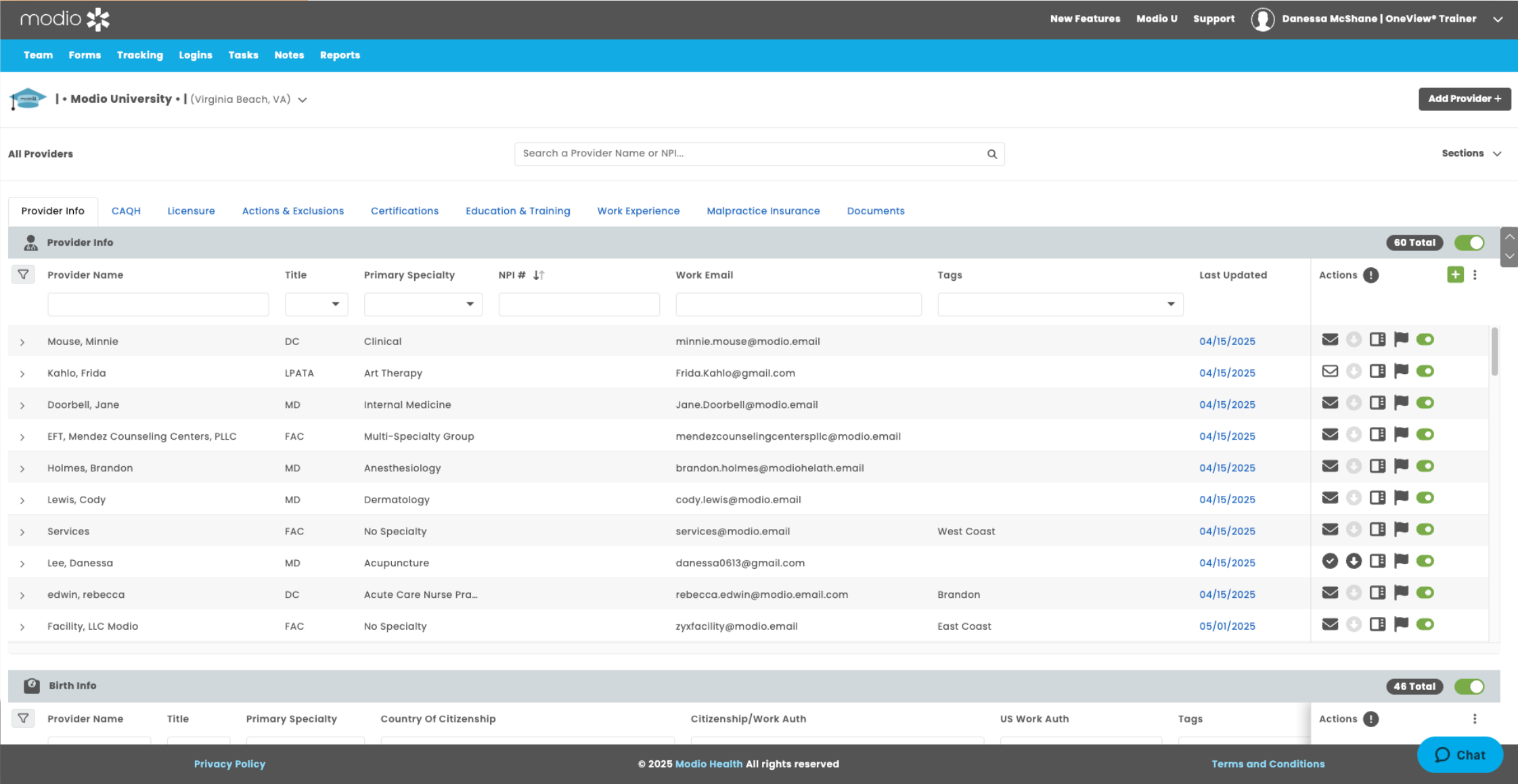
Single provider view lets you see just one provider at a time in the new OneView V2 format. This is like a provider profile and is helpful for if you are working on updating data for one specific provider.

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

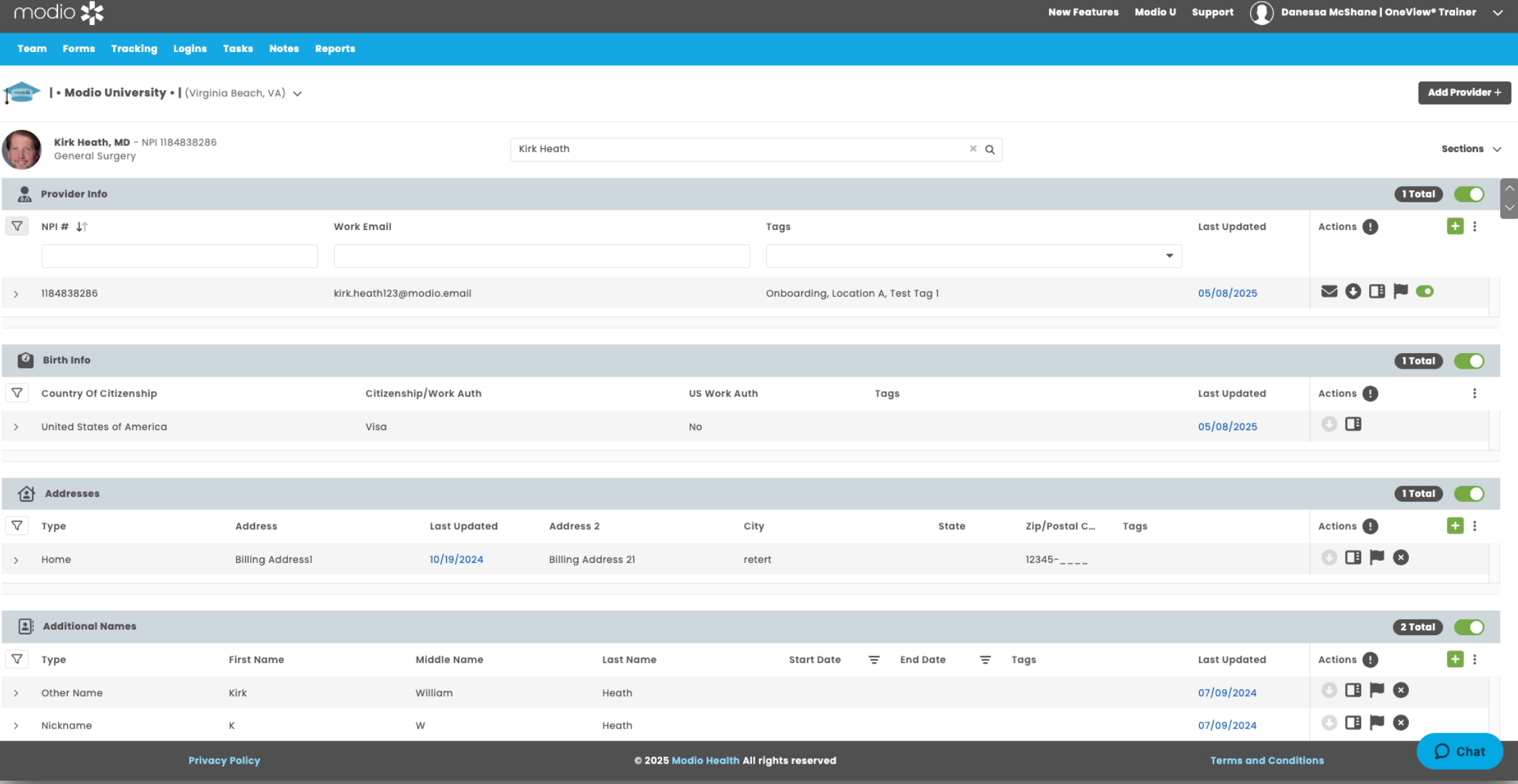
## Customizing your view

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

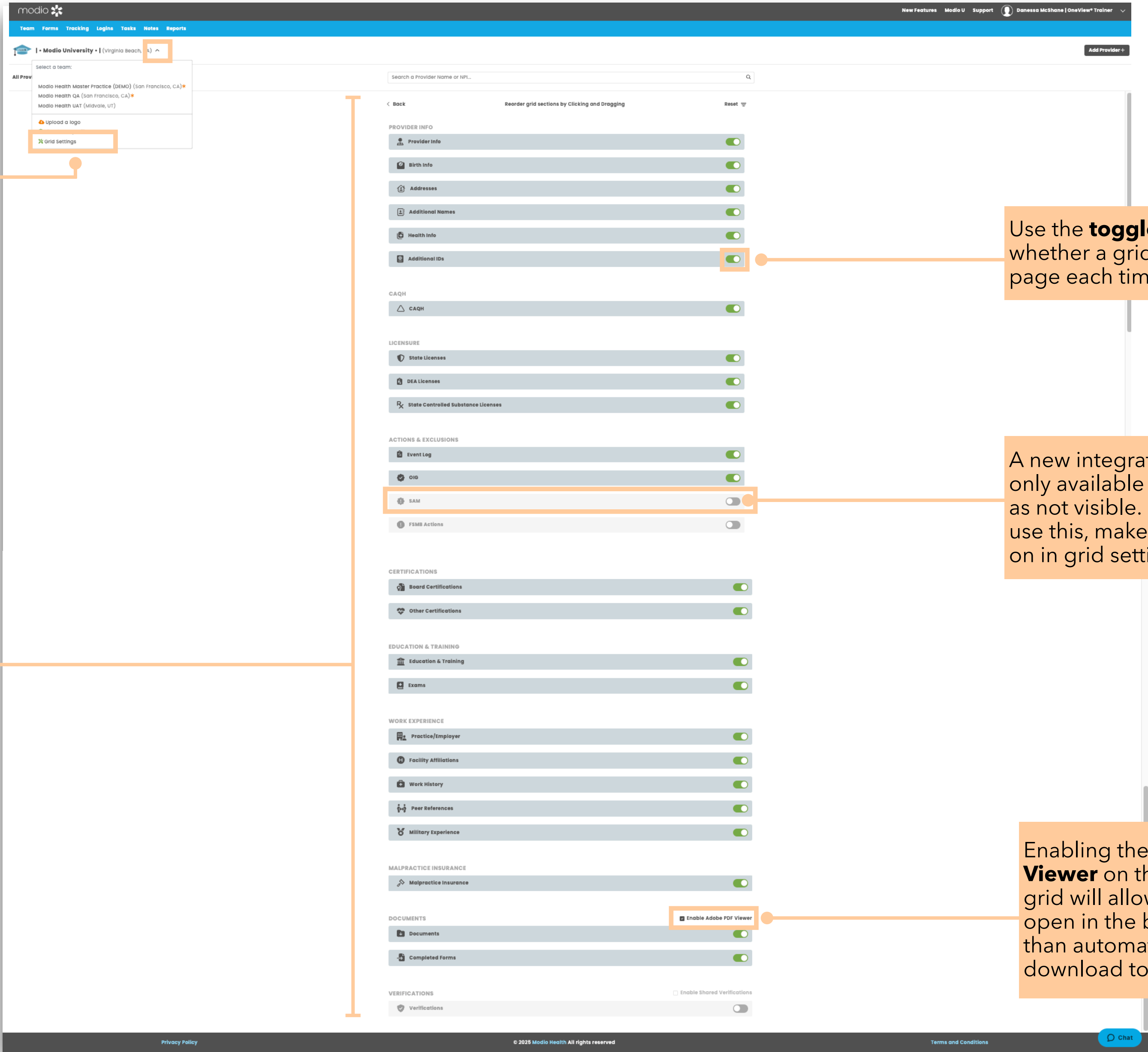


# Personalizing Grid Settings

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 will be saved 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.



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.

Tip Guide: Getting Started in OneView V2 - Dashboard Personalization Guide

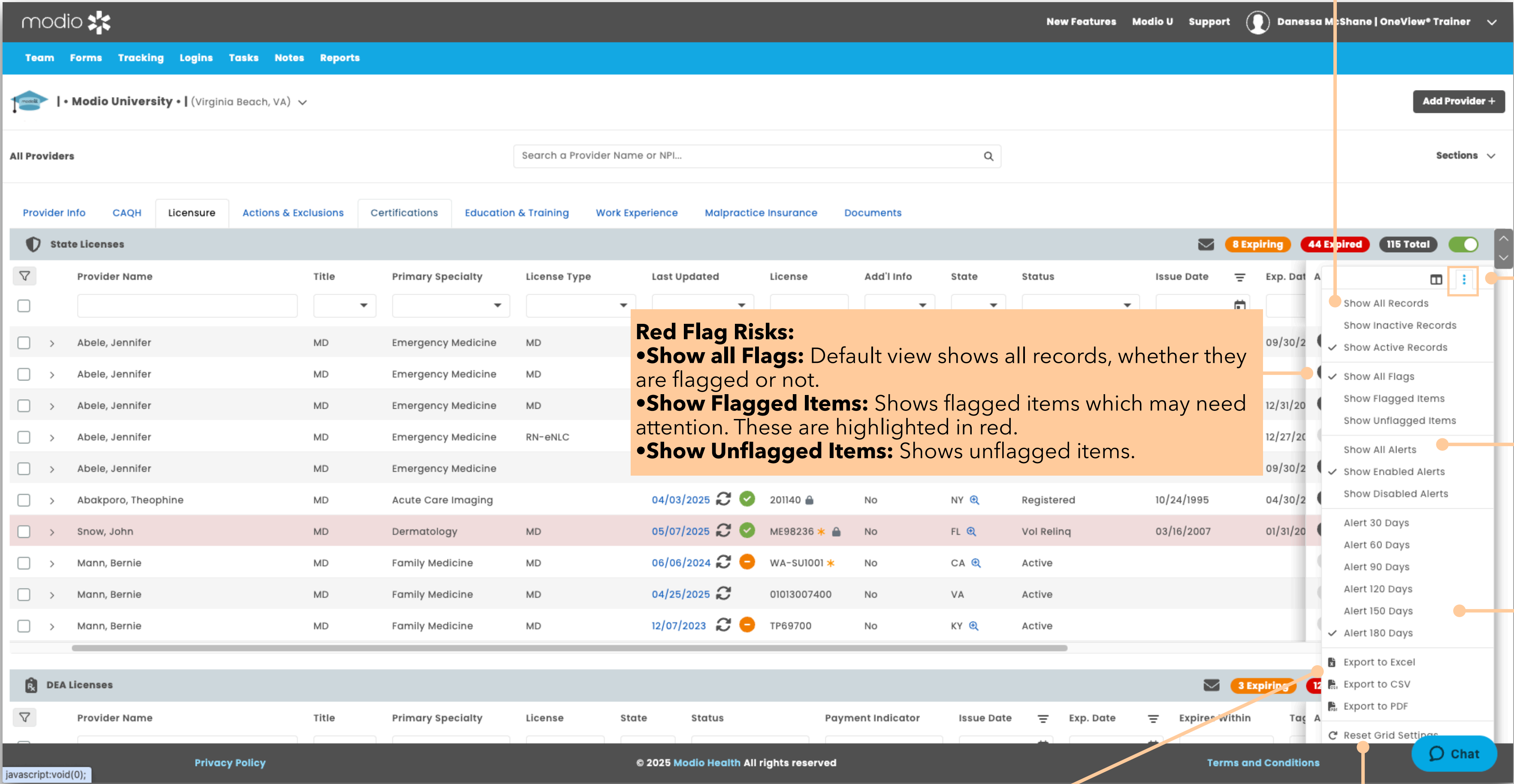
**Provider Records View:**

- 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.

Personalizing your Grid Menu

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



The screenshot shows the Modio OneView V2 dashboard. At the top, there's a navigation bar with 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', 'Notes', and 'Reports'. Below this is a header for 'Modio University' (Virginia Beach, VA) with a search bar for 'All Providers'. The main section is titled 'State Licenses' and contains a grid of provider records. The grid has columns for Provider Name, Title, Primary Specialty, License Type, Last Updated, License, Add'l Info, State, Status, Issue Date, and Exp. Date. A grid menu is open on the right side of the grid, showing options like 'Show All Records', 'Show Inactive Records', 'Show Active Records', 'Show All Flags', 'Show Flagged Items', 'Show Unflagged Items', 'Show All Alerts', 'Show Enabled Alerts', 'Show Disabled Alerts', 'Alert 30 Days', 'Alert 60 Days', 'Alert 90 Days', 'Alert 120 Days', 'Alert 150 Days', 'Alert 180 Days', 'Export to Excel', 'Export to CSV', 'Export to PDF', and 'Reset Grid Settings'. A 'Chat' button is visible in the bottom right corner.

**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 enabled 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 1 and 6 months).

**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.

# Personalizing your Grid Columns

Adjust your grid columns to personalize your grid view.

### 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.

## 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.

**All Providers**

Sections (3) ▾

**Licensure**

| <b>State Licenses</b> |       |                    |              |              |             |            |       |                  |            |            |   |  |  |
|-----------------------|-------|--------------------|--------------|--------------|-------------|------------|-------|------------------|------------|------------|---|--|--|
| Provider Name         | Title | Primary Specialty  | License Type | Last Updated | License     | Add'l Info | State | Status           | Issue Date | Exp. Date  | A |  |  |
| < Abele, Jennifer     | MD    | Emergency Medicine | MD           | 12/31/2024   | D0085596    | No         | MD    | Active           | 05/31/2018 | 09/30/2024 |   |  |  |
| < Abele, Jennifer     | MD    | Emergency Medicine | MD           | 04/03/2025   | A74488      | No         | CA    | License Canceled | 05/17/2001 |            |   |  |  |
| < Abele, Jennifer     | MD    | Emergency Medicine | MD           | 04/11/2025   | MD037745    | No         | DC    | Active           | 12/09/2008 | 12/31/2024 |   |  |  |
| < Abele, Jennifer     | MD    | Emergency Medicine | RN-eNLC      | 05/07/2025   | L1234569    | No         | CO    | Current          | 08/16/2024 | 12/27/2024 |   |  |  |
| < Abele, Jennifer     | MD    | Emergency Medicine |              | 04/03/2025   | D0085596    | No         | MD    | Active           | 05/31/2018 | 09/30/2024 |   |  |  |
| < Abakporo, Theophine | MD    | Acute Care Imaging |              | 04/03/2025   | 201140      | No         | NY    | Registered       | 10/24/1995 | 04/30/2025 |   |  |  |
| < Snow, John          | MD    | Dermatology        | MD           | 05/07/2025   | ME98236     | No         | FL    | Vol Relinq       | 03/16/2007 | 01/31/2025 |   |  |  |
| < Mann, Bernie        | MD    | Family Medicine    | MD           | 06/06/2024   | WA-SU1001   | No         | CA    | Active           |            |            |   |  |  |
| < Mann, Bernie        | MD    | Family Medicine    | MD           | 04/25/2025   | 01013007400 | No         | VA    | Active           |            |            |   |  |  |
| < Mann, Bernie        | MD    | Family Medicine    | MD           | 12/07/2023   | TP69700     | No         | KY    | Active           |            |            |   |  |  |

**DEA Licenses**
3 Expiring
12 Expired
115 Total

| Provider Name | Title | Primary Specialty | License | State | Status | Payment Indicator | Issue Date | Exp. Date | Expires Within | Tags |
|---------------|-------|-------------------|---------|-------|--------|-------------------|------------|-----------|----------------|------|
| <             |       |                   |         |       |        |                   |            |           |                |      |

Search...  
☐ Record ID  
☒ Provider Name  
☒ Title  
☒ Primary Specialty  
☒ License Type  
☒ Last Updated  
☒ License  
☒ Add'l Info  
☒ State  
☒ Status  
☐ Don't Renew?  
☒ Issue Date  
☒ Exp. Date  
☒ Expires Within  
☐ Fee Exemption  
☐ Supv. & Collab Agrmt.  
☐ Taxonomy Code  
☒ Tags

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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 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.

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New Features   Modio U   Support   Danessa McShane | OneView® Trainer

Team   Forms   Tracking   Logins   Tasks   Notes   Reports

• **Modio University** • (Virginia Beach, VA) ▾

[Add Provider +](#)

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All Providers

Sections ▾

Provider Info   CAQH   **Licensure**   Actions & Exclusions   Certifications   Education & Training   Work Experience   Malpractice Insurance   Documents

**State Licenses**

**8 Expiring**   **44 Expired**   **115 Total**

|                                     | Provider Name         | Title | Primary Specialty  | License Type | Last Updated | License     | Add'l Info | State | Status           | Issue Date | Exp. Date  | Actions ! |
|-------------------------------------|-----------------------|-------|--------------------|--------------|--------------|-------------|------------|-------|------------------|------------|------------|-----------|
| <input checked="" type="checkbox"/> |                       |       |                    |              |              |             |            |       |                  |            |            |           |
| <input type="checkbox"/>            | > Abele, Jennifer     | MD    | Emergency Medicine | MD           | 12/31/2024   | D0085596    | No         | MD    | Active           | 05/31/2018 | 09/30/2024 |           |
| <input type="checkbox"/>            | > Abele, Jennifer     | MD    | Emergency Medicine | MD           | 04/03/2025   | A74488      | No         | CA    | License Canceled | 05/17/2001 |            |           |
| <input type="checkbox"/>            | > Abele, Jennifer     | MD    | Emergency Medicine | MD           | 04/11/2025   | MD037745 *  | No         | DC    | Active           | 12/09/2008 | 12/31/2024 |           |
| <input type="checkbox"/>            | > Abele, Jennifer     | MD    | Emergency Medicine | RN-eNLC      | 05/07/2025   | L1234569    | No         | CO    | Current          | 08/16/2024 | 12/27/2024 |           |
| <input type="checkbox"/>            | > Abele, Jennifer     | MD    | Emergency Medicine |              | 04/03/2025   | D0085596    | No         | MD    | Active           | 05/31/2018 | 09/30/2024 |           |
| <input type="checkbox"/>            | > Abakporo, Theophine | MD    | Acute Care Imaging |              | 04/03/2025   | 201140      | No         | NY    | Registered       | 10/24/1995 | 04/30/2025 |           |
| <input type="checkbox"/>            | > Snow, John          | MD    | Dermatology        | MD           | 05/07/2025   | ME98236 *   | No         | FL    | Vol Relinq       | 03/16/2007 | 01/31/2025 |           |
| <input type="checkbox"/>            | > Mann, Bernie        | MD    | Family Medicine    | MD           | 06/06/2024   | WA-SUI001 * | No         | CA    | Active           |            |            |           |
| <input type="checkbox"/>            | > Mann, Bernie        | MD    | Family Medicine    | MD           | 04/25/2025   | 01013007400 | No         | VA    | Active           |            |            |           |
| <input type="checkbox"/>            | > Mann, Bernie        | MD    | Family Medicine    | MD           | 12/07/2023   | TP69700     | No         | KY    | Active           |            |            |           |

**DEA Licenses**

**3 Expiring**   **12 Expired**   **34 Total**

|                          | Provider Name | Title | Primary Specialty | License | State | Status | Payment Indicator | Issue Date | Exp. Date | Expires Within | Tag | Actions ! |
|--------------------------|---------------|-------|-------------------|---------|-------|--------|-------------------|------------|-----------|----------------|-----|-----------|
| <input type="checkbox"/> |               |       |                   |         |       |        |                   |            |           |                |     |           |

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

**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.

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

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.

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New Features

Modio U

Support

 Danessa McShane | OneView® Trainer

Team

Forms

Tracking

Logins

Tasks

Notes

Reports

 Modio University • (Virginia Beach, VA)

Add Provider +

All Providers

Search a Provider Name or NPI...

Provider Info

CAQH

Licensure

Actions & Exclusions

Certifications

Education & Training

Work Experience

Malpractice Insurance

Documents

State Licenses

0 Expiring

4 Expired

8 Total

| <input type="checkbox"/> | Provider Name        | Title | Primary Specialty       | License Type        | License       | Add'l Info | State     | Last Updated | Status           | Issue Date | Exp. Date  | Actions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------|----------------------|-------|-------------------------|---------------------|---------------|------------|-----------|--------------|------------------|------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | Mann, Bernie         | MD    | Family Medicine         | MD - Medical D... * | 01013007400   | No         | VA -... * | 04/25/2025   | Active           | MM/DD/YYYY | MM/DD/YYYY |                                  |
| <input type="checkbox"/> | > Clifford, Thomas   | MD    | Obstetrics and Gynec... | MD                  | 01010346... * | No         | VA        | 04/25/2025   | Current Inactive | 08/16/1982 | 08/31/2026 |                                  |
| <input type="checkbox"/> | > Sanborn, Leah      | MD    | Epidemiology            | GC                  | 84645131      | No         | VA        | 05/07/2025   | Active           |            | 03/02/2025 |                                  |
| <input type="checkbox"/> | > Mann, Bernie       | MD    | Obstetrics and Gynec... | MD                  | 01013007400   | No         | VA        | 03/25/2024   | Active           |            |            |                       |
| <input type="checkbox"/> | > Scott, Michael     | MD    | Pediatric Surgery       | MD                  | 55478952 *    | No         | VA        | 07/25/2022   | Current Active   |            | 02/02/2027 |            |
| <input type="checkbox"/> | > Heath, Kirk        | MD    | General Surgery         | MD                  | 0101241891 *  | No         | VA        | 04/10/2024   | Active           | 06/04/2007 | 04/30/2022 |            |
| <input type="checkbox"/> | > Heath, Kirk        | MD    | General Surgery         | MD                  | 0116015075    | No         | VA        | 12/12/2024   | Expired          | 06/25/2002 | 06/30/2007 |            |
| <input type="checkbox"/> | > Ambati, Balamurali | OD    | Ophthalmology           | MD                  | 0101261002    | No         | VA        | 01/27/2025   | Not Updated      | 08/09/2016 | 07/31/2020 |            |

DEA Licenses

3 Expiring

12 Expired

34 Total

| <input type="checkbox"/> | Provider Name       | Title | Primary Specialty  | License   | State | Status   | Payment Indicator | Issue Date | Exp. Date  | Expires Within | Tag | Actions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------|---------------------|-------|--------------------|-----------|-------|----------|-------------------|------------|------------|----------------|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/> | > Boyette, Bradford | PA    | Emergency Medicine | MB1036107 | VA    | Inactive | Paid              | 12/16/2002 | 07/31/2021 | Expired        |     |            |

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

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.

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 Danessa McShane | OneView® Trainer

Team Forms Tracking Logins Tasks Notes Reports

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 **Kirk Heath, MD** - NPI 1184838286  
General Surgery



Sections (2) 

State Licenses  0 Expiring 1 Expired 4 Total 

|  | License Type    | License                                                                                        | Add'l Info | State                                                                                  | Last Updated                                                                                   | Status   | Issue Date | Exp. Date  | Expires Within | Tags | Actions                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-----------------------------------------------------------------------------------|-----------------|------------------------------------------------------------------------------------------------|------------|----------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|----------|------------|------------|----------------|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input type="checkbox"/>                                                          | <div>&gt;</div> | 1234                                                                                           | No         | CA  | 04/10/2025  | Active   |            |            |                |      |       |
| <input checked="" type="checkbox"/>                                               | DO              | 2015-02245  | No         | NC  | 05/07/2025  | Inactive | 10/23/2015 | 08/20/2021 | Expired        |      |       |

SEARCH CRITERIA   Record(s) Found on 05/07/2025 [View Source !\[\]\(4cd887ec3897c823ade08b51d886dd06\_img.jpg\)](#)

State \*  
NC - North Carolina 

License Type  
DO - Osteopathic Doctor 

License \*  
2015-02245

First Name  
Kirk

Last Name  
Heath

ADDITIONAL INFO

Status \*  
Inactive 

Issue Date  
10/23/2015  

Exp. Date  
08/20/2021 

Don't Renew?  
Renew (No) 

Primary?  
Yes 

Multi-state?  
No 

Taxonomy Code   
Surgery (208600000X) 

Enrolled in PDMP?   
Enrolled in PDMP? 

Fee Exemption  
Select Fee Exemption 

Discard Changes Save Record

Unsaved State License 2015-02245 for Kirk Heath MD

Discard Changes Save Record

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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.



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

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

**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.

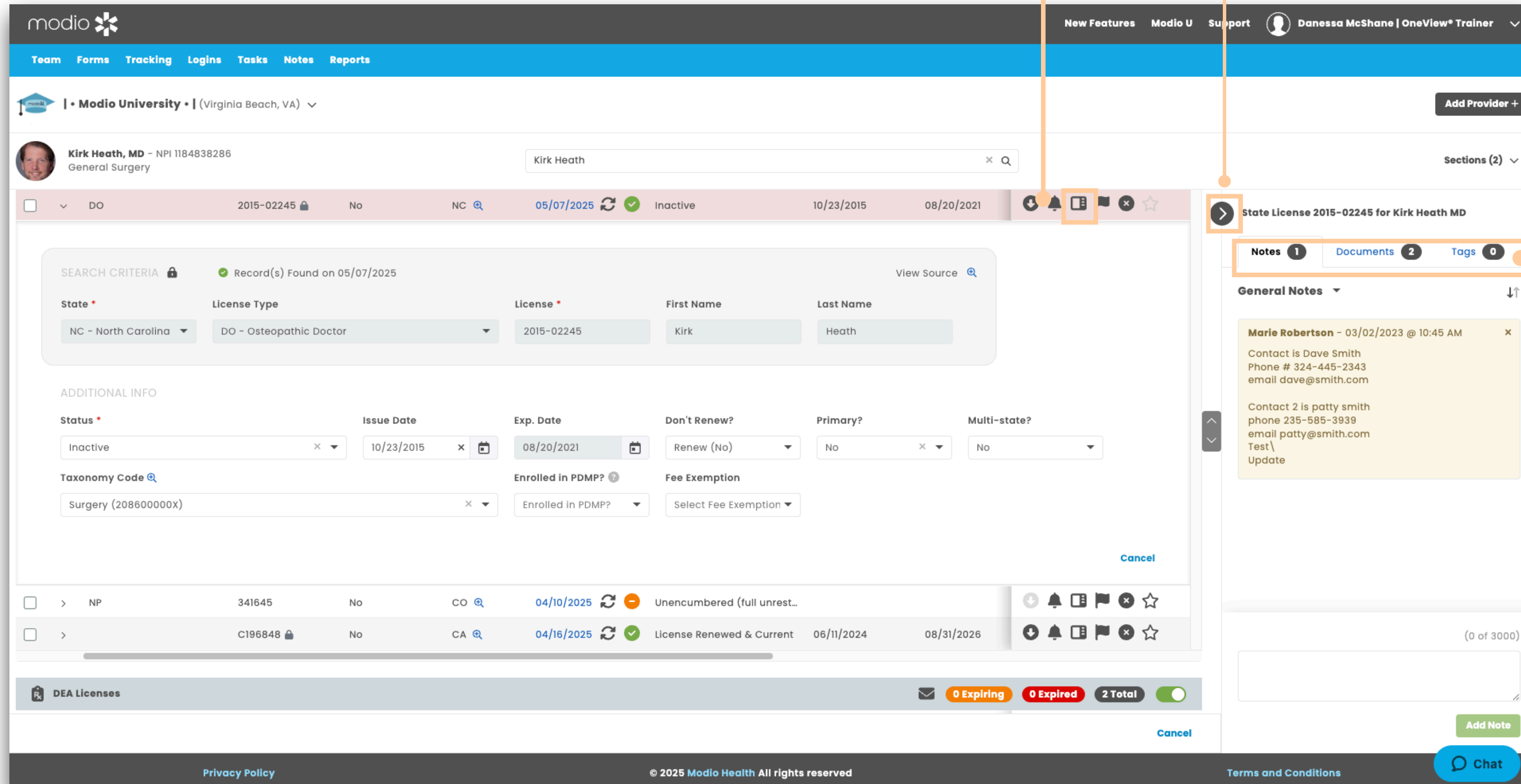
**Click on the tab you want to view.**

**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.



The screenshot displays the Modio OneView V2 interface. At the top, there's a navigation bar with links like 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', 'Notes', and 'Reports'. Below this, the user profile 'Danessa McShane | OneView® Trainer' is visible. The main content area shows the profile of 'Kirk Heath, MD' (NPI 1184838286, General Surgery). A search bar is present, and below it, a 'SEARCH CRITERIA' section with filters for State (NC - North Carolina), License Type (DO - Osteopathic Doctor), License (2015-02245), First Name (Kirk), and Last Name (Heath). The 'ADDITIONAL INFO' section includes fields for Status (Inactive), Issue Date (10/23/2015), Exp. Date (08/20/2021), Don't Renew? (Renew (No)), Primary? (No), Multi-state? (No), Taxonomy Code (Surgery (208600000X)), Enrolled in PDMP? (Enrolled in PDMP?), and Fee Exemption (Select Fee Exemption). A table below shows a list of documents, including 'NP' (341645) and 'C196848'. A side panel is open on the right, showing tabs for 'Notes' (1), 'Documents' (2), and 'Tags' (0). The 'Documents' tab is selected, showing a list of documents linked to the provider, including 'Marie Robertson - 03/02/2023 @ 10:45 AM'.



# 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.

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New FeaturesModio USupportDanessa McShane | OneView® Trainer

TeamFormsTrackingLoginsTasksNotesReports

Modio University • (Virginia Beach, VA)

Add Provider +

All Providers

Search a Provider Name or NPI...

Sections

Provider InfoCAQHLicensureActions & ExclusionsCertificationsEducation & TrainingWork ExperienceMalpractice InsuranceDocuments

State Licenses8 Expiring44 Expired115 Total

|                                     | Provider Name        | Title | Primary Specialty | License Type | License | Add'l Info | State | Last Updated | Status      | Issue Date | Exp. Date  | Actions                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                        |
|-------------------------------------|----------------------|-------|-------------------|--------------|---------|------------|-------|--------------|-------------|------------|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | > Abele, Jennifer    |       |                   |              |         | No         | MD    | 12/31/2024   | Active      | 05/31/2018 | 09/30/2026 | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |
| <input type="checkbox"/>            | > Abele, Jennifer    |       |                   |              |         |            |       |              | se Canceled | 05/17/2001 |            | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |
| <input type="checkbox"/>            | > Abele, Jennifer    |       |                   |              |         |            |       |              |             | 12/09/2008 | 12/31/2026 | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |
| <input type="checkbox"/>            | > Abele, Jennifer    |       |                   |              | RN-eNLC | L1234569   | No    | CO           | 05/07/2025  | Current    | 08/16/2024 | 12/27/2025                                                                                                                                                                                                                                                                                                                                             | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |
| <input type="checkbox"/>            | > Abele, Jennifer    |       |                   |              |         |            |       |              |             | 05/31/2018 | 09/30/2026 | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |
| <input type="checkbox"/>            | > Abakporo, Theophin |       |                   |              |         |            |       |              | Registered  | 10/24/1995 | 04/30/2027 | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |
| <input type="checkbox"/>            | > Snow, John         |       |                   |              |         |            |       |              | elinq       | 03/16/2007 | 01/31/2019 | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |
| <input type="checkbox"/>            | > Mann, Bernie       |       |                   |              |         |            |       |              |             |            |            | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |
| <input type="checkbox"/>            | > Mann, Bernie       |       |                   |              |         |            |       |              |             |            |            | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |
| <input type="checkbox"/>            | > Mann, Bernie       | MD    | Family Medicine   | MD           | TP69700 | No         | KY    | 12/07/2023   | Active      |            |            | <div><div>+ Add</div><div>Open Single Provider View</div><div>Open in Prior Version</div><div>Clear All Filters</div><div>Update Selected Licenses</div><div>Unlock Selected Record</div><div>Enable/Disable Selected Alerts</div><div>Enable Selected Alerts</div><div>Disable Selected Alerts</div><div>Copy</div><div>Copy with Headers</div></div> |                                                                                                                                                                                                                                                                                                                                                        |

DEA Licenses3 Expiring12 Expired34 Total

|  | Provider Name | Title | Primary Specialty | License | State | Status | Payment Indicator | Issue Date | Exp. Date | Expires Within | Tag | Actions |
|--|---------------|-------|-------------------|---------|-------|--------|-------------------|------------|-----------|----------------|-----|---------|
|--|---------------|-------|-------------------|---------|-------|--------|-------------------|------------|-----------|----------------|-----|---------|

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**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.

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Team Forms Tracking Logins Tasks Notes Reports

Modio University (Virginia Beach, VA)

All Providers

Provider Info CAQH Licensure Actions & Exclusions

State Licenses

| Provider Name       | Title | Primary Spec       |
|---------------------|-------|--------------------|
| Abele, Jennifer     | MD    | Emergency Medicine |
| Abele, Jennifer     | MD    | Emergency Medicine |
| Abele, Jennifer     | MD    | Emergency Medicine |
| Abele, Jennifer     | MD    | Emergency Medicine |
| Abele, Jennifer     | MD    | Emergency Medicine |
| Abakporo, Theophine | MD    | Acute Care         |
| Snow, John          | MD    | Dermatology        |
| Mann, Bernie        | MD    | Family Medicine    |
| Mann, Bernie        | MD    | Family Medicine    |
| Mann, Bernie        | MD    | Family Medicine    |

DEA Licenses

| Provider Name | Title | Primary Spec |
|---------------|-------|--------------|
|---------------|-------|--------------|

State License for Jennifer Abele MD

Record Details

|                |                                                                                                |
|----------------|------------------------------------------------------------------------------------------------|
| Record ID      | 895579                                                                                         |
| Provider Name  | Jennifer Abele                                                                                 |
| Provider ID    | 63729                                                                                          |
| Identifier(s)  | MD MD D0085596                                                                                 |
| Primary Source | https://www.mbp.state.md.us/bpqapp/default.aspx                                                |
| Record Link    | https://www.modiohealth.com/oneview/report/facility/40073/provider/63729/state-licenses/895579 |

Doctor License Supervisors

State License History

| Date Updated        | Prior Record                        | Current Record                      |
|---------------------|-------------------------------------|-------------------------------------|
| 10/21/2024, 1:57 PM |                                     | 12/31/2024, 3:35 AM                 |
| Revision ID         | 5-110438751                         | 895579                              |
| Data Source         | https://www.mbp.state.md.us/bpqapp/ | https://www.mbp.state.md.us/bpqapp/ |
| Update Source       | OneView V2                          | OneView V1                          |
| Updated By (Role)   | OneView*Admin   Azure Giles (C)     | Natalia Demchuk (Admin)             |
| License #           | D0085596                            | D0085596                            |
| License # Display   |                                     |                                     |
| State               | Maryland (MD)                       | Maryland (MD)                       |
| License Type        | MD - Medical Doctor                 | MD - Medical Doctor                 |
| Permit Type         |                                     |                                     |

8 Expiring 44 Expired 115 Total

| Date       | Last Updated | Actions |
|------------|--------------|---------|
| 12/31/2024 | 12/31/2024   |         |
| 04/03/2025 | 04/03/2025   |         |
| 04/11/2025 | 04/11/2025   |         |
| 05/07/2025 | 05/07/2025   |         |
| 04/03/2025 | 04/03/2025   |         |
| 04/03/2025 | 04/03/2025   |         |
| 05/07/2025 | 05/07/2025   |         |
| 06/06/2024 | 06/06/2024   |         |
| 04/25/2025 | 04/25/2025   |         |
| 12/07/2023 | 12/07/2023   |         |

3 Expiring 12 Expired 34 Total

Expires Within Tag Actions

Chat

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.

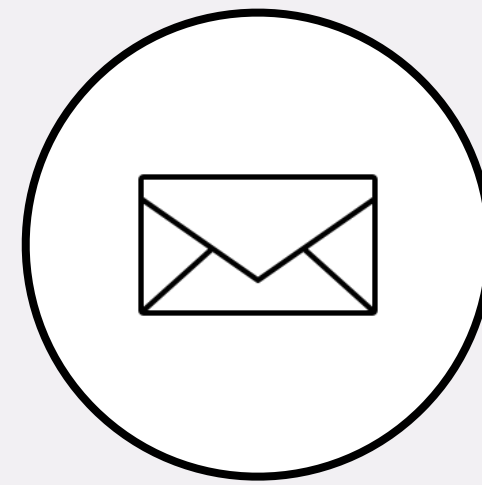
Select the "Date Updated" you want to see. By default, the most recent prior update is selected. Choose another record from this dropdown to look at a different prior record.

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

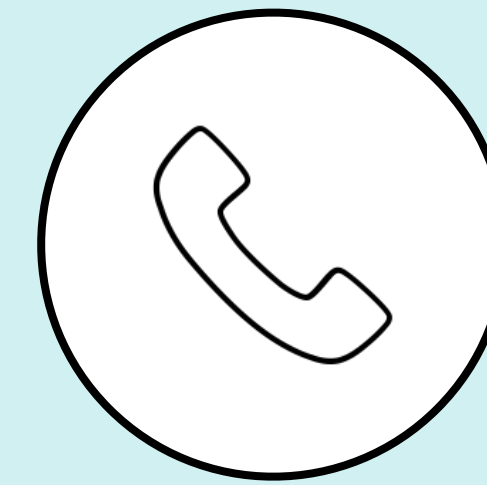
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**Online:**  
Chat Support



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



**Phone:**  
844.696.6346