



## **Tip Guide - V2 Grid Level Reporting**

Accessing and Running v2 Grid Level Reports for full access coordinators

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Provider Name	Last Updated	Title	Primary Specialty	NPI #	Work Email	Personal Email
Boyette, Bradford	04/15/2025	PA	Emergency Medicine	1316987241	bradboyette22@gmail.com	bb@modio.com
Abele, Jennifer	04/15/2025	MD	Emergency Medicine	1073502779	1234567890@modio.email	fakeemail@email.com
Zowie, Wowie	04/15/2025	MD	Addiction Psychiatry	1234567890	test.provider@modio.email	personalemail@modiohealth.com
Bulman, Arthur	04/15/2025	MD	Sports Medicine	1111111111	ajbulman10@gmail.com	
Snow, John	04/15/2025	MD	Dermatology	1801007265	john.snow@modio.email	
Mann, Bernie	04/15/2025	MD	Family Medicine	1999999991	bjseholmes@gmail.com	
Clifford, Thomas	04/15/2025	MD	Obstetrics and Gynec...	1659311579	tom.clifford@modio.email	Test@gmail.com
Quinn, Michael	04/15/2025	MD	Radiology	1568453348	michael.quinn@modio.email	
Group/Organization Name	04/15/2025	FAC	No Specialty	1111111111	modiouniversitymaster@modio.e...	thomas.addesso@modiohealth.c...
Holmes, Brandon	04/15/2025	MD	General Surgery	9999999999	testing99823@gmail.com	brandon.holmes@modiohealth.c...

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Show Unflagged Items

Export to Excel

Export to CSV

Export to PDF

Reset Grid Settings

About Reports:  
V2 is composed of many grids. Each grid hosts a different set of data. All individual Grids in v2 have an export/reporting option. Once exported, the report will reflect the columns that are visible on the grid. The order of the columns, the data, and any applied filters will all reflect in the report/export.

- Running a v2 Grid-Level report:
1. Select the ellipsis icon in the desired grid.
  2. Select from 3 Export Options: Excel, CSV, or PDF.

Tip Guide: Reports - Filters & Customizations: v2 Grid-Level Reports

The report will reflect and filtering applied to the grid. It will also show the columns in the order you have arranged them. This allows you to create reports with the specific information you need.

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Board Certifications

0 Expiring2 Expired20 Total

	Provider Name	Title	Org Type	Board/Organization	Specialty	Certification #	Issue Date	Exp. Date	Expires Within	
<input type="checkbox"/>			Board							
<input type="checkbox"/>	> Mann, Bernie	MD	Board	American Board for Occu...	Case Management (CM)					
<input type="checkbox"/>	> Holmes, Brandon	MD	Board	American Board of Surger...	General Surgery	1231456	01/29/2020	02/01/2027		
<input type="checkbox"/>	> Boy, Tommy	NP	Board	American Academy of Nur...	Family Nurse Practitioner	123456789	01/01/2024	01/01/2026	255 days	
<input type="checkbox"/>	> Heath, Kirk	MD	Board	American Board of Surger...	General Surgery	456456456	11/07/2022	06/30/2023	Expired	
<input type="checkbox"/>	> Heath, Kirk	MD	Board	American Board of Radiol...	General Radiology					
<input type="checkbox"/>	> Sanborn, Leah	MD	Board	American Board of Anesth...	Critical Care Medicine					
<input type="checkbox"/>	> Sanborn, Leah	MD	Board	American Board of Surger...	Vascular Surgery					
<input type="checkbox"/>	> Sanborn, Leah	MD	Board	American Association of C...	Acute - Critical Care Kno...	123456789				
<input type="checkbox"/>	> Sanborn, Leah	MD	Board	American Association of N...	Nurse Practitioner	11111111111	02/27/2023			
<input type="checkbox"/>	> Bradway, John	MD	Board	American Board of Orthop...	Orthopaedic Surgery			12/31/2030		

Other Certifications

2 Expiring

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\*Apply any filters to create a focused list of data points before running the Grid-Level Report.  
All columns have filter options and multiple filters can be used at the same time.  
\*Drag and drop columns to adjust the order of the report before export

Use the ellipses icon in each grid to locate and apply additional filters.

**\*Important:** Some of these filters and settings are “sticky” double check these filter before exporting data.

Tip Guide: Reports - Filters & Customizations: v2 Grid-Level Reports

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<input type="checkbox"/>	> Sanborn, Leah	MD	Board	American Board of Surger...	Vascular Surgery					
<input type="checkbox"/>	> Sanborn, Leah	MD	Board	American Association of C...	Acute - Critical Care Kno...	123456789				
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<input type="checkbox"/>	> Bradway, John	MD	Board	American Board of Orthop...	Orthopaedic Surgery			12/31/2030		

Search...

☐ Record ID

☒ Provider Name

☒ Title

☐ Primary Specialty

☒ Org Type

☒ Board/Organization

☒ Specialty

☒ Certification #

☒ Issue Date

☒ Exp. Date

☒ Expires Within

☐ Cert. Status

☐ Tags

☒ Last Updated

☒ Actions

Other Certifications

2 Expiring

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## Frequently Asked Questions

### **Q: Can read only coordinator profiles see grid level reports?**

No, only full access coordinators have access to v2 grid level reports.

### **Q: Can I also run v2 Grid-Level reports in single provider view?**

Yes, you can run reports in each grid section in V2 in single provider view just like in multi provider view. In single provider view under the license section, you will also find an additional option for a report that puts all licenses types into one report. This is only available in single provider view.

### **Q: I need to save copies of the OIG and SAM reports every month, but I would like to keep them in the platform where can I save them?**

One option is to make an FAC profile where you can save documents for your group including the monthly reports you need.

### **Q: What if I can't find the report I need in the platform?**

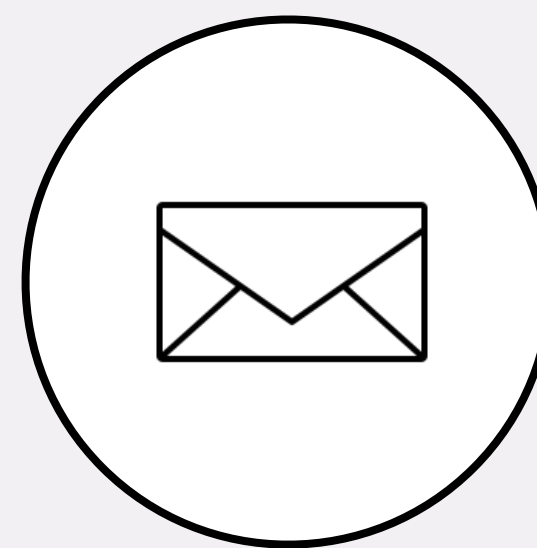
If the reports offered don't meet your needs, it is best to reach out to support for additional help.

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

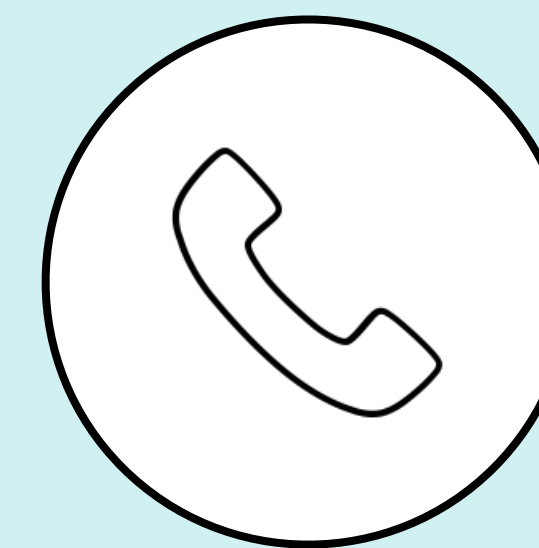
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