OneView®

Tip Guide: Managing Compliance Alerts

Use this guide to review the most effective ways for managing Compliance Alerts for your team

TABLE OF CONTENTS

1	Title Page
2	Table Of Contents
3-4	Customizing Grid Settings
5	Utilizing The Filters (Expiring, Expired, Total) To Help Prioritize
6	Utilizing Advanced Filters
7	Email Send Alert Feature
8	Running Primary Source Verification, Reviewing The Envelope Icon
9	Removing/Inactivating Expired Documents
10	Updating Malpractice Insurance
11	Frequently Asked Questions
12	Modio Support Contact Information

Tip Guide: Managing Compliance Alerts - Customize Grid Settings

Introduction: Fist use Grid Settings to best match your compliance alert needs.

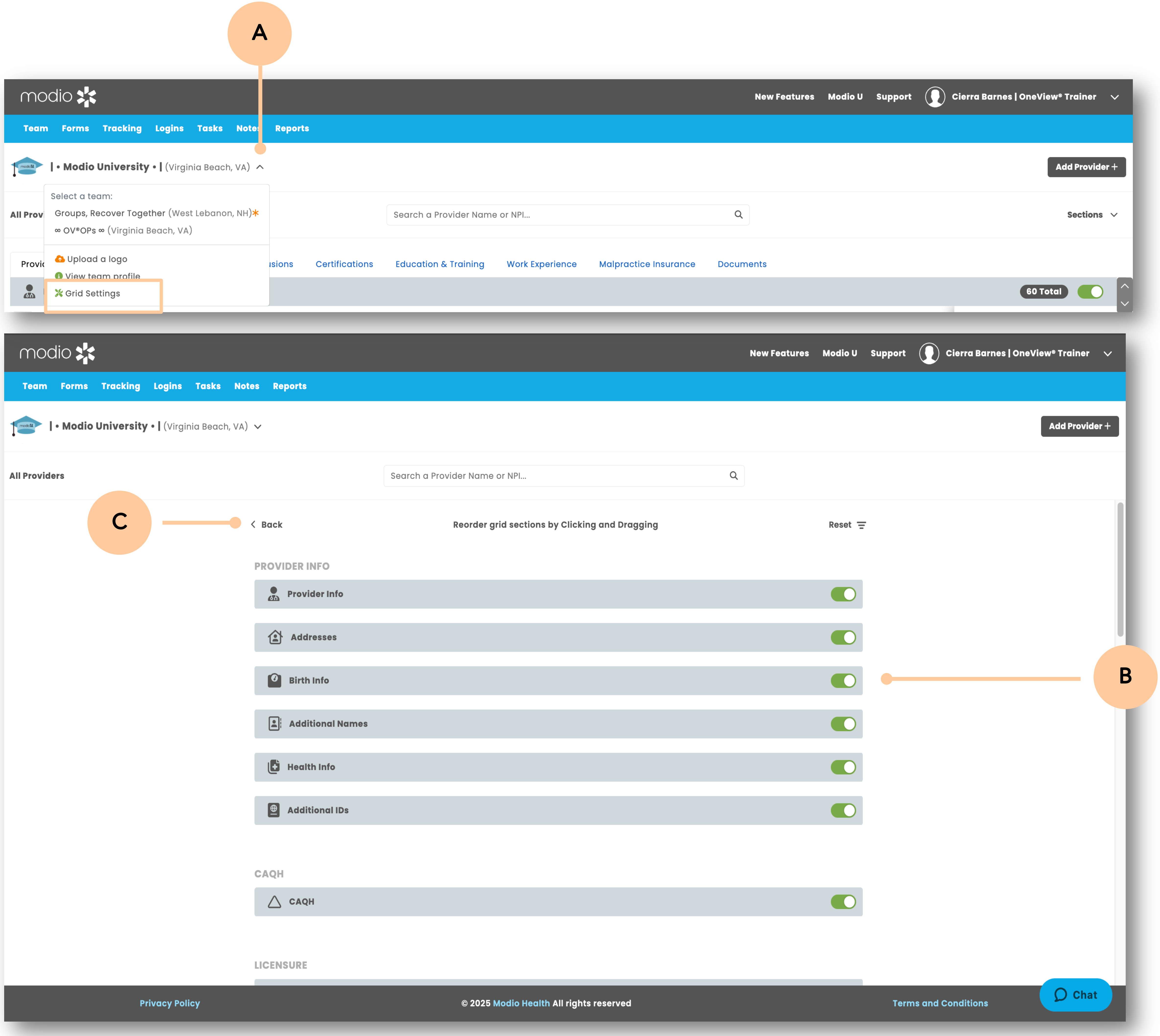
Start by customizing your grid settings.

a. Click your **team name** in the top right corner and select **Grid Settings** from the drop-down menu.

b. Toggle on or off the sections according to your compliance needs. Here is a list of our most watched Compliance Alerts:

- State Licenses
- DEA Licenses
- State Controlled Substance Licenses
- Board Certifications
- Other Certifications
- OIG
- SAM
- CAQH
- Documents
- Malpractice
- NOTE: you can add additional available sections if you'd like.

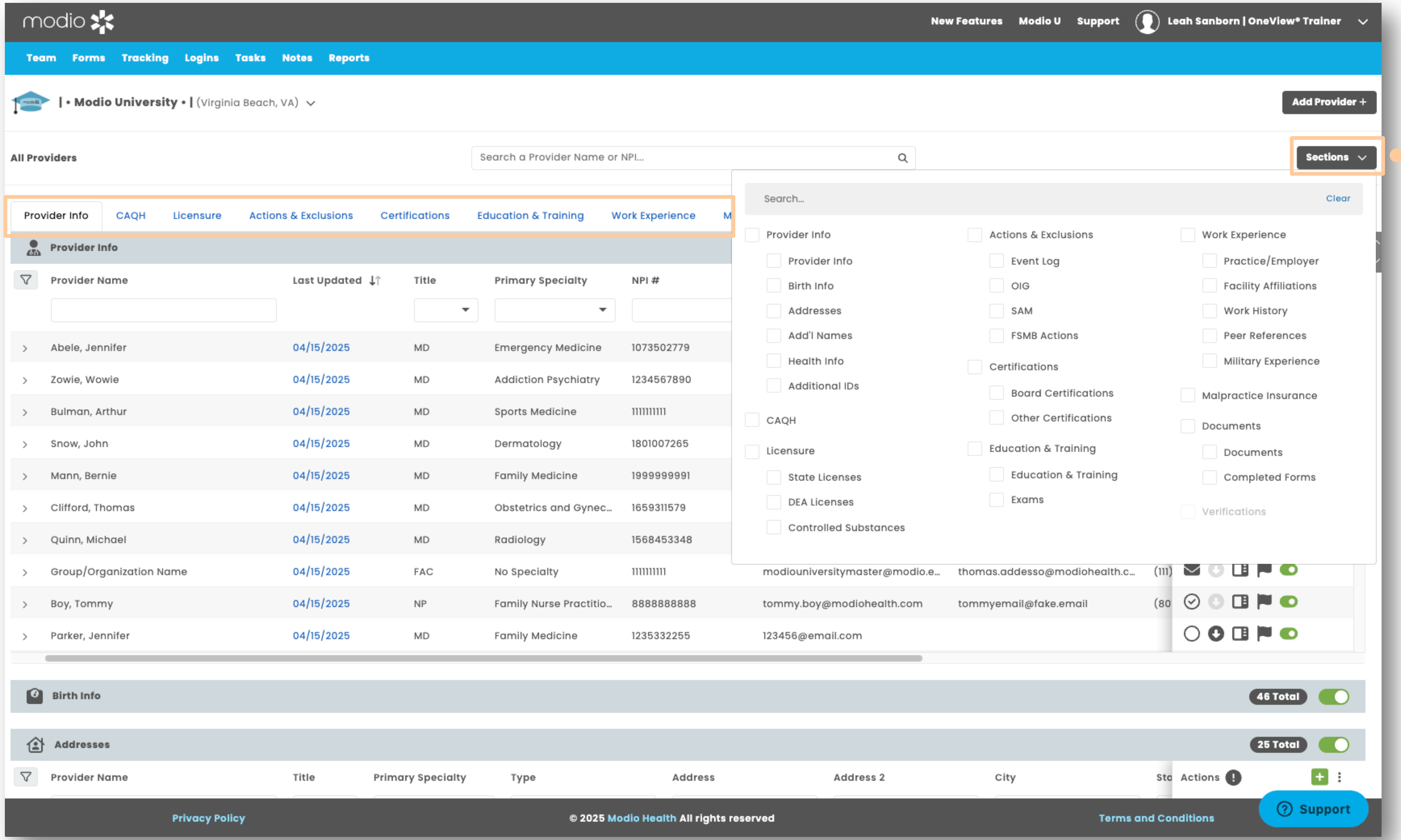
c. Once you have finished customizing your grids, click "**Back**." These settings are sticky, meaning they will persist every time you access OneView V2.



Introduction: Use all-provider view to see all records for the profiles on your team.

To look at a subset of record, use the tabs across the top to view by grouped record types, or use the sections filter to choose which sections display.

Tabs:
Use the Tabs to move between grids, which are grouped by type to quickly view and manage any compliance alerts on your OneView Team.



Sections:
Use the **Sections** filter to show as few as one grid at a time. Select multiple sections to view only what you need.

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Introduction: Utilizing Filters.

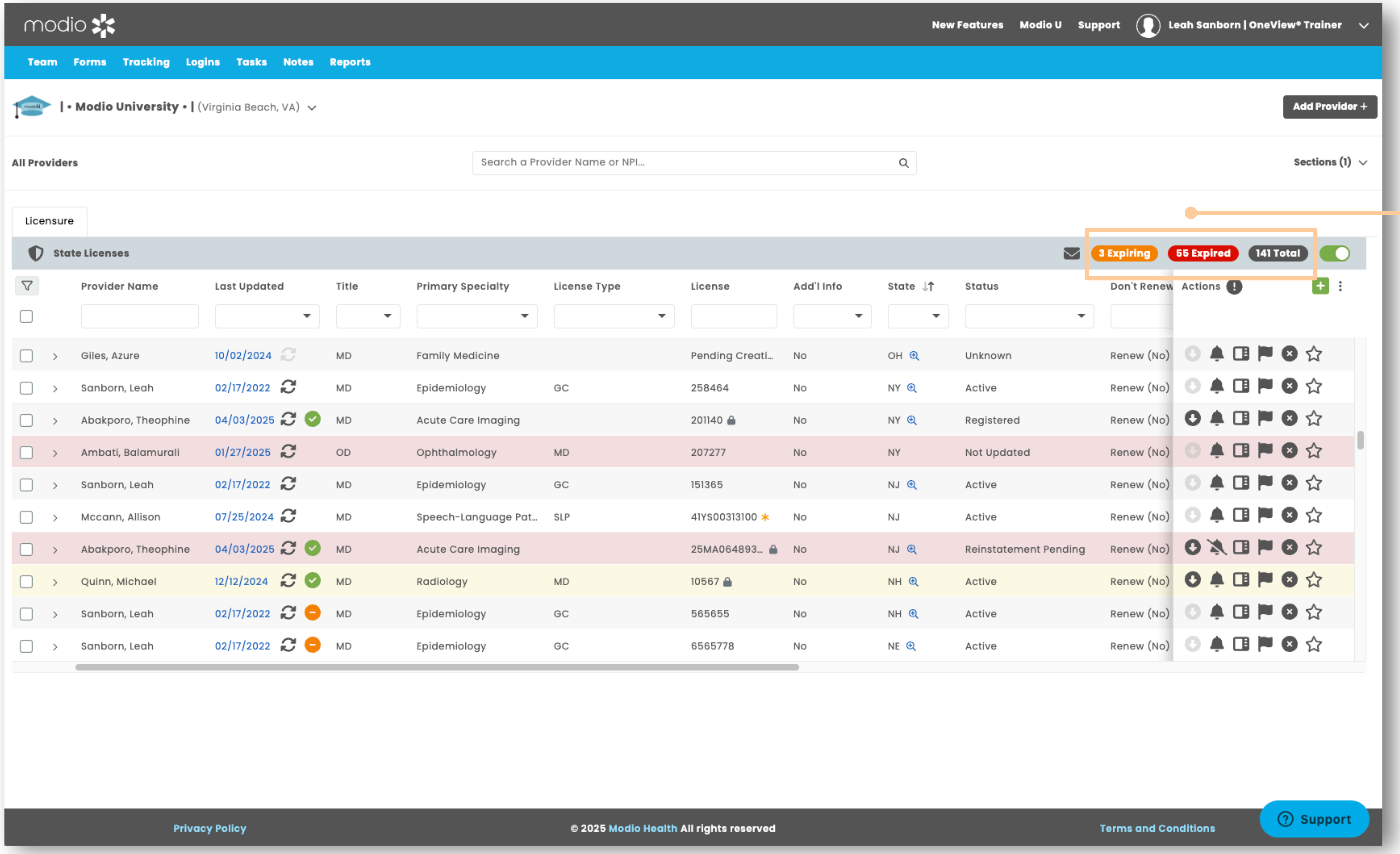
Adjust the filters provided to help prioritize your workflows when managing Compliance Alerts for your team. There are 3 filters available in the grid level header.

Alert filters are available at a grid level. Grids with expiration dates will display the **Red**, **Orange** and **Dark Grey** quick filter options.

Quickly toggle between:

- All data points
- Expiring Data Points
- Expired Data points

at the grid level with a single click.



Expiring: This filter will allow you to see what is soon to expire within the grid you're in. It is also connected to the advanced filtering option within the three-dot icon, which allows you to change the number of days you would like to be alerted.

Expired: This filter will allow you to see what records are past their expiration date.

Total: This filter will allow you to see all records within your grid. Including expiring, expired and up to date records.

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Introduction: Utilizing the advanced filtering options in the three-dot icon to filter your grid so you can have an even more efficient view.

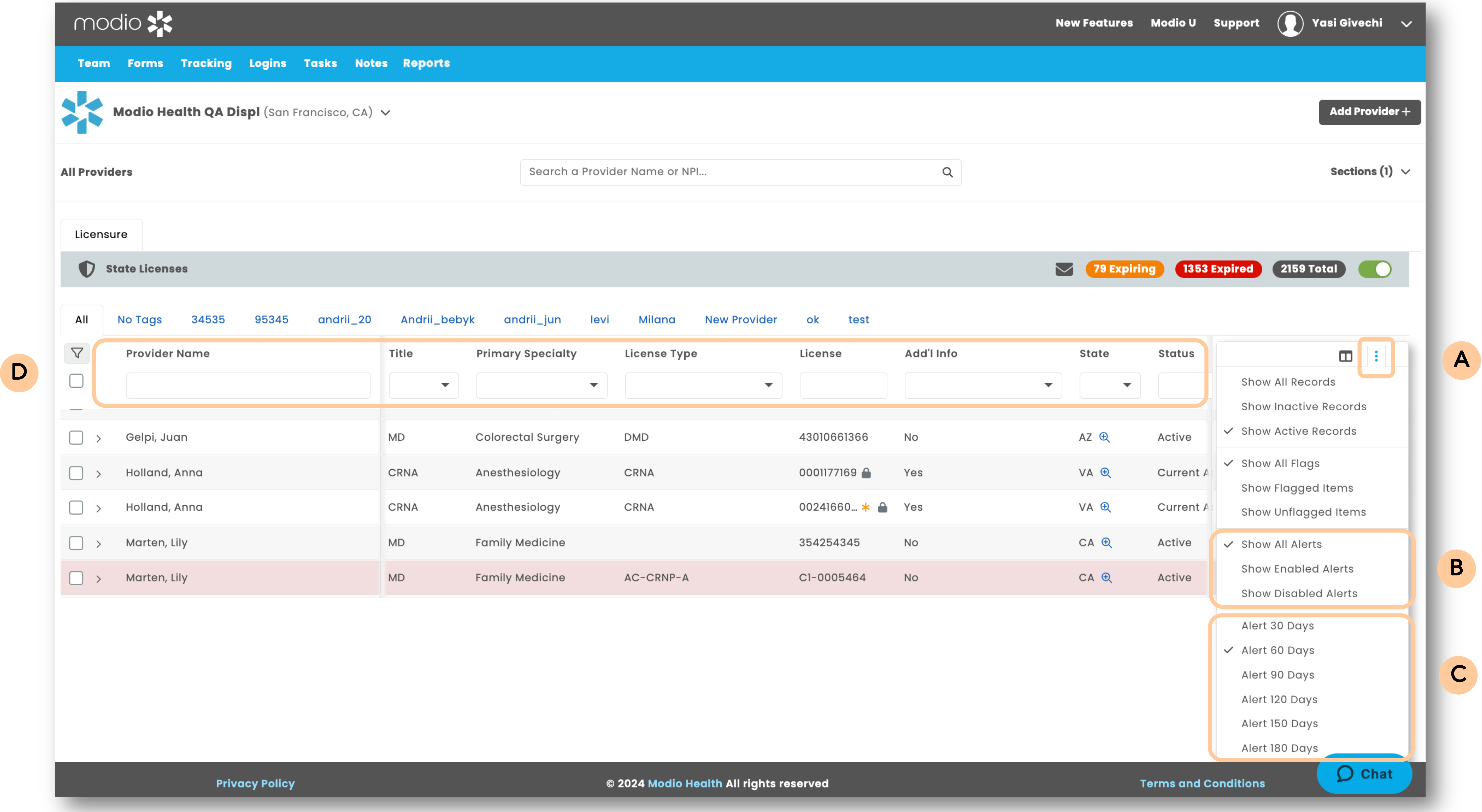
A Select the three-dot icon to access additional filters. These filters will help create a focused group of compliance alerts.

B **Helpful Hints:**

By default, the platform will "**Show All Alerts**" but you have the option to view just the enabled or disabled Alerts. Disable an Alert by clicking on the bell icon under the actions item column. This will mute that alert for that record.

C By default, the platform will Alert you at the 60-day mark, so when that record is set to expire in 60 days or less. In V2 you have the option to adjust that. So, if you'd like to work ahead or you want to be Alerted at when the record is set to expire in 30 days or more you can change that according to your workflows.

D Use the filter boxes located under each column name if you'd like to narrow down your list that you are viewing. Popular use cases are filtering by State and Title.



Tip Guide: Managing Compliance Alerts - Email Send Alerts

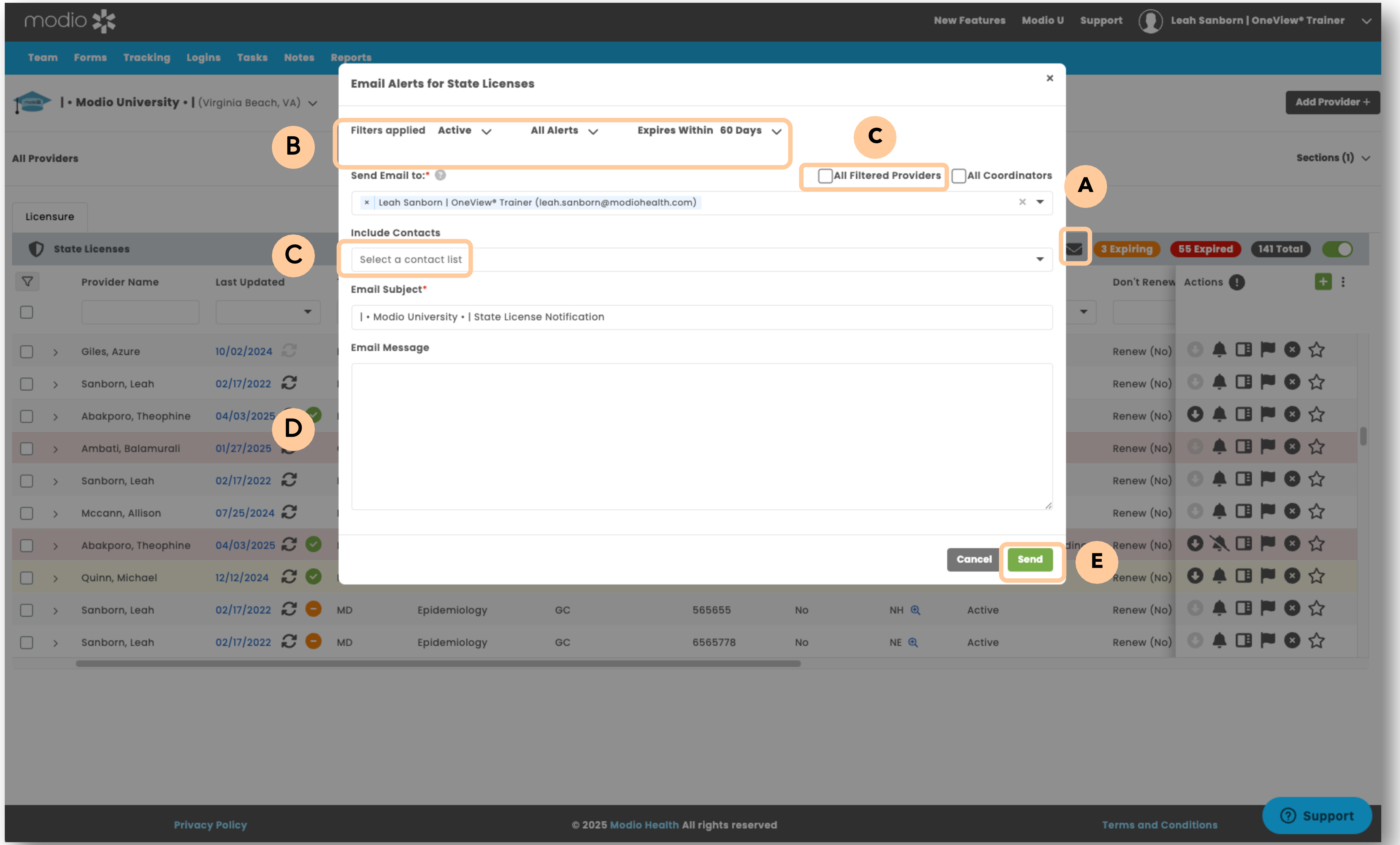
Introduction: Ready to notify your team? After setting your column filters, you can use the email alerts feature to quickly reach out to providers or coordinators directly from the platform.

A **Email Alerts**
Select the email icon to send a message to providers with upcoming expirables or to the coordinators on your team.

B **Reviewing Email Send Filters**
Before sending an email, make sure to review the three filter options in the Email Send Model. These filters determine which group of providers will receive the message.
Note: The filters in this model are not persistent (or "sticky") . They must be manually updated for each new email send. These settings are separate from any filters applied at the grid level.

C **Select "All Filtered Providers"**

- **All Filtered Providers:** Sends individual emails (not group emails) to each provider included in your filtered list. Each provider will receive details specific to their upcoming alert.
- **All Coordinators:** Sends the email to all coordinators who have access to your team.
- **Include Contacts:** Want to add additional recipients to your team's send list? Contact Support@modiohealth.com to enable this feature.



D **Personalized Email Message:**
Add a customized **Email Message** before sending to your providers or your team members. Use this feature to communicate any details or next steps.

E **Send:**
Now that the provider list is filtered, the email model filters have been reviewed, recipient list has been selected and the the personalized message has been added click **Send**.

Helpful Tips:

- Before selecting the email icon, set advanced column filters to create a focused list of providers.
- Filtering grid columns before selecting the email icon will narrow down the provider send list. Popular use cases and filtering by provider type and state before sending.

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Introduction: How to Use the Primary Source Verification Feature in OneView.

You can now access the **Primary Source Verification** tool under the **"Last Updated"** column in the **"Licensure"** tab and the **"Actions & Exclusions"** tab in OneView V2.

OneView allows you to run checks on up to 10 licenses at a time within the **Licenses** grid. Click the updater icon 🔄 next to a license to:

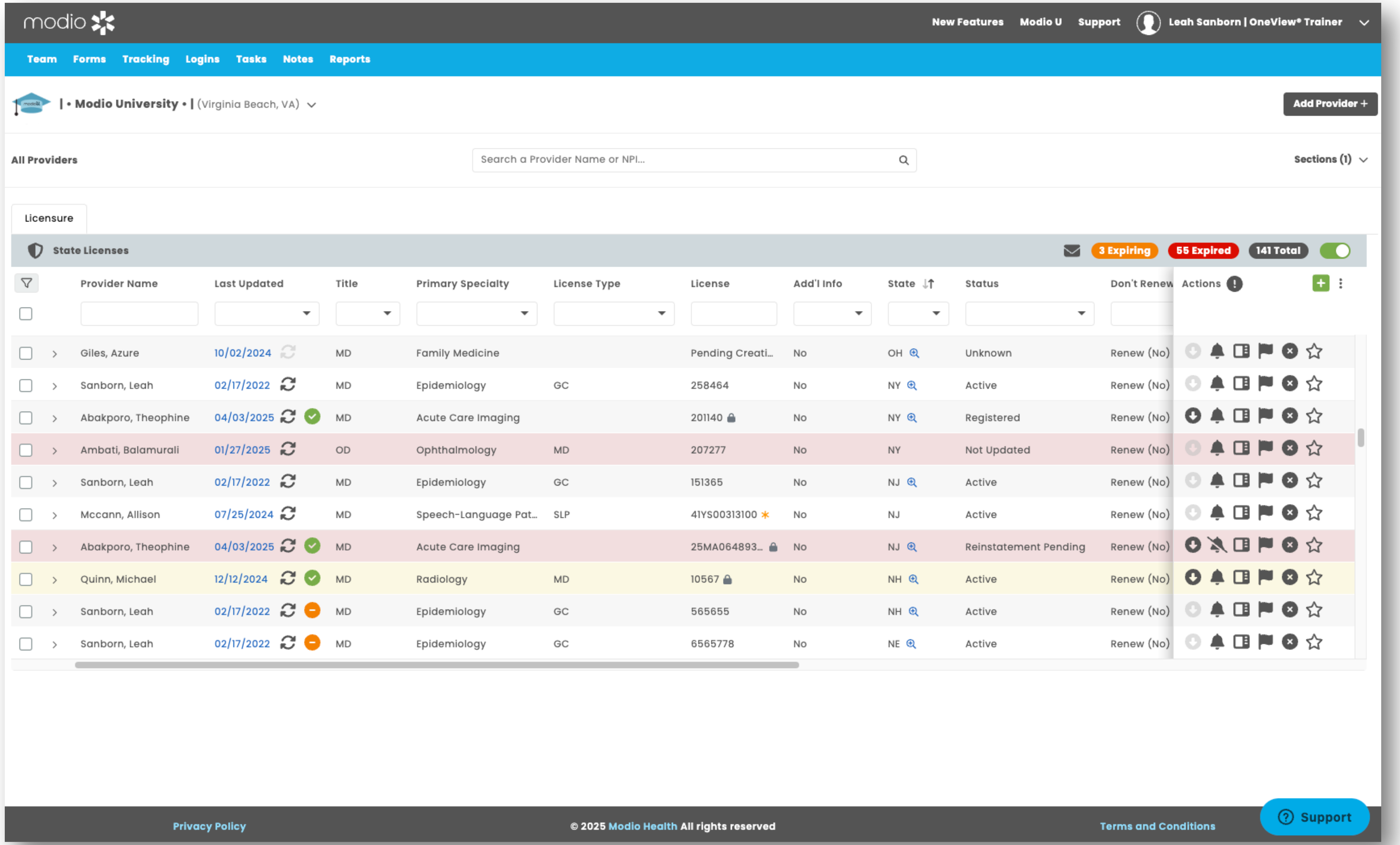
- Verify Primary Source updates
- Update the license data
- Save the **Primary Source Document** to your records

Alternate Way to Run the Updater:

1. Check the empty box beneath the filter icon.
2. The system will auto-select the first 10 licenses.
3. Right-click on a provider's name and select **"Update Selected Licenses"**.
4. The updater will process them in batches of 10 until all are complete.

After running, the system will:

- Automatically apply Primary Source updates
- Download the **Primary Source Document** (you can access it by clicking the down arrow icon in the **"Actions"** column)
- To view the history and timestamp of any changes, click the date under the **"Last Updated"** column.



Helpful Tips:

- If you use the "Last Updated" column often, drag it to the left side of your grid for quicker access without needing to scroll.
- Once you've updated licenses that are nearing expiration, use the envelope icon to message the provider or a coordinator on your team—right from within the platform. (See slide #7 for more on how the email feature works.)

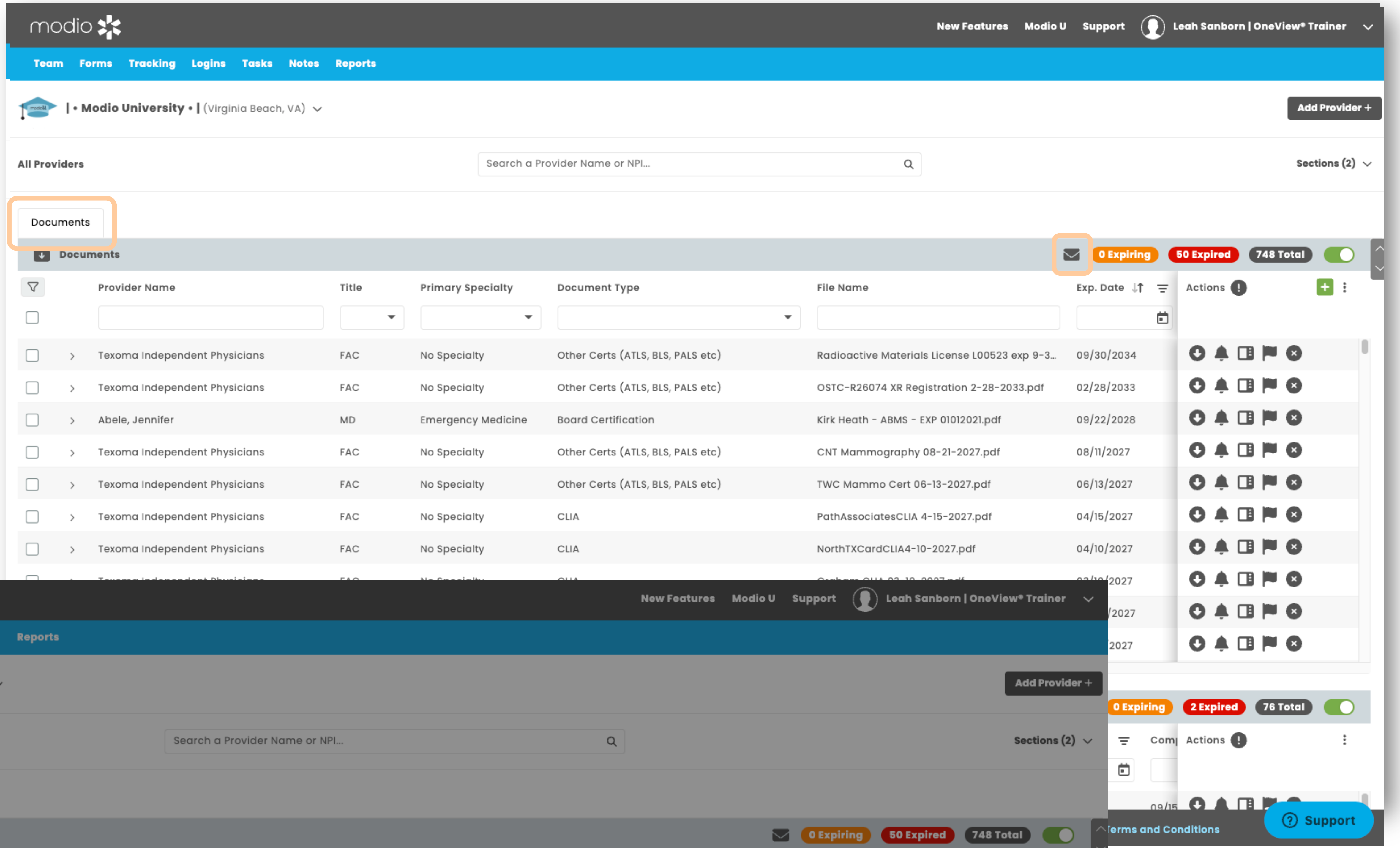
Introduction: Managing Documents

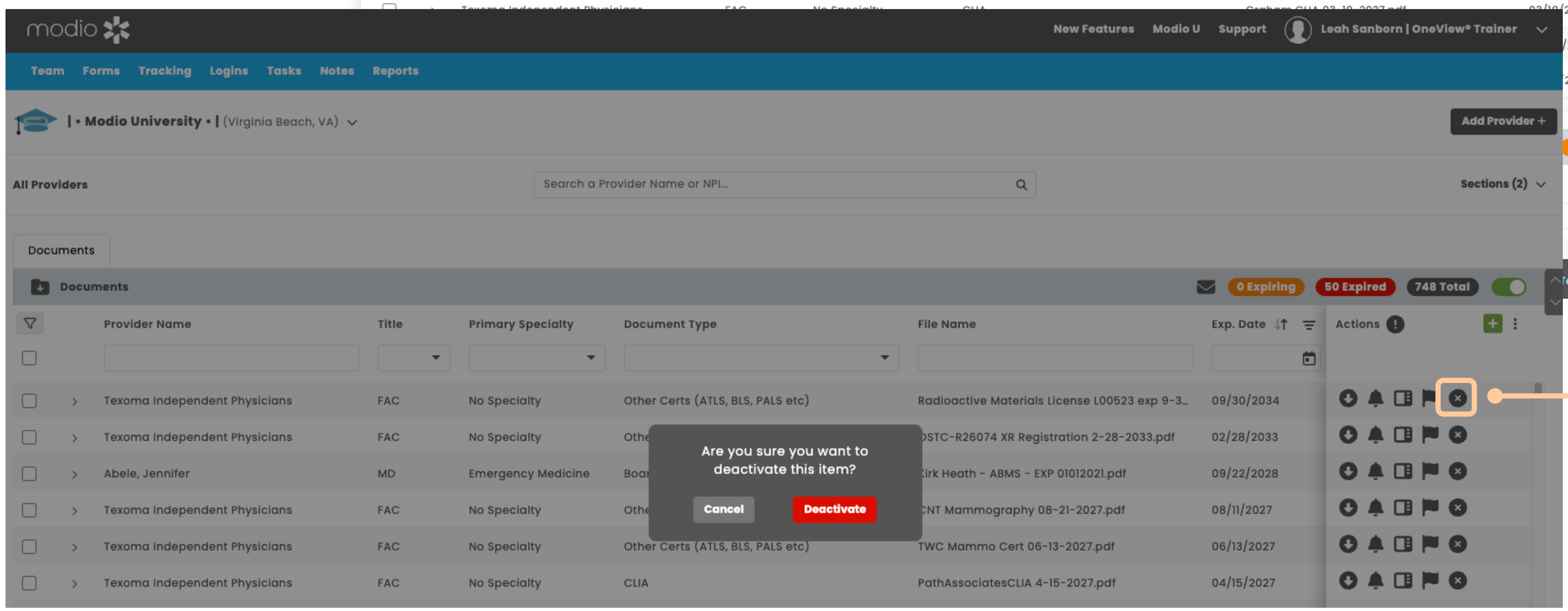
Utilize the filters to locate any expired or expiring Documents, you might want to get an updated Document on file.

Use the green plus sign by the three-dot icon to add a new or updated document. Enter in the required fields which are indicated by the red stars and click "**Save Record**" at the bottom right corner.

Use the name convention when saving documents to your computer, and the platform will recognize it and autofill those fields in for you. The naming convention to use is:

(Name - Doc Type - Exp date).





To remove or inactive an expired document, click on the grey **x** icon under the actions item column. Then click "Inactive"

Helpful Tip: If you accidentally made a document or record inactive, go to your three-dot icon, click "Show Inactive Records" and click the green plus sign under the actions item column to restore it.

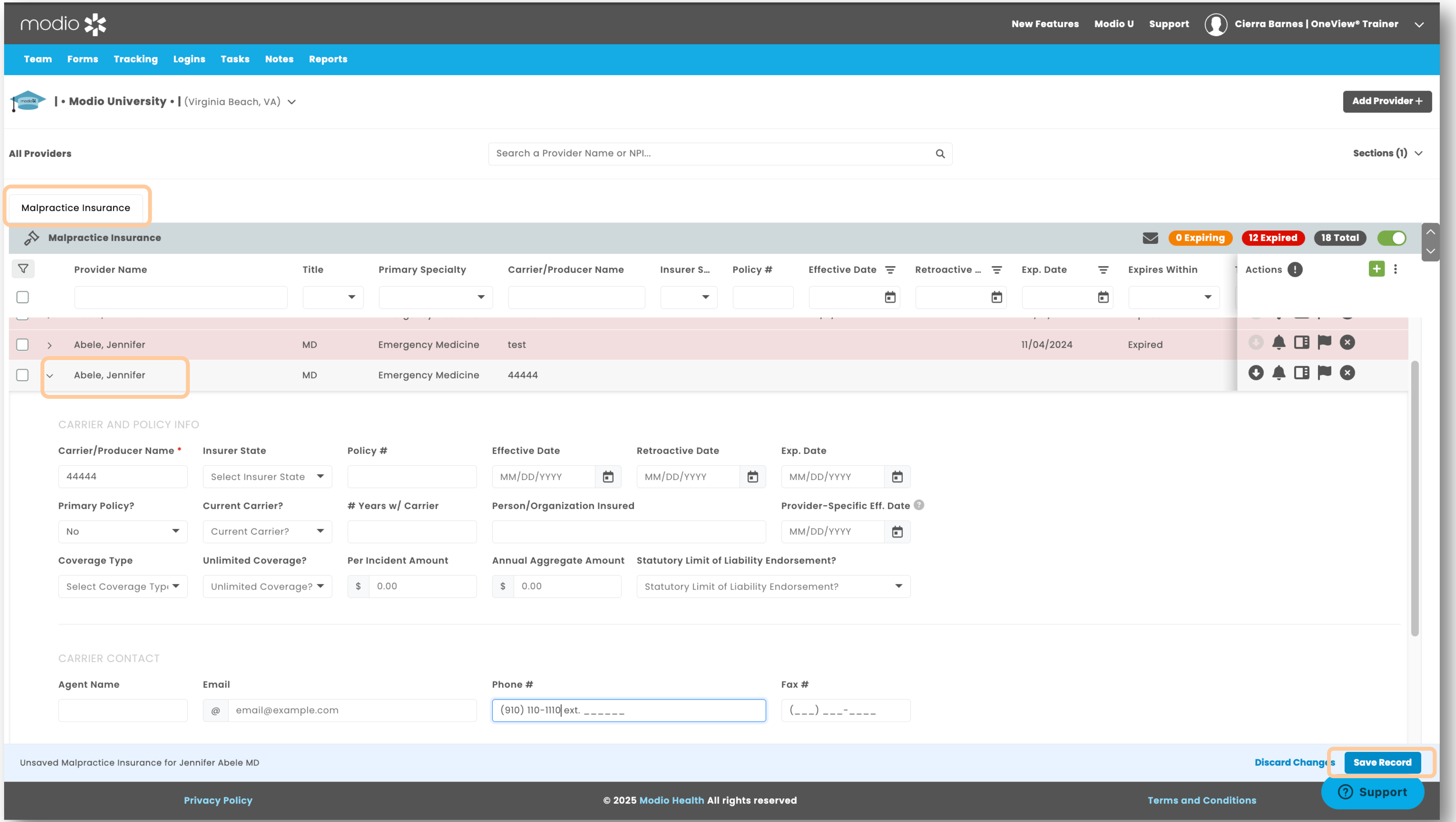
Introduction: Updating Malpractice Insurance

To update the information for a providers Malpractice, first navigate to the "Malpractice Insurance" tab.

Click on the providers name to open their record, this is called inline editing. You can then update those field. Hit the "**Save Record**" button to apply the changes you made.

Helpful Tips:

- If your organization updates Malpractice Insurance in bulk, send us a spreadsheet to Support@ModioHealth.com and our data team will make those updates for you.
- Any changes or updates that you make in the providers record in V2 will also apply to their profile in V1, so there is no need to do anything twice.



Frequently Asked Questions

Q: When something is soon to expire or expired, will I receive a notification?

The red and orange expiration bubbles are alerts only—they won't open tabs automatically. You'll need to manually click the relevant tab(s) to view what's nearing expiration or already expired. By following the compliance management best practices in this guide, you can stay on top of expirations and keep your workflow smooth and straightforward.

Q: Does OneView automatically run the updaters for me?

OneView does run OIG and SAM updaters automatically once a month, in the middle of the month. OneView does not automatically run the State License, DEA License, or State Controlled Substance License PSV. You will need to manually click the updater icon that is located under the "Last Updated" column in your grid.

Q: Will OneView send out an automated email to providers if their license is expiring soon or has already expired?

Email notification send will need to be completed manually. Click on the envelope icon within the grid that you're in and type your message to personalize it and select send to remind providers to renew their licenses.

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

Online:
Live Chat Support

Email:
Support@modiohealth.com

Phone:
844.696.6346