



Tip Guide: Master Records vs FAC Profiles vs OneView® Teams

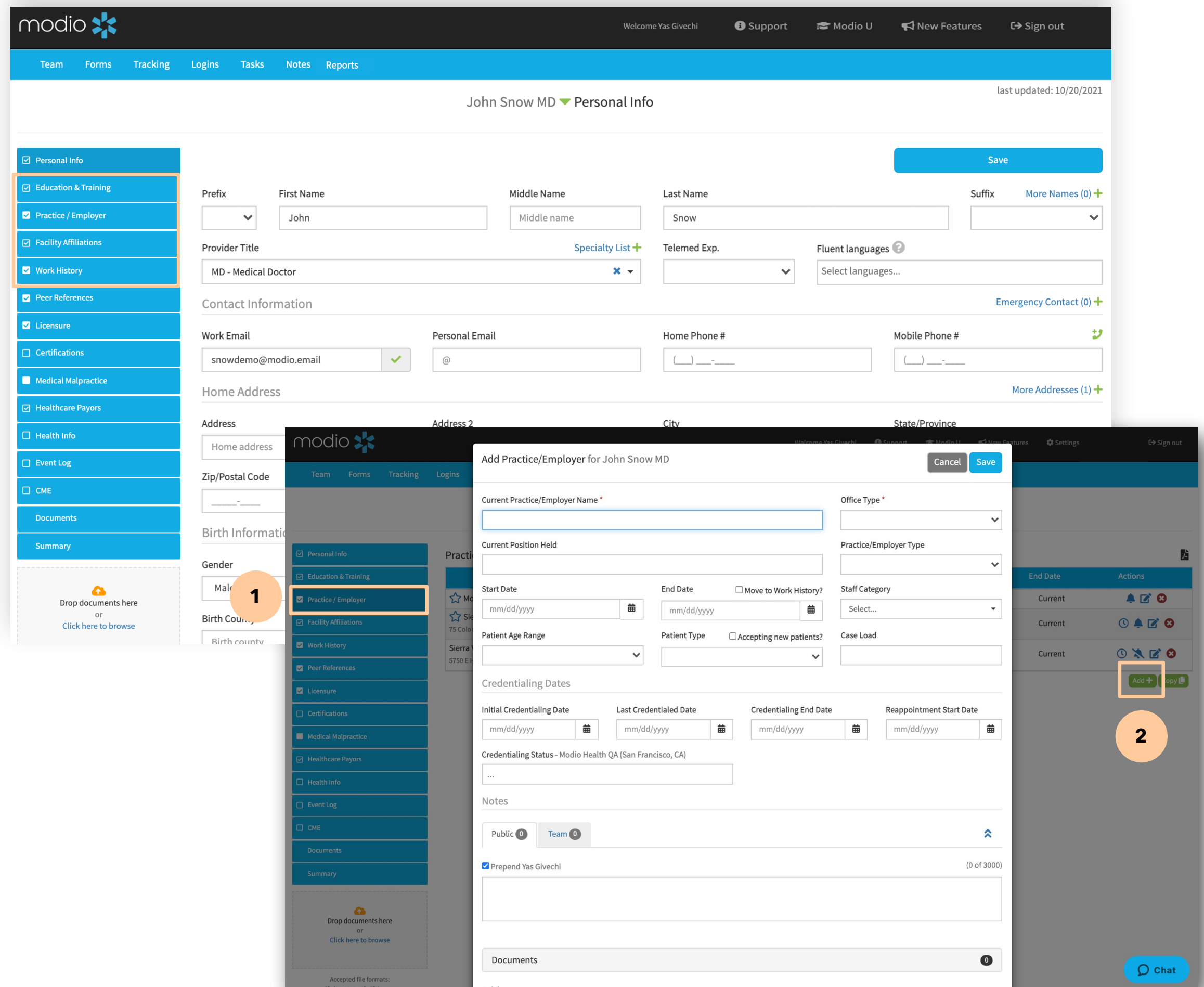
What is a Facility Master Record and how is it created and managed?

Facility Master Records are the 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

For more information on keeping your Facility Master Records up to date please refer to the tip guide Facility Management. Our team is happy to help update records when appropriate through email at support@modiohealth.com.



The screenshot displays the modio OneView® interface for managing a provider's profile. The main form is titled "John Snow MD" and is categorized under "Personal Info". The form includes sections for Personal Information (Prefix, First Name, Middle Name, Last Name, Suffix, More Names), Provider Title, Specialty List, Telemed Exp., and Fluent languages. It also includes Contact Information (Work Email, Personal Email, Home Phone #, Mobile Phone #) and Home Address (Address, Address 2, City, State/Province, Zip/Postal Code). A sidebar on the left lists various record types: Personal Info, Education & Training, Practice / Employer, Facility Affiliations, Work History, Peer References, Licensure, Certifications, Medical Malpractice, Healthcare Payors, Health Info, Event Log, CME, Documents, and Summary. A modal window titled "Add Practice/Employer for John Snow MD" is open, showing fields for Current Practice/Employer Name, Office Type, Current Position Held, Practice/Employer Type, Start Date, End Date, Patient Age Range, Patient Type, Staff Category, Case Load, Credentialing Dates, Credentialing Status, and Notes. A sidebar on the right shows a list of records with columns for End Date and Actions.

What is a FAC Profile and how is it created / managed?

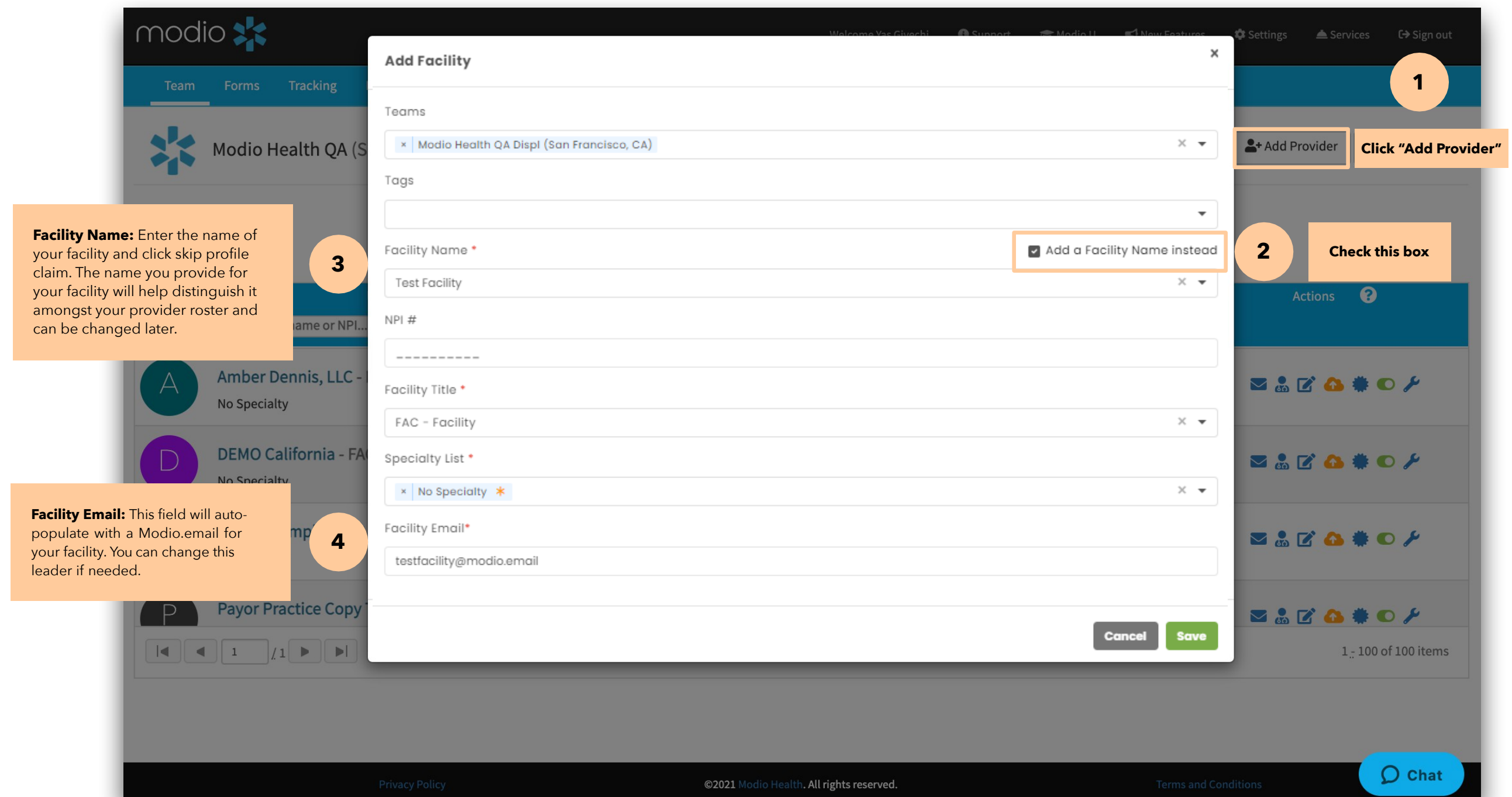
A FAC Profile is the representation of a group or organization which lives alongside & functions as a credentialing profile within your team's roster. Once created, FAC Profiles allow you to track the data, documents, and credentialing information specific to that organization or group. FAC Profiles are created & managed by the Coordinators on your Team.

How would I utilize a FAC Profile in OneView®?

FAC Profiles are useful to track & manage the standard data associated with a group or organization. Examples could include:

- Facility / Group Malpractice Policy Info & Documents
- Healthcare Payors associated with a specific location
- Facility Level Credentialing Data, Documents & Forms
- Group Administrative Document & Data Storage

You can create a FAC Profile by applying the same process used to add a new provider. Simply navigate to the '**Add Provider**' tool located in the top righthand corner of your OneView® Team dashboard and then follow the additional steps outlined in the image shown.



The image shows a screenshot of the Modio 'Add Facility' form. The form is overlaid on a blurred background of the Modio dashboard. The form has the following fields and callouts:

- Callout 1:** Points to the 'Add Provider' button in the top right corner of the dashboard.
- Callout 2:** Points to a checkbox labeled 'Add a Facility Name instead' in the 'Facility Name' field.
- Callout 3:** Points to the 'Facility Name' field, which contains the text 'Test Facility'.
- Callout 4:** Points to the 'Facility Email' field, which contains the text 'testfacility@modio.email'.

The form itself contains the following fields:

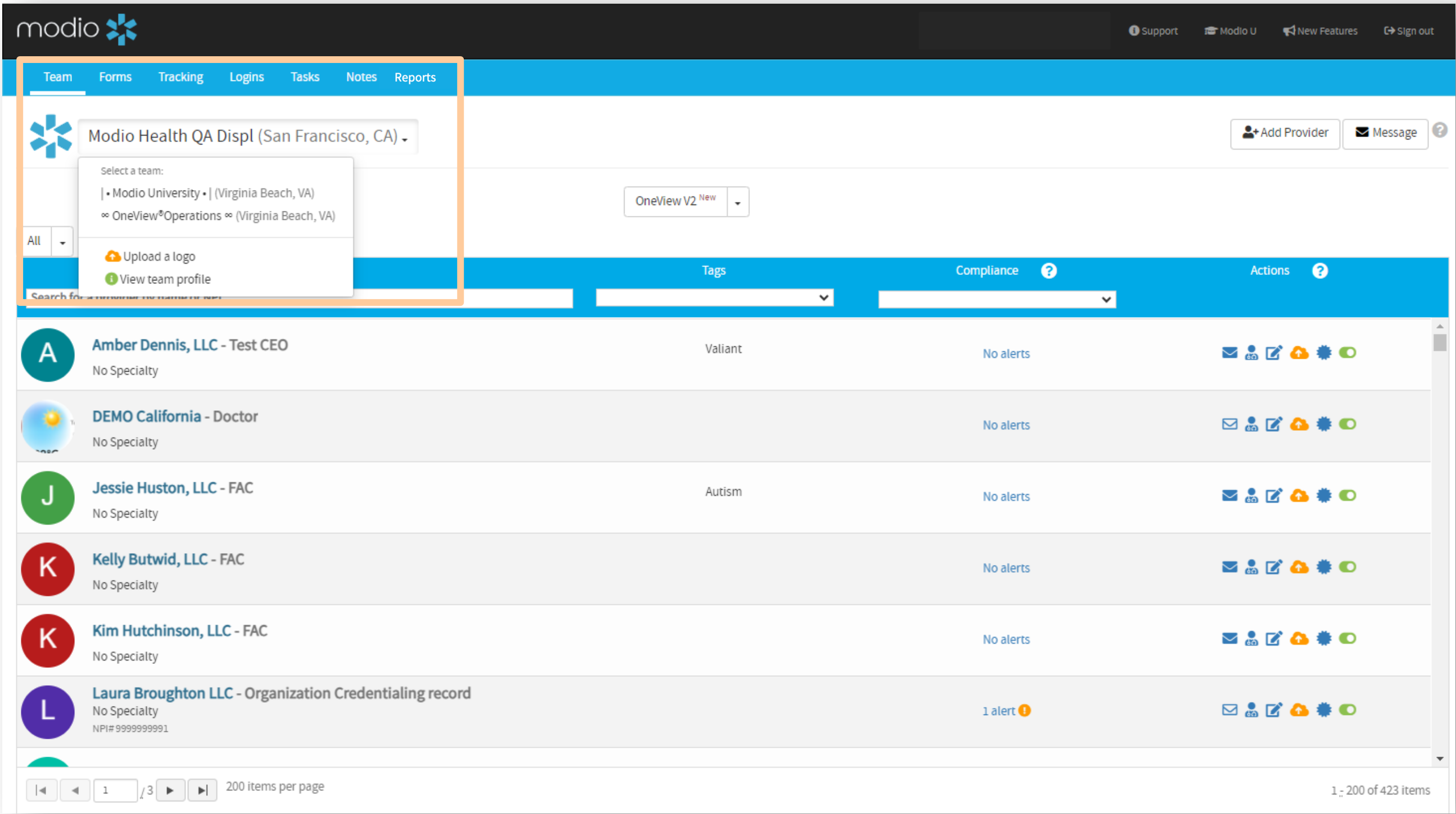
- Teams:** A dropdown menu with 'Modio Health QA Displ (San Francisco, CA)' selected.
- Tags:** A dropdown menu.
- Facility Name:** A text input field with 'Test Facility' entered. A checkbox 'Add a Facility Name instead' is checked.
- NPI #:** A text input field with '-----' entered.
- Facility Title:** A dropdown menu with 'FAC - Facility' selected.
- Specialty List:** A dropdown menu with 'No Specialty' selected.
- Facility Email:** A text input field with 'testfacility@modio.email' entered.
- Buttons:** 'Cancel' and 'Save' buttons at the bottom right of the form.

What is a OneView® Team and how is it created / managed?

A OneView® Team is a dedicated workspace for your organization and is the foundation for your credentialing workflows within our platform. These are designed & customized based on organizational structure and credentialing workflows & needs.

OneView® Teams are created & maintained in our OneView® master database and once established, these Team Dashboards will be available by the coordinators previously authorized to have access.

Your OneView® Team Structure directly impacts & correlates to the features within the Teams Navigation Tool Bar (Forms, Tracking, Logins, Task, Notes, Onboarding, Tags). Any actions completed within these Features will be Team specific and will not be available or reflected within other OneView® Teams.



Frequently Asked Questions

Q: Many of my providers have the same list of Payors and locations. Would an FAC be helpful for me?

Yes! An FAC profile is a great way to store information that you want to copy onto other provider profiles. Build a list of Payors and Locations in your FAC to quickly Copy/Paste from one profile to another. This can be a great time saver when creating a new provider profiles.

Q: I have to credential for both groups and facilities. Can I have a group and/or facility as a profile type?

Yes, you can by creating the profile as a FAC. You can use the various sections of the profile to manage and keep track of expirable items, start tracking events, and various other credentialing items just as you would for an individual provider. Though not all integrations work for all facility types many of the features will and updates to the platform are made regularly.

Q: Is there an easy way to identify which records in the master records are the best ones for my team?

You can have a specific client ID assigned to your facilities on request. A client ID is typically a short word that easily identifies the facility record as specific for your organization.

Q: Why would I need multiple Teams?

Most organizations work best from a Single Team setup. There are some general guidelines that make having multiple teams useful, however please remember it is always best to work with your account manager to ensure that this will be a solution that works for you. Creating a multi-team set up comes with limitations, too.

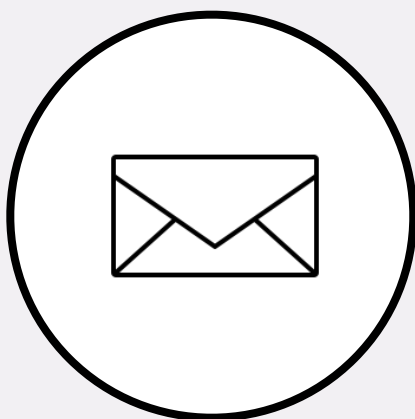
1. Restricting access to a group of profiles at a coordinator level.
2. Onboarding - The onboarding invite template is team level. If you require different Onboarding templates and messages for different types of providers, then a multi-team structure might be right for you.
3. Profile Management/Workspace separation - Forms and Tracking are Team level features and additional child teams can be used to hold additional workflows and forms.

Support & Contact

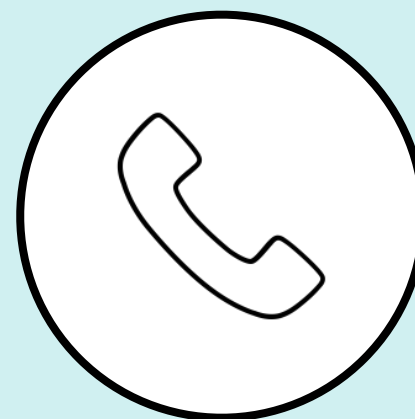
If you need a new OneView® Team added to your account, simply submit a request containing the pertinent details of your Team needs to **support@modiohealth.com**. Once our team reviews your request, we will schedule a follow-up call to discuss further specifications. In these instances, your Account Manager will work with you to coordinate a meeting to discuss all potential options & solutions.



Online:
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