



Modio **OneView**[®] Tip Guide

FACILITY MASTER RECORD AND
LOCATION MANAGEMENT

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Click [here](#) to Watch a 45-minute-deep dive into the Facility Master Record with several of our OneView experts!

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

Facility Master Records are the unique 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

You can request a **Facility Master Record** creation by sending the pertinent data points to support@modiohealth.com.

- Personal Info
- Education & Training
- Practice / Employer
- Facility Affiliations
- Work History
- Peer References
- Licensure
- Certifications
- Medical Malpractice
- Healthcare Payors
- Health Info
- Event Log
- CME
- Documents
- Summary

Four sections of your provider profiles are location based.

Two of those sections; "Practice/Employer" and "Facility Affiliations" - data entries must be added through the Master Record.

See the next Pages for a how-to on the Facility Master Update report. Have additional locations added to the master record by submitting any edits or changes to existing locations by using this report.

•**Step 1** - Type the address into the text box. A list of potential matches will appear in a dropdown for you to select from. If the address does not generate a match, then try to search by name or keyword

•**Step 2** - If you see your location in the dropdown select it by clicking once.

•**Step 3** - If you can't find a match for your location after searching by address and key words, a message will appear in blue.

•**Step 4** - Have the new location quickly added to our database by the support team via Support@modiohealth.com

Best Practice Tip #1 - Best practice is to always add locations from the Facility Master Record. The system will give you an option to add a location manually. If you add a location manually in either the "Practice/Employer" section or the "Facility Affiliations" section, you may run into issues in the future. These locations are connected to Reporting, Forms, Payors, Tracking and more!

Best Practice Tip #2 - Educations & Training and Work History sections are location based. Best practice is still to search the facility master record for existing locations, but it is OK to add data manually to these 2 sections.

OneView: Support Guide Reporting : **Facility Master Update VS Facilities**

Report: Facility Master Update

- Location/Facility Focused
- Used to QA Locations and Facilities

Outcome: All unique locations found within your provider profiles that are associated with the master database.

Use case example:

View all locations that are stored in any of your provider profiles and are part of the Facility Master Record. Click the pen and paper icon and then scroll to the section labeled Address.

- These locations must have the "Update address info from master record" box selected to be part of this report
- This report will not include Education & Training or Work History locations

Indicator in OneView: When the facility is added correctly the check boxes are checked in blue. This blue check keeps your location connected to the Facility Master Record. If the box has been unchecked - the facility is not being pulled from our master record or it was not added correctly (a manual entry)

Report: Facilities

- Provider Focused
- Used to QA Provider Profiles

Outcome: All unique locations associated with any provider on your team roster.

Use case example :

View all your locations at a provider level. This includes:

- locations that were added manually
- Address Info from Master Record if box is either checked or unchecked
- Locations that were added correctly through the Facility Master Record
- This report will not include Education & Training or Work History locations

See the next Pages for a deep dive into the Facility Master Update Report

The screenshot shows the Modio OneView interface. At the top, there are navigation tabs: Team, Forms, Tracking, Logins, Tasks, and Notes. Below this is a header for 'Modio Health QA (San Francisco, CA)'. A search bar for providers is visible. On the right side, an 'Alerts' dropdown menu is open, listing various report categories. The 'Facility Master Update' option is highlighted with a yellow box and a circled '1'.

Once you have run the Facility Master Update report you can start to make edits or changes. Follow these steps to start updating your locations:

- Step 1** - Run the Facility Master Update Report from the reports dropdown
- Step 2** - Important! Save the report as an Excel Workbook (*.xlsx)
- Step 3** - Add or update any data for your existing locations and highlight those edits in yellow
- Step 4** - Add any new locations that are not yet a part of the Facility Master Record and highlight in yellow at the bottom of the report
- Step 5** - Email the Excel document to Support@ModioHealth.com

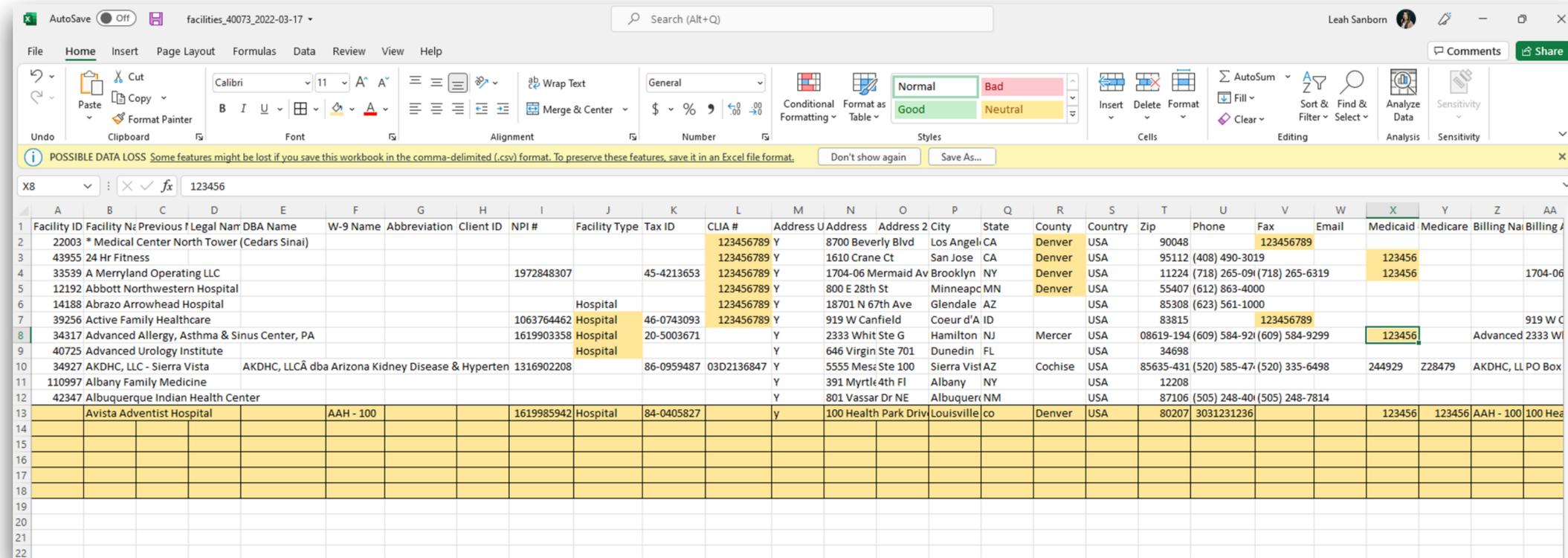
This block contains two screenshots illustrating the steps. The top screenshot shows a file save dialog box with 'Excel Workbook (*.xlsx)' selected, highlighted with a yellow box and a circled '2'. The bottom screenshot shows an Excel spreadsheet with a data table. The table has columns for Facility ID, Facility Name, Previous Facility Name, Legal Name, DBA Name, W-9 Name, Abbreviated Name, Client ID, NPI #, Facility Type, Tax ID, CLIA #, Address, City, State, County, Country, Zip, Phone, Fax, Email, Medicaid, Medicare, Billing Name, Billing Address, and Billing City. Row 10 is highlighted in yellow, and the cell containing '239823' is also highlighted with a yellow box and a circled '3'. A circled '4' is placed at the bottom left of the spreadsheet area.

Facility ID	Facility Name	Previous Facility Name	Legal Name	DBA Name	W-9 Name	Abbreviated Name	Client ID	NPI #	Facility Type	Tax ID	CLIA #	Address	City	State	County	Country	Zip	Phone	Fax	Email	Medicaid	Medicare	Billing Name	Billing Address	Billing City
22003	* Medical Center North Tower (Cedars Sinai)											8700 Beverly Blvd	Los Angeles	CA	USA	90048									
43955	24 Hr Fitness											1610 Crane Ct	San Jose	CA	USA	95112	(408) 490-3019								
33539	A Merryland Operating LLC							1972848307		45-4213653		1704-06 Mermaid Av	Brooklyn	NY	USA	11224	(718) 265-(718) 265-6319						1704-06 Mermaid Av	Brooklyn	
12192	Abbott Northwestern Hospital											800 E 28th St	Minneapolis	MN	USA	55407	(612) 863-4000								
14188	Abrazo Arrowhead Hospital								Hospital			18701 N 67th Ave	Glendale	AZ	USA	85308	(623) 561-1000								
39256	Active Family Healthcare							1063764462		46-0743093		919 W Canfield	Coeur d'Alene	ID	USA	83815							919 W Canfield	Coeur d'Alene	
34317	Advanced Allergy, Asthma & Sinus Center, PA							1619903358		20-5003671		2333 Whit Ste G	Hamilton	NJ	Mercer	USA	08619-194	(609) 584-(609) 584-6000					Advanced 2333 Whit Ste G	Hamilton	
40725	Advanced Urology Institute											646 Virgin Ste 701	Dunedin	FL	USA	34698									
34927	AKDHC, LLC - Sierra Vista							1316902208		86-0959487	03D2136847	5555 Mesa Ste 100	Sierra Vista	AZ	Cochise	USA	85635-431	(520) 585-(520) 335-6498	244929	228479			AKDHC, LL PO Box 16076	Belfair	
42347	Albuquerque Indian Health Center											801 Vassar Dr NE	Albuquerque	NM	USA	87106	(505) 248-(505) 248-7814								

OneView: Support Guide Facility Master Record - Reporting

Use this report to make any updates or edits to your current locations. If you have a location that is not currently part of the Facility Master Record, add the information to this report, highlight it in yellow and email it to Support@modiohealth.com

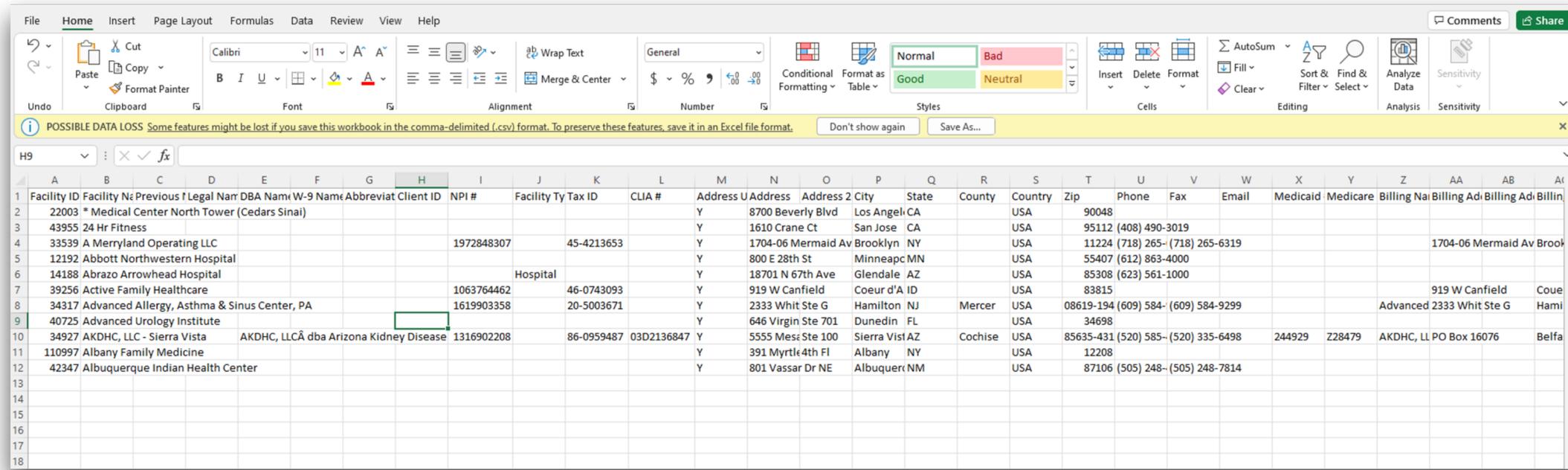
Best Practice Tip #1 - Run this report every month and review to ensure all locations are up to date.



Facility ID	Facility Name	Previous Facility Name	Legal Name	DBA Name	W-9 Name	Abbreviation	Client ID	NPI #	Facility Type	Tax ID	CLIA #	Address 1	Address 2	City	State	County	Country	Zip	Phone	Fax	Email	Medicaid	Medicare	Billing Name	Billing Address
22003	* Medical Center North Tower		(Cedars Sinai)								123456789	8700 Beverly Blvd	Los Angeles	CA	Denver	USA	90048			123456789					
43955	24 Hr Fitness										123456789	1610 Crane Ct	San Jose	CA	Denver	USA	95112	(408) 490-3019				123456			
33539	A Merryland Operating LLC						1972848307			45-4213653	123456789	1704-06 Mermaid Av	Brooklyn	NY	Denver	USA	11224	(718) 265-0911	(718) 265-6319			123456			1704-06 Mermaid Av Brook
12192	Abbott Northwestern Hospital										123456789	800 E 28th St	Minneapolis	MN	Denver	USA	55407	(612) 863-4000							
14188	Abrazo Arrowhead Hospital								Hospital		123456789	18701 N 67th Ave	Glendale	AZ		USA	85308	(623) 561-1000							
39256	Active Family Healthcare							1063764462	Hospital	46-0743093	123456789	919 W Canfield	Coeur d'Alene	ID		USA	83815			123456789					919 W Canfield
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40725	Advanced Urology Institute											646 Virgin Ste 701	Dunedin	FL		USA	34698								
34927	AKDHC, LLC - Sierra Vista		AKDHC, LLC	dba Arizona Kidney Disease & Hyperten			1316902208			86-0959487	03D2136847	5555 Mesa Ste 100	Sierra Vista	AZ	Cochise	USA	85635-431	(520) 585-4711	(520) 335-6498	244929	228479	AKDHC, LLC	PO Box		
110997	Albany Family Medicine											391 Myrtle 4th Fl	Albany	NY		USA	12208								
42347	Albuquerque Indian Health Center											801 Vassar Dr NE	Albuquerque	NM		USA	87106	(505) 248-4011	(505) 248-7814						
	Avista Adventist Hospital				AAH - 100			1619985942	Hospital	84-0405827		100 Health Park Driv	Louisville	CO	Denver	USA	80207	3031231236			123456	123456	AAH - 100	100 Hea	

Note: Report with Edits/Changes/New locations you added highlighted in yellow and saved as (*.xlsx)

Best Practice Tip #2 - When filling out the address, if the billing and/or mailing address is the same as the physical location - best practice is to include that on the report. Submitting complete data now will lead to success when using the Forms feature in the future!



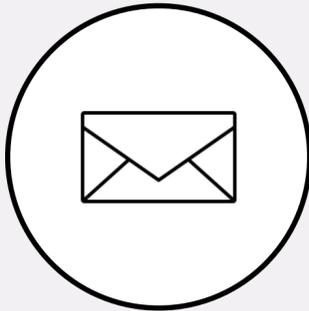
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43955	24 Hr Fitness										Y	1610 Crane Ct	San Jose	CA		USA	95112	(408) 490-3019							
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42347	Albuquerque Indian Health Center										Y	801 Vassar Dr NE	Albuquerque	NM		USA	87106	(505) 248-4011	(505) 248-7814						

Note: Original Report (with no highlighting)

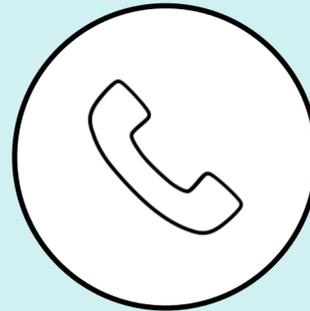
If you need a new OneView® Team added to your account, simply submit a request containing the pertinent details of your Team needs to **support@modiohealth.com**. Once our team reviews your request, we will schedule a follow-up call to discuss further specifications. In these instances, your Account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



Online:
Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346