




Tip Guide: Navigating Primary Source Integrations

Introduction

Use this guide as a basic introduction to locate and use Primary Source Verification tools throughout the OneView platform.

In addition to Primary Source Verifications, there are other integrations available throughout the platform that will help with profile builds, importing data, and more.

Throughout the platform, primary source integrations are accompanied by an updater tool indicated by this icon. Click on this icon  to check for updates on licenses and more.

Here are some of the benefits of using our OneView Primary Source Integrations:

- We have hundreds of integrations with primary sources. Each one of these eliminates a manual search for a provider on a site to verify.
- Primary sources are industry standards - rely on us to link to a standard source.
- Primary source document generation - saves time to upload to provider docs with the click of a button rather than printing to PDF, saving and uploading to the profile.
- Ability for bulk runs - example: Use V2 to run multiple updaters at the same time.
- Reduction in user error - primary source verified fields are locked to reduce user error with data entry.



Primary Source Integrations

Profile Card

- NPI/NPPES

Licenses Tab in v2 & License section in v1

- State Licenses
- DEA
- State Controlled Substance

Certifications

- NCCPA

Actions & Exclusions Grid

- OIG
- SAM
- FSMB

Additional Integrations with OneView

- LexisNexis - Add Provider
- CAQH - Import requests
- Find Feature
- SFTP
- DocuSign

Note - We're constantly improving OneView! Check our bi-weekly release notes for the latest integration enhancements.

Primary Source Integrations

Profile Card: Hosts updaters for **NPI, OIG, State License, DEA License and Controlled Substance.**

Recommended Workflow:

1. Add a new provider using the Add Provider button in V1 or V2. Type the provider Name or NPI in the Provider name field and select the correct Provider from the dropdown list. Selecting a name from the dropdown will pull basic provider data from the **LexisNexis** integration.
2. Review data on the Profile Card. The updater Icon will appear next to **NPI, OIG, State License, DEA License and Controlled Substance**. Run the PSVs by selecting the updater icon in all sections of the Profile Card.
3. This best practice and recommended workflow will ensure your new provider profile has up to date information for the verified sections. Primary Source Verification documents are automatically saved to your provider profile when running these updaters from the **v2 profile card**.

modio

TeamFormsTrackingLoginsTasksNotesReports

Modio University • (Virginia Beach, VA)

All Providers

Provider InfoCAQHLicensureActions & ExclusionsCertifications

Provider Info

Provider Name	Title	Primary Specialty
Kaurin, Rhonda	CNA	Personnel
Appleseed, Johnny	PA-C	Certified Nurse Practitioner
Heath, Kirk	MD	General Surgery
Heath, Kirk	MD	General Surgery
Bradway, John	MD	Orthopedics
Zowie, Wowie	MD	Addiction Medicine
Sanborn, Leah	MD	Epidemiology
Giles, Azure	MD	Family Medicine
Denning, Cierra	MD	Breast, Gynecology
Wright, Azure	NA	Personnel

Profile Card

Kirk Heath, MD
General Surgery

Notes

NPI #1184838286Updated: 05/08/2025

OIGPassDOB: 01/01/1964Updated: 05/08/2025

Home AddressBilling Address1, Billing Address 21, retet 12345- ----Email: kirk.heath123@modio.email

Primary PracticeSierra Vista Medical Group5750 E Hwy 90, Ste 200, Sierra Vista, AZ 85635Phone: (520) 263-3500

Primary AffiliationSentara Virginia Beach General Hospital1060 1st Colonial Rd, Virginia Beach, VA 23454

Professional SchoolEastern Virginia Medical School

Graduation Date05/14/2002ECFMG? No

State Licenses

CA	1234			upd. 04/10/2025 (a month ago)
CA	C196848		exp. 08/31/2026	upd. 04/16/2025 (22 days ago)
CO	341645	NP		upd. 04/10/2025 (a month ago)
NC	2015-02245	DO	exp. 08/20/2021	upd. 05/07/2025 (a day ago)

DEA Licenses

VA	FH0329032		exp. 10/31/2027	upd. 04/10/2025 (a month ago)
VA	MB1036107			upd. 04/10/2025 (a month ago)

Controlled Substances

VA	133433	MD		upd. 04/24/2025 (14 days ago)
----	--------	----	--	-------------------------------

Board Certifications

American Board of Family Medicine	Family Medicine	exp. 01/01/2024
American Board of Surgery	General Surgery	exp. 06/30/2023

OK

New FeaturesModio USupportDanessa McShane | OneView

Add Provider +

Sections

60 Total

Last Updated	Actions
04/15/2025	[Icons]
04/15/2025	[Icons]
05/08/2025	[Icons]
04/15/2025	[Icons]
04/15/2025	[Icons]
04/15/2025	[Icons]
04/15/2025	[Icons]
04/15/2025	[Icons]
04/15/2025	[Icons]
04/15/2025	[Icons]

46 Total

TagsActions

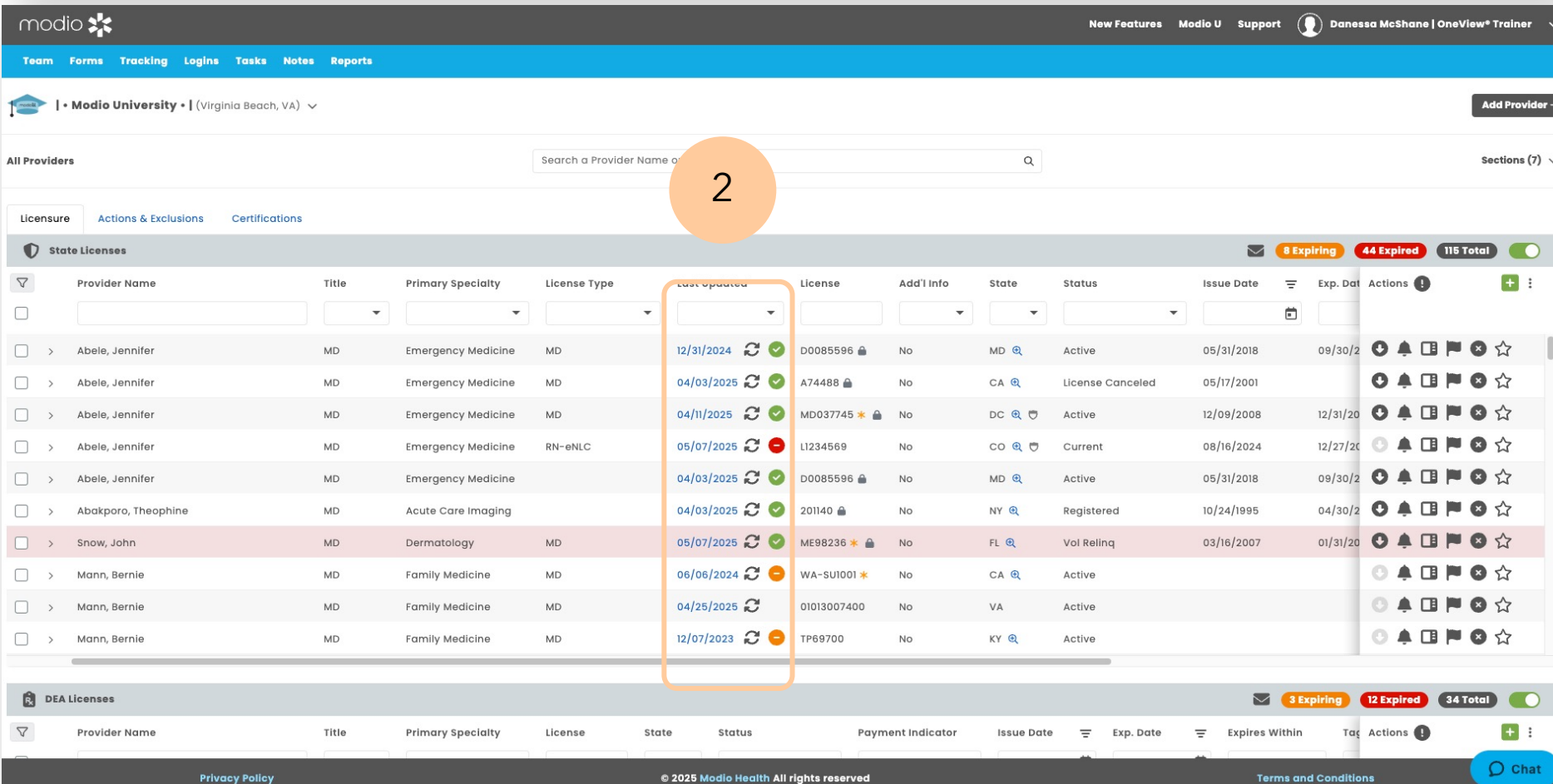
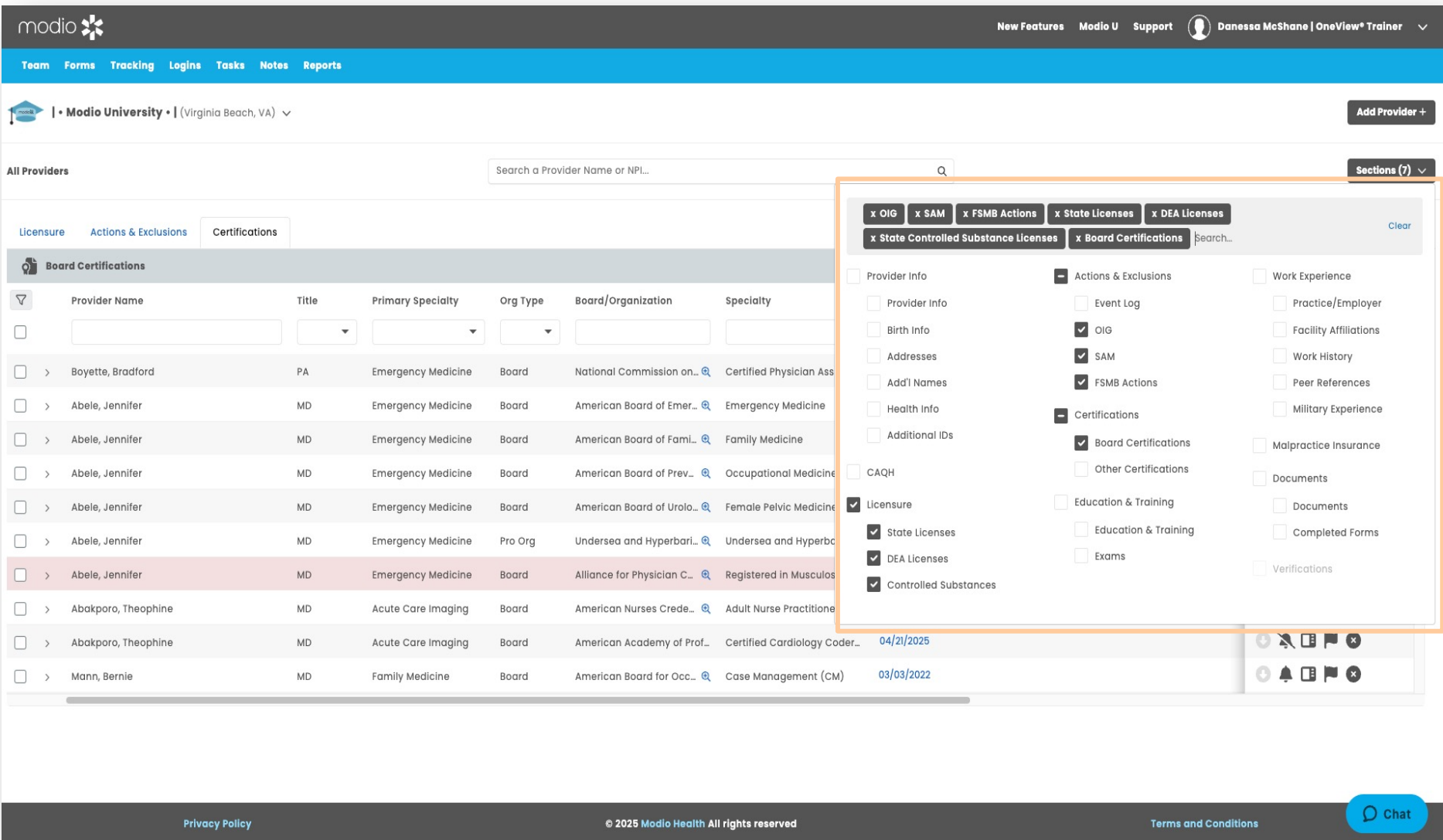
Privacy Policy© 2025 Modio Health All rights reservedTerms and ConditionsChat

Primary Source Integrations - V2 Grids

V2 Grids: Hosts updaters for **NPI, OIG, SAM, State License, DEA License and Controlled Substance NCCPA, FSMB.**

Recommended Workflow:

- 1. Navigate to the V2 grid section of the OneView platform.
- 2. Set up your grid sections to include **OIG, SAM, FSMB Actions, State Licenses, DEA Licenses, State Controlled Substance Licenses, Board Certifications.** From the sections option.
- 3. Use the updater to run Primary Source Verifications. This will automatically download the PSV document and save it to the data entry point. Any data in the license record will also be updated to match the return from the primary source.
- 4. Use the V2 tip guides for a deep dive into V2 grid settings, grid reporting, advanced filters and more.



Find Feature - V2

Single Provider View - Find Feature

Recommended Workflow:

- 1. Navigate to single provider view for a provider with MD, DO, PA, or PA-C title.
- 2. Select the magnification glass icon on the right
- 3. Select and add additional state licenses to profiles.
- 4. Run the updater icon to ensure the most up to sate data is included from the Primary Source.

*The find feature is also available in V1 License section for select provider types. Use the **Find Feature Tip Guide** for additional details and information.

modio

New FeaturesModio USupportDanessa McShane | OneView® Trainer

TeamFormsTrackingLoginsTasksNotesReports

Modio University (Virginia Beach, VA)

Add Provider +

John Snow, MD - NPI 1801007265Dermatology

John Snow

1

Sections (8)

Provider Info

1 Total

NPI #

Work Email

Tags

Last Updated

Actions

1801007265

john.snow@modio.email

Dermatology

04/15/2025

State Licenses

0 Expiring1 Expired1 Total

License Type

Last Updated

License

Add'l Info

State

Status

Issue Date

Exp. Date

Expires Within

Tags

Actions

MD

05/07/2025

ME98236

No

FL

Vol Relinq

03/16/2007

01/31/2019

Expired

DEA Licenses

No Records found for John Snow, MD

State Controlled Substance Licenses

No Records found for John Snow, MD

OIG

Privacy Policy

Terms and Conditions

Chat

Find State Licenses for John Snow

Select which license(s) to add

License	Sta...	Issued Name	Status	Issue Date	Exp. Date
<input checked="" type="checkbox"/>	MD60577175	WA	John Lawrence Snow	Inactive	07/31/201505/26/2018
<input type="checkbox"/>	C-142513	CA	John Lawrence Snow	Inactive	05/09/2016

Deselect All

CloseAdd

2

3

4

Primary Source Integrations - V2 - Pro Tips

FSMB Grid:

Visit the FSMB Tip guide and follow the instructions or reach out to your CSM to start setting up your unique API to enable this PSV.

modio

New FeaturesModio USupportDanessa McShane | OneView® Trainer

TeamFormsTrackingLoginsTasksNotesReports

Modio University

(Virginia Beach, VA)

Add Provider +

All Providers

Search a Provider Name or NPI...

Sections (4)

Actions & ExclusionsCertifications

Board Certifications

0 Expiring1 Expired4 Total

	Provider Name	Title	Primary Specialty	Org Type	Board/Organization	Specialty	Last Updated	Certification #	Issue Date	Actions
<input type="checkbox"/>					NCCPA					
<input type="checkbox"/>	> Boyette, Bradford	PA	Emergency Medicine	Board	National Commission on...	Certified Physician Assista...	04/21/2025	1054165	06/21/2002	
<input type="checkbox"/>	> Appleseed, Johnny	PA-C	Certified Physician As...	Board	National Commission on...	Certified Physician Assista...	01/08/2025		02/05/2019	
<input type="checkbox"/>	> Beasely, Pam	MPA	Dermatology	Board	National Commission on...	Dermatology	01/08/2025			
<input type="checkbox"/>	> Johnson, Brittany	PA	Certified Physician As...	Board	National Commission on...	Certified Physician Assista...	01/08/2025			

V1 Profiles: Most of these integrations are also available in V1 at a single provider level.

Primary Source Integrations - V2 - Pro Tips

NCCPA:

NCCPA Board Certifications should be added to the Board Certifications Grid in V2. Upon request, an update icon can be added by request. Email Support@ModioHealth.com to request access to this PSV updater.

modio

New FeaturesModio USupportDanessa McShane | OneView® Trainer

TeamFormsTrackingLoginsTasksNotesReports

Modio University • (Virginia Beach, VA)

Add Provider +

All Providers

Search a Provider Name or NPI...

Sections (4)

Actions & ExclusionsCertifications

Lewis, ChristineMDCardiologyNoName + SSNScheduled

FSMB Actions36 Total

	Provider Name	Title	Primary Specialty	FID	Action Status	Tags	Last Updated	Actions
<input type="checkbox"/>								
<input type="checkbox"/>	> Boyette, Bradford	PA	Emergency Medicine	210991477	Cleared		02/19/2025	
<input type="checkbox"/>	> Abele, Jennifer	MD	Emergency Medicine	307234302	Cleared		02/13/2025	
<input type="checkbox"/>	> Zowie, Wowie	MD	Addiction Psychiatry				No History	
<input type="checkbox"/>	> Bulman, Arthur	MD	Sports Medicine				No History	
<input type="checkbox"/>	> Abakporo, Theophine	MD	Acute Care Imaging				05/08/2025	
<input type="checkbox"/>	> Snow, John	MD	Dermatology				No History	
<input type="checkbox"/>	> Mann, Bernie	MD	Family Medicine				No History	
<input type="checkbox"/>	> Clifford, Thomas	MD	Obstetrics and Gynec...				No History	
<input type="checkbox"/>	> Quinn, Michael	MD	Radiology				No History	
<input type="checkbox"/>	> Holmes, Brandon	MD	General Surgery				06/20/2024	

V1 Profiles: Most of these integrations are also available in V1 at a single provider level.

Primary Source Integrations - V2 - Pro Tips

OIG & SAM

- These Actions & Exclusions will return automatically once a month, in the middle of the month. Use the “V2 audit history table” to view current and historic PSV updates.
- Run these updaters manually to download the PVS document to the profile.

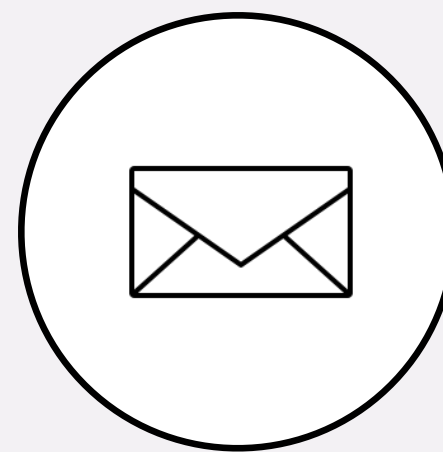
[illegible]

V1 Profiles: Most of these integrations are also available in V1 at a single provider level.

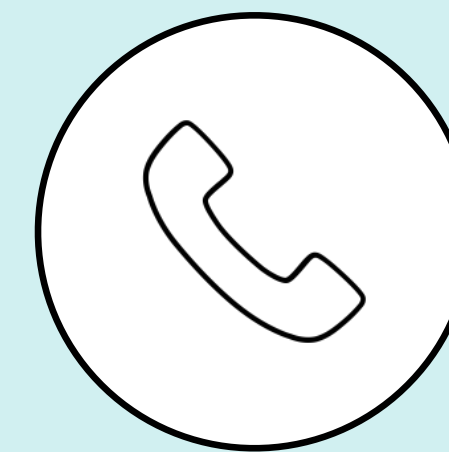
For additional questions or further training, contact the Modio Team via:



Online:
Live Chat Support



Email:
Support@modiohealth.com



Phone:
844.696.6346