

# **Coneview** 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 additional 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  $\mathcal{Z}$  to check for updates on licenses and more.

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

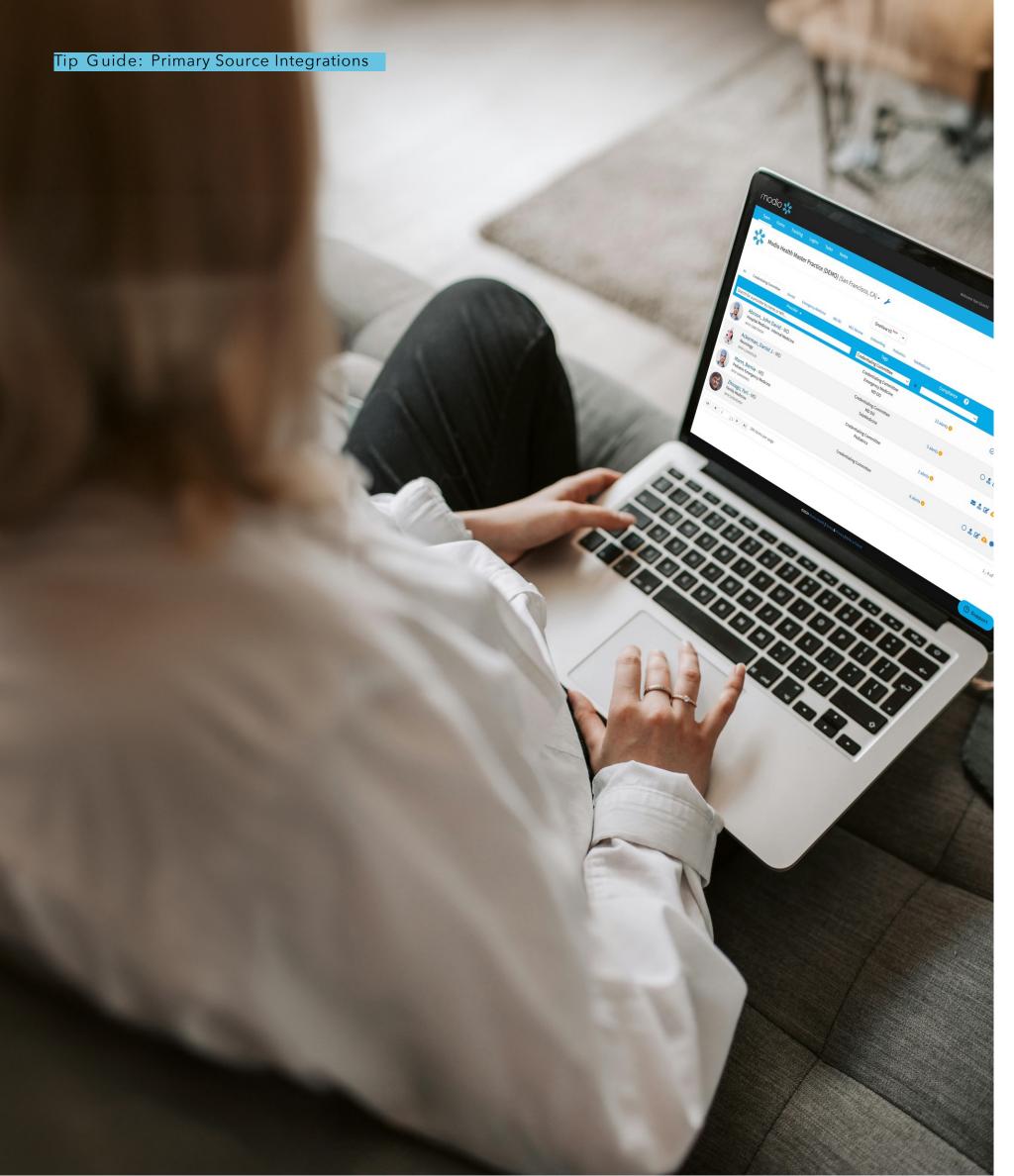
- for a provider on a site to verify.
- o Primary sources are industry standards rely on us to link to a standard source.
- rather than printing to PDF, saving and uploading to the profile.
- o Ability for bulk runs example: Use V2 to run multiple updaters at the same time.



• We have hundreds of integrations with primary sources. Each one of these eliminates a manual search

• Primary source document generation - saves time to upload to provider docs with the click of a button

• Reduction in user error - primary source verified fields are locked to reduce user error with data entry.



- DEA

• NCCPA

- OIG
- SAM
- FSMB

- •
- •
- SFTP •
- •

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



# **Primary Source Integrations**

# **Profile Card**

• NPI/NPPES

# Licenses Tab in v2 & License section in v1

• State Licenses • State Controlled Substance

# Certifications

# **Actions & Exclusions Grid**

# **Additional Integrations with OneView**

LexisNexis - Add Provider CAQH - Import requests Find Feature DocuSign

### **Primary Source Integrations**

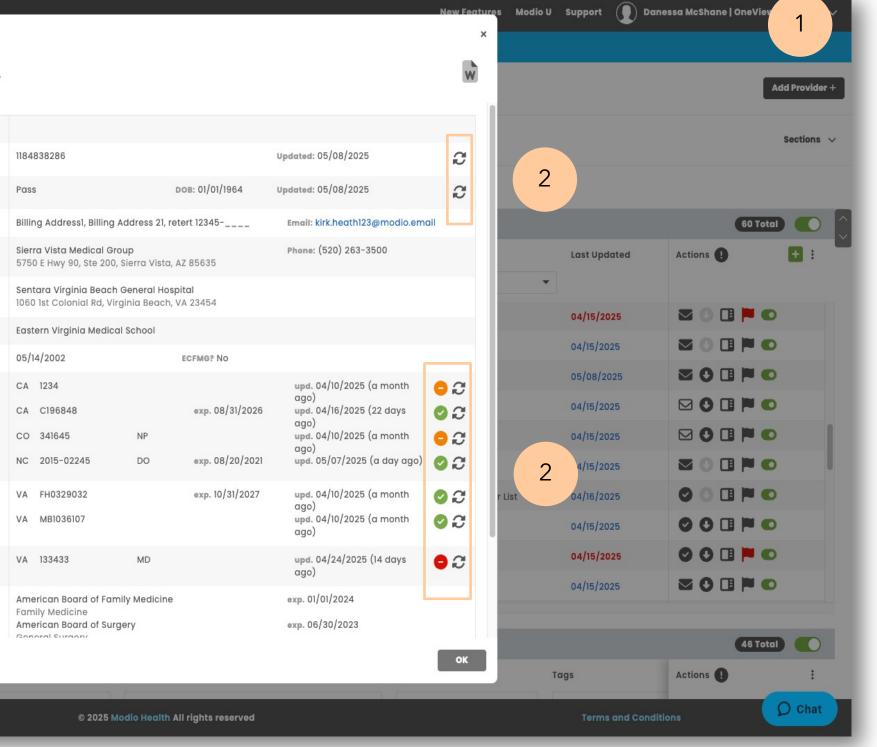
Profile Card: Hosts updaters for NPI, OIG, State License, DEA License and Controlled Substance.

### **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.
- 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**.

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### **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.
- Use the updater to run Primary Source 3. 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.

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# Find Feature - V2

## Single Provider View - Find Feature

### **Recommended Workflow:**

- 1. Navigate to singe 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.

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# **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.

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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 <u>Support@ModioHealth.com</u> to request access to this PSV updater.

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	>	Abakporo, Theophine		MD	Acute Care Imaging		
	>	Snow, John		MD	Dermatology		
	>	Mann, Bernie		MD	Family Medicine		
	>	Clifford, Thomas		MD	Obstetrics and Gynec		
	>	Quinn, Michael		MD	Radiology		
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V1 Profiles: Most of these integrations are also available in V1 at a single provider level.



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# **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.

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>	schmo, joe	MD	Acupuncture				
>	kirby, belinda	RN	Registered Nurse				
>	Appleseed, Johnny	PA-C	Certified Physician As				
>	Beasely, Pam	MPA	Dermatology				
>	Johnson, Brittany	PA	Certified Physician As				
>	Checkey, Alexa	MD	Abdominal Imaging				
>	Ambati, Balamurali	OD	Ophthalmology				
>	Larson, Kirt	NP	Nurse Practitioner				
_							
Ð	SAM						
$\nabla$	Provider Name	Title	Primary Specialty	Alia	ses Se	earch Criteria	SAM Number
	Privacy Policy					© 2025 Modio Health All rights res	served

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



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



