OneView®

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 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

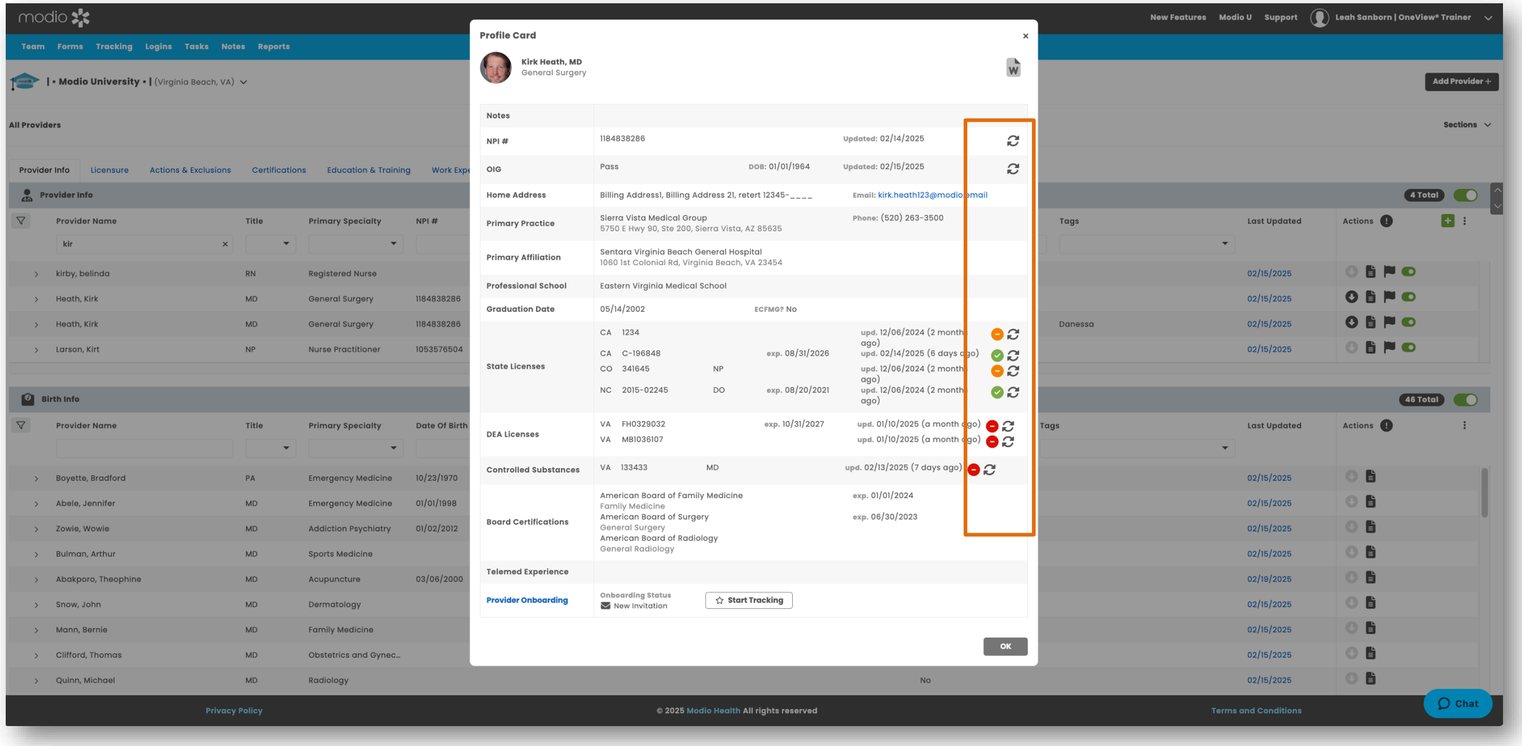
Note - We're constantly improving OneView! Check our bi-weekly release notes for the latest integration enhancements.

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**.

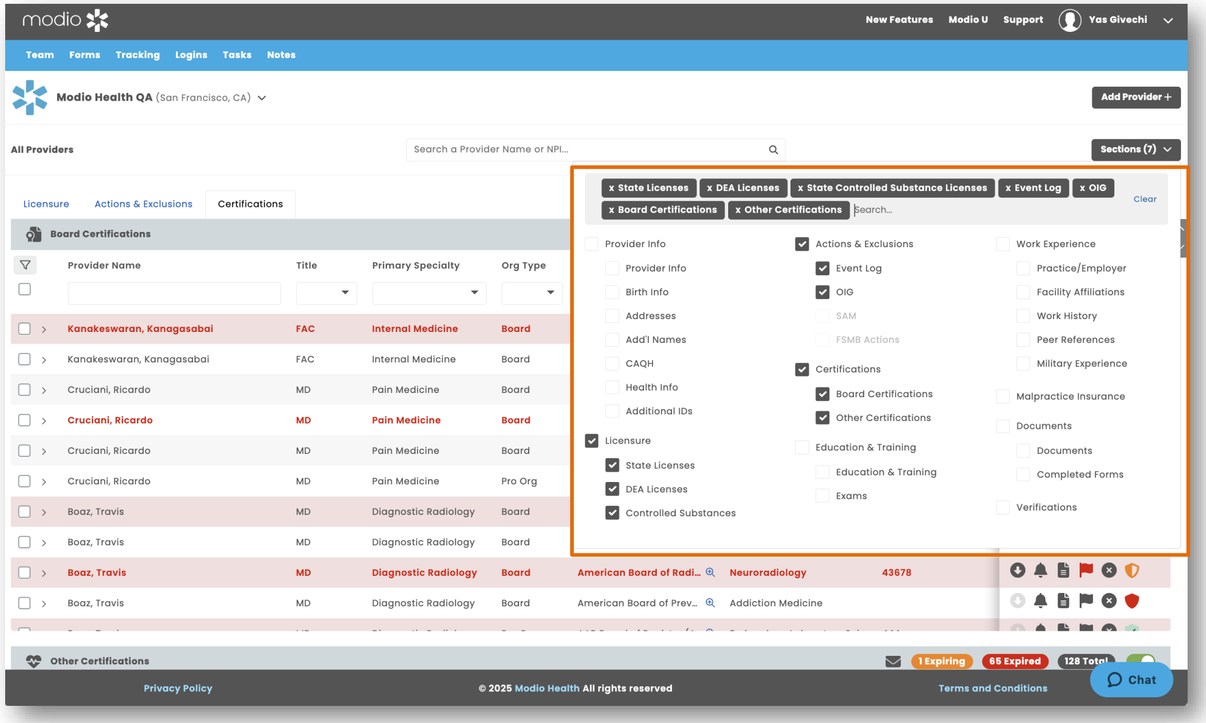


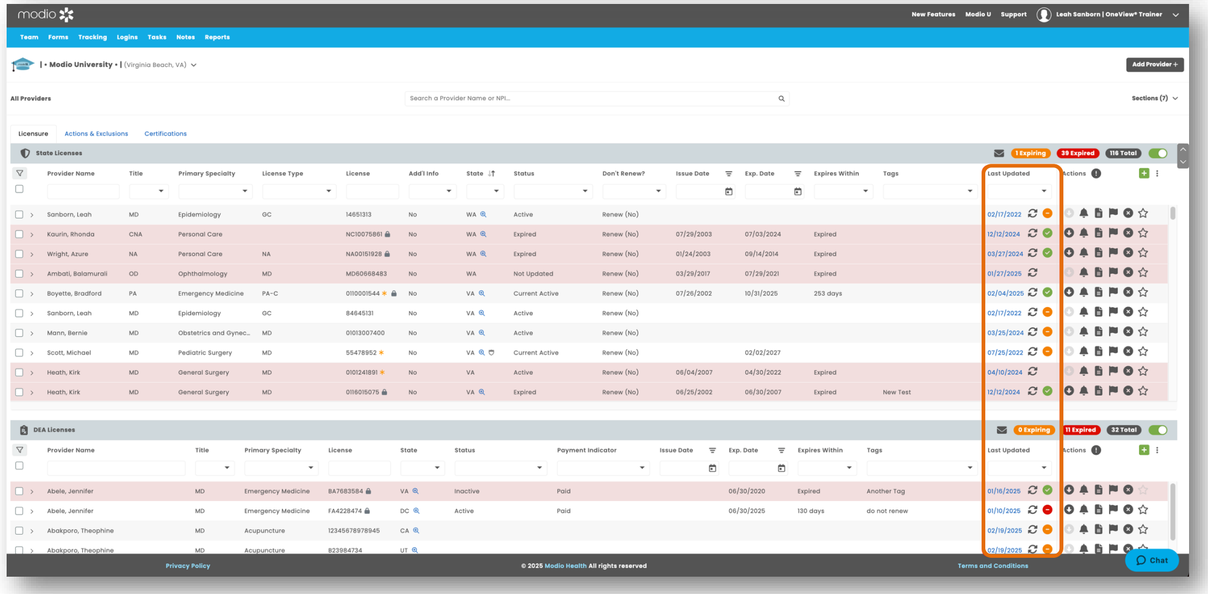
Primary Source Integrations – V2 Grids

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 dep dive into V2 grid settings, grid reporting, advanced filters and more.





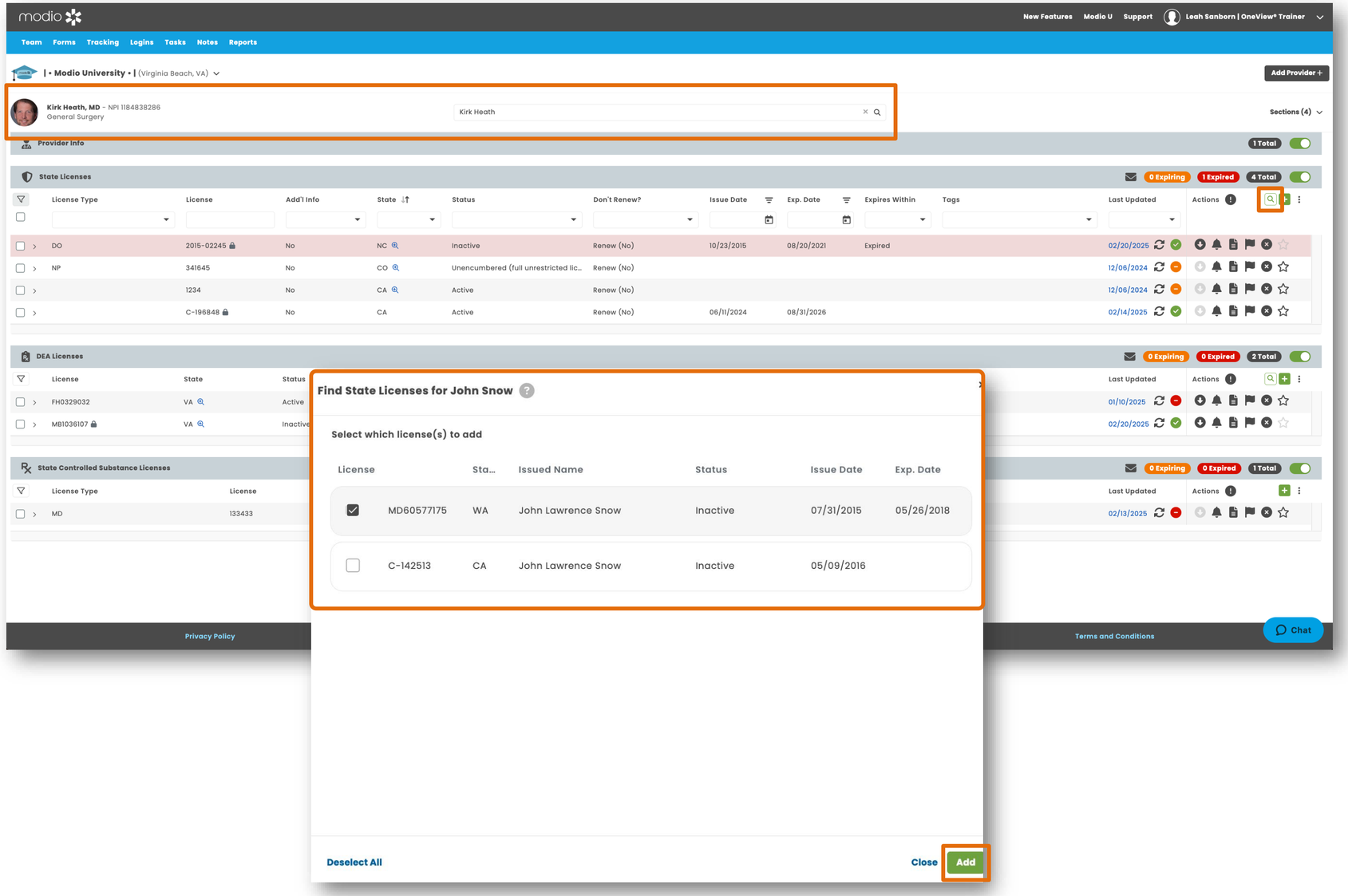
Find Feature – V2

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.



Primary Source Integrations – V2

Modio's 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.

FSMB Grid:

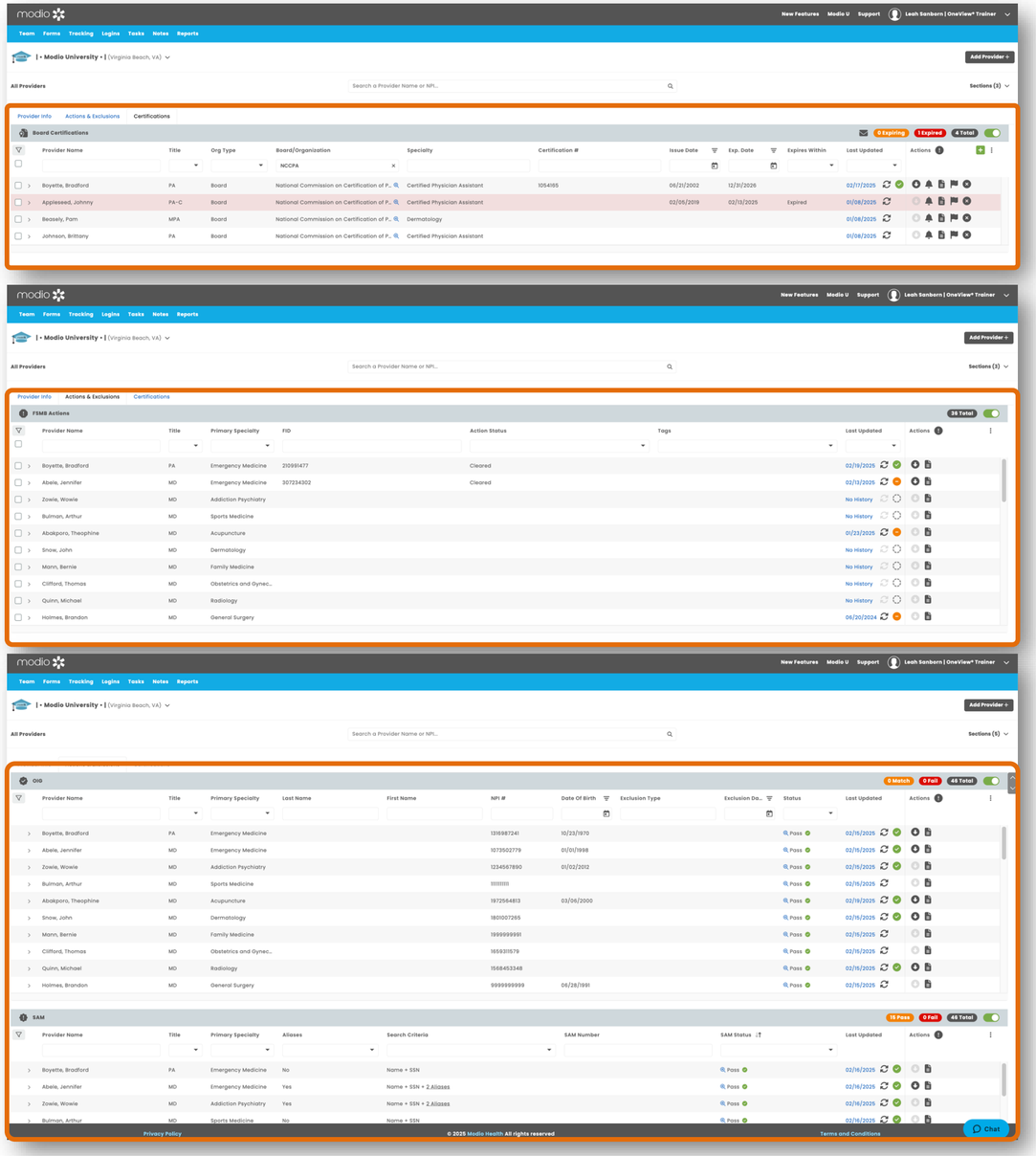
- Visit the FSMB Tip guide and follow the instructions or reach out to your CSM to start setting up your unique API to enable this PSV.

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.

V1 Profiles

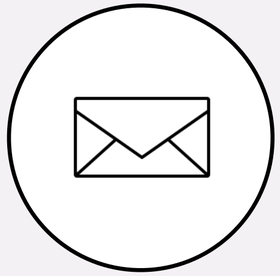
- Most of these integrations are also available in V1 at a single provider level.



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



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