



Tip Guide: OneView Data Export

## Why complete a data OneView Data Export?

- **When:** Before requesting provider profiles to be removed from your OneView Team
- **Why:** Creating data backups, you can remove profiles from your team roster but keep all historic data on file, outside of OneView.
- If a removed profile needs to be added back to your Team roster, use the data export to quickly rebuild the profile in OneView.

Use this guide to save & back up provider data before sending a list of providers to be permanently removed from your team.

By creating data backups, you can remove profiles from your team roster but keep all historic data on file, outside of OneView. If a removed profile needs to be added back to your Team roster, use the data export to quickly rebuild the profile in OneView.

**Efficiency Tip** - If you are removing an entire Team or more than 20 providers at a time, send a ticket to [Support@ModioHealth.com](mailto:Support@ModioHealth.com) - we may be able to assist in larger data export pulls.

Click the drop-down menu, then click on **the Inactive Provider** toggle at the bottom of the list to view your Teams Inactive Provider roster.

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Welcome Yas GivechiSupportModio UNew FeaturesSign out

TeamFormsTrackingLoginsTasksNotesReports

Modio Health Master Practice (DEMO) (San Francisco, CA)Add ProviderMessage?

AllCredentiaing CommitteeDentalEmergency MedicineMD DOMEC Review

Provider

Search for a provider by name or NPI...

OneView V2New

Web Reports

Recredentialing

Payor Recredentialing

Completed Items

State License Coverage

Team Compliance Alerts

Inactive Providers

Family Healthcare - FAC

No Specialty

NPI# 1548200181

15 alerts

Actions

Abakporo, Theophine David - QMHA

Acute Care Imaging

NPI# 1972564813

Dental

MD DO

3 alerts

Actions

Abrams, Pamela D - MD

Pediatric Endocrinology

NPI# 1851502215

6 alerts

Actions

Abroon, John David - MD

Hospital Medicine - Internal Medicine

NPI# 1588750434

Credentiaing Committee

Emergency Medicine

MD DO

14 alerts

Actions

1 / 1

200 items per page

1 - 133 of 133 items

Chat

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1

From the Team page, Inactivate any profiles that will be removed from your Team Roster.

Next, select the green toggle to inactivate.


# Running Reports :

Click on the Reports Module to access the standard reports for your inactive providers on that team.

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Team | Forms | Tracking | Logins | Tasks | Notes | **Reports**

 Modio Health Master Practice (DEMO) (San Francisco, CA) ▾


+ Add Provider

Message ?

All | Credentialing Committee | Dental | Emergency Medicine | MD DO | MEC Review

Provider


Search for a provider by name or NPI...



Family Healthcare - FAC

No Specialty


NPI# 1548200181



Abakporo, Theophine David - QMHA

Acute Care Imaging


NPI# 1972564813



Abrams, Pamela D - MD

Pediatric Endocrinology

NPI# 1851502215



Abroon, John David - MD

Hospital Medicine - Internal Medicine

NPI# 1588750434

OneView V2 <sup>New</sup>

Web Reports

☒ Recredentialing

☒ Payor Recredentialing

☒ Completed Items

☒ State License Coverage







☒ Team Compliance Alerts

☐ Inactive Providers







Compliance ?

Actions ?







15 alerts !









3 alerts !



6 alerts !



14 alerts !



1

/ 1

200 items per page

1 - 133 of 133 items

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Standard Reports – Inactive Providers:

Click on the Standard Reports – Inactive folder to view the reports for your inactive providers. We suggest downloading all reports that appear in this list. This includes both standard and any custom reports in your Team.

Key Takeaway:

Exported Reports hold data that is queried directly from the existing profiles.

Home

COLLECTIONS

>

Your personal collection

Curated Reports

Custom Reports

Standard Reports

Standard Reports - Inactive

Tracking Reports

BROWSE >

Trash

Standard Reports - Inactive

Type	Name ^	Last edited by	Last edited at	
	Inactive Certifications	Landon Goodson	5/7/2025	...
	Inactive CME	Landon Goodson	5/7/2025	...
	Inactive Compliance	Landon Goodson	5/7/2025	...
	Inactive Documents	Landon Goodson	5/7/2025	...
	Inactive Education	Landon Goodson	5/7/2025	...
	Inactive Event Log	Landon Goodson	5/7/2025	...
	Inactive Facilities	Landon Goodson	5/7/2025	...
	Inactive Facility Master	Landon Goodson	5/7/2025	...
	Inactive Health Info	Landon Goodson	5/7/2025	...
	Inactive Licensure	Landon Goodson	5/7/2025	...
	Inactive Medical Malpractice	Landon Goodson	5/7/2025	...
	Inactive Missing Fields	Landon Goodson	5/7/2025	...
	Inactive More Names	Landon Goodson	5/7/2025	...
	Inactive OIG	Landon Goodson	5/7/2025	...
	Inactive Payors	Landon Goodson	5/7/2025	...
	Inactive Peer References	Landon Goodson	5/7/2025	...
	Inactive Providers	Landon Goodson	5/7/2025	...
	Inactive Recredentialing	Landon Goodson	5/7/2025	...
	Inactive Work History	Landon Goodson	5/7/2025	...

Standard Reports - Inactive

Search

New

Inactive Providers

Filter

Summarize

Show Editor

i

Provider ID

Created

Onboarding

Onboarding Completed

Tags

Job Title

Last Name

Suffix

First Name

Middle Name

626320	11/9/2023	New Invitation				down		sit	
493204	12/15/2022	New Invitation		Colorado, FAC, Master Payor List, Test Provider	QMHS			Avel eCare, LLC	
741544	10/10/2024	New Invitation						ABC - Payors	
246616	10/28/2020	New Invitation						ABC Clinic	
404455	3/30/2022	New Invitation						ABC Health Center	
343887	9/1/2021	New Invitation			Master Lists			Modio NY	
613523	10/6/2023	New Invitation				Oyague		Katrina	Schmidt
691543	5/21/2024	New Invitation				321		Test	
459835	8/25/2022	New Invitation				Holmes		Brandon	
180160	3/11/2020	New Invitation				z Modio U Healthcare Facility			
481117	11/1/2022	Complete Profile	11/2/2022			Giles		Azure	V
356141	10/21/2021	New Invitation				Heath		Modio	
252709	11/18/2020	New Invitation							
472927	10/7/2022	New Invitation				PP			
180164	3/11/2020	New Invitation				z Disney Florida			
719814	8/6/2024	New Invitation				Hassan			
18391	1/31/2018	Incomplete Profile		Region NE	NP	Barton			
787817	2/17/2025	New Invitation				test 123			

Visualization

Showing 25 rows 13.3s

**Downloading Reports:**

Once you've selected the report, click on the cloud icon in the bottom right-hand corner and select the file type that you would like to download the report as. (.xlsx is the most used export type)

## Accessing Inactive Providers in V2:

To access inactive providers in V2 click on the three-dot icon and click on the "Show Inactive Providers" filter.

## Generate Reports:

Within the three dots you have the option to run an Excel, CSV, and PDF report to pull the data from within the personal info grid.



Downloading A Provider Summary - v1:

1. From the Team homepage, click on a desired provider profile, then navigate to the **Summary** section.

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Team Forms Tracking Logins Tasks Notes Reports

Jennifer Abele MD ▾ Personal Info last updated: 06/24/2025

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

Drop documents here or Click here to browse

Accepted file formats:

Save

Prefix Mrs First Name Jennifer Middle Name B Last Name Abele Suffix More Names (3) +

Provider Title MD - Medical Doctor Specialty List +

Telemed Exp. 4 Years Fluent languages Amharic

Contact Information Emergency Contact (1) +

Work Email 1234567890@modio.email Personal Email fakeemail@email.com Home Phone # (845) 914-1234 Mobile Phone # (757) 988-8886

Home Address More Addresses (2) +

Address 1102 Hollywood Avenue Address 2 Home address 2 City LA State/Province CA - California

Zip/Postal Code 87889 County California Country United States of America

Birth Information More Birth Info (1) +

Gender Female Identifies as transgender? Date of Birth 01/01/1998 Birth City San Diego Birth State CA - California

Birth Country john.barry@modiohealth.com Birth Country United States of America Country of Citizenship Zaire Citizenship/Work Authorization U.S. Citizen (Birth/Naturalization) Authorized to work in U.S.?

Identification Chat

2. Click either the **PDF** in the top right corner to download the provider's Summary. Use the **Word icon** to download the provider CV

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Team Forms Tracking Logins Tasks Notes Reports

Modio University | (Virginia Beach, VA)

Jennifer Abele MD Summary

Personal Info: Jennifer Abele MD

Prefix Mrs First Name Jennifer Middle Name B Last Name Abele

Provider Title MD - Medical Doctor Telemedicine Experience 4 Years

Fluent Languages Amharic

Other Names

Name Type	Start Date	End Date	First Name	Middle Name	Last Name
Supervisor Name	01/04/2022		Mortimer		Cheesewheel
Other Name			Jenn		Abele
Other Name			Jenny		Abele

Marital Status Married

Contact Information

Work Email 1234567890@modio.email Personal Email fakeemail@email.com Home Phone # 8459141234 Mobile Phone # 7579888886

3. **Save** the Summary or CV for each profile that will be removed from your roster.



2. Select the Download icon in the upper right corner to download all documents associated with this provider.

Downloading Documents - v1

1. Next, navigate to the Documents section.

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Welcome Yasi GivechiSupportModio UNew FeaturesSign out

TeamFormsTrackingLoginsTasksNotesReports

Modio Health QA (San Francisco, CA)

Yuri Zhivago MD Documents

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

Drop documents here or Click here to browse

Accepted file formats: pdf, docx, txt, rtf, gif, jpg, png

Securely Upload, Download, and Email Documents.

Documents

Completed Forms

Personal Info: Yuri Zhivago MD

Type	File Name	Date	Permission	Expiration Date	Status	Actions
<div></div>	...	...	<div></div>	...	Active	
Color Photo	<div>Powell Alisha - Color Photo.jpg</div>	02/14/2018	General		Active	<div></div> <div></div> <div></div>
Color Photo	<div>Udall Dana - Color Photo.jpg</div>	02/14/2018	General		Active	<div></div> <div></div> <div></div>
Curriculum Vitae (CV)	<div>Analytics Results 1.8-1.14.18.xlsx</div>	02/20/2018	General		Active	<div></div> <div></div> <div></div>

Health Info: Yuri Zhivago MD

Type	File Name	Date	Permission	Expiration Date	Status	Actions
<div></div>	...	...	<div></div>	...	Active	
Covid-19 Vaccine	<div>Screenshot 2024-12-05 at 12.13.37.png</div>	12/05/2024	Coordinator Only		Active	<div></div> <div></div> <div></div>

Malpractice: Yuri Zhivago MD

Education: Yuri Zhivago MD

Type	File Name	Date	Permission	Expiration Date	Status	Actions
<div></div>	...	...	<div></div>	...	Active	
Exam Scores	<div>profile-sharing-example-v2.png</div>	02/16/2024	General		Active	<div></div> <div></div> <div></div>

Miscellaneous: Yuri Zhivago MD

Upload

Download

Email

Support

# Downloading Completed Forms - v1

- 1. Within the Documents section, click on the Completed Forms tab.
- 2. Next, download individual forms by clicking the cloud icon next to each form.

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TeamFormsTrackingLoginsTasksNotesReports

Modio Health QA (San Francisco, CA)

Yuri Zhivago MD Documents

Personal Info

Education & Training

Practice / Employer

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Medical Malpractice

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Event Log

CME

Documents

Summary

Drop documents here or Click here to browse

Accepted file formats: pdf, docx, txt, rtf, gif, jpg, png

Securely Upload, Download, and Email Documents.

Documents

Completed Forms

Personal Info: Yuri Zhivago MD

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Color Photo	Powell Alisha - Color Photo				Active	
Color Photo	Udall Dana - Color Photo					
Curriculum Vitae (CV)	Analytics Results 1.8-1.1					

Health Info: Yuri Zhivago MD

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Covid-19 Vaccine	Screenshot 2024-12-05 a					

Malpractice: Yuri Zhivago MD

Education: Yuri Zhivago MD

Type	File Name	Date	Permission	Expiration Date	Status	Actions
Exam Scores	profile-sharing-example					

Miscellaneous: Yuri Zhivago MD

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TeamFormsTrackingLoginsTasksNotesReports

Modio Health QA (San Francisco, CA)

Yuri Zhivago MD Documents

Completed Form Name

Date Sent

Date Delivered

Date Completed

Date Expiration

Actions

Yuri Zhivago						
Yuri Zhivago, MD	Facility Attestations	11/30/2023	11/30/2023	11/30/2023		

1, 1 of 1 items

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TeamFormsTrackingLoginsTasksNotesReports

Modio Health QA (San Francisco, CA)

Yuri Zhivago MD Documents

Completed Form Name

Date Sent

Date Delivered

Date Completed

Date Expiration

Actions

Yuri Zhivago						
Yuri Zhivago, MD	Facility Attestations	11/30/2023	11/30/2023	11/30/2023		

1, 1 of 1 items

## Downloading Tracking Reports

Navigate to the Tracking Reports Folder, then download all available tracking reports as shown on slide 6 of this guide.

## Request Secure Data Export

If you would like to obtain reports of your providers' encrypted information (Logins, SSNs, Driver License info, etc), this can be requested by reaching out to [support@modiohealth.com](mailto:support@modiohealth.com).

These reports will be sent to you via secure email.

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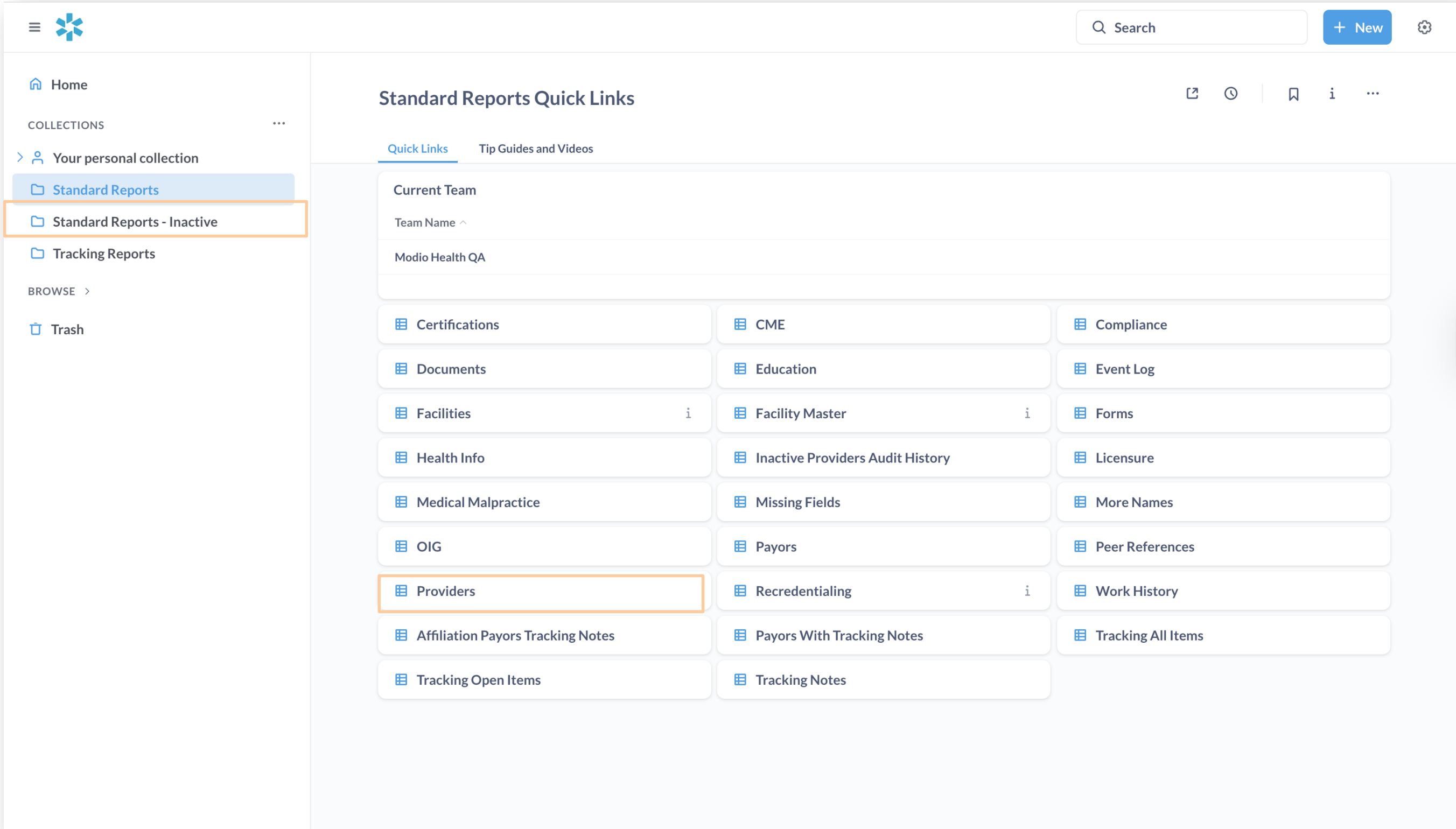
i

Type	Name ^	Last edited by	Last edited at	
<div></div>	Affiliation Payors Tracking Notes	Landon Goodson	2/5/2025	...
<div></div>	Payors With Tracking Notes	Landon Goodson	2/5/2025	...
<div></div>	Tracking All Items	Landon Goodson	2/5/2025	...
<div></div>	Tracking Notes	Landon Goodson	2/5/2025	...
<div></div>	Tracking Open Items	Landon Goodson	2/5/2025	...

## Summary - How to complete a Data Export

- 1. Now that all profile data is downloaded and saved, use the Provider report (Active or Inactive) to send in the request to remove profiles to [Support@ModioHealth.com](mailto:Support@ModioHealth.com)
- 2. Download the report as a .XLSX
- 3. Highlight the rows to be deleted

**Helpful Tip:** Use the Provider report (Active or Inactive) to highlight profiles to be removed. Make sure this request is coming from a designated POC on your team.

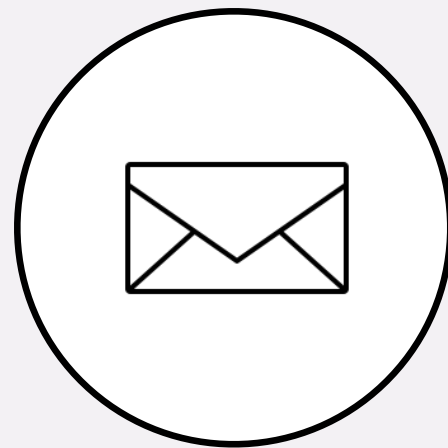


For additional questions or further training, contact the Modio Team via:

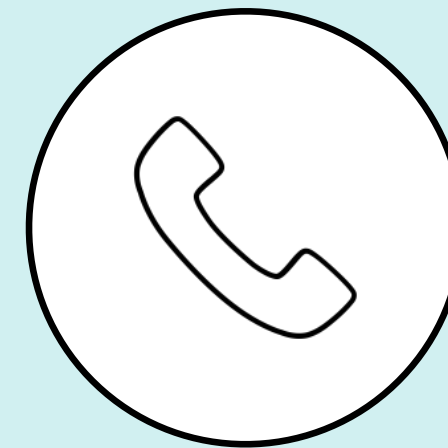
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**Online:**  
Live Chat Support



**Email:**  
[Support@modiohealth.com](mailto:Support@modiohealth.com)



**Phone:**  
844.696.6346