OneView®

Tip Guide: OneView Data Export

Why complete a data OneView Data Export?

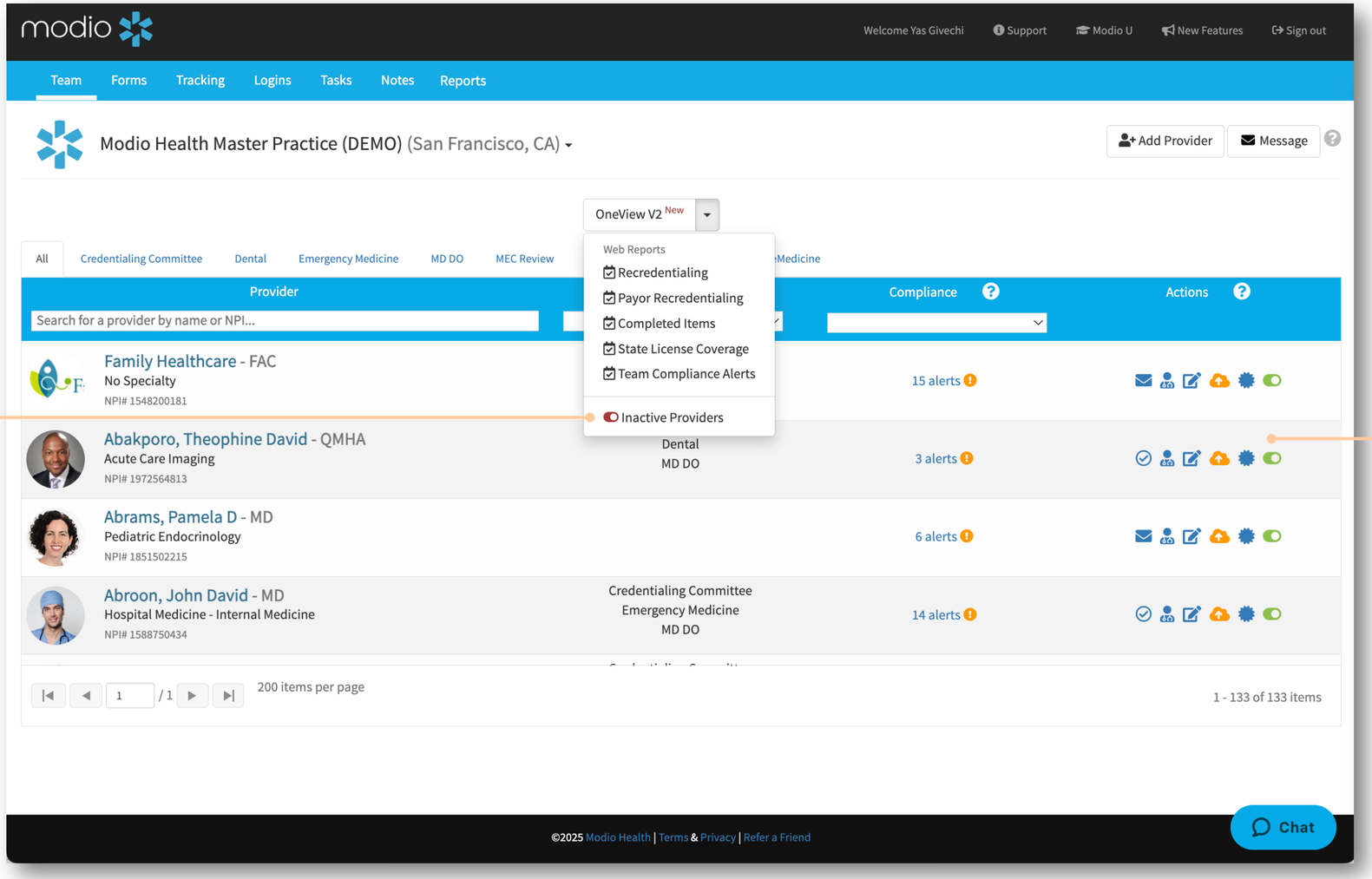
- **When:** Before requesting provider profiles to be removed from your OneView Team
- **Why:** Creating data backups, you can remove profiles from your team roster but keep all historic data on file, outside of OneView.
- If a removed profile needs to be added back to your Team roster, use the data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



2

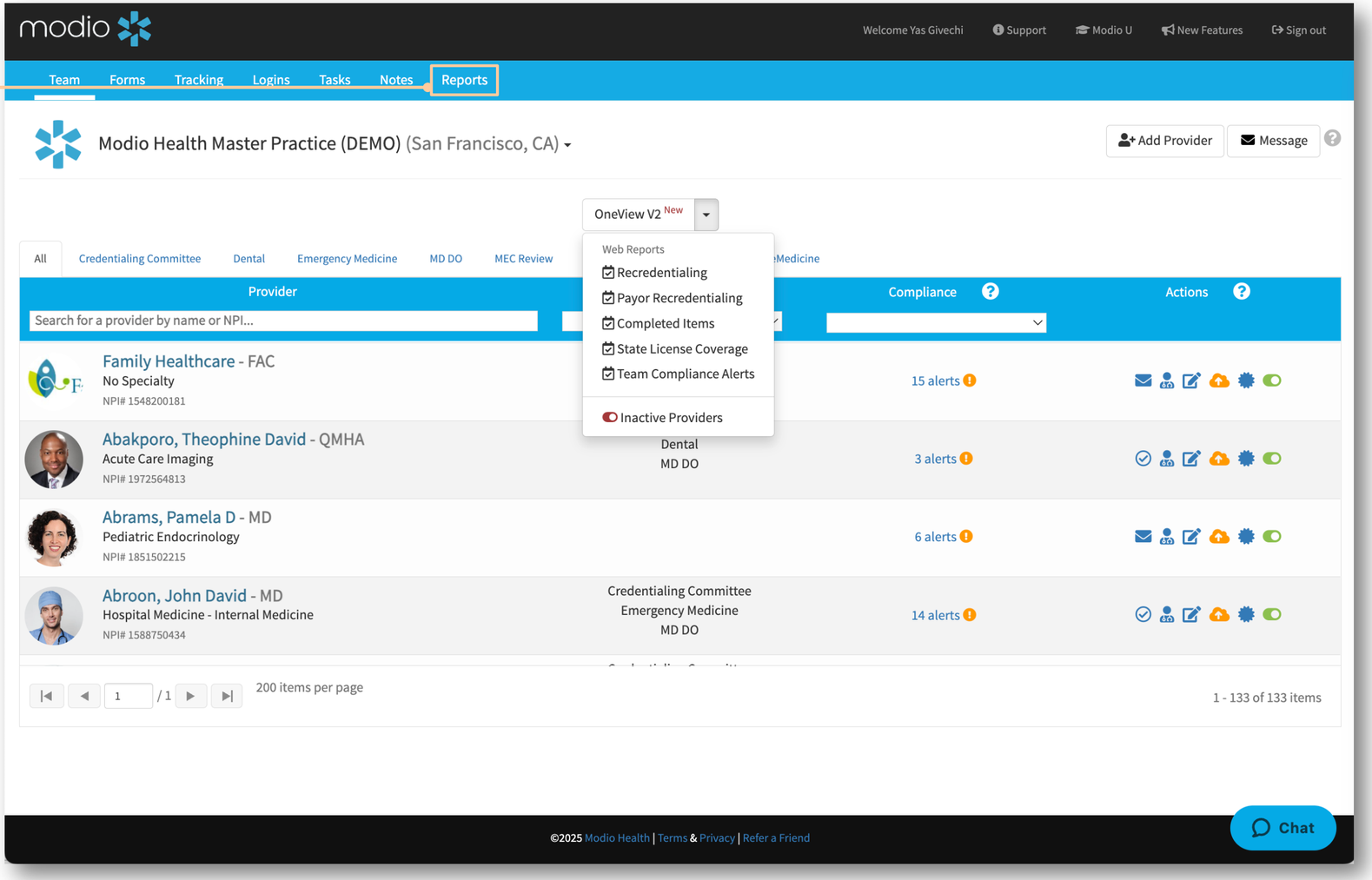
1

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

Next, select the green toggle to inactivate.

Running Reports :

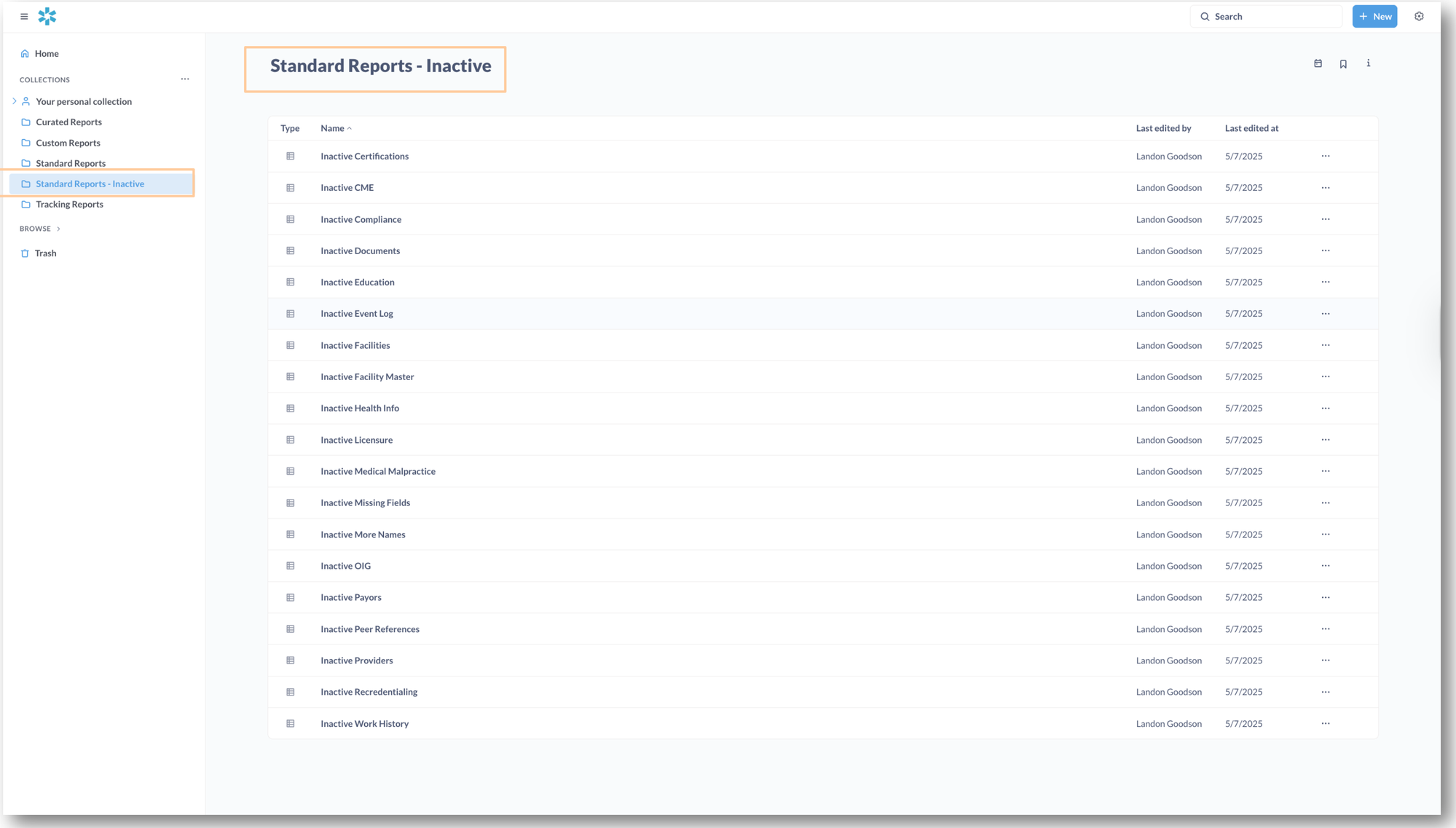
Click on the Reports Module to access the standard reports for your inactive providers on that team.

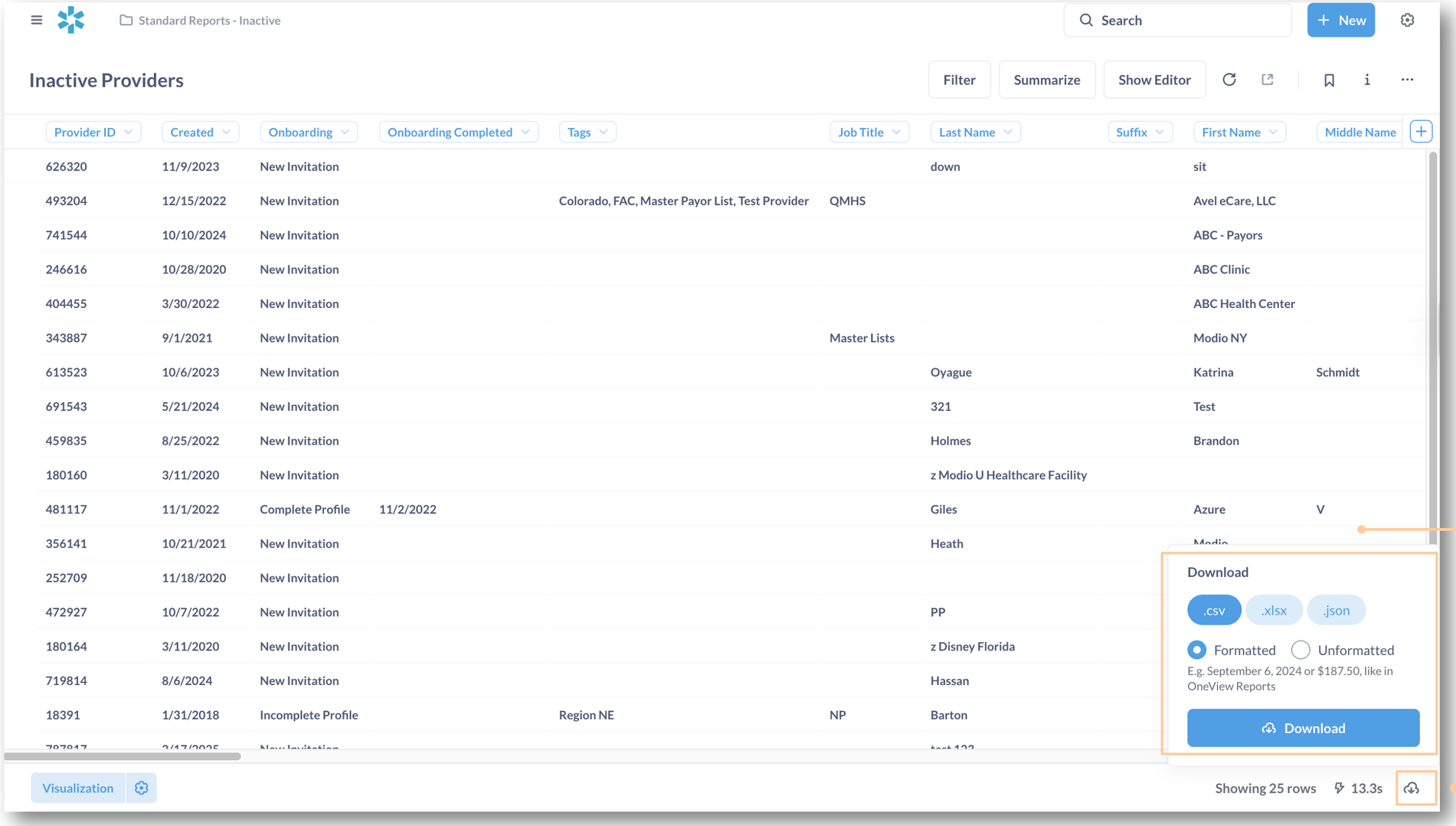


Standard Reports – Inactive Providers:

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.

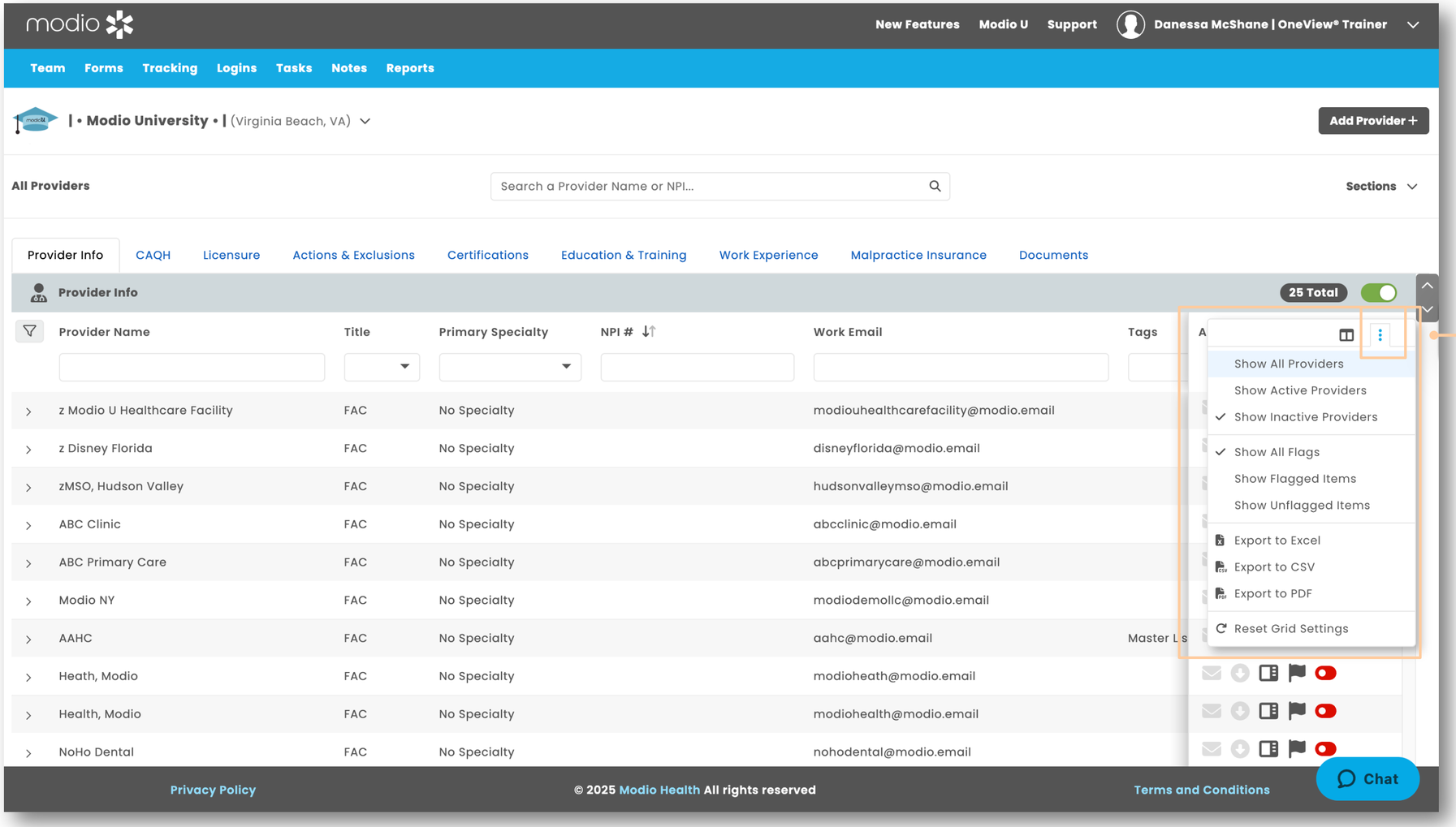
Key Takeaway:
Exported Reports hold data that is queried directly from the existing profiles.





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)

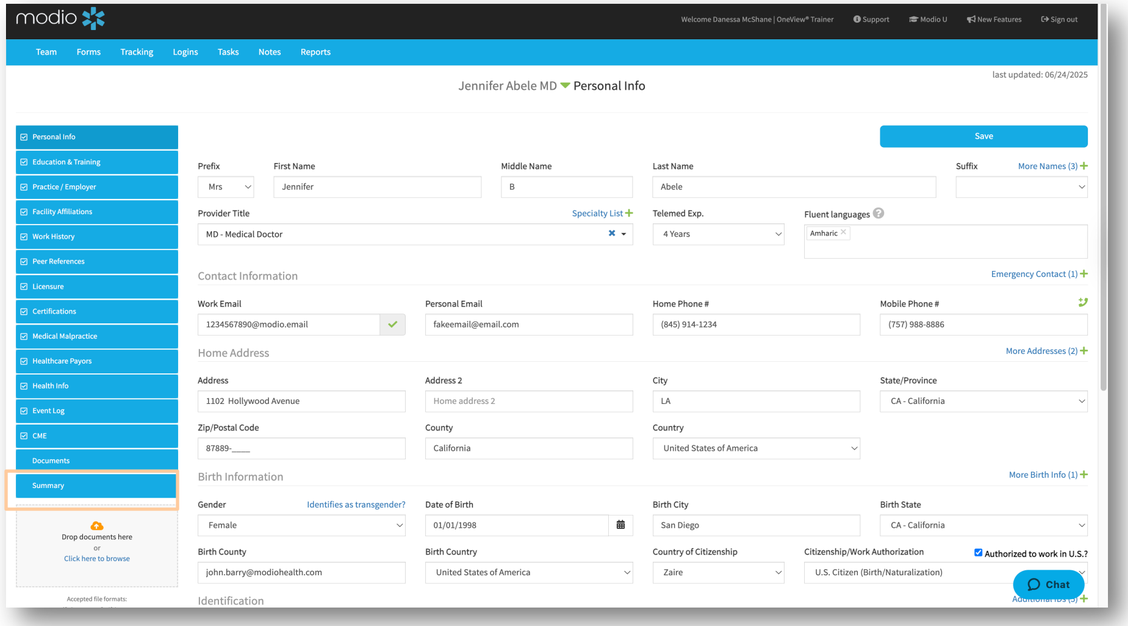


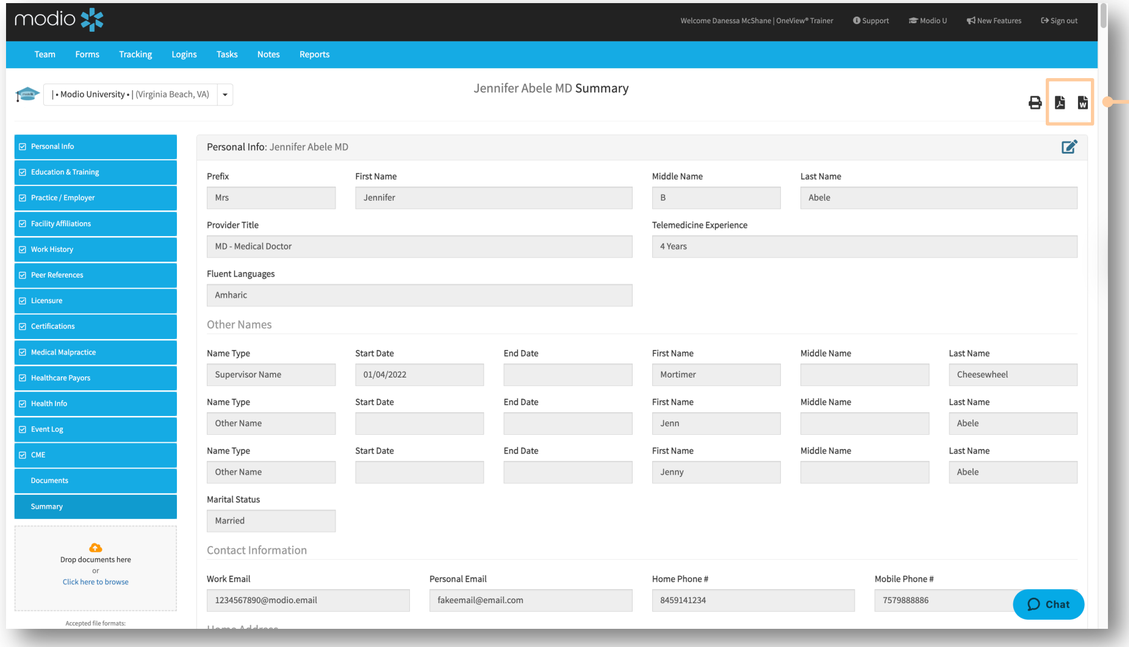
Accessing Inactive Providers in V2:
To access inactive providers in V2 click on the three-dot icon and click on the "Show Inactive Providers" filter.

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.





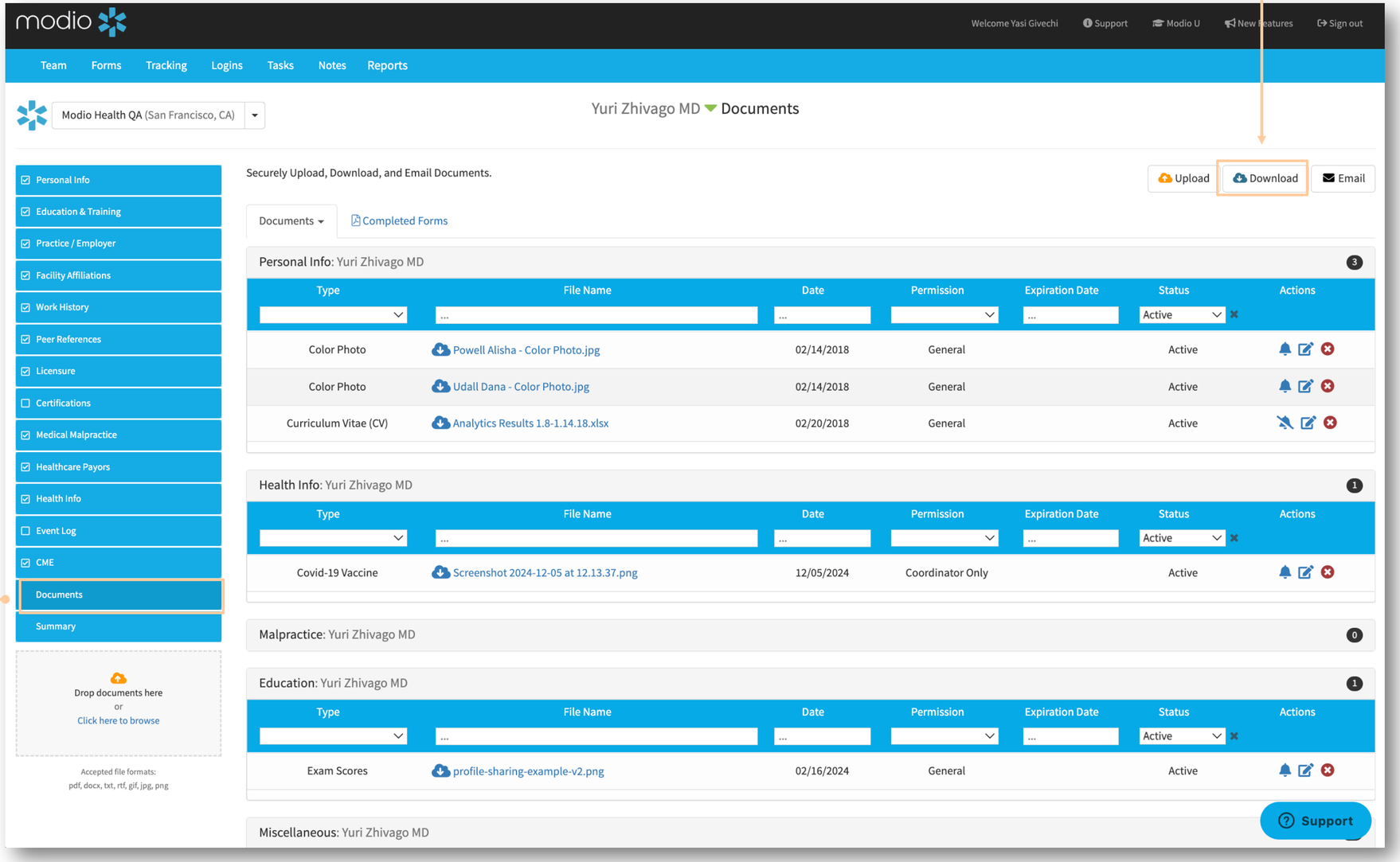
2. Click either the **PDF** in the top right corner to download the provider's Summary. Use the **Word icon** to download the provider CV

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

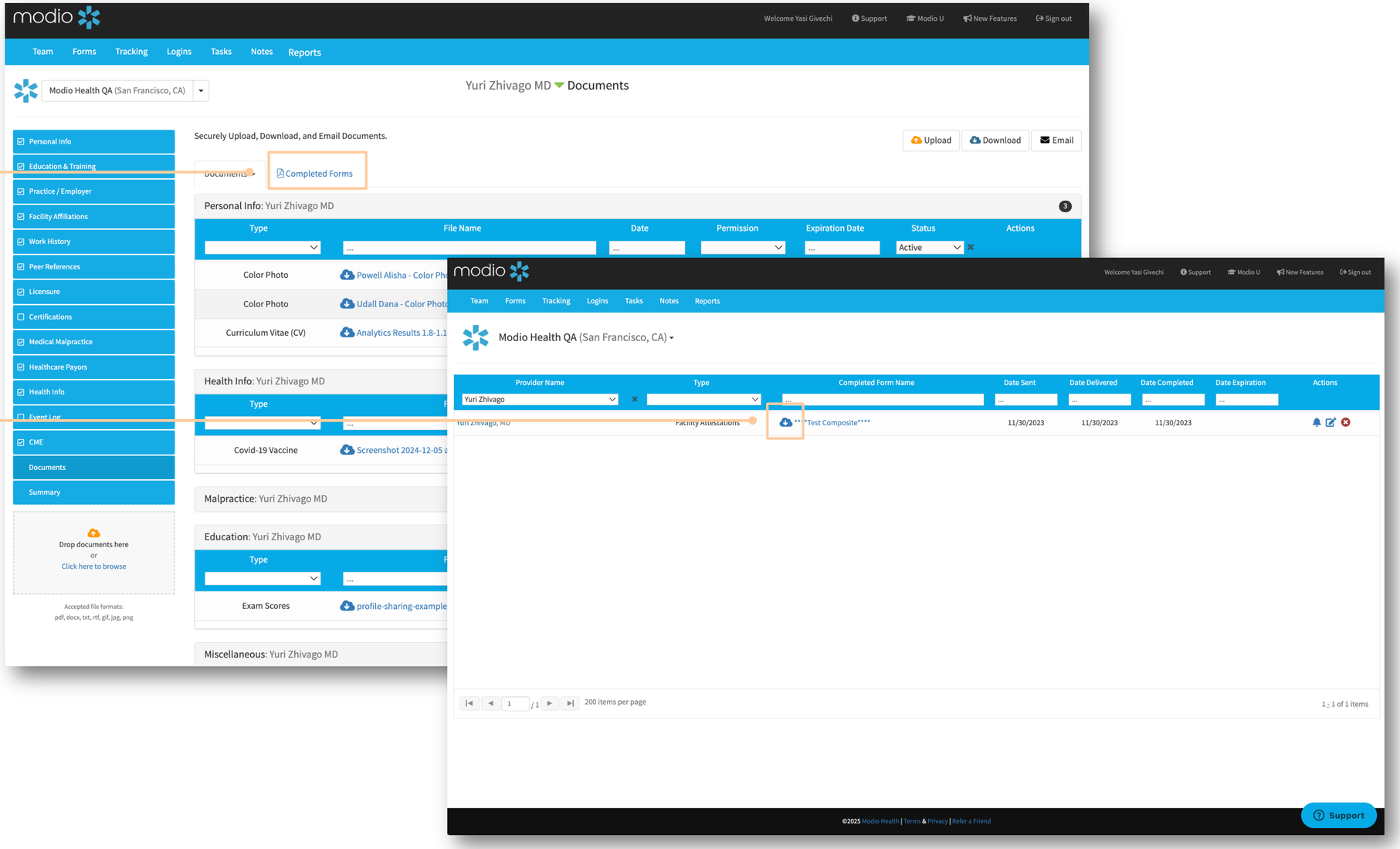
1. Next, navigate to the Documents section.



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.



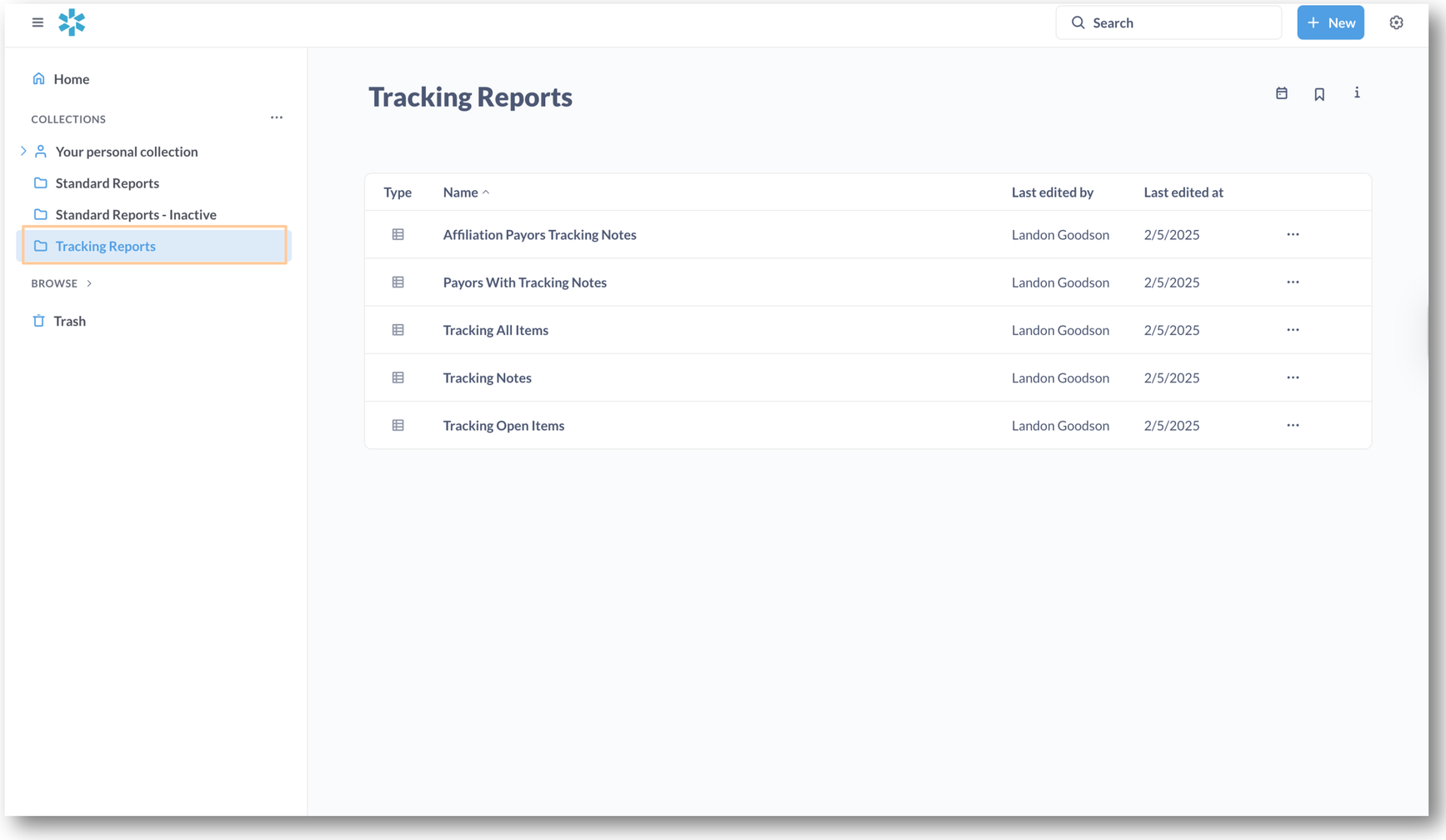
Downloading Tracking Reports

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.

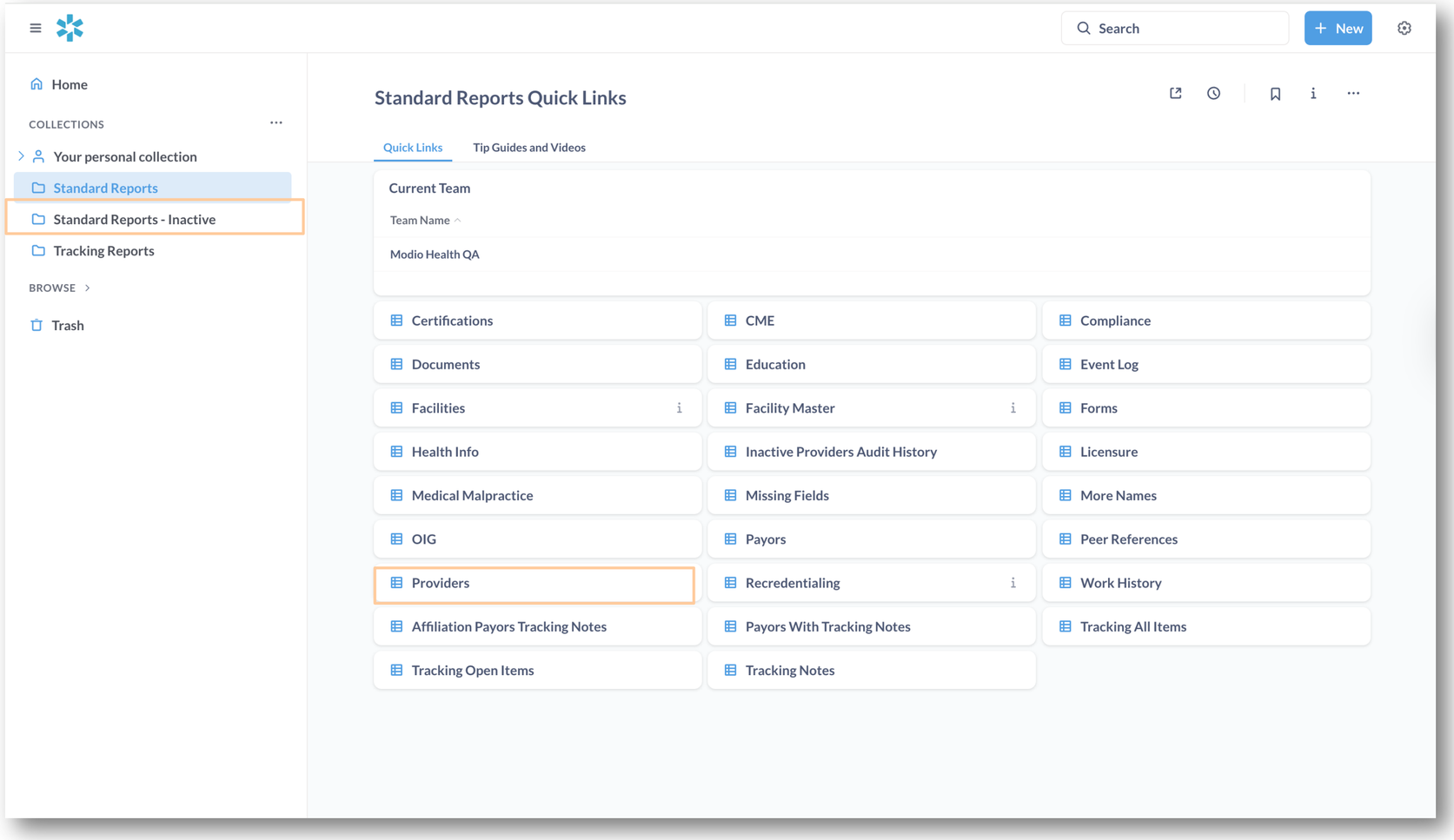
These reports will be sent to you via secure email.



Summary – How to complete a Data Export

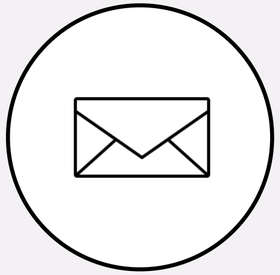
1. Now that all profile data is downloaded and saved, use the Provider report (Active or Inactive) to send in the request to remove profiles to Support@ModioHealth.com
2. Download the report as a .XLSX
3. Highlight the rows to be deleted

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:

Online:
Live Chat Support



Email:
Support@modiohealth.com

Phone:
844.696.6346