



OneView[®]

Tip Guide: Reporting Module

About the OneView Reporting Module

Our OneView Reporting Module introduces capabilities like column filters, customizations, Ad-Hoc reporting, and more!

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Start Here!

Welcome to our Reports Module!

Access the **Reports Module** from the top navigation of OneView. Clicking the Reports Tab will open a new tab on your browser. This new Reporting module will be your best source for Ad-Hoc reporting, introducing new capabilities like column formatting, saving favorites, and new download settings.

Step 1: Select the Reports option from the top navigation toolbar in OneView to open a new tab that holds the entire OneView Reporting Module.

Pro Tip:

Keep both the OneView tab and the Reporting tab open to quickly toggle between the two as needed throughout your day.

The screenshot displays the Modio OneView Reporting Module interface. At the top, the navigation bar includes 'Team', 'Forms', 'Tracking', 'Logins', 'Tasks', 'Notes', and 'Reports', with 'Reports' highlighted. An orange callout box labeled 'Start Here!' points to the 'Reports' tab. Below the navigation bar, the user is identified as 'Leah Sanborn | OneView® Trainer'. The main content area features a table of providers with columns for 'Provider', 'Tags', 'Compliance', and 'Actions'. The table lists several providers, including 'Group/Organization Name - FAC', 'StarshipEnterprise - FAC', 'Sunrise Medical Lab - FAC', 'Texoma Independent Physicians - FAC', 'ZYX FACILITY - FAC', '321, Test - DO', and 'Abakporo, Theophine David - Employed'. A 'OneView V2 New' dropdown is visible above the table. The footer includes a chat button and copyright information: '©2024 Modio Health | Terms & Privacy | Refer a Friend'.

Provider	Tags	Compliance	Actions
Group/Organization Name - FAC No Specialty NPI# 1111111111	Colorado Dermatology FAC...	No alerts	[Icons]
StarshipEnterprise - FAC Medical Education NPI# 567125	MT	1 alert	[Icons]
Sunrise Medical Lab - FAC No Specialty	North Carolina Office 1	2 alerts	[Icons]
Texoma Independent Physicians - FAC No Specialty NPI# 5555555544		1 alert	[Icons]
ZYX FACILITY - FAC No Specialty		No alerts	[Icons]
321, Test - DO Acupuncture and Chinese Herbal Medicine		No alerts	[Icons]
Abakporo, Theophine David - Employed Acupuncture	Group A	7 alerts	[Icons]

Tip Guide: OneView Reporting Module Introduction

OneView Reporting Module Tour: Now that you have selected the reports tab, the feature will open. As you navigate, you'll notice a wide selection of capabilities within the tool. Here are the features we recommend you learn first.

Your Personal Collection: This section holds any reports that you have saved after applying filters, conditional formatting, custom columns, visualizations and other changes to existing Standard Reports. Personal collection is coordinator based. Only you will be able to access reports saved to your personal collection.

Home: Select "Home" or the blue Modio logo to return to the main reports page.

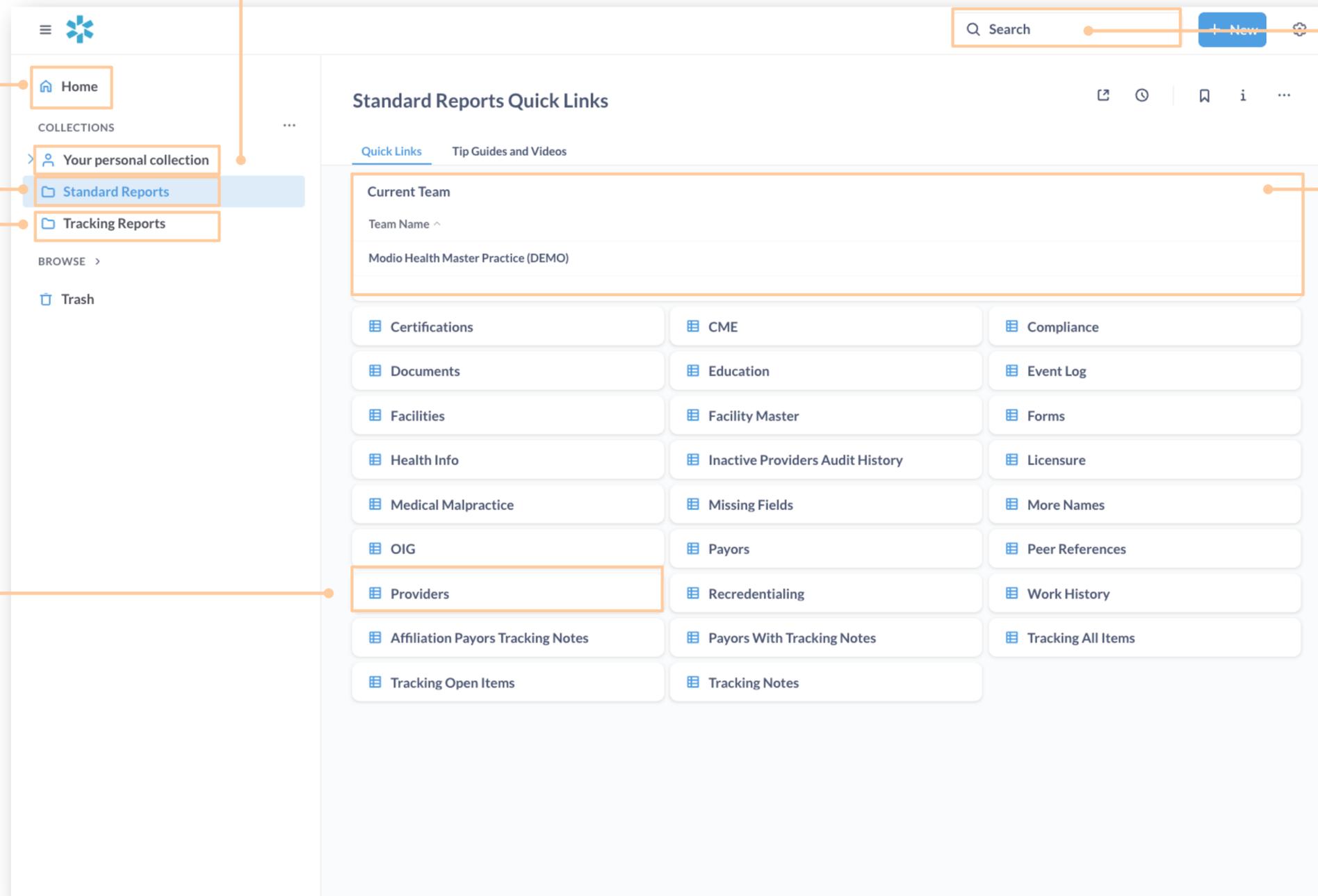
Standard Reports: These reports are available to all OneView Coordinators and for all Teams.

Tracking Reports: These reports are related to the Tracking feature in OneView.

Run a Report: Select a tile from the Standard Reports quick link or navigate to your Personal Collection to run any available reports.

Search: Find the reports you need with a quick keyword search.

Team Indicator: The data that queries in your reports will pull directly from the Team name listed here. If you have access to more than one Team, check here to confirm you are running a report with the desired data.



Tip Guide: OneView Reporting Module Introduction

Using OneView Reports Module: Now that you have selected a report and let it run, use this slide as in introduction to Filters, Visualizations, and more.

Filter: Filter data by column.

Summarize: Filter and count by specific data.

Show Editor: View the details of the report and add additional filters and customizations.

Save: The **Save** option will appear once changes have been made to the report. Use the Save button to save the filtered report to your Personal Collection.

Adjust Columns:

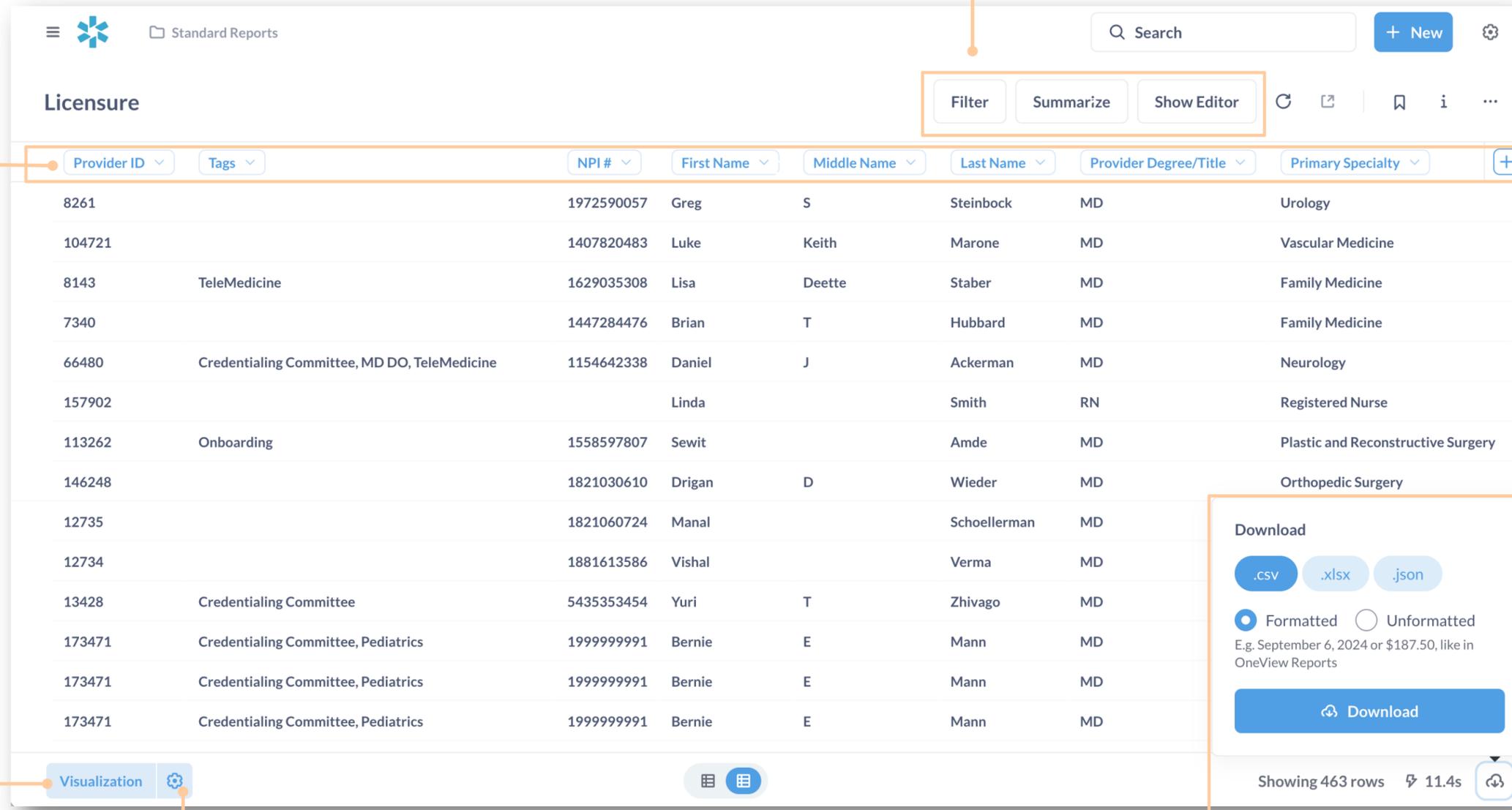
Drag & drop columns to reorder your report before downloading. Select the dropdown arrow on each column for additional customization options.

Visualization:

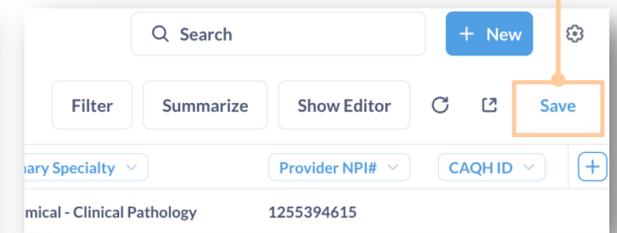
Use this feature after using the Summarize feature to create visualizations.

Gear Icon:

Easily add, remove, reorder columns from the existing report.



The screenshot displays the OneView Reporting Module interface for a report titled "Licensure". At the top, there is a search bar, a "+ New" button, and a gear icon. Below the search bar are three buttons: "Filter", "Summarize", and "Show Editor", which are highlighted with an orange box. The main area contains a table with columns: "Provider ID", "Tags", "NPI #", "First Name", "Middle Name", "Last Name", "Provider Degree/Title", and "Primary Specialty". Each column has a dropdown arrow. The table lists 15 rows of data. At the bottom left, there is a "Visualization" button with a gear icon. At the bottom right, there is a "Download" menu with options for ".csv", ".xlsx", and ".json", and radio buttons for "Formatted" (selected) and "Unformatted". A "Download" button is also present. The status bar at the bottom shows "Showing 463 rows" and "11.4s".



This close-up screenshot shows the top right corner of the interface, including the search bar, "+ New" button, and gear icon. Below these are the "Filter", "Summarize", "Show Editor", and "Save" buttons. The "Save" button is highlighted with an orange box.

Download:

Use the download icon to export a report as a .csv, .xlsx, .json file type.

Frequently Asked Questions

Q: How quickly is data refreshed on these reports?

You may see a short delay for current data, with the data refresh currently set at 3.5 minutes during business hours.

Q: Is there a way to move columns from one report to another? How can I add data points that aren't currently in a report? ?

Yes! Use the show editor button to access the Join data feature. This will allow you to combine existing reports and remove any duplicate or unneeded columns. Use the Custom column feature to combine or modify any existing columns.

Q: How can I filter on Last Name with providers that share the same last name? ?

We do not have Provider Name as a column to allow you to filter to a specific name, but you can layer a Last Name and First Name filter to find the specific provider you need. Use the custom column feature to combine First name and Last Name into one column.

Q: Can encrypted fields like SSN be added to my report? ?

Currently encrypted fields are not available in our reports. We have planned work to secure the encrypted data for reporting. For now this type of request will remain a custom report request.

Q: How can I use filters to capture many text strings in one query?

The Filter option for "Contain" only allows you to search for one text string at a time, i.e., any Payor Names containing "Aetna." A better filter option uses "Is" which can be layered and set up to display a dropdown list of available values.

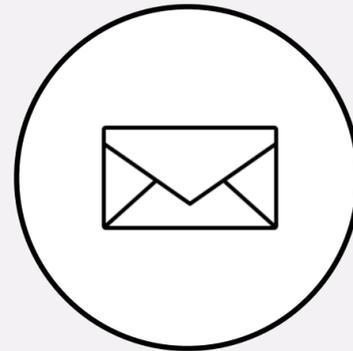
Q: What is the time zone used?

All report timestamps are set in Eastern Time Zone. Click on a column header for the time stamp (most often used on Updated Date) and see the time zone included.

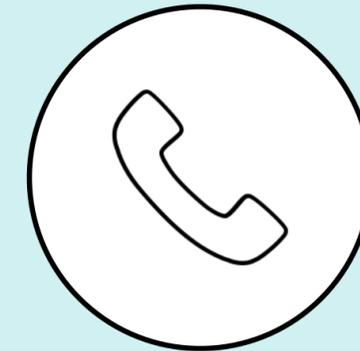
For additional questions or further training, contact the Modio Team via:



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