OneView®

Tip Guide : Managing Compliance Alerts

Use this guide to review the effective ways to managing Compliance Alerts for your team.

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Before you get started on viewing your compliance records, we recommend you first customize your settings to best match your compliance alert needs.

Start by customizing your grid settings.

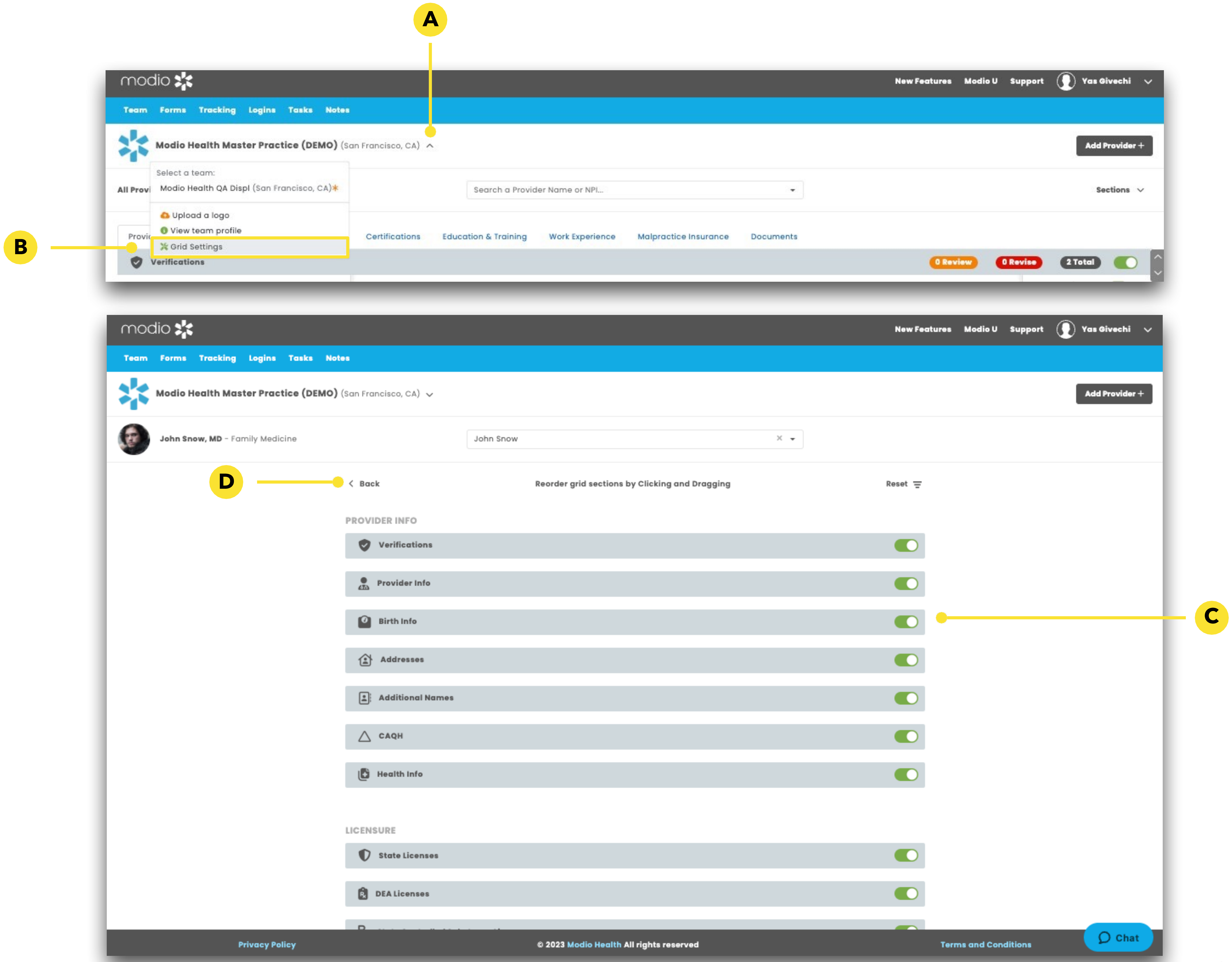
a. Click your **team name** in the top right corner and select **Grid Settings** from the drop-down menu.

b. **Toggle off** the sections that you don't need to regularly monitor. Using this new view allows you to add additional sections you want to view for compliance, like Exams or SAM.

c. Toggle on or off the sections according to your compliance needs. Here is a list of our most watched Compliance Alerts:

- State Licenses
- DEA Licenses
- State Controlled Substance Licenses
- Board Certifications
- Other Certifications
- OIG
- CAQH
- Documents
- Malpractice
- NOTE: you can add additional available sections if you like, it does not have to match the prior report exactly.

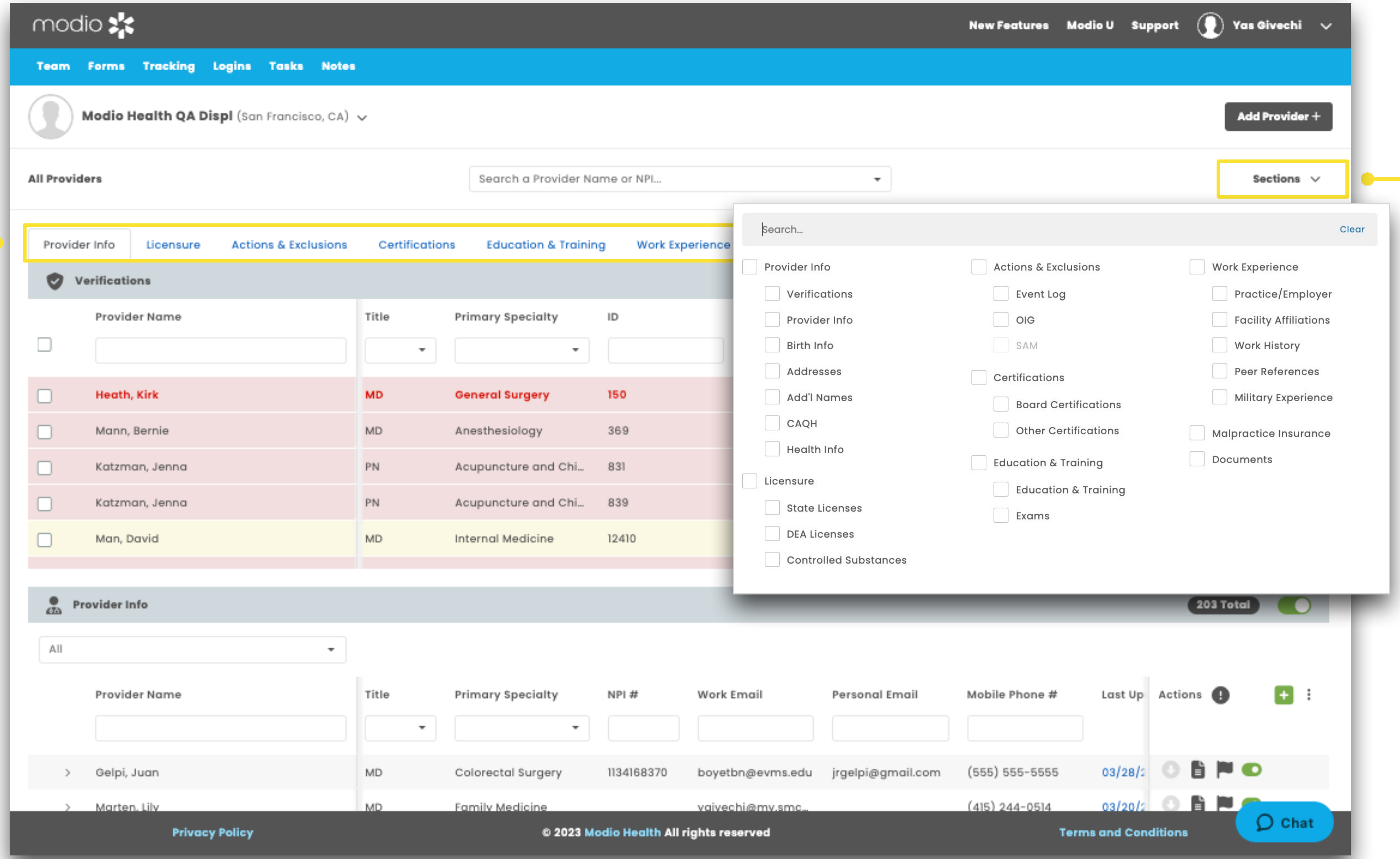
d. Once you have finished customizing your grids, click "**Back**." These settings are sticky, meaning they will persist every time you access OneView V2.



Use the all-provider view to see all records for the providers on your team. To look at a subset of record, use the tabs across the top to view by grouped record types, or use the sections filter to choose which sections display

Use the sub-navigation to move between grids, which are grouped by type to quickly view and manage any compliance alerts on your OneView Team.

A



B

Use the **Sections** filter to show as few as one grid at a time. Select multiple sections to view only what you need.

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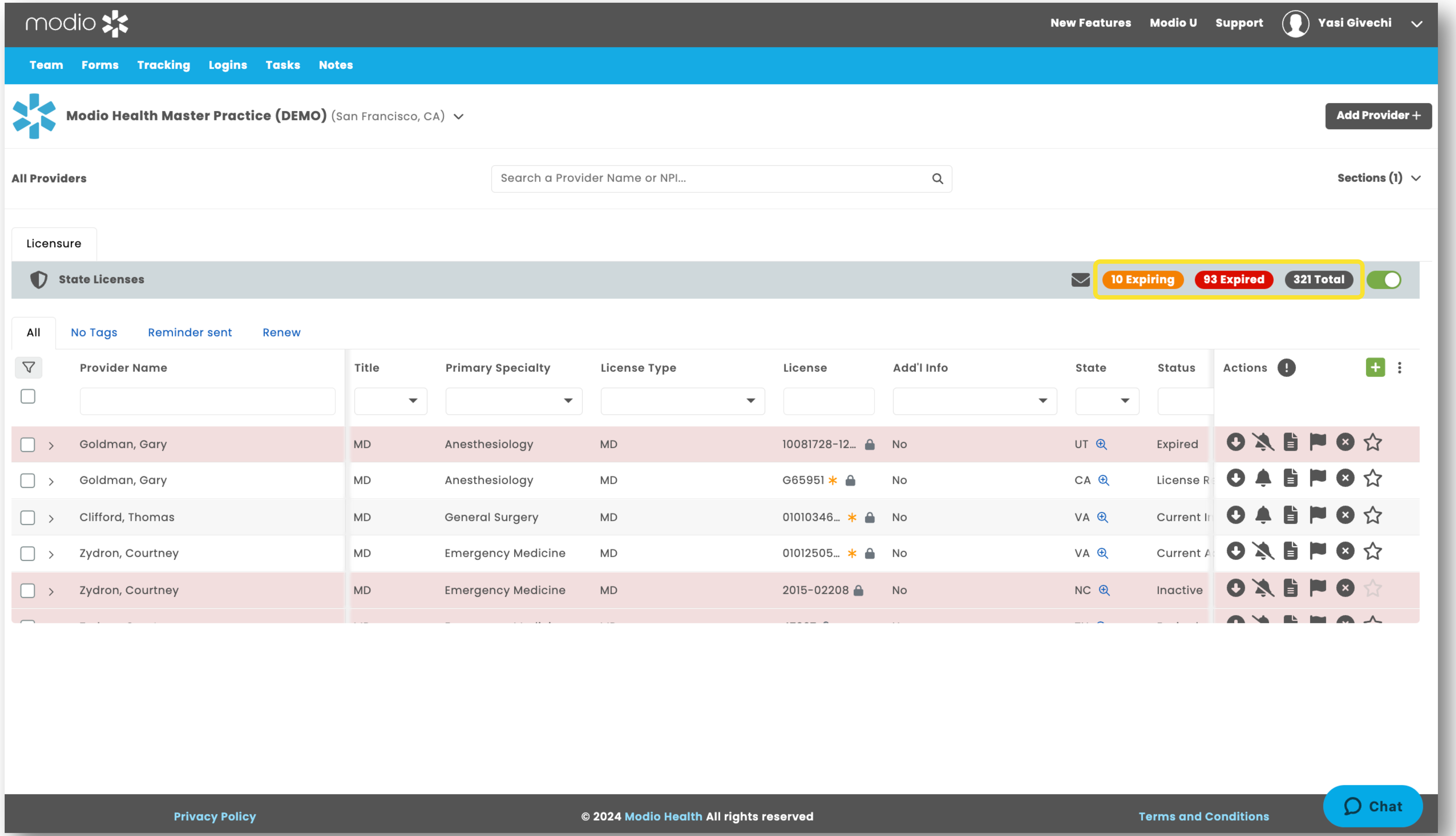
Utilizing Filters : Utilizing the filters provided to help prioritize your workflows when managing Compliance Alerts for your team. There are 3 filters available in the grey, grid level toolbar.

These alert filters are available at a grid level. Grids with expiration dates will display the Red, Orange and Dark Grey quick filter options.

Quickly toggle between:

- All data points
- Expiring Data Points
- Expired Data points

at the grid level with a single click.



Expiring: This filter will allow you to see what is soon to expire within the grid you're in. It is also connected to the advanced filtering option within the three-dot icon, which allows you to change the number of days you would like to be alerted.

Expired: This filter will allow you to see what records are past their expiration date.

Total: This filter will allow you to see all records within your grid. Including expiring, expired and up to date records.

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Introduction: Utilizing the advanced filtering options in the three-dot icon will allow you to filter your grid so you can have an even more efficient view.

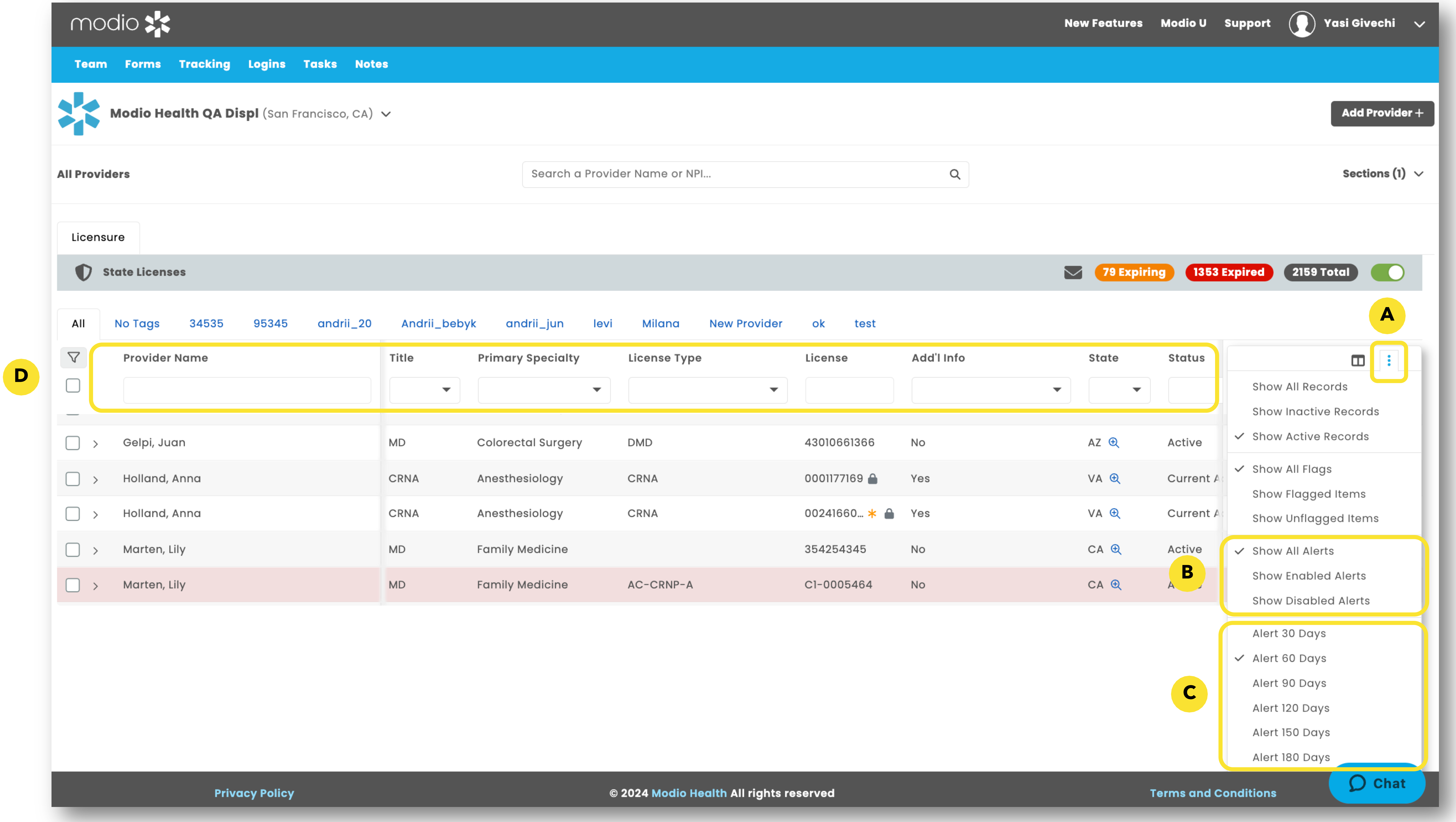
A Select the three-dot icon to access additional filters. These filters will help create a focused group of compliance alerts.

Helpful Hints:

B By default, the platform will "**Show All Alerts**" but you have the option to view just the enabled or disabled Alerts. Disable an Alert by clicking on the bell icon under the actions item column. This will mute that alert for that record.

C By default, the platform will Alert you at the 60-day mark, so when that record is set to expire in 60 days or less. In V2 you have the option to adjust that. So, if you'd like to work ahead or you want to be Alerted at when the record is set to expire in 30 days or more you can change that according to your workflows.

D Use the filter boxes located under each column name if you'd like to narrow down your list that you are viewing. Popular use cases are filtering by State and Title.



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Email Send Alerts. Feature: Now that your column filters have been set you are on your way to sending out an email alert to any providers or coordinators on you team.

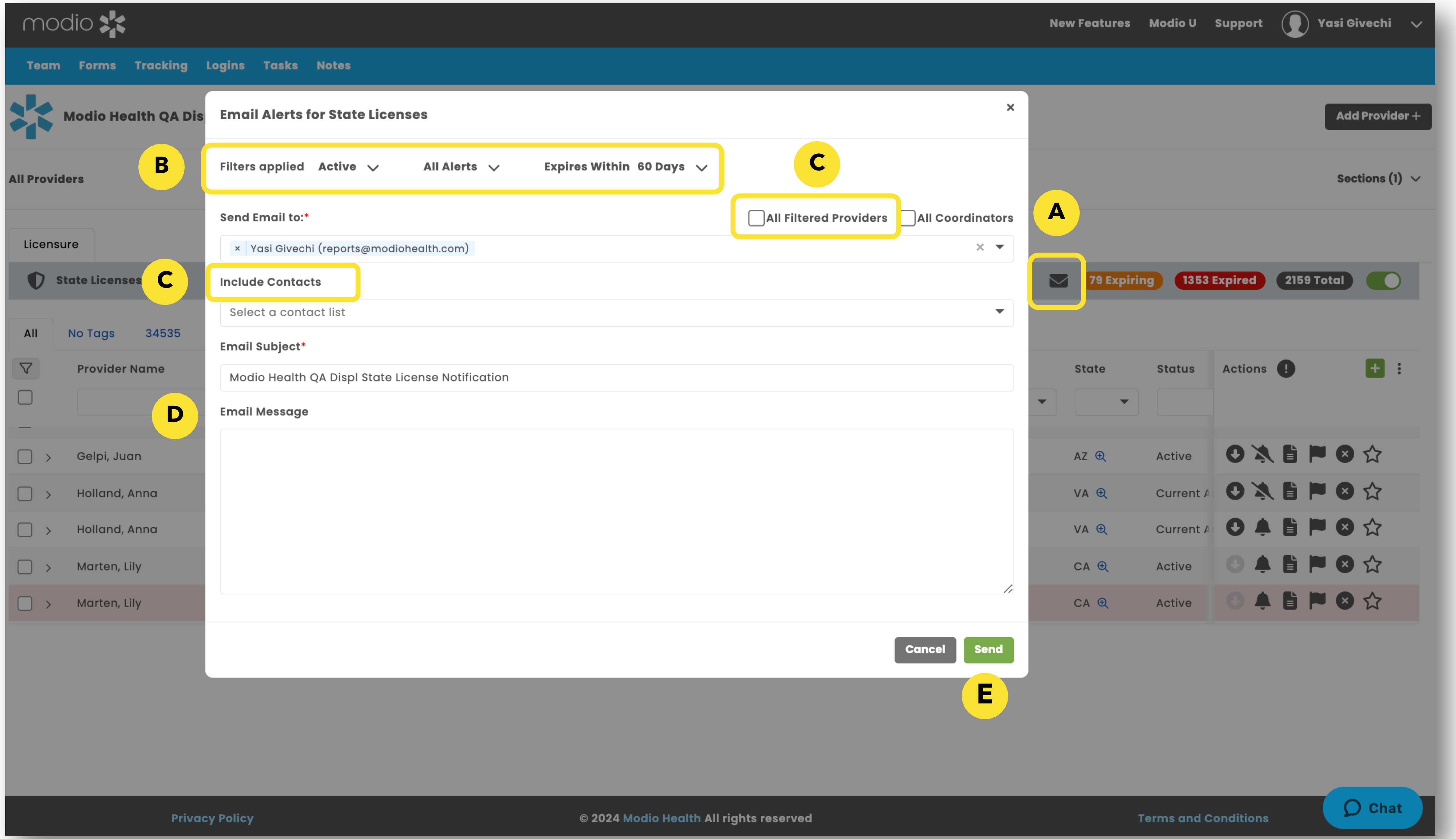
A **Select the email icon to send a message to providers with upcoming expirables or to the coordinators on your team.**

B **Review the 3 filter options on the email send model.** Now that the email send model is open, review the 3 filters. This will help ensure the email is being sent to the correct group of providers.

*Notes, the filters in this model are not "sticky" They will need to be adjusted with every new email send.

C **Select "All Filtered Providers".** This option will add a filtered list of providers to the send list. Each provider will receive their own email (not a group email) about their upcoming alert.

- Selecting "All Coordinators" will rout the email to any coordinates who have access to your team.
- Include Contacts: Your organization has the option to add an additional send list to your team. Reach out to Support@modiohealth.com to add contacts to this feature.



D **Personalized Email Message:** Add a customized email message before sending to your providers or your team members. Use this feature to communicate any details or next steps.

E **Send:** Now that the provider list is filtered, the email model filters have been reviewed, recipient list has been selected and the the personalized message has been added click SEND.

Helpful Hints:

- Before selecting the email icon, set advanced column filters to create a focused list of providers.
- Filtering grid columns before selecting the email icon will narrow down the provider send list. Popular use cases and filtering by provider type and state before sending.

Access the Primary Source Verification feature under the "Last Updated" column in our Licensure tab and the Actions & Exclusions tab in V2

OneView allows you to run 10 licenses at a time in the Licenses grids. One click of the updater icon will check the Primary Source for any updates, update the license data entry, and save the Primary Source Document for your record.

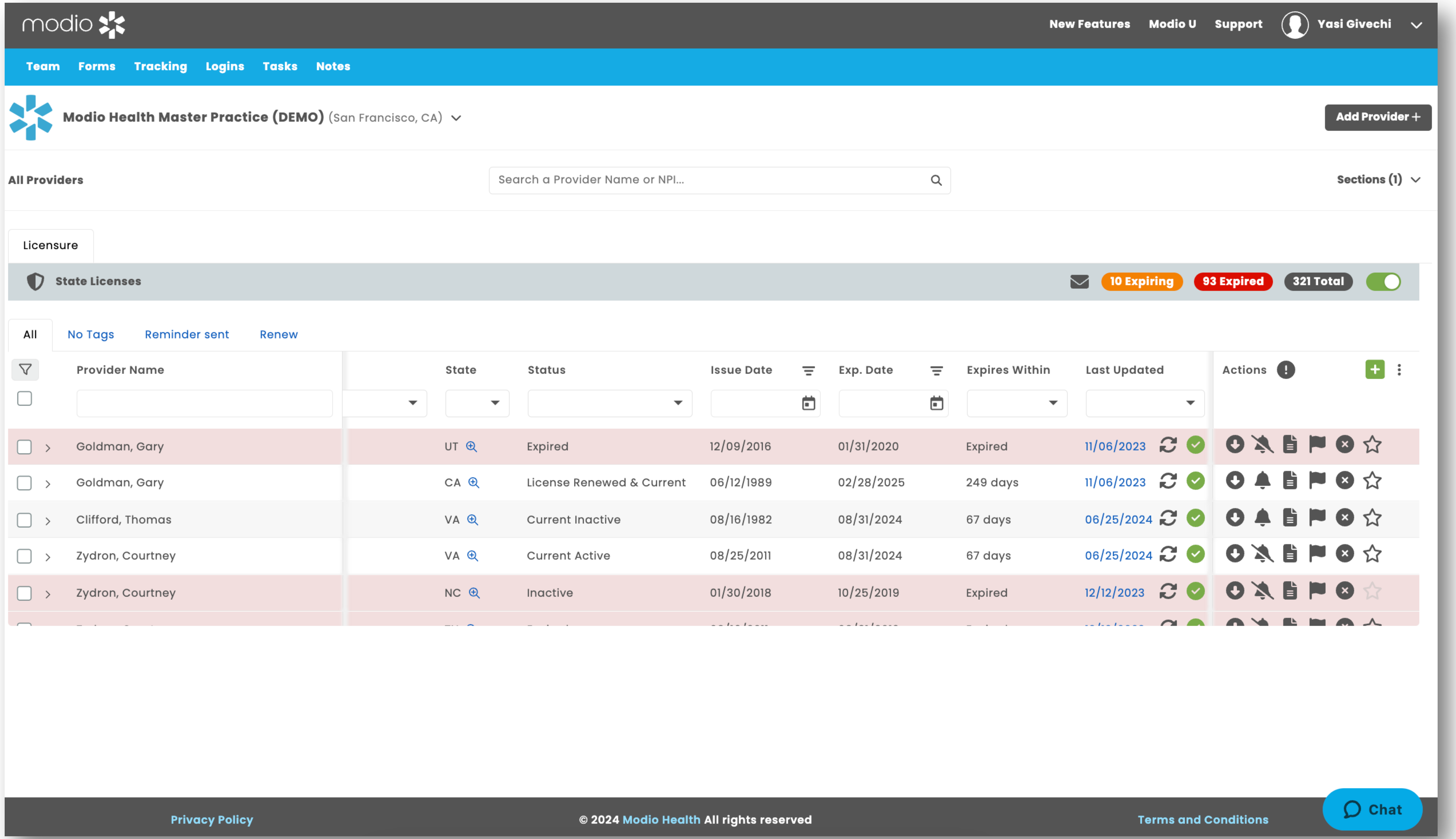
An additional way to run the updaters is, check the empty box under the filter icon and the system will select the first 10 licenses for you. Next, right click on the first providers name and click "Updated Selected Licenses" and it will run the 10, then the next 10 and the next until done.

Once run, the feature will automatically make those Primary Source updates, automatically download the Primary Source document, which you can download by clicking on the down arrow icon under the Actions item column.

View the Primary Source changes and other audit history and time stamp info by clicking on the date under the "Last updated column"

Helpful Hints:

- If this is a column that you use frequently, feel free to drag and drop the last updated column towards the left of the grid so you don't have to scroll.
- After running all updaters on licenses that will expire soon, use the envelope icon to reach out to a provider or coordinator on your team while still being in the platform. See slide #7 for additional details on that email feature.



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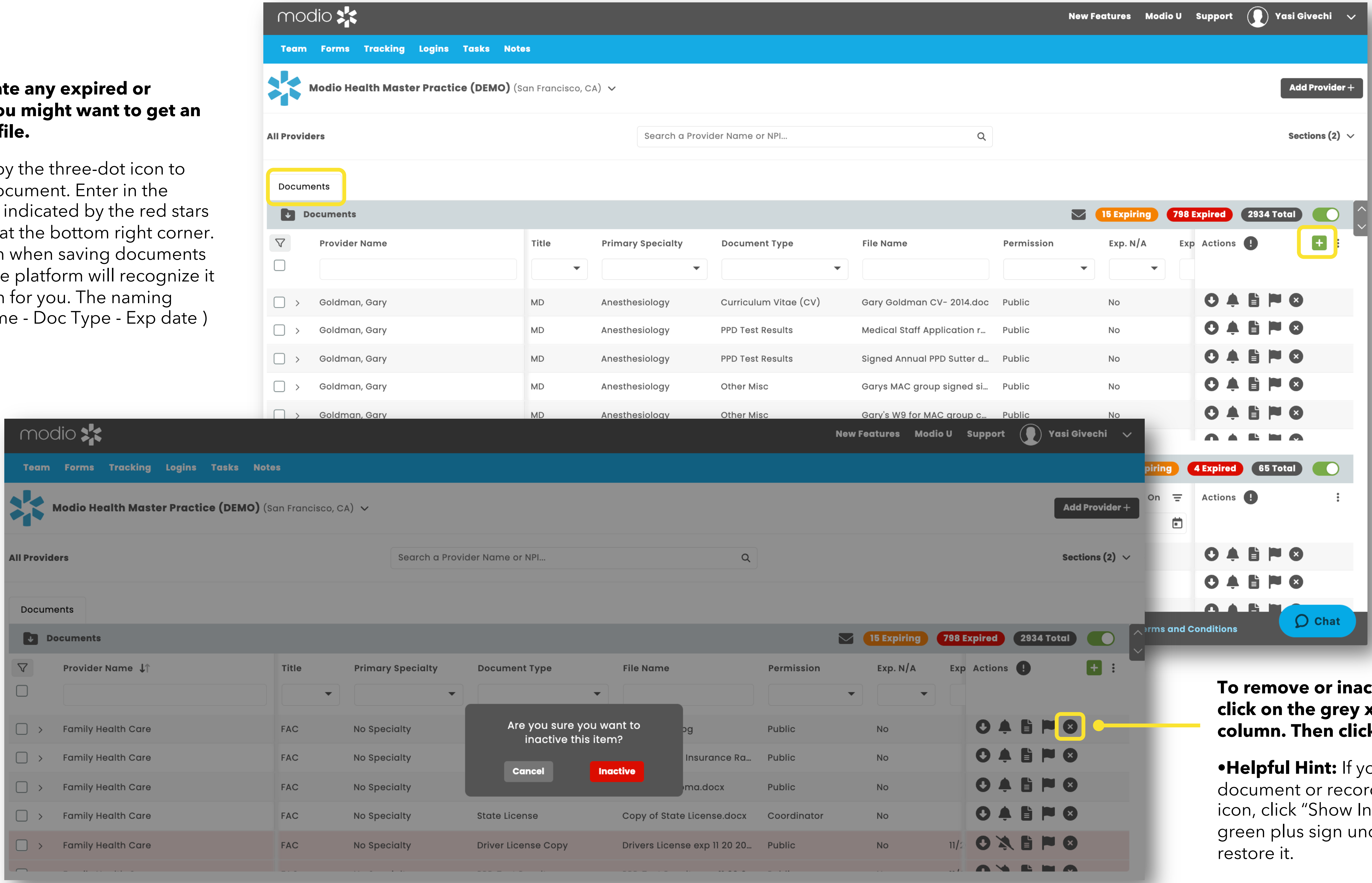
Introduction: Managing Documents

Utilize the filters to locate any expired or expiring Documents, you might want to get an updated Document on file.

Use the green plus sign by the three-dot icon to add a new or updated document. Enter in the required fields which are indicated by the red stars and click “**Save Record**” at the bottom right corner. Use the name convention when saving documents to your computer, and the platform will recognize it and autofill those fields in for you. The naming convention to use is (Name - Doc Type - Exp date)



To remove or inactive an expired document, click on the grey x icon under the actions item column. Then click “Inactive”

•**Helpful Hint:** If you accidentally made a document or record inactive, go to your three-dot icon, click “Show Inactive Records” and click the green plus sign under the actions item column to restore it.

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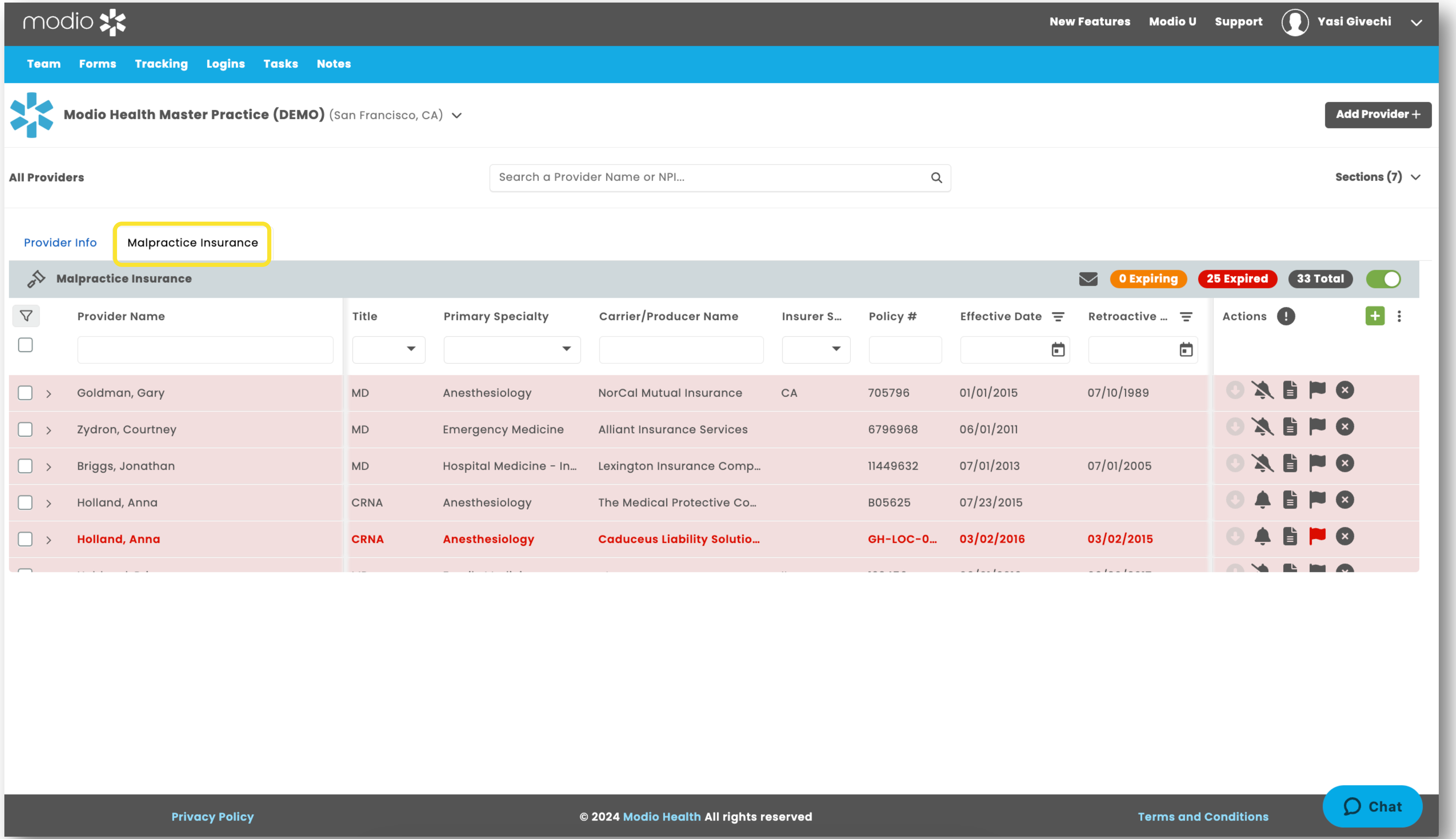
Introduction: Updating Malpractice Insurance

To update the information for a providers Malpractice, first navigate to the "Malpractice Insurance" tab.

Click on the providers name to open their record, this is called inline editing. You can then update those fields and make sure to hit the "Save Record" button to apply the changes you made.

Helpful Hint: If your organization updates Malpractice Insurance in bulk, send us a spreadsheet to Support@ModioHealth.com and our data team will make those updates for you.

Helpful Hint: Any changes or updates that you make in the providers record in V2 will also apply to their profile in V1, so there is no need to do anything twice.



Frequently Asked Questions

Q: When something is soon to expire or expired, will I receive a notification?

Unfortunately, we do not have that feature currently. You will have to manually click on the tab(s) to see what is soon to expire or what already has expired.

Q: Does OneView automatically run the updaters for me?

OneView does not automatically run the State License, DEA License , or State Controlled Substance License PSV. You will need to manually click the updater icon that is located under the "Last Updated" column in your grid. However, OneView does run OIG and SAM updaters automatically in the middle of the month.

Q: Will OneView send out an automated email to providers if their license is expiring soon or has already expired?

Unfortunately, not currently. Click on the envelope icon within the grid that you're in, and manually type your message to personalize it and select send to remind providers to renew their licenses.

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

Online:
Live Chat Support

Email:
Support@modiohealth.com

Phone:
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