

Oneview®

TIP GUIDE - REPORTS

Accessing and Running Reports for full access coordinators

Tip Guide - Reports

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Tip Guide - ReportsIntroduction: V1 Web Reports

Web reports serve as an interactive dashboard. They provide an overall snapshot of your teams data that can be used for various credentialing solutions. Access web reports in the reports dropdown located next to the OneView V2 button as show here.



You can click on any of the titles of each column to change the current sort order.

Completed Items for | Modio University • | Completed/Uploaded **Provider Name** Group/Organization Name, FAC Nexus Wound Care, FAC StarshipEnterprise, FAC Sunrise Medical Lab, FAC Texoma Independent Physicians, FAC Abakporo Theophine, MD Abele Jennifer, MD Ambati Balamurali, MD **|**◀ ◀ 1 / 1 ► ► **|** 50 ► items per page

Use the blank search boxes seen going across to enter the information or select from the dropdown to filter your report.

> The profile names seen here are a direct link to that profile.

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When selecting the numbers in the column, you will see a pop-up. These will show you the items that are part of the profile represented by that number. For example, where it says 1 under login you can see the 1 login stored there or in the documents column you can see the beginning of the list of documents in that profile.





Tip Guide - Reports Introduction: V1 CSV Reports

CSV Reports are also found next to the OneView V2 button in the drop-down menu as shown here.

OneView V2 New 👻
Web Reports
🖾 Recredentialing
🔄 Payor Recredentialing
😇 Completed Items
🔄 State License Coverage
过 Team Compliance Alerts
CSV Reports
⊞ Certifications
⊞ CME
⊞ Compliance
I Documents
⊞ Education
🌐 Event Log
⊞ Facilities
I Forms
III Health Info
III Licensure
I Medical Malpractice
I Missing Field
I More Names
⊞ OIG
I Payors
I Providers
⊞ Recredentialing
🌐 Tasks (All Teams)
ITracking (All Teams)
I Work History
I Peer References
⊞ Facility Master Update

CSV Reports are a useful tool to sort, filter, manipulate, and report various data points for your team's data by various sections as shown in the drop-down.

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You can apply any techniques you would for manipulating an Excel report to the CSV report. You can then save the report as an Excel report. **In this example**, filters have been applied to all the columns allowing for quick filtering.

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In every grid section you can access report options by clicking on the ellipse in the action section.

Next to the ellipse is another icon that allows you to select or deselect any column that is in dark blue. By checking or unchecking the box the column will be added or removed from that grid.



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When creating a report in V2 the report will appear with whatever **filtering** you have applied. It will also show the columns in the order you have arranged them. This allows you to create reports with the specific information you need. You can export the data to Excel, CSV, or PDF.





Tip Guide - Reports Frequently Asked Questions

Q: I updated a lot of information on my report. Why didn't it show up in the platform?

The reports are one directional. They can only pull information from the platform not send it back. They will however pull the most recent information so if you have made recent updates to a profile, you can rerun a report and see that new information reflected.

Q: What is a good use case for utilizing the Web Reports?

Web Reports are interactive reports that offer a great snapshot view of all the profiles on your team. They allow you to interact with data from the profiles and seamlessly move into the profile. These reports are particularly useful for following up on items like Onboarding invitations, recredentialing with facilities, payors, and monitoring license statuses.

Q: In V2 can I also run reports in single provider view? Yes, you can run reports in each grid section in V2 in single provider view just like in multi provider view. In single provider view under the license section, you will also find an additional option for a report that puts all licenses types into one report. This is only available in single provider view.

Q: I need to save copies of the OIG and Sam reports every month, but I would like to keep them in the platform where can I save them?

One option is to make an FAC profile where you can save documents for your group including the monthly reports you need. An FAC can also be handy for storing other information like a list of payors and facilities you would like to copy to other profiles.

Q: What if I can't find the report I need in the platform?

Q: Can read only coordinator profiles see reports?

No, only full access coordinators have access to the reports drop down and to V2.

If the reports offered don't meet your needs, it is best to reach out to support for additional help.



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





Phone: 844.696.6346

