



Tip Guide : Managing Compliance Alerts

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

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Fist use Grid 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 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
 - SAM
 - CAQH
 - Documents
 - Malpractice
 - NOTE: you can add additional available sections if you'd like,.
- c. Once you have finished customizing your grids, click "**Back**." These settings are sticky, meaning they will persist every time you access OneView V2.

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Add Provider +

Select a team:

Groups, Recover Together (West Lebanon, NH)Groups, Recover Together (West Lebanon, NH)OV*OPs (Virginia Beach, VA)

Upload a logoView team profileGrid Settings

Search a Provider Name or NPI...

Sections

ProvisionsCertificationsEducation & TrainingWork ExperienceMalpractice InsuranceDocuments

60 Total

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Add Provider +

All Providers

Search a Provider Name or NPI...

Back

Reorder grid sections by Clicking and Dragging

Reset

PROVIDER INFO

Provider Info

Addresses

Birth Info

Additional Names

Health Info

Additional IDs

CAQH

CAQH

LICENSURE

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Use all-provider view to see all records for the profiles 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 Tabs to move between grids, which are grouped by type to quickly view and manage any compliance alerts on your OneView Team.

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Add Provider +

All Providers

Search a Provider Name or NPI...

Sections

Provider InfoCAQHLicensureActions & ExclusionsCertificationsEducation & TrainingWork Experience

Provider Info

Provider Name	Last Updated	Title	Primary Specialty	NPI #
> Abele, Jennifer	04/15/2025	MD	Emergency Medicine	1073502779
> Zowie, Wowie	04/15/2025	MD	Addiction Psychiatry	1234567890
> Bulman, Arthur	04/15/2025	MD	Sports Medicine	1111111111
> Snow, John	04/15/2025	MD	Dermatology	1801007265
> Mann, Bernie	04/15/2025	MD	Family Medicine	1999999991
> Clifford, Thomas	04/15/2025	MD	Obstetrics and Gynec...	1659311579
> Quinn, Michael	04/15/2025	MD	Radiology	1568453348
> Group/Organization Name	04/15/2025	FAC	No Specialty	1111111111
> Boy, Tommy	04/15/2025	NP	Family Nurse Practitio...	8888888888
> Parker, Jennifer	04/15/2025	MD	Family Medicine	1235332255

Search...

☐ Provider Info

☐ Birth Info

☐ Addresses

☐ Add'l Names

☐ Health Info

☐ Additional IDs

☐ CAQH

☐ Licensure

☐ State Licenses

☐ DEA Licenses

☐ Controlled Substances

☐ Actions & Exclusions

☐ Event Log

☐ OIG

☐ SAM

☐ FSMB Actions

☐ Certifications

☐ Board Certifications

☐ Other Certifications

☐ Education & Training

☐ Education & Training

☐ Exams

☐ Work Experience

☐ Practice/Employer

☐ Facility Affiliations

☐ Work History

☐ Peer References

☐ Military Experience

☐ Malpractice Insurance

☐ Documents

☐ Documents

☐ Sent Forms

Birth Info

48 Total

Addresses

25 Total

Provider Name

Title

Primary Specialty

Type

Address

Address 2

City

Sta

Actions

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Support

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

Tip Guide: Managing Compliance

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.

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Add Provider +

All Providers

Search a Provider Name or NPI...

Sections (3)

Licensure

State Licenses

7 Expiring48 Expired111 Total

	Provider Name	Title	Primary Specialty	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date	Expires Within	Actions
<input type="checkbox"/>												
<input type="checkbox"/>	> Abele, Jennifer	MD	Emergency Medicine		D0085596	No	MD	Active	05/31/2018	09/30/2026		
<input type="checkbox"/>	> Abele, Jennifer	MD	Emergency Medicine	MD	D0085596	No	MD	Active	05/31/2018	09/30/2026		
<input type="checkbox"/>	> Abele, Jennifer	MD	Emergency Medicine	RN-eNLC	L1234569	No	CO	Current	08/16/2024	12/27/2025	141 days	
<input type="checkbox"/>	> Abele, Jennifer	MD	Emergency Medicine	MD	MD0377...	No	DC	Active	12/09/2008	12/31/2026		
<input type="checkbox"/>	> Abakporo, Theophine	MD	Acute Care Imaging		201140	No	NY	Registered	10/24/1995	04/30/2027		
<input type="checkbox"/>	> Snow, John	MD	Dermatology	MD	ME98236	No	FL	Vol Relinq	03/16/2007	01/31/2019	Expired	
<input type="checkbox"/>	> Mann, Bernie	MD	Family Medicine	MD	01013007400	No	VA	Active				
<input type="checkbox"/>	> Mann, Bernie	MD	Family Medicine	MD	132456	No	AZ	Active				
<input type="checkbox"/>	> Mann, Bernie	MD	Family Medicine	MD	M-361900	No	ID	Active				
<input type="checkbox"/>	> Mann, Bernie	MD	Family Medicine	MD	TP69700	No	KY	Active				

DEA Licenses

0 Expiring13 Expired33 Total

	Provider Name	Title	Primary Specialty	License	State	Status	Payment Indicator	Issue Date	Exp. Date	Expires Within	Tag	Actions
--	---------------	-------	-------------------	---------	-------	--------	-------------------	------------	-----------	----------------	-----	---------

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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.

Tip Guide: Managing Compliance Alerts

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 7 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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Modio Health QA Displ (San Francisco, CA)

Add Provider +

All Providers

Search a Provider Name or NPI...

Sections (1)

Licensure

State Licenses

79 Expiring1353 Expired2159 Total

AllNo Tags3453595345andrii_20Andrii_bebykandrii_junleviMilanaNew Provideroktest

Provider Name

Title

Primary Specialty

License Type

License

Add'l Info

State

Status

> Gelpi, Juan

MD

Colorectal Surgery

DMD

43010661366

No

AZ

Active

> Holland, Anna

CRNA

Anesthesiology

CRNA

0001177169

Yes

VA

Current A

> Holland, Anna

CRNA

Anesthesiology

CRNA

00241660...

Yes

VA

Current A

> Marten, Lily

MD

Family Medicine

354254345

No

CA

Active

> Marten, Lily

MD

Family Medicine

AC-CRNP-A

C1-0005464

No

CA

A

Show All Records

Show Inactive Records

Show Active Records

Show All Flags

Show Flagged Items

Show Unflagged Items

Show All Alerts

Show Enabled Alerts

Show Disabled Alerts

Alert 7 Days

Alert 14 Days

Alert 30 Days

Alert 60 Days

Alert 90 Days

Alert 120 Days

Alert 150 Days

Alert 180 Days

6

Tip Guide: Managing Compliance Alerts

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.

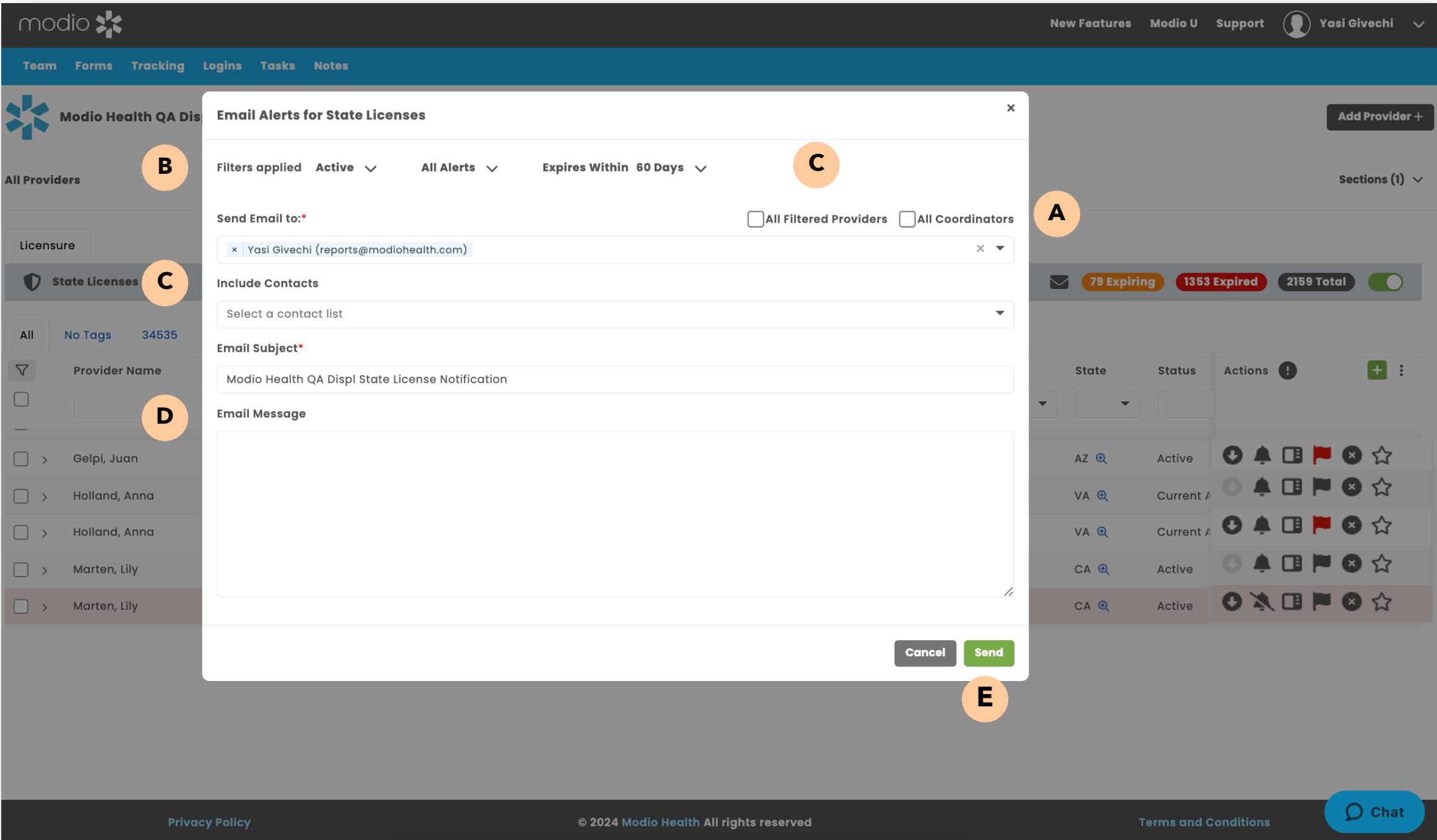
A Select the email icon to send a message to providers with upcoming expirables or to the coordinators on your team.

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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Add Provider +

All Providers

Search a Provider Name or NPI...

Sections (3)

Licensure

State Licenses

1 Expiring62 Expired137 Total

	Provider Name	Title	Primary Specialty	License Type	License	Add'l Info	State	Status	Issue Date	Exp. Date	Expires Within	Actions
<input type="checkbox"/>												
<input checked="" type="checkbox"/>	> Boyette, Bradford	PA	Emergency Medicine	PA-C	01100015...	No	VA	Current Active	07/26/2002	10/31/2025	84 days	
<input checked="" type="checkbox"/>	> Abele, Jennifer		Emergency Medicine	NP-C	0101232393	No	VA	Expired	02/06/2002	12/31/2020	Expired	
<input checked="" type="checkbox"/>	> Abele, Jennifer		Emergency Medicine	D-N-P	1234590	No	IN	Valid to Practice Whil...	08/16/2024	10/18/2025	71 days	
<input checked="" type="checkbox"/>	> Abele, Jennifer		Emergency Medicine		15165116	No	AK	Inactive				
<input checked="" type="checkbox"/>	> Abele, Jennifer		Emergency Medicine		D0085596	No	MD	Active	05/31/2018	09/30/2026		
<input checked="" type="checkbox"/>	> Abele, Jennifer		Emergency Medicine	MD	D0085596	No	MD	Active	05/31/2018	09/30/2026		
<input checked="" type="checkbox"/>	> Abele, Jennifer		Emergency Medicine	RN-eNLC	L1234569	No	CO	Current	08/16/2024	12/27/2025	141 days	
<input checked="" type="checkbox"/>	> Abele, Jennifer		Emergency Medicine	MD	MD0377...	No	DC	Active	12/09/2008	12/31/2026		
<input checked="" type="checkbox"/>	> Abakporo, Theop		Emergency Medicine		201140	No	NY	Registered	10/24/1995	04/30/2027		
<input checked="" type="checkbox"/>	> Abakporo, Theophine	MD	Acute Care Imaging	BCBA	201140	No	NC	Active	08/03/2023	08/03/2025	Expired	

DEA Licenses

0 Expiring13 Expired33 Total

	Provider Name	Title	Primary Specialty	License	State	Status	Payment Indicator	Issue Date	Exp. Date	Expires Within	Tag	Actions
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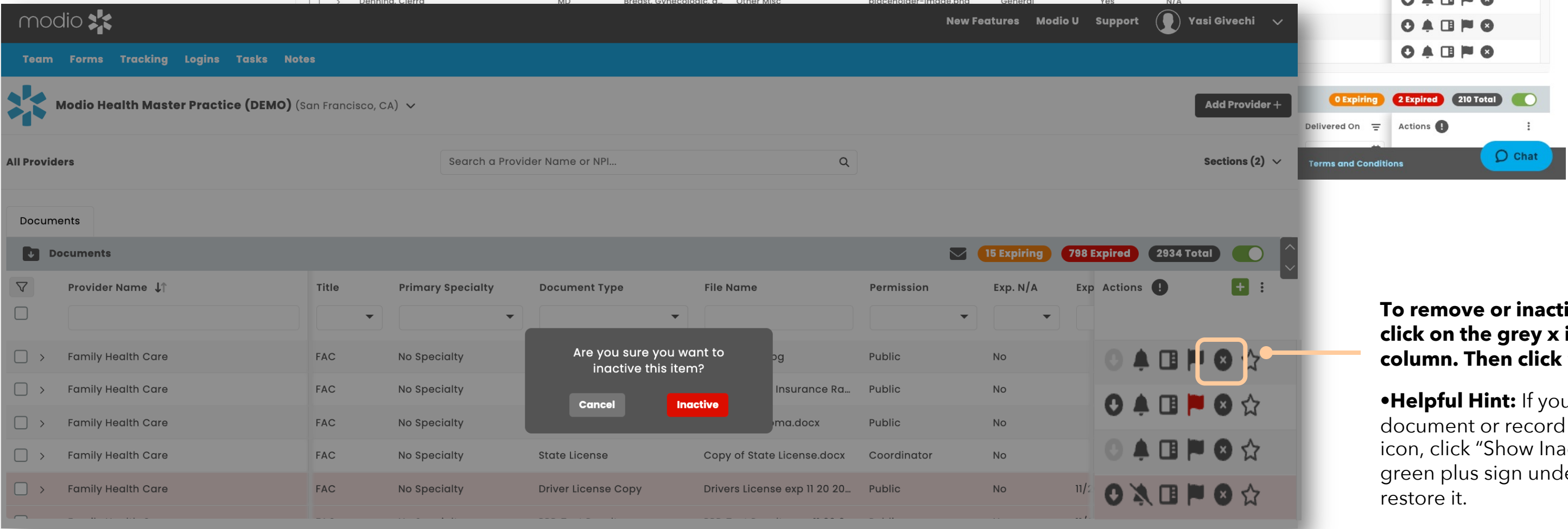
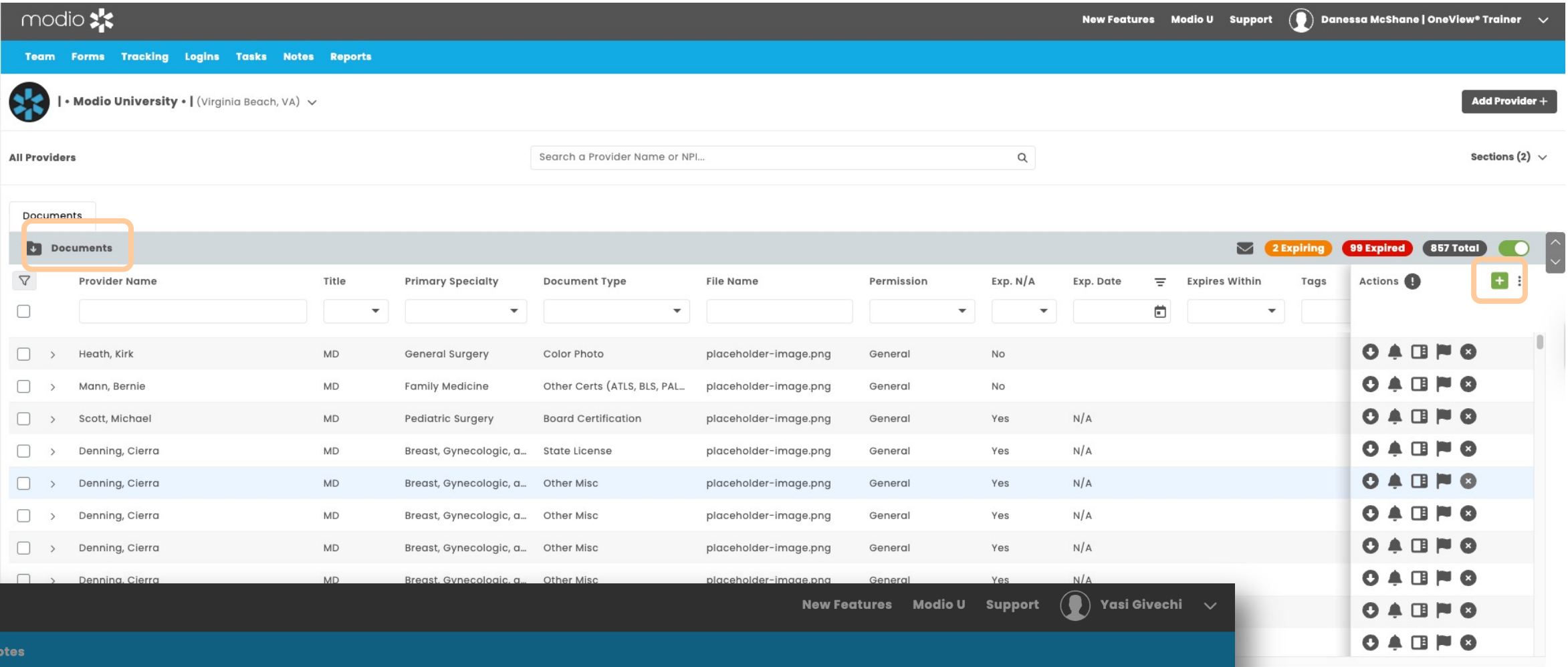
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Tip Guide: Managing Compliance Alerts

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.

Tip Guide: Managing Compliance Alerts

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 field. 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.

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Add Provider +

All Providers

Search a Provider Name or NPI...

Sections (1)

Malpractice Insurance

Malpractice Insurance0 Expiring12 Expired18 Total

	Provider Name	Title	Primary Specialty	Carrier/Producer Name	Insurer S...	Policy #	Effective Date	Retroactive ...	Exp. Date	Expires Within	Actions
<input type="checkbox"/>											
<input type="checkbox"/>	> Abele, Jennifer	MD	Emergency Medicine	test					11/04/2024	Expired	
<input type="checkbox"/>	▼ Abele, Jennifer	MD	Emergency Medicine	44444							

CARRIER AND POLICY INFO

Carrier/Producer Name *

Insurer State

Policy #

Effective Date

Retroactive Date

Exp. Date

44444

Select Insurer State

MM/DD/YYYY

MM/DD/YYYY

MM/DD/YYYY

Primary Policy?

Current Carrier?

Years w/ Carrier

Person/Organization Insured

Provider-Specific Eff. Date ?

No

Current Carrier?

MM/DD/YYYY

Coverage Type

Unlimited Coverage?

Per Incident Amount

Annual Aggregate Amount

Statutory Limit of Liability Endorsement?

Select Coverage Type

Unlimited Coverage?

\$ 0.00

\$ 0.00

Statutory Limit of Liability Endorsement?

CARRIER CONTACT

Agent Name

Email

Phone #

Fax #

@ email@example.com

(910) 110-1110 ext. _____

() - - - -

Unsaved Malpractice Insurance for Jennifer Abele MD

Discard Changes

Save Record

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Support

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.

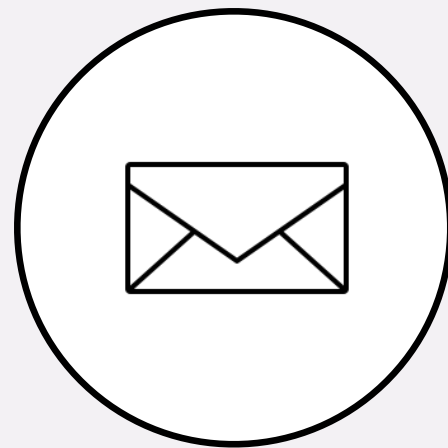
Q: Will OneView send out an automated email to providers if their license is expiring soon or has already expired?

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.

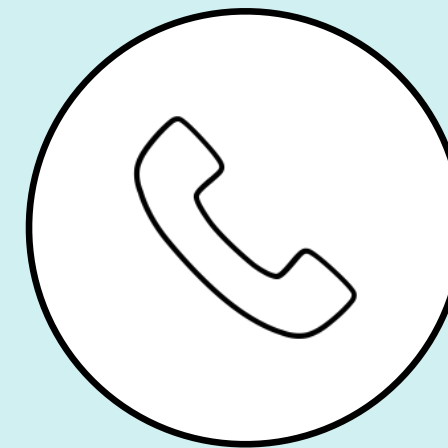
For additional questions or further training, contact the Modio Team via:



Online:
Live Chat Support



Email:
Support@modiohealth.com



Phone:
844.696.6346