



Tip Guide: OneView Reports Module - Advanced Features

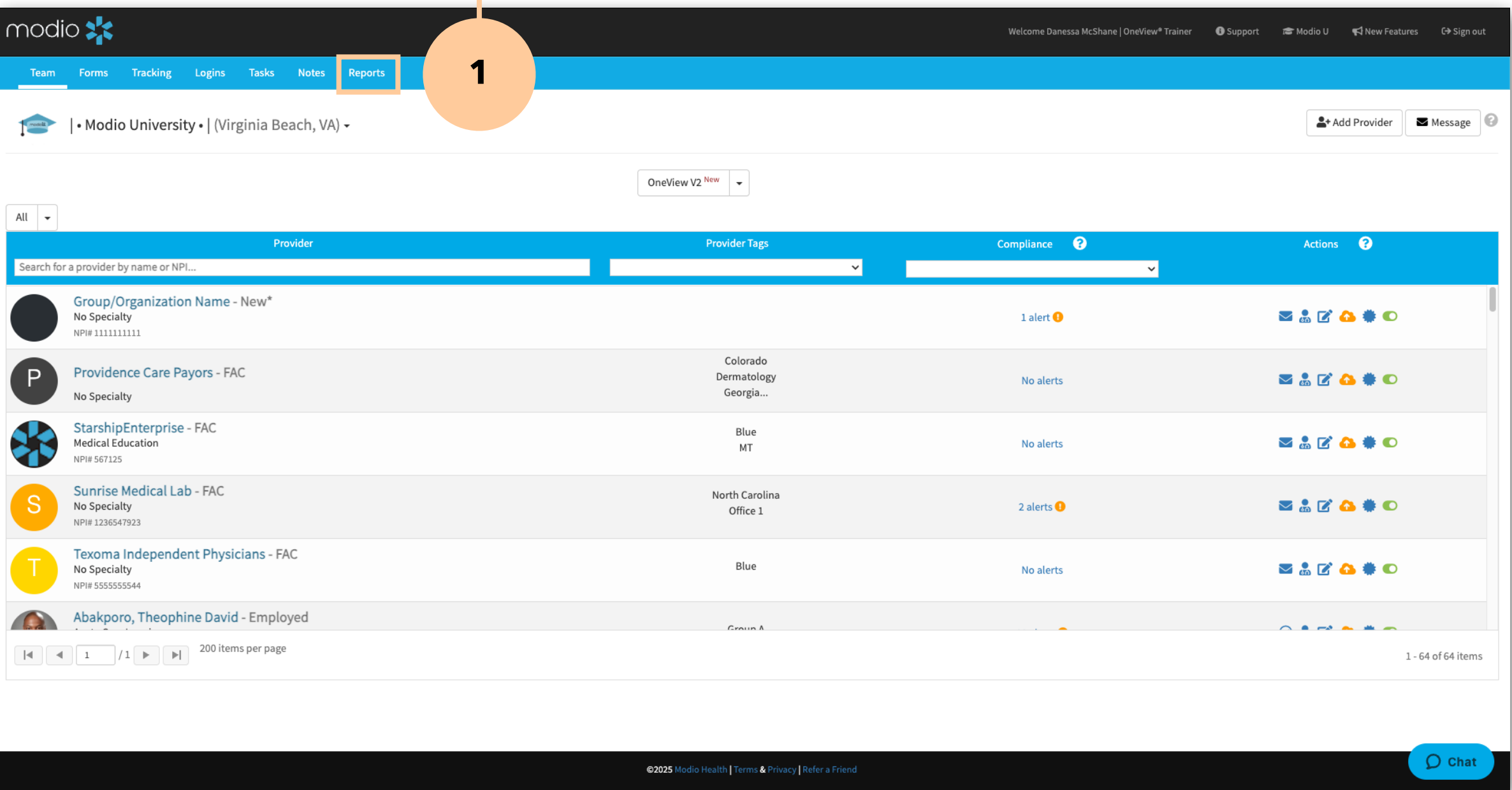
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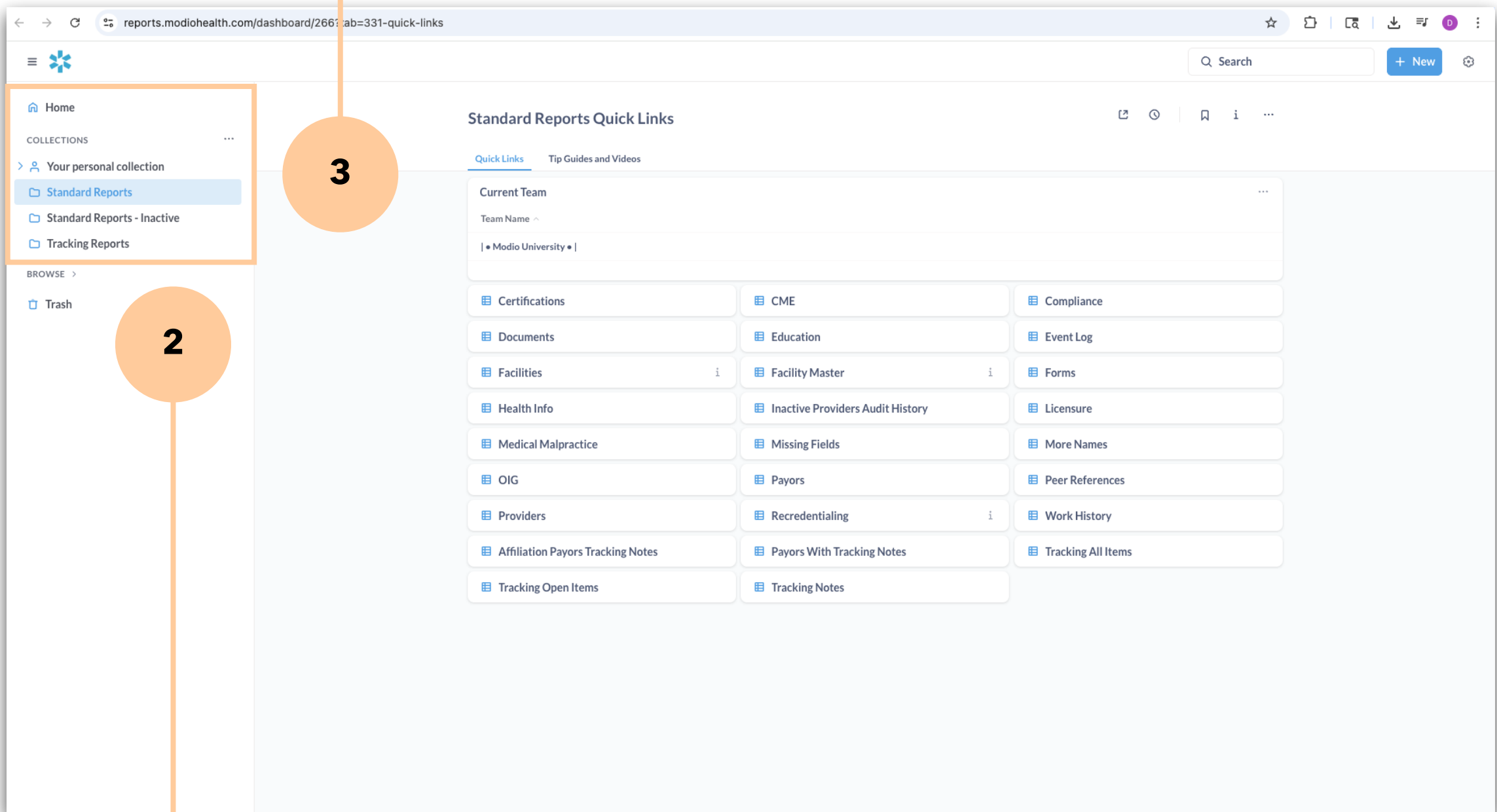
Tip Guide: OneView Reports Module - Advanced Features



Click the **Reports tab** located in the team toolbar to access the Reports Module.



After clicking the **Reports tab**, the **Reports module** will open up in another tab. You will be able to access your Personal collection, as well as Standard reports.



Helpful Tip: All of the data in these reports is pulled directly from your Team. The more complete your profiles are, the better your reporting experience will be.

Conditional formatting is a feature that lets you visually highlight data in tables based off of specific rules or condition. It is used to mark important patterns, trends, or outliers stand out.

1

After selecting the report you'd like to run, click the **gear icon** to access conditional formatting. This feature allows you to add rules to make cells within the report change color.

2

Conditional Formatting:

1. From the dropdown, select which column(s) you would like to be affected.
2. You can refine your results by selecting options such as "is equal to," "contains," and others to filter by a specific column value.
3. Choose the color you'd like to use for highlighting the cells.
4. To highlight the entire row, simply toggle this option on.
5. Select "Add Rule" to apply the updates to your report.
6. When you've finished adding rules to the cells, click Done.

Note: Highlights made to the cells will not be included in the exported report.

3

Click **Save** to add this customized report to your personal collection.

Started from Licensure

OneView DW / Licensure

Columns

Conditional Formatting

Which columns should be affected?

Provider Degree/Title

When a cell in this column...

is equal to

MD

...turn its background this color:

Highlight the whole row

Add rule

Done

Provider ID	Provider Tags	NPI #	First Name	Middle Name	Last Name	Provider Degree/Title	Primary Specialty	Work Email
373018	Do Not Use	1999999991	Bernie		Mann	MD	Obstetrics and Gynecology	bernie@modiohealth.com
452000	Dermatology	1234567891	Cierra		Denning	MD	Breast, Gynecologic, and Perinatal Pathology	cdenning23@gmail.com
780637	Danessa	1750397576	Balamurali	Krishna	Ambati	OD	Ophthalmology	Balamurali.ambati@oneview.email
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	MD	Epidemiology	leahsanborn@gmail.com
560611			Frida		Kahlo	LPATA	Art Therapy	Frida.Kahlo@gmail.com
780637	Danessa	1750397576	Balamurali	Krishna	Ambati	OD	Ophthalmology	Balamurali.ambati@oneview.email
324763	Danessa	7777666665	George	R	Mtuwa	WAIV - Waiver	Attendant Care	goldenpaths@gmail.com
373018	Do Not Use	1999999991	Bernie		Mann	MD	Obstetrics and Gynecology	bernie@modiohealth.com
780637	Danessa	1750397576	Balamurali	Krishna	Ambati	OD	Ophthalmology	Balamurali.ambati@oneview.email
180696		1999999991	Bernie		Mann	MD	Family Medicine	bjseholmes@gmail.com
618742	Danessa, Location A, Onboarding	1184838286	Kirk	William	Heath	MD	General Surgery	kirk.heath.modiounersty@moi...
325407	Location A, Onboarding, Test Tag 1	1184838286	Kirk	W	Heath	MD	General Surgery	kirk.heath123@modio.email
785869		1053576504	Kirt	Webb	Larson	NP	Nurse Practitioner	kirt123@gmail.com
583561		1447250170	Darrell	Lee	Murray	MD	Family Medicine	darrell.murray@modio.email
785869		1053576504	Kirt	Webb	Larson	NP	Nurse Practitioner	kirt123@gmail.com
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	MD	Epidemiology	leahsanborn@gmail.com
413840	North Carolina, Office 1	1236547923	Sunrise Medical...			FAC	No Specialty	sunrisemedicallab@modio.email
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	MD	Epidemiology	leahsanborn@gmail.com
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	MD	Epidemiology	leahsanborn@gmail.com
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	MD	Epidemiology	leahsanborn@gmail.com
780637	Danessa	1750397576	Balamurali	Krishna	Ambati	OD	Ophthalmology	Balamurali.ambati@oneview.email
250666	Brandon	0000000000	Brandon		Holmes	MD	General Surgery	brandon0000@gmail.com

Visualization

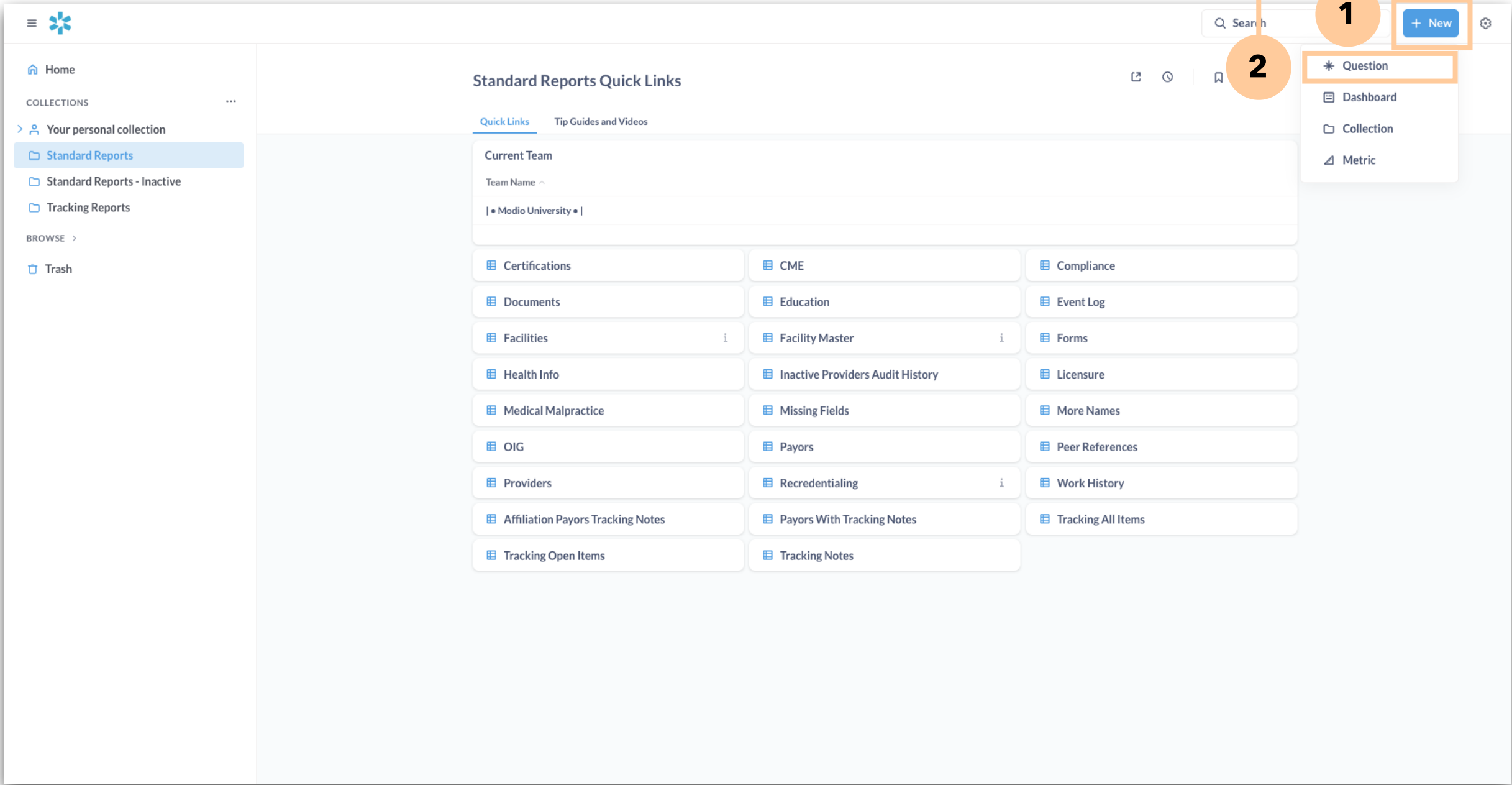
Showing 185 rows 22.9s

1

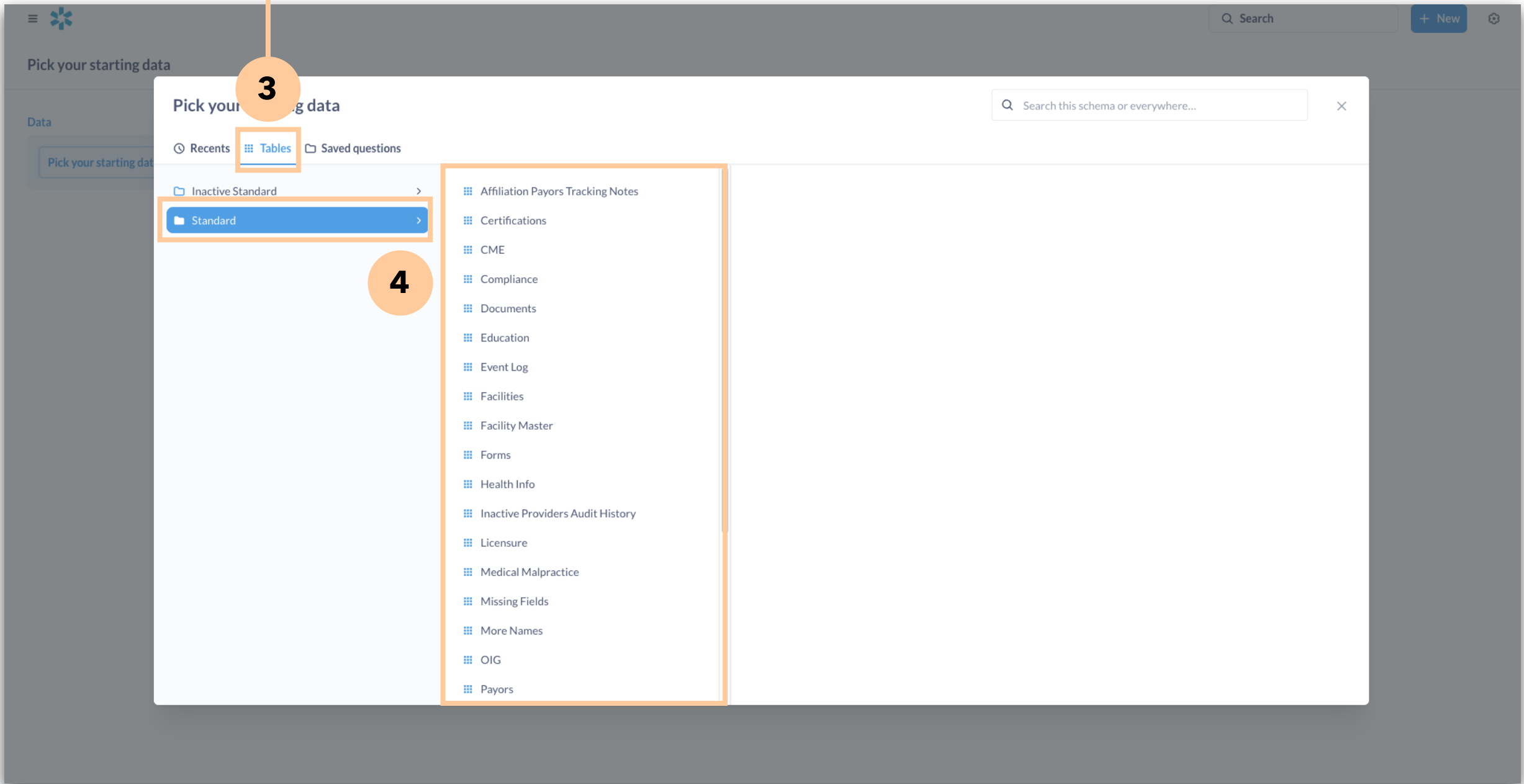
Tip Guide: ORM Advanced Features - Merging Reports

Merging Reports: This feature lets you combine two or more existing questions (reports), based on a shared column, allowing you to view all data points together in a single report.

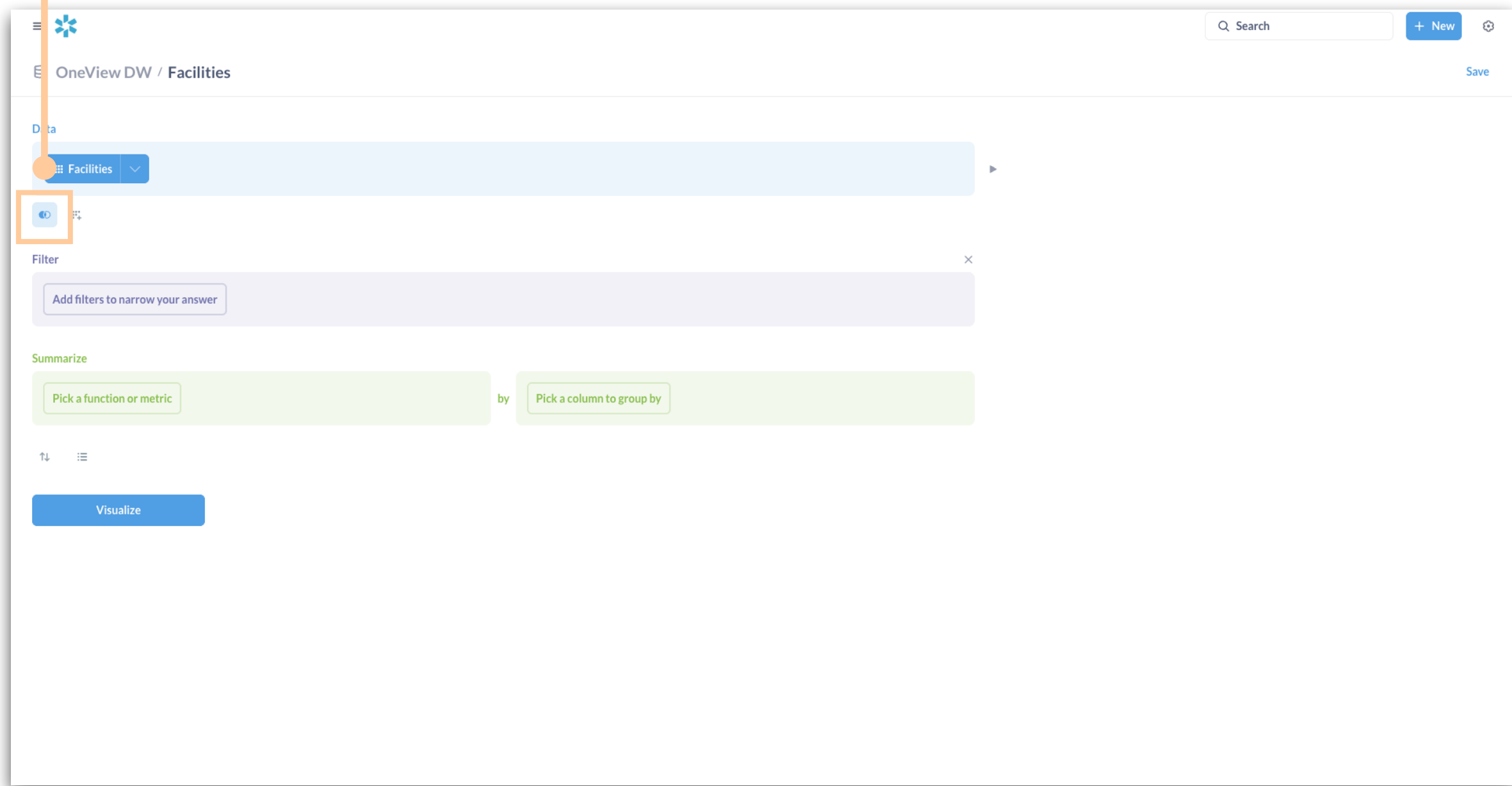
Click **New** in the upper right-hand corner and then Select **Question**.



Next, select **Tables** and then choose the folder where your report is located. Now, select the report.

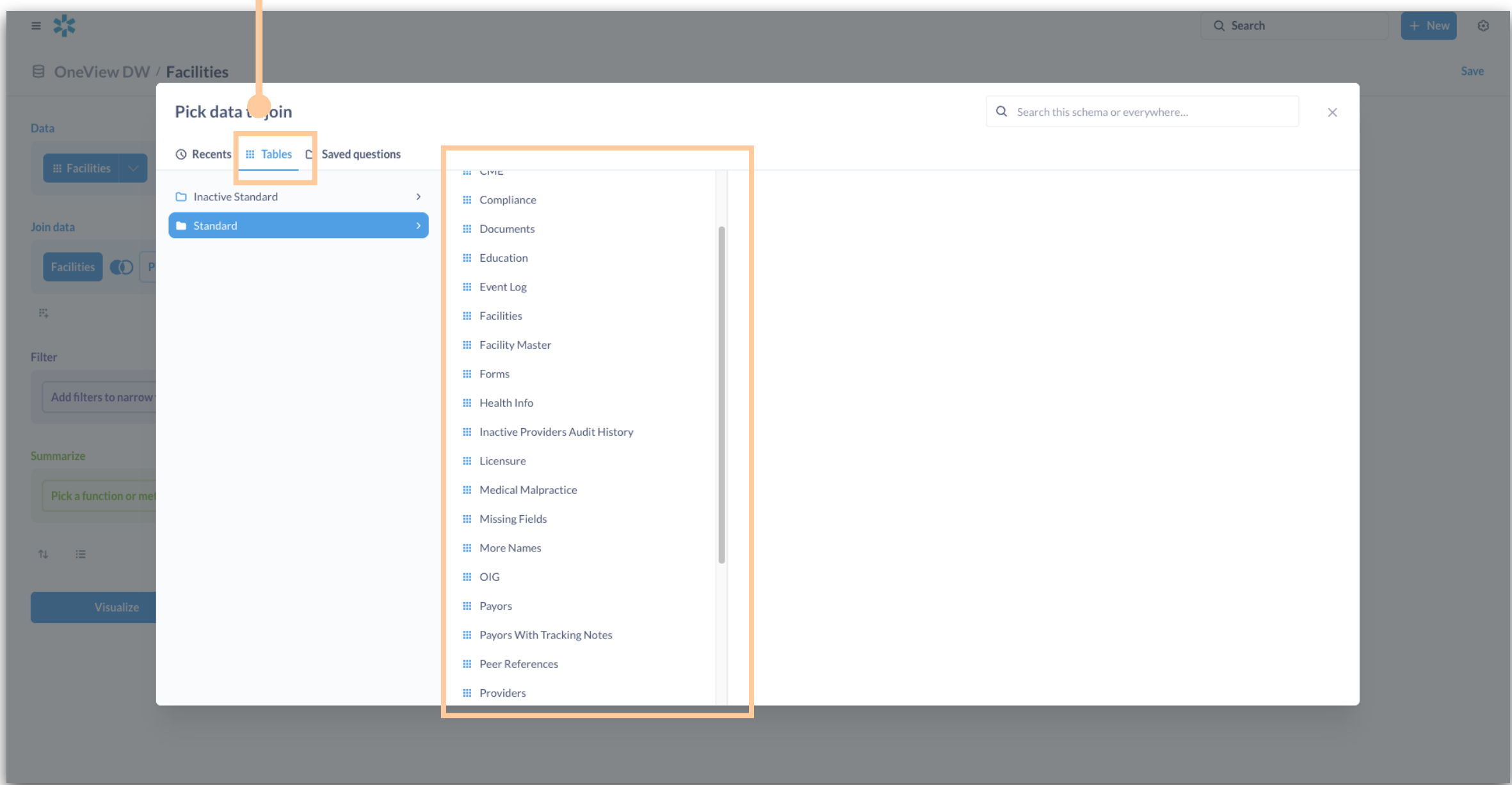


1 Click the **combine icon** to include another report.



2

Select **Table**, choose the folder where your report is located, and then select the report that you would like to join.



1

2

3

When combining reports, only the columns from the additional reports will be labeled with their source report name, while the first report's columns will remain unchanged.

Note: The name of the combined report will reflect the reports you've selected.

After selecting the reports you want to merge, choose the columns that appear in both reports to ensure proper generation. Then, click **Visualize** to create the report.

Pro Tip: Select the "Provider ID" column, because this column lives within all reports and is a unique ID assigned to each profile at the time it was created in OneView.

OneView DW / Facilities

Facilities

Join data

Facilities Licensure

Filter

Summarize

Visualize

Facilities
Pick a column...

Licensure
Pick a column...

Find...

Facilities

Provider ID

Facility ID

Last Name

First Name

Work Email

Provider Type

Primary Specialty

Provider NPI#

CAQH ID

Start Date

End Date

Client ID

Is Primary

Currently Affiliated

OneView DW / Facilities + Licensure

Provider ID

Last Name

First Name

Provider Type

Provider NPI#

End Date

Type

Facility Name

State

Licensure - Provider → License Type

Licensure - Provider → License State

Licensure - Provider → Provider Deg

63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC		DC	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	MD	DC	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	D-N-P	IN	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC		AK	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC		MD	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	MD	MD	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	NP-C	VA	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	RN-eNLC	CO	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC		VA	MD
611846	Holmes	Brandon	MD			Practice	Ascension St Joseph - Chicago	IL			
612302	XYZ	Test Provider	MD	9871567896		Practice	Cabinet Peaks Medical Cent...	MT	MD	NC	MD
225779		Group/Organiz...	FAC	1111111111		Practice	Indian Health Services - Alb...	NM			
158129	Abakporo	Theophine	MD	1972564813		Practice	Central Arkansas Radiation ...	AR	P.A.	AK	MD
158129	Abakporo	Theophine	MD	1972564813		Practice	Central Arkansas Radiation ...	AR		MD	MD
158129	Abakporo	Theophine	MD	1972564813		Practice	Central Arkansas Radiation ...	AR	CADC	IA	MD
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ		VA	NP
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ	NP	TN	NP
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ	NP	AK	NP
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ		TX	NP
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ	NP	ID	NP
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ		UT	NP

Showing 1,788 rows 44.5s

1

2

OneView DW / Facilities + Licensure

Provider ID Facility ID Last Name First Name Work Email Provider Type Primary Specialty Provider NPI# CAQH ID Start Date End Date Clier

851127	169761	Eyre		il.com	MD	Art Therapy	8008675309				
851127		Eyre		il.com	MD	Art Therapy	8008675309				
851127	108618	Eyre		il.com	MD	Art Therapy	8008675309				Marathon H
851127	131353	Eyre		il.com	MD	Art Therapy	8008675309				
851127	20945	Eyre		il.com	MD	Art Therapy	8008675309				
851127	108620	Eyre		il.com	MD	Art Therapy	8008675309				
851127	21012	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
851127	39256	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
851127	118785	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
851127	39582	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
851127	14489	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
851127	121547	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
618742	14188	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Su					
618742	20764	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Su					
618742	124512	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Su					
2175	108618	Boyette	Bradford	bradboyette22@gmail.com	PA	Emergency					

Visualization

Combining Columns: Select the dropdown option for the column you would like to combine.

After selecting the Combine column, select the additional column(s) you'd like to combine.

Pro Tip: Use the merge column option to create a cleaner display and simplify your reports. Example: Merging First Name, Last Name and Middle into one column and name it "Full Name"

3

OneView DW / Facilities + Licensure

Provider ID Facility ID Last Name First Name Work Email Provider Type Primary Specialty Provider NPI# CAQH ID Start Date End Date Clier

851127	169761	Eyre					8008675309				
851127		Eyre					8008675309				
851127	108618	Eyre					8008675309				Marathon H
851127	131353	Eyre					8008675309				
851127	20945	Eyre					8008675309				
851127	108620	Eyre					8008675309				
851127	21012	Eyre					8008675309				
851127	39256	Eyre					8008675309				
851127	118785	Eyre					8008675309				
851127	39582	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy	8008675309				
851127	14489	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy	8008675309				
851127	121547	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy	8008675309				
618742	14188	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery	1184838286	654789321			
618742	20764	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery	1184838286	654789321			Test
618742	124512	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery	1184838286	654789321			
2175	108618	Boyette	Bradford	bradboyette22@gmail.com	PA	Emergency Medicine	1316987241		2/1/2007		Marathon H

Visualization

Showing 1,800 rows 40.6s

OneView DW / Facilities + Licensure

Provider ID

Facility ID

Last Name

First Name

Work Email

Provider Type

Primary Specialty

Provider NPI#

CAQH ID

Start Date

End Date

Clerk

851127	169761	Eyre						8008675309			
851127		Eyre						8008675309			
851127	108618	Eyre						8008675309			
851127	131353	Eyre						8008675309			
851127	20945	Eyre						8008675309			
851127	108620	Eyre						8008675309			
851127	21012	Eyre						8008675309			
851127	39256	Eyre						8008675309			
851127	118785	Eyre						8008675309			
851127	39582	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
851127	14489	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
851127	121547	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy					
618742	14188	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery					
618742	20764	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery					
618742	124512	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery					
2175	108618	Boyette	Bradford	bradboyette22@gmail.com	PA	Emergency Medicine					

Visualization

Combine "First Name" with other columns

Second column

Provider ID

Separated by (space)

Example

text text

Done

If you'd like to separate the data within the combined columns, select **Separated** by and enter the character or value you want to use as the separator.

OneView DW / Facilities + Licensure

Provider ID

Facility ID

Last Name

First Name

Work Email

Provider Type

Primary Specialty

Provider NPI#

CAQH ID

Start Date

End Date

Clerk

851127	169761	Eyre						8008675309			
851127		Eyre						8008675309			
851127	108618	Eyre						8008675309			
851127	131353	Eyre						8008675309			
851127	20945	Eyre						8008675309			
851127	108620	Eyre						8008675309			
851127	21012	Eyre						8008675309			
851127	39256	Eyre						8008675309			
851127	118785	Eyre						8008675309			
851127	39582	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy		8008675309			
851127	14489	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy		8008675309			
851127	121547	Eyre	Jane	kelcymolyneux@gmail.com	MD	Art Therapy		8008675309			
618742	14188	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery		1184838286	654789321		
618742	20764	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery		1184838286	654789321		Test
618742	124512	Heath	Kirk	kirk.heath.modiouniverst...	MD	General Surgery		1184838286	654789321		
2175	108618	Boyette	Bradford	bradboyette22@gmail.com	PA	Emergency Medicine		1316987241		2/1/2007	Marathon H

Visualization

Combine "First Name" with other columns

Separator

,

Second column

Provider ID

+ Add column

Example

text, text

Done

OneView DW / Facilities + Licensure

Provider ID	Last Name	First Name	Provider Type	Provider NPI#	End Date	Type	Facility Name	State	Licensure - Provider → License Type	Licensure - Provider → License State	Licensure - Provider → Provider Deg
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC		DC	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	MD	DC	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	D-N-P	IN	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC		AK	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC		MD	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	MD	MD	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	NP-C	VA	MD
63729	Abele	Jennifer	MD	1073502779	5/22/2024	Affiliation	Duke Raleigh Hospital	NC	RN-eNLC		
611846	Holmes	Brandon	MD			Practice	Ascension St Joseph - Chicago	IL			
612302	XYZ	Test Provider	MD	9871567896		Practice	Cabinet Peaks Medical Cent...	MT	MD		
225779		Group/Organiz...	FAC	1111111111		Practice	Indian Health Services - Alb...	NM			
158129	Abakporo	Theophine	MD	1972564813		Practice	Central Arkansas Radiation ...	AR	P.A.		
158129	Abakporo	Theophine	MD	1972564813		Practice	Central Arkansas Radiation ...	AR			
158129	Abakporo	Theophine	MD	1972564813		Practice	Central Arkansas Radiation ...	AR	CADC		
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ			
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ	NP		
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ	NP		
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ	NP		
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ	NP		
299754	Boy	Tommy	NP	8888888888		Affiliation	Canyon Vista Medical Center	AZ	NP		

1

Combining Columns: Click **Show Editor** in the upper right-hand corner.

2

Select the **plus icon** to add a combined column. Then select the **combined column** shortcut.

3

OneView DW / Facilities + Licensure

Show Visualization Save

Data

Facilities

Join data

Facilities Licensure

Facilities Provider ID = Licensure Provider ID

Custom column

Combined First Name, Last Name

Visualize

EXPRESSION

Common functions

- case
- concat
- contains
- between
- coalesce

Shortcuts

- Combine columns
- Extract columns

Documentation

1

2

3

You can now see the combined column within the report.

Select the columns you'd like to combine and then select **Visualize** to generate your report.

OneView DW / Facilities + Licensure

Search

+ New

Show Visualization

Save

Data

Facilities

Join data

Facilities

Licensure

on

Facilities Provider ID

=

Licensure Provider ID

+

Custom column

Combined First Name, Last Name

+

Filter

Summarize

Visualize

Select columns to combine

First column

Last Name

Second column

First Name

Separated by (space)

+ Add column

Example

text text

Done

OneView DW / Facilities + Licensure

Search

+ New

Filter

Summarize

Show Error

Refresh

Save

Licensure - Provider → Supervisor

Licensure - Provider → Last Updated

Licensure - Provider → Notes

Combined First Name, Last Name

+

Danessa McShane OneView® Trainer---Kirk Heath, MD	7/22/2024, 6:57 PM		
	8/16/2023, 3:10 PM	notes	
	8/6/2024, 3:36 PM		
Danessa McShane OneView® Trainer (danessa.mcshane@modiohealth.com)	7/22/2024, 6:55 PM		
	10/24/2023, 1:58 PM		
Brandon Holmes, MD---Danessa McShane OneView® Trainer	9/24/2024, 6:34 PM	Modio Health OneView®Admin --- Brandon Holmes - Demo Update Test	
	2/17/2022, 6:02 PM		
	2/21/2024, 2:12 PM		
	12/6/2024, 11:51 AM		
Danessa McShane OneView® Trainer	7/22/2024, 6:55 PM		
	12/6/2024, 11:53 AM		
fjkldfjdkljstl	5/7/2025, 3:02 PM		
	9/19/2025, 3:30 PM		
	5/1/2025, 1:59 PM		
	12/6/2024, 11:49 AM		
	8/5/2025, 3:25 PM		
	9/19/2025, 3:29 PM		
	7/22/2025, 3:44 PM		
	9/24/2024, 6:35 PM		
	10/31/2024, 11:19 AM		
	4/3/2025, 1:21 PM		
	5/7/2025, 3:02 PM		

Visualization

Showing 1,788 rows

39.2s

1

OneView DW / Licensure										
Provider ID	Provider Tags	NPI #	First Name	Middle Name	Last Name	Provider Degree/Title	Primary Specialty	Work Email	Date Of Birth	Provider Status
299754	FNP, Mid-Level Provider	8888888888	Tommy		Boy	NP	Family Nurse Practitioner	tommy.boy@modiohealth.com	3/7/2022	Active
328870		1841379187	Dwayne	Edward	Johnson	MD	Pediatrics	therock76587578@modio.email	1/1/1900	Active
715138		1669866224	Allison	R	Mccann	MD	Speech-Language Pathology	allison.mccan@onview.email		Active
780637	Danessa	1750397576	Balamurali	Krishna	Ambati	OD	Ophthalmology	Balamurali.ambati@oneview.email	7/29/1977	Active
185014	Brandon	1659311579	Thomas	George	Clifford	MD	Obstetrics and Gynecology	tom.clifford@modio.email		Active
223759		1568453348	Michael	John	Quinn	MD	Radiology	michael.quinn@modio.email		Active
299754	FNP, Mid-Level Provider	8888888888	Tommy		Boy	NP	Family Nurse Practitioner	tommy.boy@modiohealth.com	3/7/2022	Active
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	MD	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active
780637	Danessa	1750397576	Balamurali	Krishna	Ambati	OD	Ophthalmology		7/29/1977	Active
333670		1043446982	Reekesh	R	Patel	MD	Physical Medicine and Rehabilitation			
299754	FNP, Mid-Level Provider	8888888888	Tommy		Boy	NP	Family Nurse Practitioner			
180696		1999999991	Bernie		Mann	MD	Family Medicine			
663678	West Coast				Services	FAC	No Specialty			
158129	Group A	1972564813	Theophine	David	Abakporo	MD	Acute Care Imaging			
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	MD	Emergency Medicine			
299754	FNP, Mid-Level Provider	8888888888	Tommy		Boy	NP	Family Nurse Practitioner			
823742		1184838286	Professor		ModioU	CScD	Acupuncture			
158129	Group A	1972564813	Theophine	David	Abakporo	MD	Acute Care Imaging			
299754	FNP, Mid-Level Provider	8888888888	Tommy		Boy	NP	Family Nurse Practitioner			
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	MD	Emergency Medicine			
443466	Plastic Surgery, Virginia Beach	5689412378	Michael		Scott	MD	Pediatric Surgery			

Summarize: The Summarize function lets you organize and capture your data by specific parameters. For example, you can use it to count how many providers hold a particular state license.

3

OneView DW / Licensure										
Count by License State										
License State	Count									
AK	11									
AL	4									
AR	1									
AZ	5									
CA	19									
CO	7									
CT	1									
DC	3									
FL	7									
GA	6									
GU	1									
HI	1									
IA	1									
ID	4									
IL	1									
IN	9									
KS	4									
KY	2									
MA	1									
MD	4									
ME	2									
MN	4									

Summarize by

Count x +

Group by

Find...

LICENSURE

Provider ID

Provider Tags

NPI #

First Name

Middle Name

Last Name

Provider Degree/Title

Primary Specialty

Work Email

Date Of Birth

Provider Status

Start Date

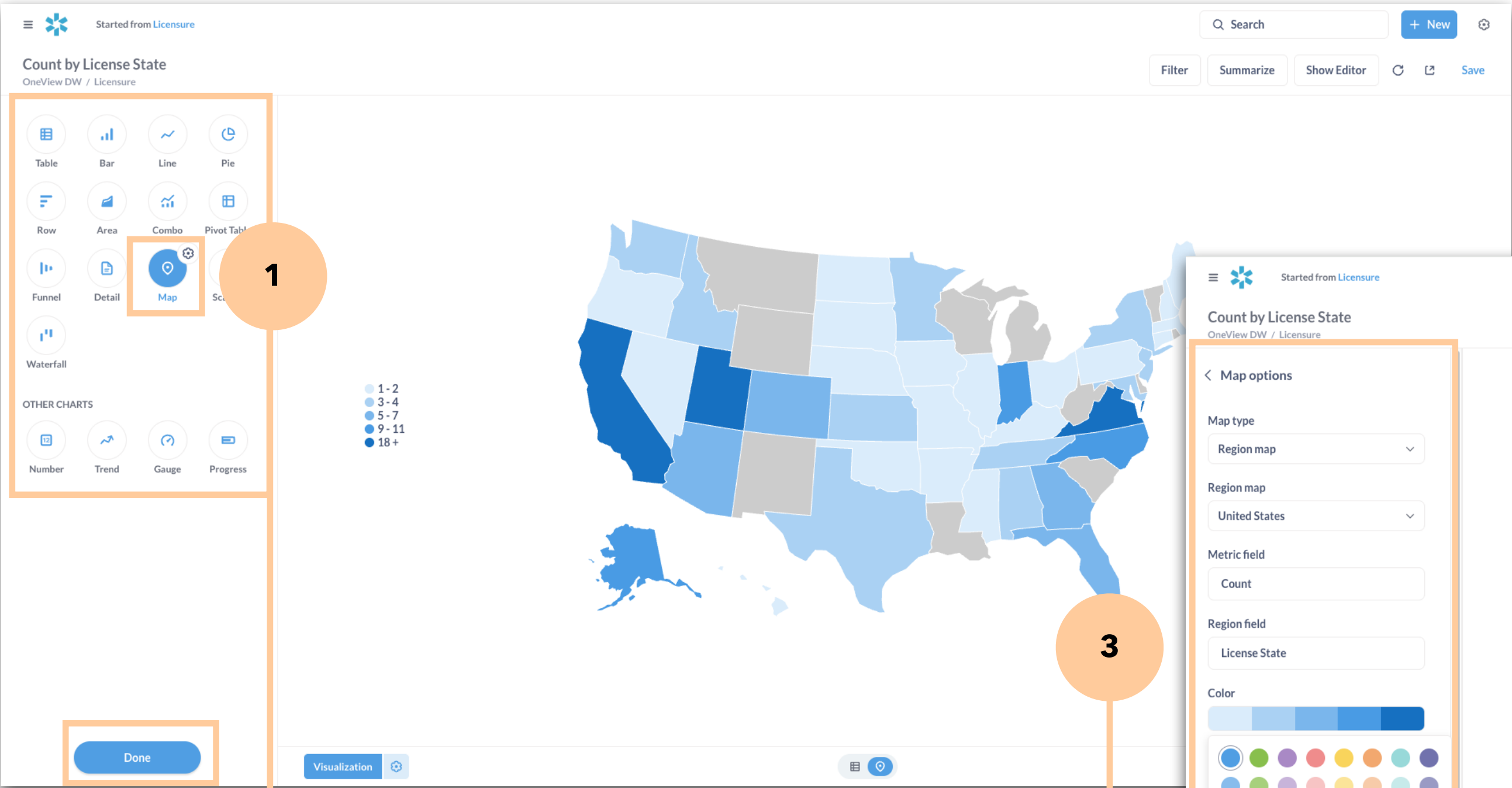
End Date

Role

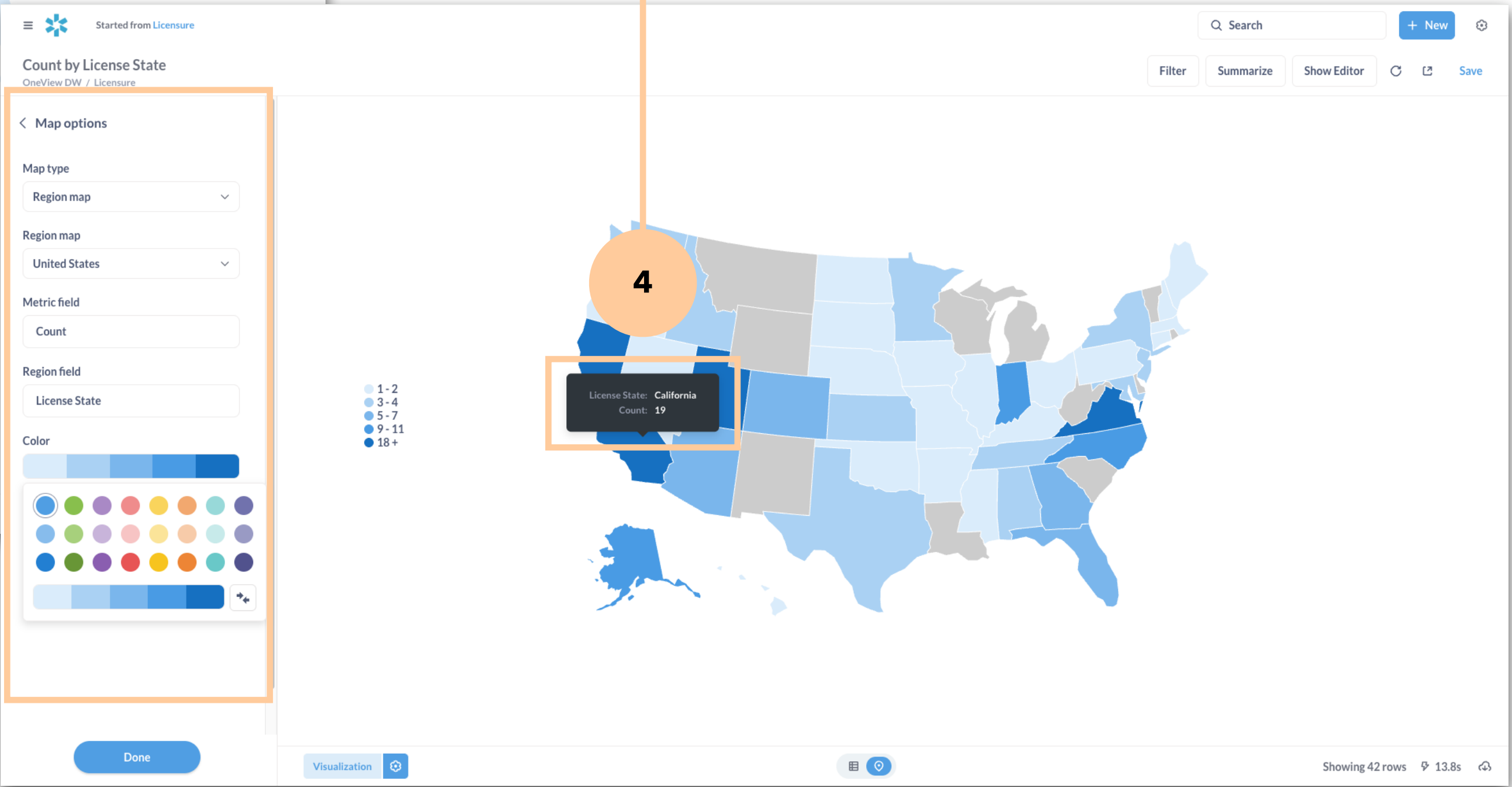
Done

2

Visualizations: While tables are useful for looking up information or finding specific numbers, it's usually easier to see trends and make sense of data using charts.



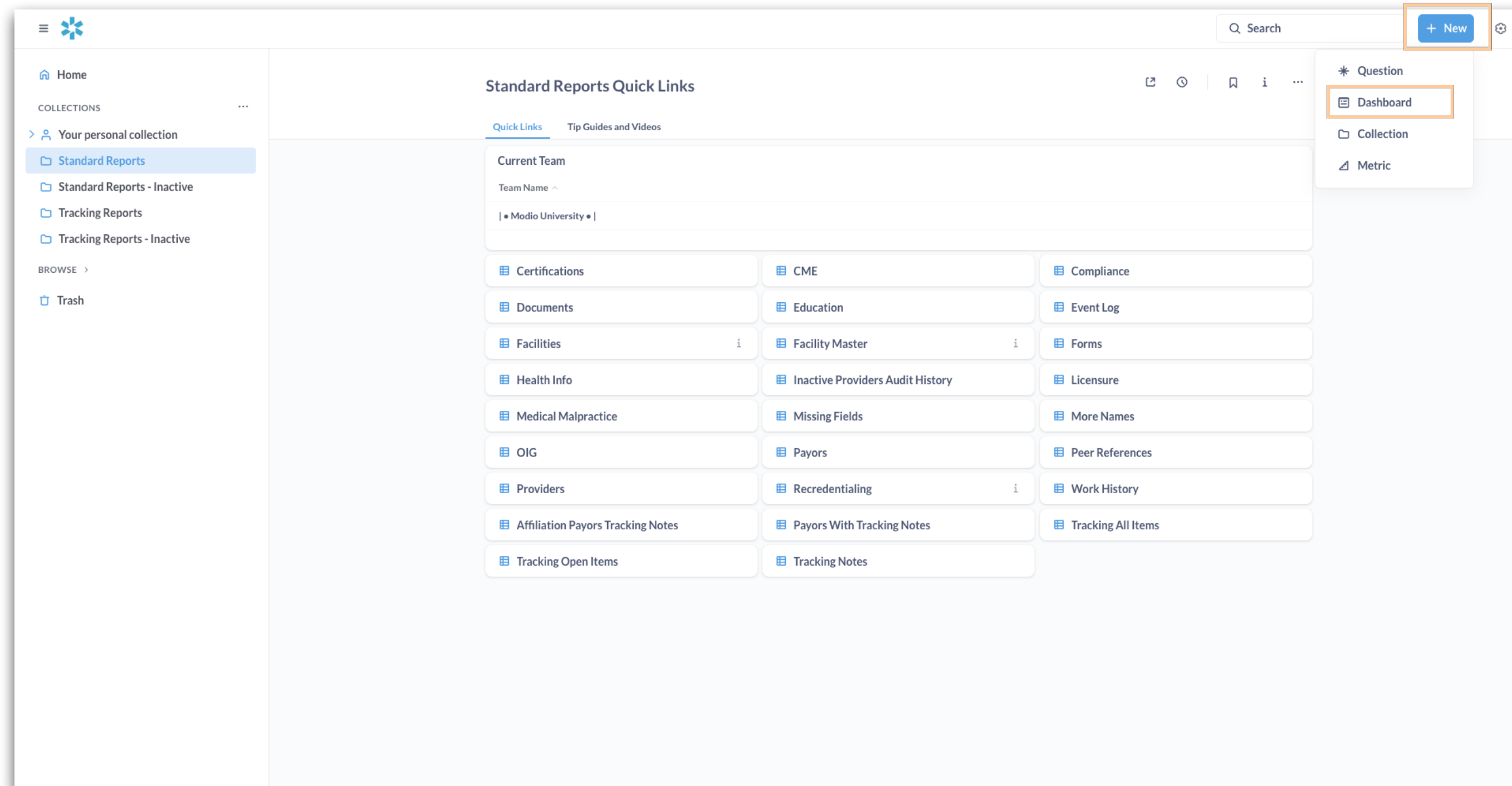
Pro Tip: Choose the Map option to display data by state. Hovering over a state reveals its values, such as '19 State Licenses in California.'



Click the **gear icon** next to your selected visualization to access additional options, such as changing the color of the displayed data. After completing your changes, select **Done**.

Tip Guide: ORM Advanced Features -Creating a Dashboard

A Dashboard is a collection of multiple visualizations (questions) displayed together in one place. Dashboards are a great tool for organizing meaningful data and viewing it efficiently all in one place. They allow for customization so you can focus on the insights that matter most and streamline your workflow.



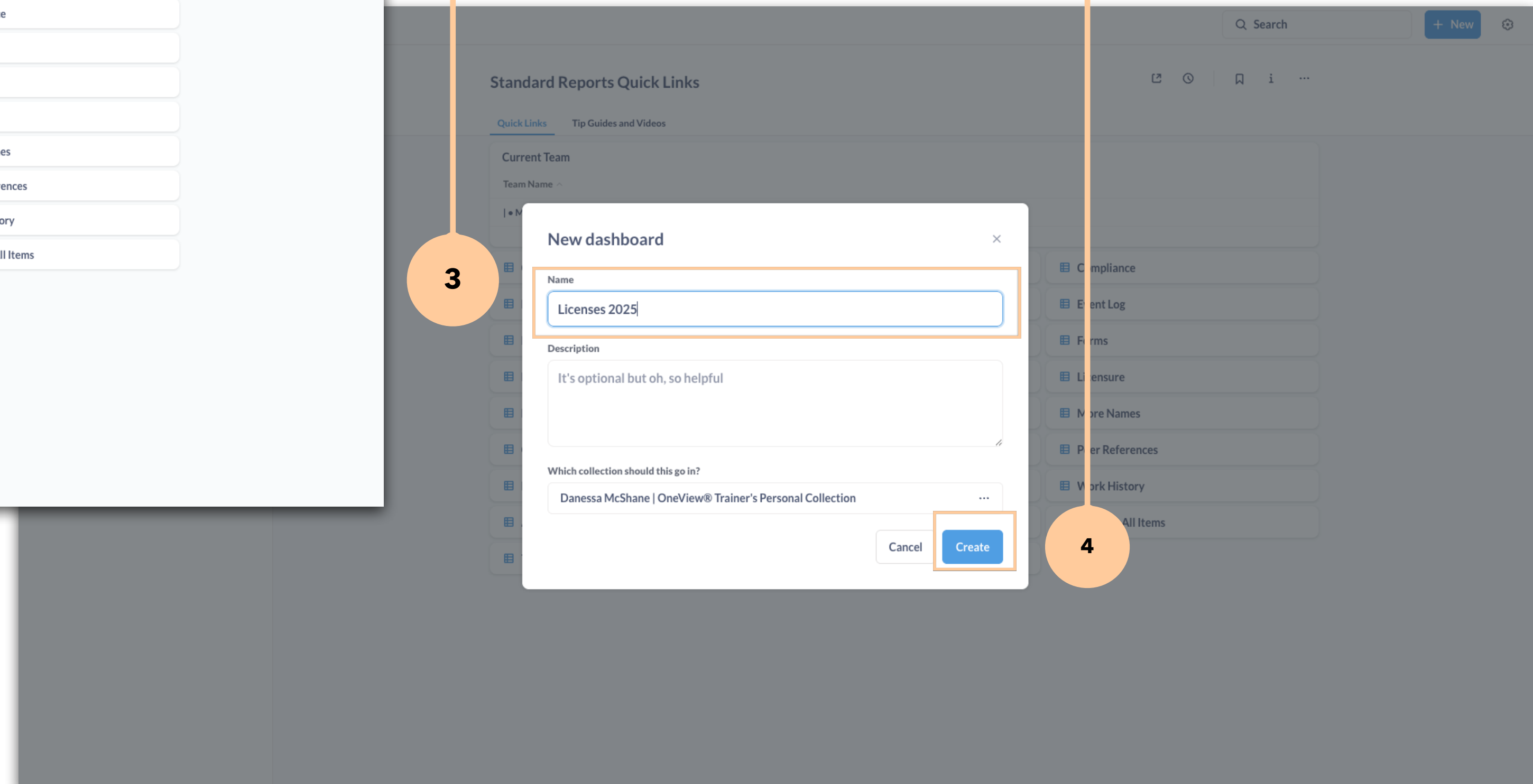
1

Creating a Dashboard: Click on the “New” button in the upper -righthand corner. Then select “Dashboard” from the dropdown.

2

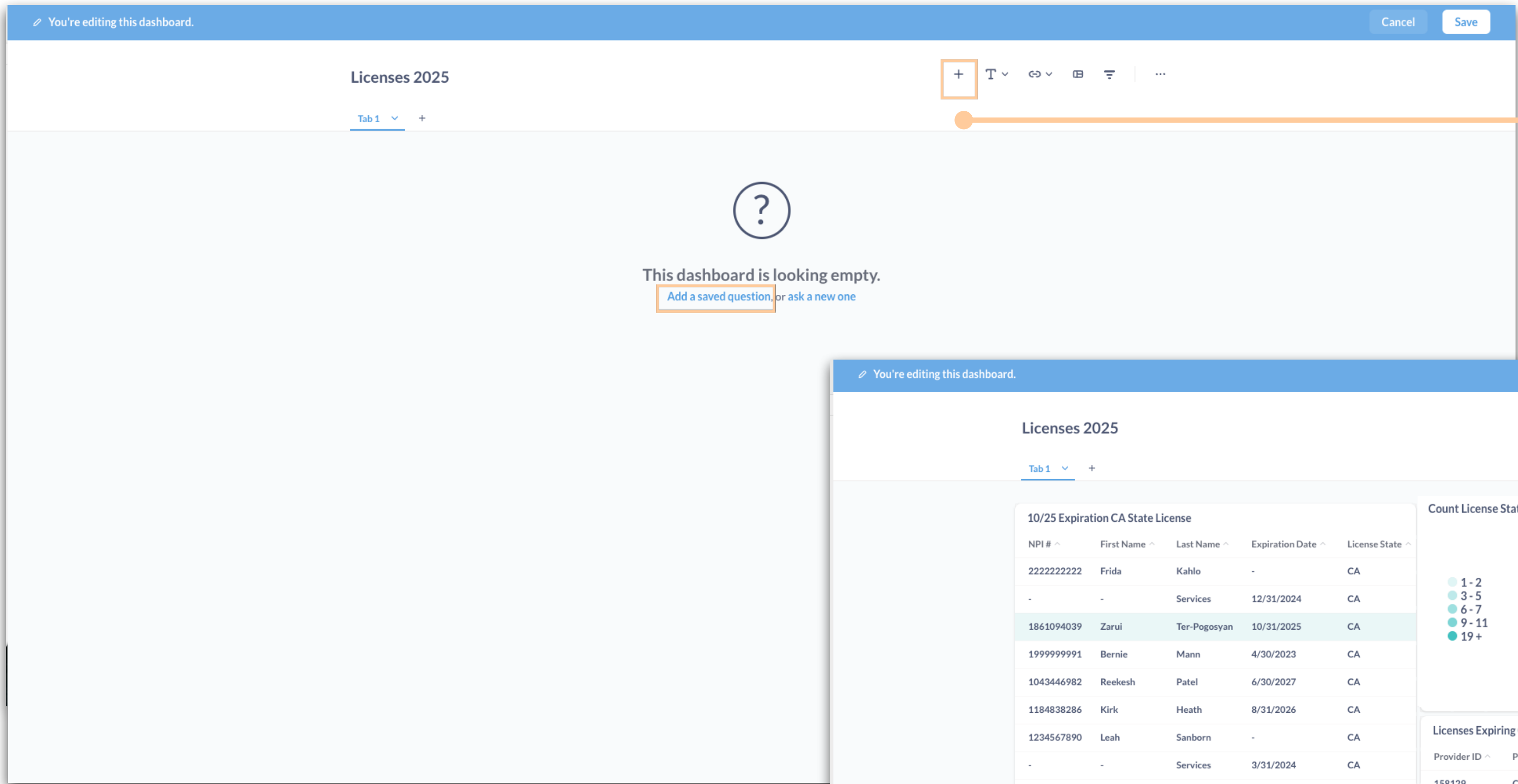
After selecting the “**Dashboard**” option you will see a popup window appear. Add a name and description (optional) for your dashboard. Then click “**Create**” to save the dashboard to your personal collection.

3

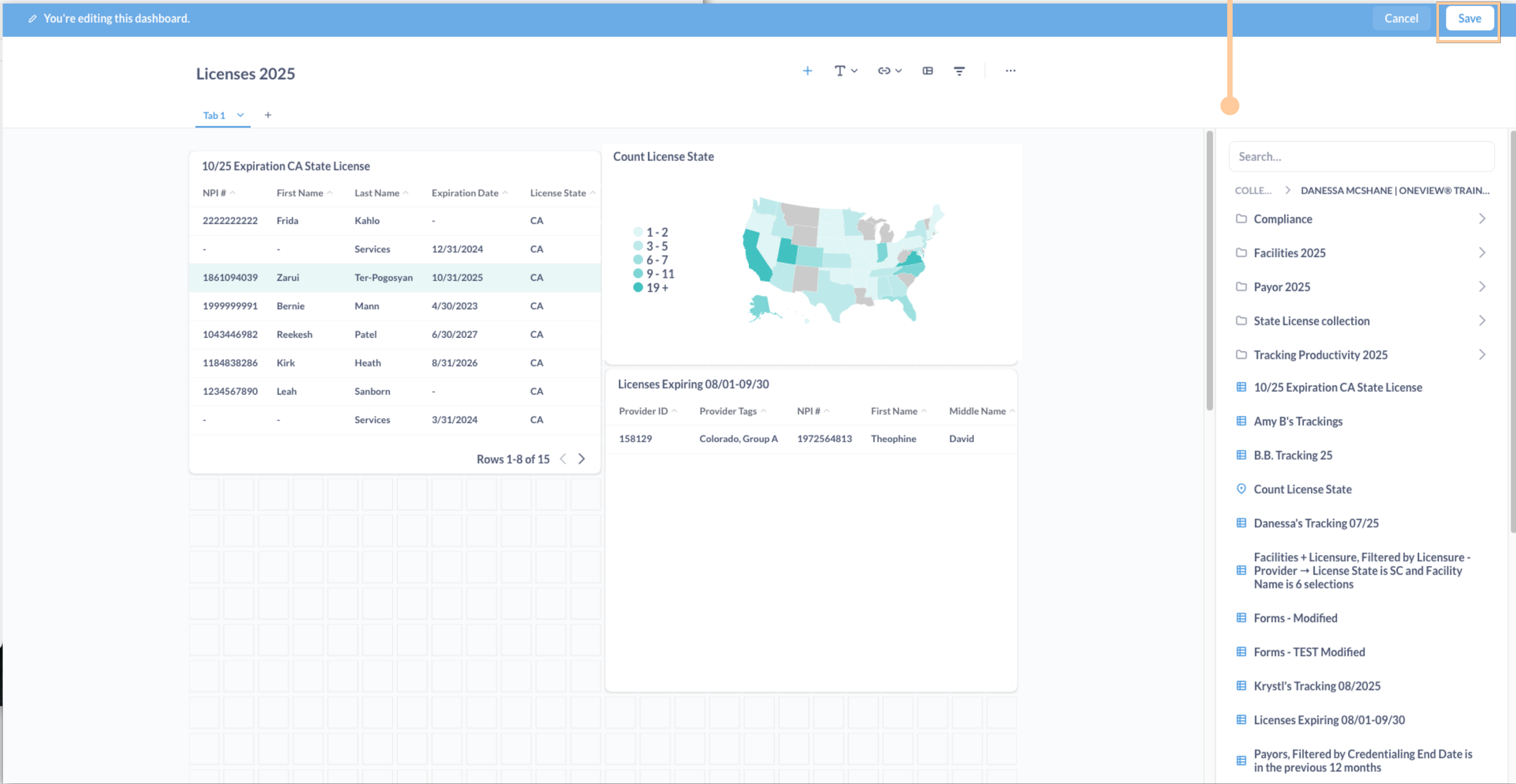


4

Pro Tip: If you have Curator access, you can share the dashboard you’re creating to your Curated Reports folder so your team can access it. See *the OV Tip Guide ORM - Curator Access* to learn more.



Adding Reports to a Dashboard: Click **"Add a saved question"** or the **plus (+) icon** to open a list of your existing reports. From there, select the reports that you'd like to add to your dashboard. Once you've finished selecting your reports, click **Save** to ensure they're added to your dashboard.



Pro Tip: Once reports have been added to your dashboard, drag a drop to move, resize or align reports as needed.

Dashboard Use case:

- Example 1: Create a dashboard that holds all reports and visualizations for licensing for your team. View all of those reports at the same time on your dashboard.
- Example 2: Create a dashboard to monitor provider profile completeness streamline your internal audit processes.

Tip Guide: ORM Advanced Features - Adding New Reports to a Dashboard



OneView DW / Licensure

Provider Tags contains Colorado

Provider ID	Provider Tags	NPI #	First Name	Middle Name	Last Name	Primary Specialty	Work Email	Date Of Birth	Provider Status	Start Date	End Date	Role	Multistate
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		Y	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	Emergency Medicine	1234567890@modio.email	1/1/1998	Active			Y	N
2175	Colorado, DEMO, Dermatology, Mid Level	1316987241	Bradford	Newton	Boyette	Emergency Medicine	bradboyette22@gmail.com	10/23/1970	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	Emergency Medicine	1234567890@modio.email	1/1/1998	Active			Y	N
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	Emergency Medicine	1234567890@modio.email	1/1/1998	Active			Y	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N

Visualization

Showing 50 rows 89.4s

Save new question

Name

Colorado Providers Licenses

Description

It's optional but oh, so helpful

Which collection should this go in?

Danessa McShane | OneView® Trainer's Personal Collection

Cancel Save

1

Colorado Providers Licenses

Provider Tags contains Colorado

Provider ID	Provider Tags	NPI #	First Name	Middle Name	Last Name	Primary Specialty	Work Email	Date Of Birth	Provider Status	Start Date	End Date	Role	Multistate
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		Y	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	Emergency Medicine	1234567890@modio.email	1/1/1998	Active			Y	N
2175	Colorado, DEMO, Dermatology, Mid Level	1316987241	Bradford	Newton	Boyette	Emergency Medicine	bradboyette22@gmail.com	10/23/1970	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	Emergency Medicine	1234567890@modio.email	1/1/1998	Active			Y	N
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	Emergency Medicine	1234567890@modio.email	1/1/1998	Active			Y	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N

Visualization

Showing 50 rows 89.4s

Saved! Add this to a dashboard?

Yes please! Not now

2

Colorado Providers Licenses

Provider Tags contains Colorado

Provider ID	Provider Tags	NPI #	First Name	Middle Name	Last Name	Primary Specialty	Work Email	Date Of Birth	Provider Status	Start Date	End Date	Role	Multistate
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		Y	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	Emergency Medicine	1234567890@modio.email	1/1/1998	Active			Y	N
63729	Colorado, Group A, MD	1073502779	Jennifer	B	Abele	Emergency Medicine	1234567890@modio.email	1/1/1998	Active			Y	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N
158129	Colorado, Group A	1972564813	Theophine	David	Abakporo	Acute Care Imaging	theophine.test@gmail.com	3/6/2000	Active				N
340009	Colorado, Master Lists, Master Payor List	1234567890	Leah		Sanborn	Epidemiology	leahsanborn@gmail.com	11/6/1992	Active	7/26/2021		N	N

Visualization

Showing 50 rows 89.4s

Add this question to a dashboard

Search...

Recents Dashboards

Today

Licenses 2025 in Danessa McShane's Personal Collection

Licenses i in Danessa McShane's Personal Collection

Earlier

Payors i in Facilities 2025

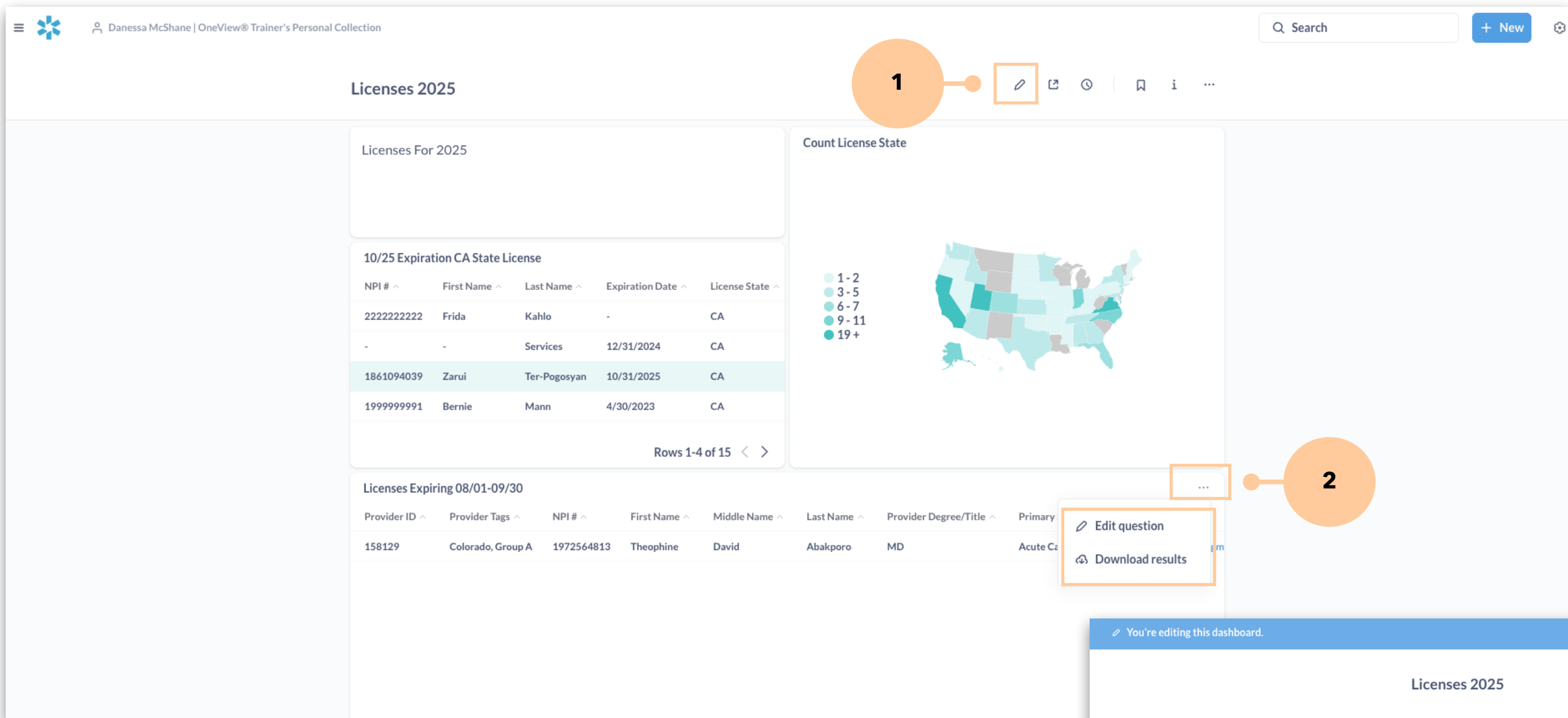
Cancel Select

3

4

Adding New Reports to a Dashboard: After you name and save your customized report, a pop-up will appear asking if you'd like to add the report to a dashboard. If so, select **"Yes please!"**

Next, choose the dashboard where you'd like to save it. Once you've made your selection, click **"Select"** to have the report populate on the chosen dashboard.

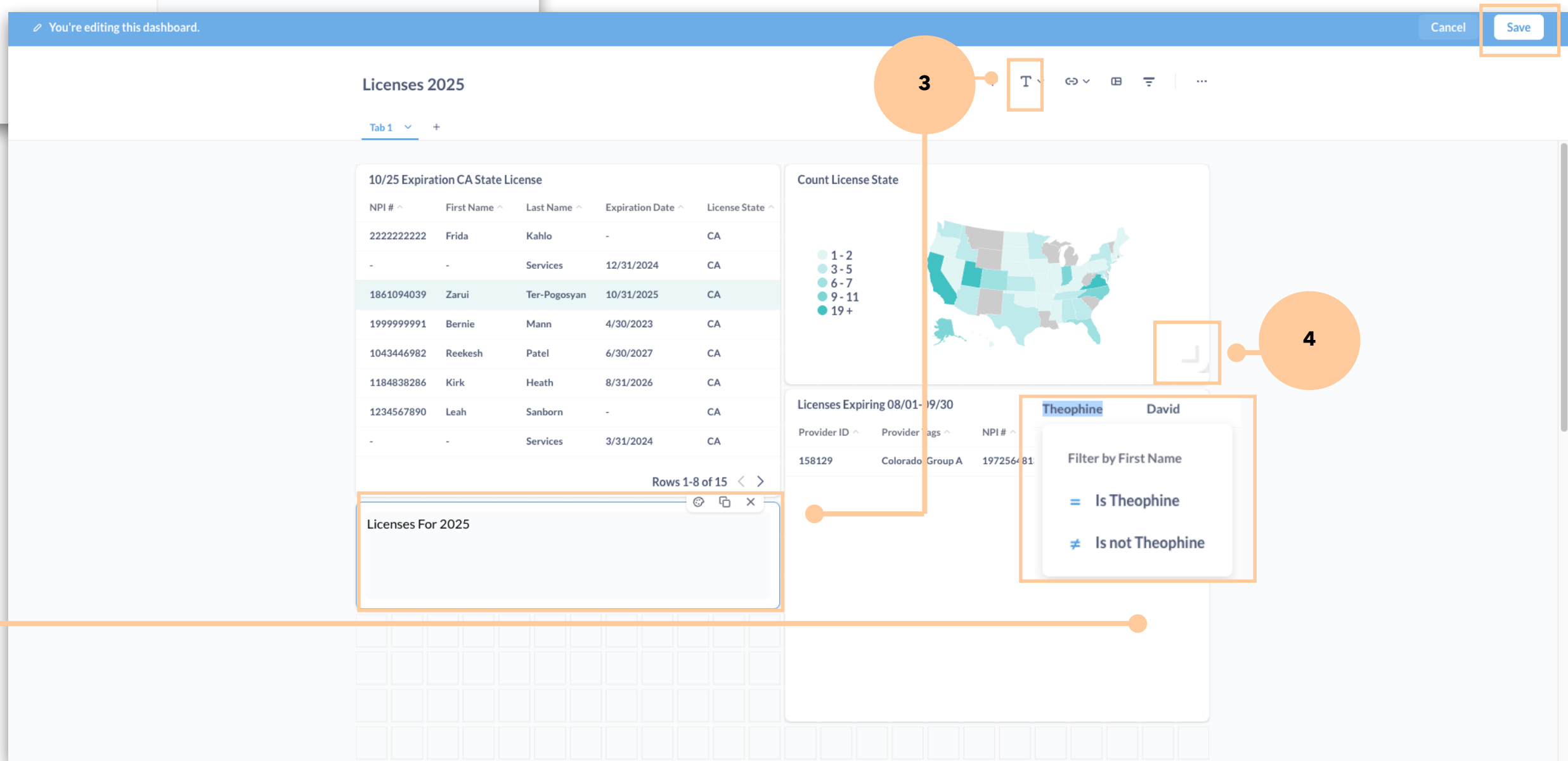


Customizing Dashboards:

1. Click the **pen icon** (edit icon) to make changes to your dashboard.
2. Click the **three-dot icon** in the upper right-hand corner of each report to edit or download that specific report.
3. Click the **"T" icon** to add a heading or text box to your dashboard.
4. Use the **arrow icon** in the bottom right-hand corner of each report to adjust its size.
5. Click **"Save"** to apply and save your adjustments.

Note: **Drag and drop** reports to rearrange their order on the dashboard.

Pro Tip: Double-click a data point to view quick filter options for that column.



1
Start Here

The screenshot shows the 'Danessa McShane | OneView® Trainer's Personal Collection' interface. On the left, a sidebar under 'COLLECTIONS' has 'Your personal collection' highlighted. The main area is divided into 'Pinned questions' (containing a table of practice records) and 'Dashboards' (containing a 'Licenses' dashboard). Below the dashboards is a table of reports. A dropdown menu is open for the 'Licenses 2025' report, showing options: 'Pin this', 'Bookmark', 'Duplicate', 'Move', and 'Move to trash'. A 'Pinned questions' section is also visible at the top of the main area.

Facility ID	Provider ID	Last Name	First Name
104022	340009	Sanborn	Leah
	325407	Heath	Kirk
20945	443466	Scott	Michael

Type	Name	Last edited by	Last edited at
	Licenses 2025	Danessa McShane ...	10/24/2025
	Colorado Providers Licenses	Danessa McShane ...	10/24/2025
	10/25 Expiration CA State License	Danessa McShane ...	10/24/2025
	Count License State	Danessa McShane ...	10/24/2025
	Forms - TEST Modified i	Danessa McShane ...	10/24/2025
	Tracking All Items - Ashley G.	Danessa McShane ...	10/10/2025

Unpinning Reports & Dashboards: If you'd like to unpin a report or dashboard, click the **three-dot icon** in the upper right-hand corner of the item and select **"Unpin."**

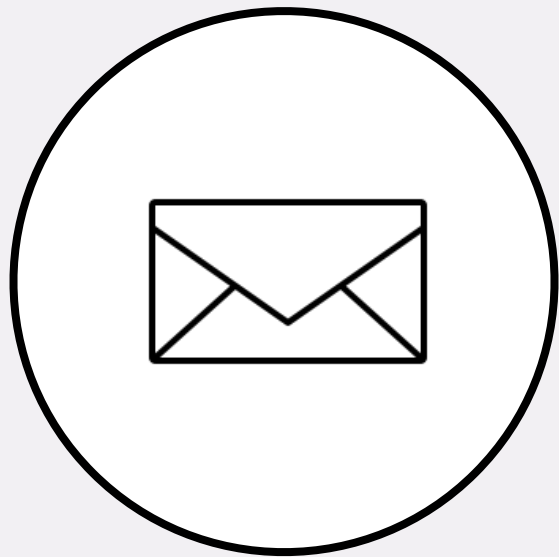
Pinning Reports & Dashboards: When you're in your personal collection, click the three-dot icon to the right of the report or dashboard you'd like to pin.

From the dropdown menu, select **"Pin this."** You'll then see your pinned reports and dashboards displayed at the top of your personal collection.

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



Online:
Live Chat Support



Email:
support@modiohealth.com



Phone:
844.696.6346