# CAQH Solutions℠

**CAQH Provider Data Portal®**

# Practitioner Quick Reference Guide

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# 1    Introduction

## 1.1    Overview

The CAQH Provider Data Portal is the premier industry solution for healthcare providers to easily self-report data required by health plans, hospitals, and other organizations. This information is used for credentialing, directory management, claims, and other key functions.

The easy to use Provider Data Portal saves time and eliminates the need for redundant, time-consuming paper forms and faxes. It simplifies data collection by prompting a Practitioner to enter only the data required for the state(s) where they practice. Practitioners can re-attest their credentialing data in minutes and easily confirm their directory information directly in the portal. Information is submitted securely, electronically, and only once so a Practitioner can spend less time filling out forms and more time caring for their patients. Updated information is immediately available to organizations authorized by the Practitioner. Available in all 50 states and the District of Columbia, the CAQH Provider Data Portal is free to Practitioners.

*NOTE: The CAQH Provider Data Portal data set meets the data collection requirements of URAC, the National Committee for Quality Assurance (NCQA) and Joint Commission standards.*

*The CAQH Provider Data Portal is supported by America's Health Insurance Plans, American Academy of Family Physicians, American College of Physicians, American Health Information Management Association, American Medical Association, and Medical Group Management Association.*

## 1.2    Scope

This document is intended to serve as a quick reference for working with the CAQH Provider Data Portal. For additional information, see the various documents available from the **Resources** page of the portal.

# 2   Using the Provider Data Portal

The menu prompts in the CAQH Provider Data Portal take you through each step of the process. Click the **Save & Continue** button at the bottom of each page to go to the next page. Each step specifies instructions for new users who are using the portal for the first time.

## 2.1   New Users

If you are a new user, you will need the following information before getting started:

- CAQH-supplied Provider ID Number (PO ID).
- Previously completed credentialing application if available (for reference).
- List of all current practice locations.
- Identification numbers, such as Social Security Number, National Provider Identifier (NPI), DEA, UPIN, and license number.
- Electronic (scanned) copies of your DEA Certificate, CDS Certificate, and Malpractice Insurance Face Sheet.
- Summary of any pending or settled malpractice cases.
- Any other required supporting documents.

Practitioners using the solution for the first time should allow approximately two hours to complete the process. You can also complete the process over several sessions. Click the **Save & Continue** button to save your information if you leave the application. When returning, you must log in and select the section you wish to work on.

| Register with the Provider Data Portal | Complete the Application and Review Data | Authorize Access to Your Information |
|---|---|---|
| If you have been invited to join the CAQH Provider Data Portal by a health plan, hospital, or other participating organization, you may have received a welcome letter with your CAQH Provider ID Number. As a new user, you also have the option to self-register through the Provider Data Portal: https://proview.caqh.org/pr. Upon completion of the self-registration process, you will receive a welcome email with your unique CAQH Provider ID Number. Once you have received your CAQH Provider ID Number, follow the next steps to complete your registration: <br> 1. Navigate to: https://proview.caqh.org/pr <br> 2. Click **Register Now**. <br> 3. At the bottom of the page, click the **here** link on "If you already have a CAQH Provider ID, please click here." <br> 4. Enter your CAQH Provider ID Number. <br> 5. Enter your authentication data (SSN, National Provider Identifier (NPI), DEA, UPIN, and License Number). <br> 6. Create a unique username and password. <br> 7. Choose and answer three security questions. <br> 8. Acknowledge the Terms of Service. <br> 9. Click **Create Account**. | 1. Select **Profile Data** from the top navigation menu. <br> 2. Enter the requested information within each section. <br>   - Use **Go to previous section** or **Save & Continue** to page forward or backward within your application. <br>   - It's important to click on the **Save & Continue** button to save your information. If you close the browser. Without clicking this button, you will lose your information. <br> 3. Select **Review & Attest** to review your profile and to make any required fixes to your information. During review you can do any of the following: <br>   - Select **View Errors** to view both required and suggested fixes. Required fixes are items that must be fixed to complete your profile. Suggested fixes are items that appear irregular or inconsistent within your profile information. <br>   - Select **View Documents** to view the status of all uploaded supporting documents, as well as any missing or expired documents. <br>   - Double-click on the image in **View Your Data Summary** to review a summary of your profile information. <br>   - Generate a replica of a state-specific application by clicking **Download Your State Application**, selecting the state, and clicking **Download**. <br> 4. Authorize customers to grant them access to your information. | Only you can authorize who has access to your information. For new users, access the **Authorize** page from the left navigation. <br> 1. On the Authorize page, you have two options to select which listed organization(s)** you would like to receive your information: <br>   - All healthcare organizations that indicate I am an affiliated provider or am in the process of becoming an affiliated provider. <br>   -OR- <br>   - Only the healthcare organizations that indicate I am an affiliated provider or am in the process of becoming an affiliated provider, and I specify below: <br>     Select one and click **Save** to proceed to the next step in the process. <br> 2. Click **Review & Attest**. <br> 3. Proceed to the Next Steps — All Users section of this document. <br><br> *NOTE: **If a Participating Organization you wish to authorize does not appear, please contact that organization, and ask to be added to their provider roster.* |

## 2.2    Next Steps – All Users

| Verify Your Data Entry – Review and Attest | Submit Supporting Documents | Authorize Access to Your Information |
|---|---|---|
| Complete the following steps to verify the accuracy of your information and complete your attestation.<br>1. Select **Review & Attest** from the top navigation bar.<br>2. Click **View Your Data Summary** to display a summary of the data you entered.<br>3. Review your data summary to make sure it is complete. You may save or print your data summary.<br>   - If you need to make changes, click **Profile Data** from the top navigation bar to select the section that needs to be revised.<br>4. Select **Attest** to certify that you have carefully reviewed all information contained within your profile and all information provided by you is true, correct, and complete to the best of your knowledge. | After you complete your attestation, CAQH enables you to upload any required supporting documents directly into the system. You can also upload your documents as you are completing your application. To do so, follow these steps:<br>1. The **Documents** or **Review** pages will inform you what documents are needed to complete your application.<br>2. Upload the Upload the supporting documents (e.g., DEA certificates, W-9 forms, etc.) directly to CAQH.<br>Once your application is complete and your supporting documents are reviewed for accuracy, your information will be available to the organizations you authorized. You will need to check with each individual organization to determine your credentialing status. | Every 120 days (180 days for providers practicing in Illinois), you will receive a notification from CAQH to re-attest that all the information in your profile is still correct. To complete this requirement, follow these steps:<br>1. Navigate to: https://proview.caqh.org/pr at least every 120 days (180 days for IL Providers).<br>2. Log in to your account.<br>3. Select **Review & Attest** on the Home page.<br>4. Review and update your data as needed.<br>5. Click **Attest**.<br>6. Upload any applicable supporting documents. |

# Appendix A    Training Information and Solutions Center Information

## A.1   Training Information

### A.1.1     Participating Organizations

Users may access our free, on-demand training center for training on CAQH solutions. To enroll in the learning center:

1. Log in to: https://proview.caqh.org/PO.
2. Scroll to the bottom of the page and click on **Get Trained**.
3. You will be routed to the training library for participating organizations and will be able to register.

### A.1.2     Practitioners, Groups Users, and Practice Managers

Users may access our free, on-demand training center for training on CAQH solutions. To enroll in the learning center:

1. Log in to your portal.
   - Practitioners log in to: https://proview.caqh.org/PR.
   - Groups log in to: https://proview.caqh.org/EPM.
   - Practice Managers log in to: https://proview.caqh.org/PM.
2. Scroll to the bottom of the page and click on **Get Trained**.
3. You will be routed to the training library for practitioners, groups, and practice managers and will be able to register.

## A.1   Solutions Center Information

### A.1.1     Participating Organizations

Chat with us by logging in to: https://proview.caqh.org/PO.

- Chat Hours: Monday – Friday: 8:00 AM - 5:00 PM (ET).

Call us at 888-600-9802.

- Phone Hours: Monday – Friday: 8:00 AM - 5:00 PM (ET).

### A.1.2     Practitioners, Groups Users, and Practice Managers

Log in to your portal to chat with us.

- Chat Hours: Monday – Friday: 8:00 AM – 6:30 PM (ET).
  - Practitioners log in to: https://proview.caqh.org/PR.
  - Groups log in to: https://proview.caqh.org/EPM.
  - Practice Managers log in to: https://proview.caqh.org/PM.

Call us at 888-599-1771.

- Phone Hours: Monday – Friday: 8:00 AM - 8:00 PM (ET).

## Appendix B    Revision History

| Date | Version | Revision |
|------|---------|----------|
| 02/01/2017 | 1.0 | First Draft. |
| 06/12/2023 | 2.0 | Updated product name from ProView to Provider Data Portal and other rebranding updates (DirectAssure to Directory Management, etc.). |
| 11/20/2023 | 3.0 | Updated front and back cover for product branding. |

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