CAQH Provider Data Portal

Practice Manager User Guide

Version #2.0
Last Updated: 06/12/2023

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Contents

1. Introduction

The purpose of this document is to assist you as a Practice Manager in using the Provider Data Portal for Practice Managers. This portal is designed for office managers, allowing for common information to be entered at one time for multiple providers. There is no need to fill out redundant information for each healthcare provider practicing in your office.

1.1. CAQH Provider Data Portal Overview

CAQH is the healthcare industry's premier resource for providers and other healthcare providers to self-report professional and practice information to payers, hospitals, large provider groups and health systems. The CAQH Provider Data Portal eliminates duplicative paperwork for these organizations that may require provider profile information for credentialing, directory services and other business uses.

If you are an office manager or administrator who assists with gathering information for credentialing or other administrative purposes for multiple providers, the CAQH Provider Data Portal for Practice Managers may facilitate your data entry process.

This information will, in turn, become part of each provider's profile, to which they will attest. The CAQH Provider Data Portal for Practice Managers can be accessed at https://proview.caqh.org/pm

The following steps provide you with a high-level overview of the process flow when using the CAQH Provider Data Portal for Practice Managers.

1. A provider is added to the CAQH system either by self-registration or via a health plan.
2. Using the CAQH Provider Data Portal for Practice Managers, the Practice Manager logs in and completes common sections for multiple providers.
3. The Practice Manager adds the applicable provider to their "Provider List".
4. The Practice Manager exports the applicable sections and indicates which provider from the "Provider List" the data should be exported to.
5. The provider logs into the CAQH Provider Data Portal for Providers and, reviews the available exported data, and then can choose to import the data into the data profile.
6. The provider completes any remaining required fields and the authorization section, which allows health plans access to the data profile.
7. The provider completes the attestation and uploads any required supporting documentation.
8. CAQH reviews the provider's supporting documentation for quality.
9. The provider status is marked "Initial Profile Complete" or "Reattestation". (See Appendix for full list of provider statuses).
10. The completed provider data profile is available to the Participating Organization.

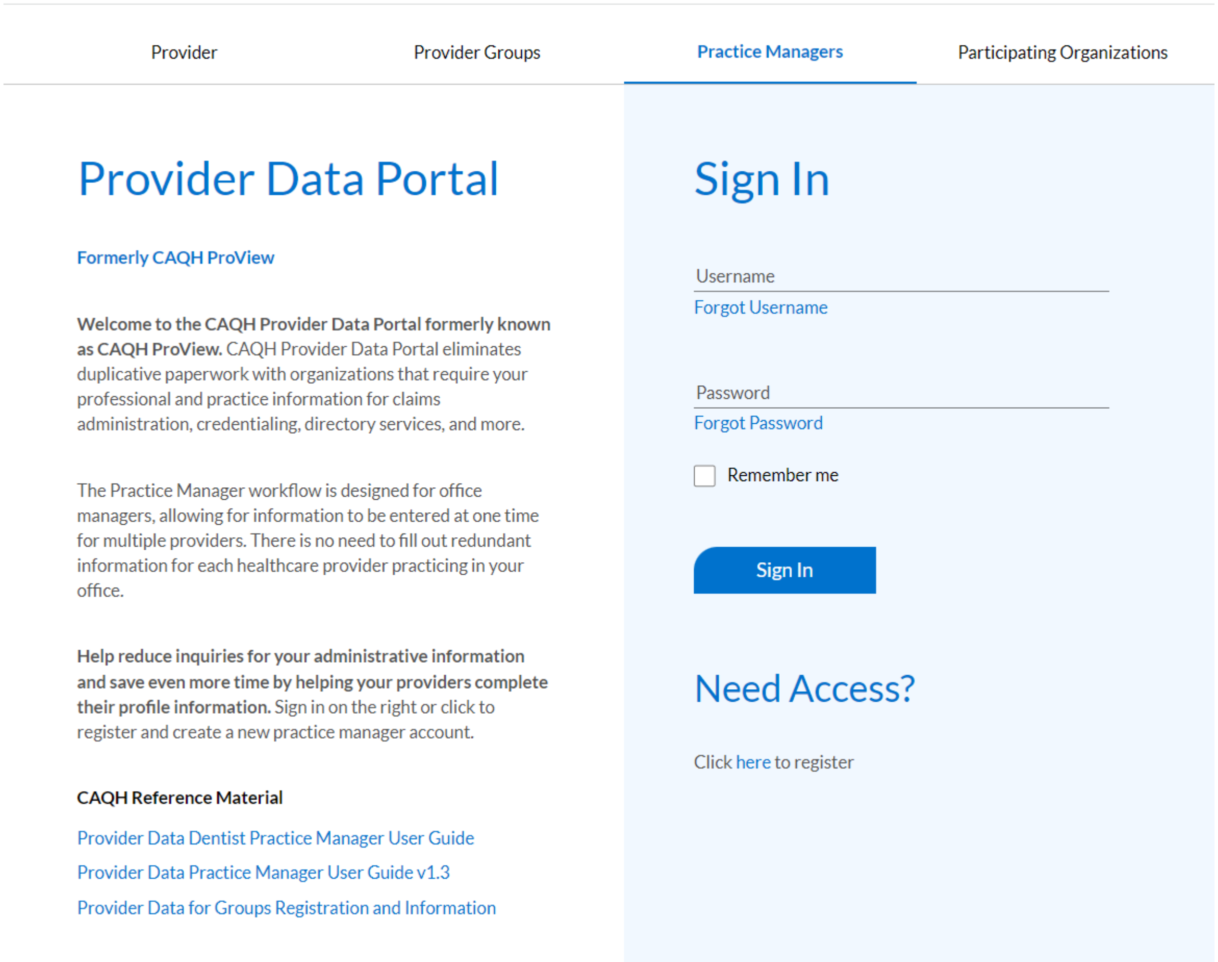
This document will provide additional information and helpful tips for each of the steps that relate to the Practice Manager Module. To learn how providers use CAQH, please refer to the CAQH Provider Data Portal Provider User Guide.

2. Registration

Registration is required for all Practice Managers to obtain access to the CAQH Provider Data Portal for Practice Managers.

2.1. New Users- Administrators

You may begin the self-registration process by accessing CAQH at https://proview.caqh.org/pm and selecting “Click here to register.”. All users who self-register will automatically be established as Administrator user accounts, which allows for access to add or edit “child” user accounts.



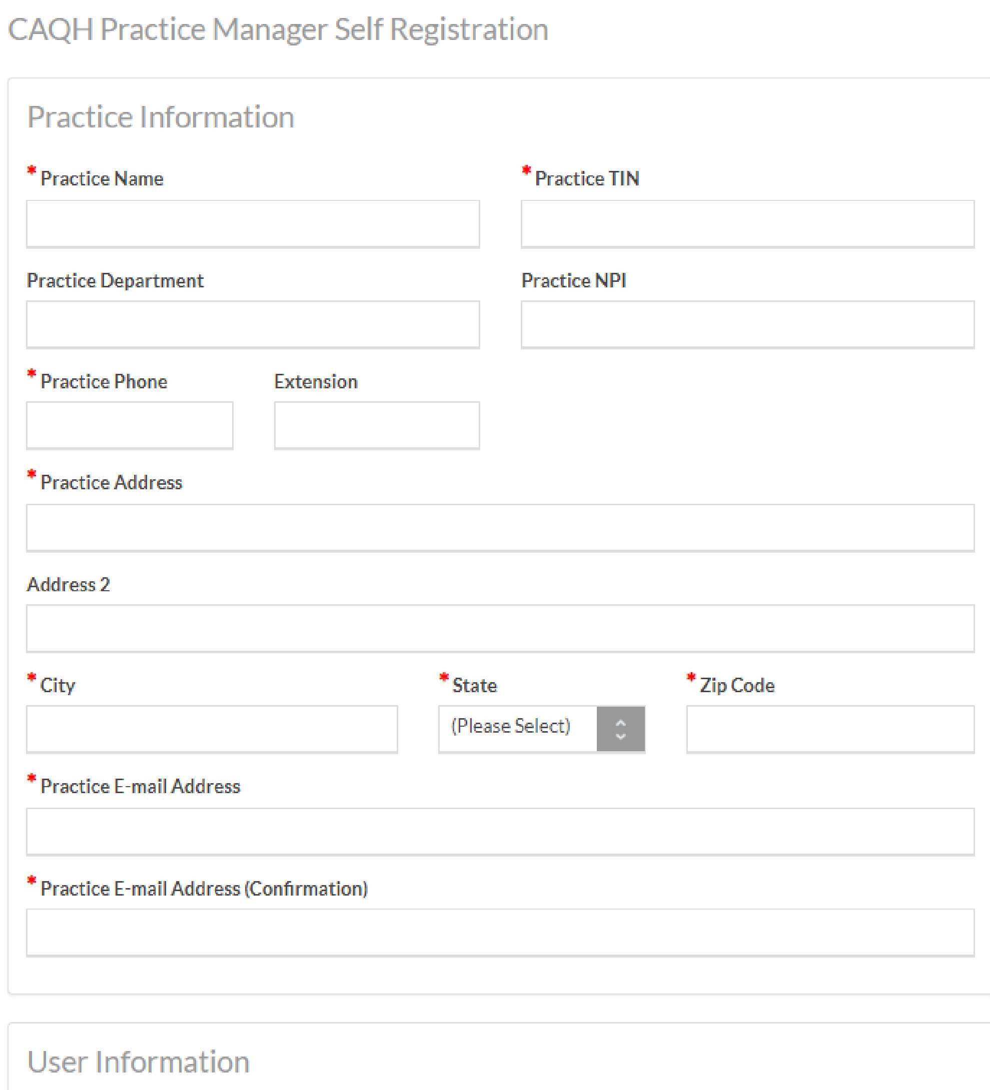
2.2. New Users

Once the Administrator has established an account, the Administrator will be able to add other Administrators or Basic Users to the same account. A Basic User cannot add or edit other users but will have all other privileges and views as the Administrator.

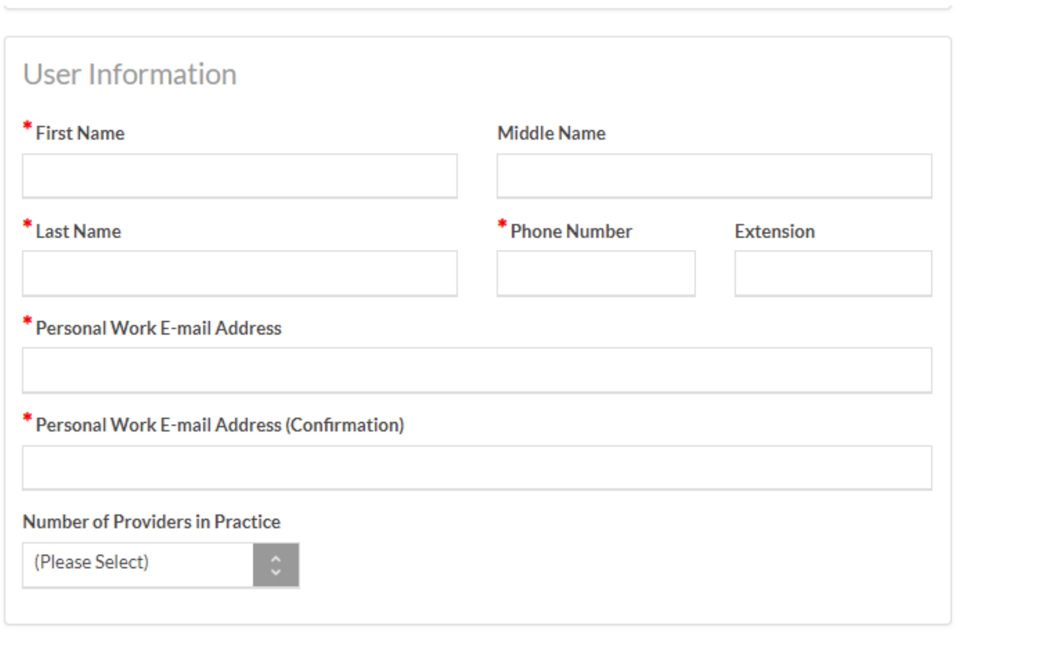
When a new user is created in the portal by the Administrator, CAQH will send an email to the email address of the newly created user. New users will complete their registration with the CAQH Provider Data Portal for Practice Managers by selecting the link contained in the e-mail. You will be prompted to update your username and password at this time. Refer to “Creating a CAQH Username and Password” on page 7 of this guide for the next steps in the process.

2.3. Self-Registration

Users who self-register with the Practice Manager Module will need to complete the Practice Manager Self Registration screen. This includes completing your practice information. The fields marked with an asterisk (*) are required.

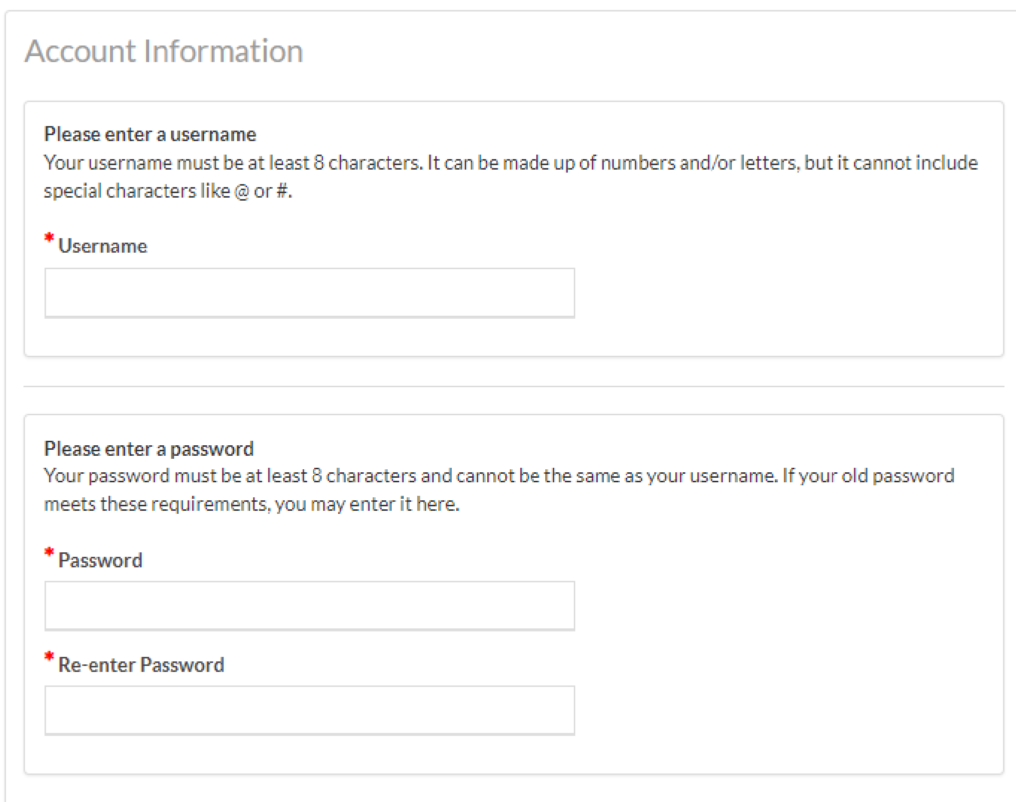


You will also need to provide your user account information.

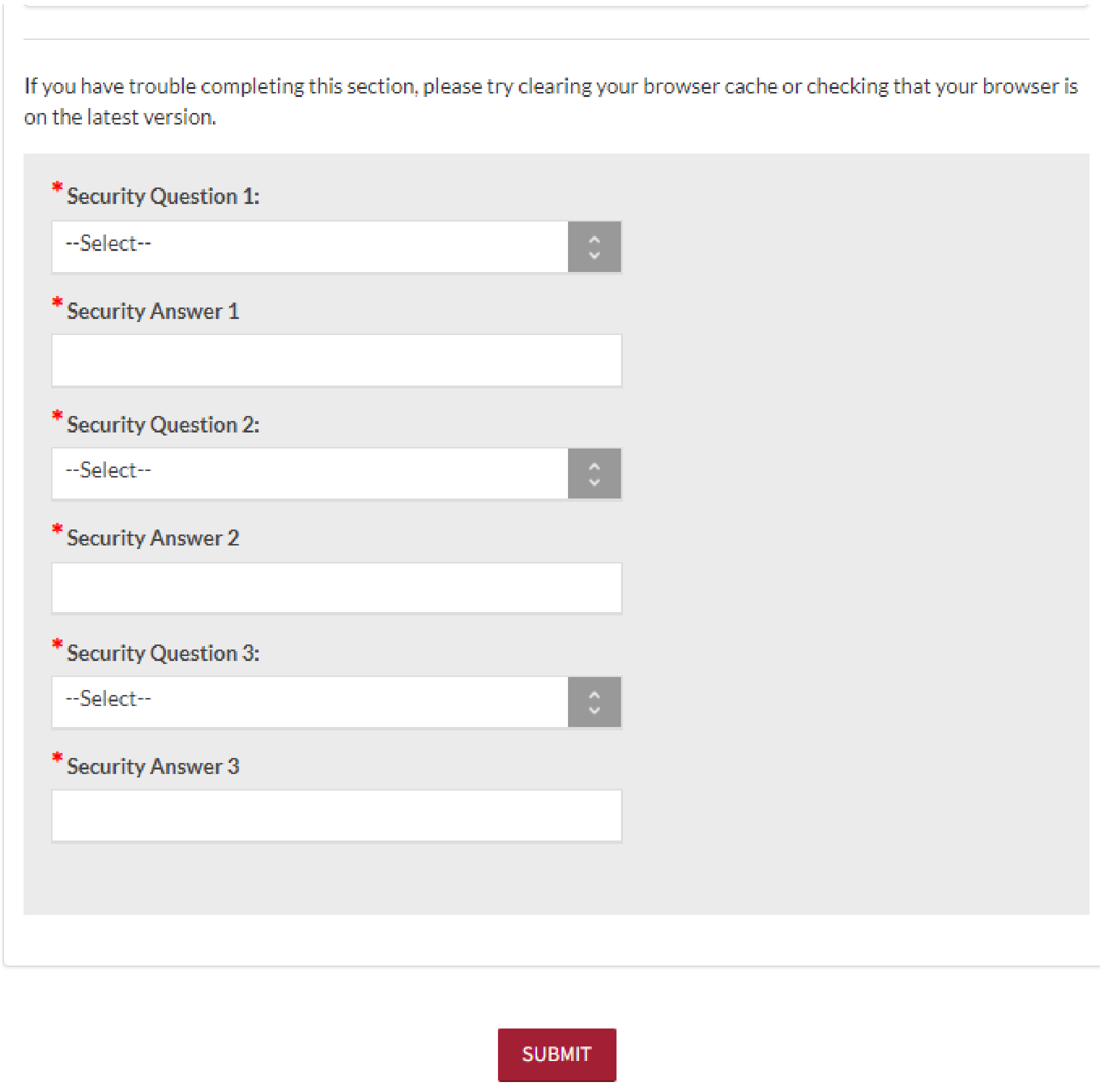


2.4. Creating a Username and Password

CAQH users will be asked to create a username and password.



CAQH users will also be asked security questions to facilitate account access in case of a forgotten username and/or password. Select three security questions and provide unique answers for each. Then select “Submit”.


If you have trouble completing this section, please try clearing your browser cache or checking that your browser is on the latest version.

* Security Question 1:

--Select--

* Security Answer 1

* Security Question 2:

--Select--

* Security Answer 2

* Security Question 3:

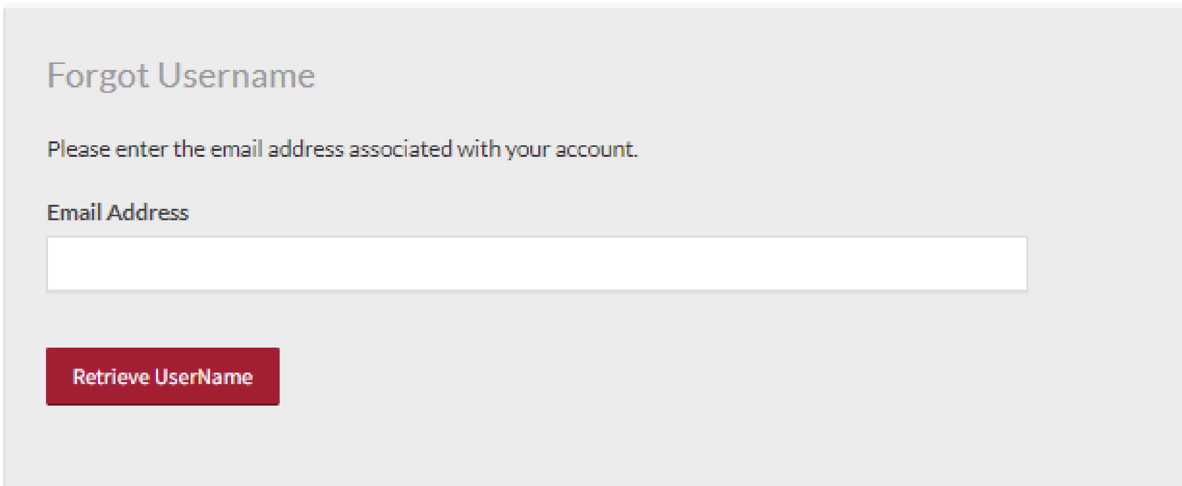
--Select--

* Security Answer 3

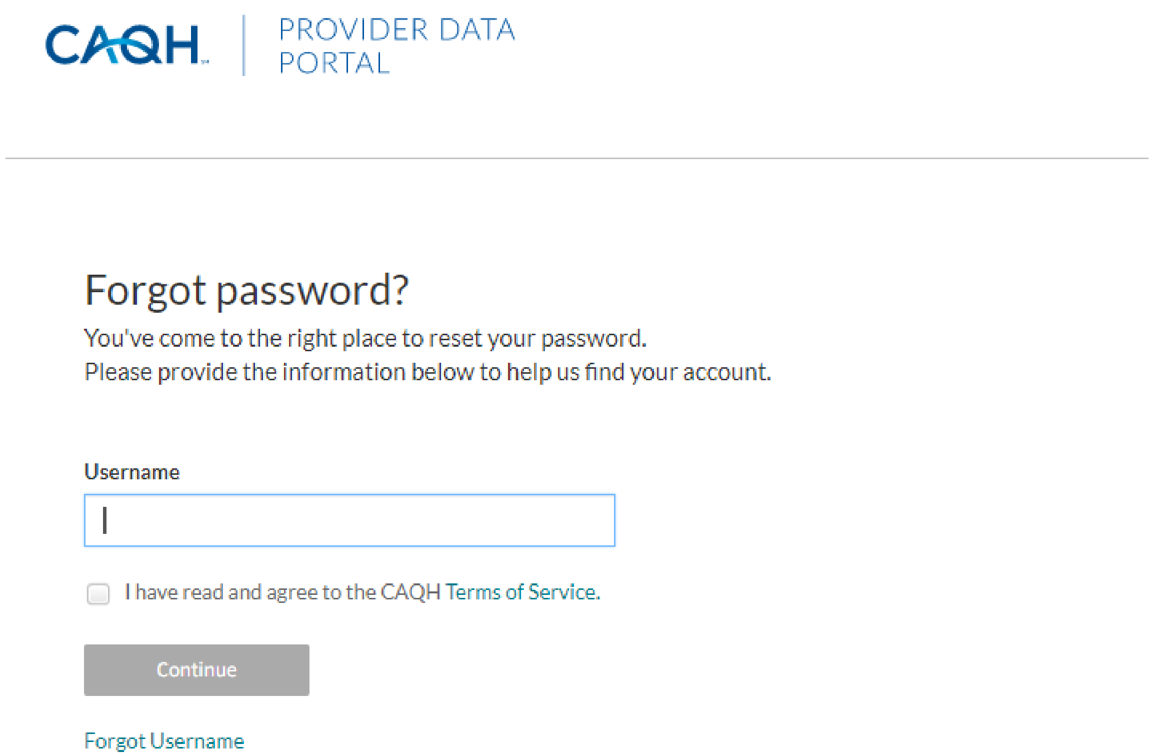
SUBMIT

2.5. Forgotten Username and/or Password

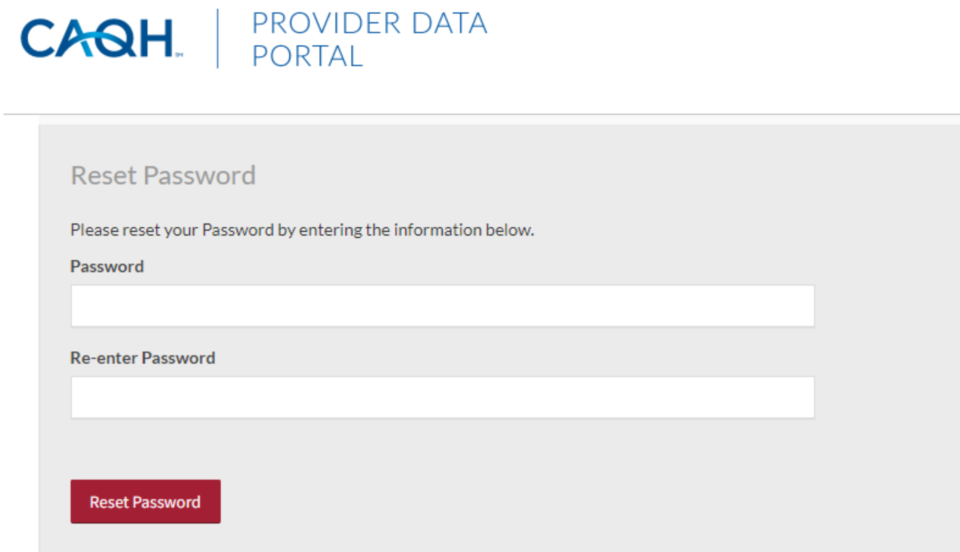
If you forgot your Username, you may select the “Forgot Username” link on the CAQH Provider Data Portal sign-in page. Enter your email address to receive your username in an email.



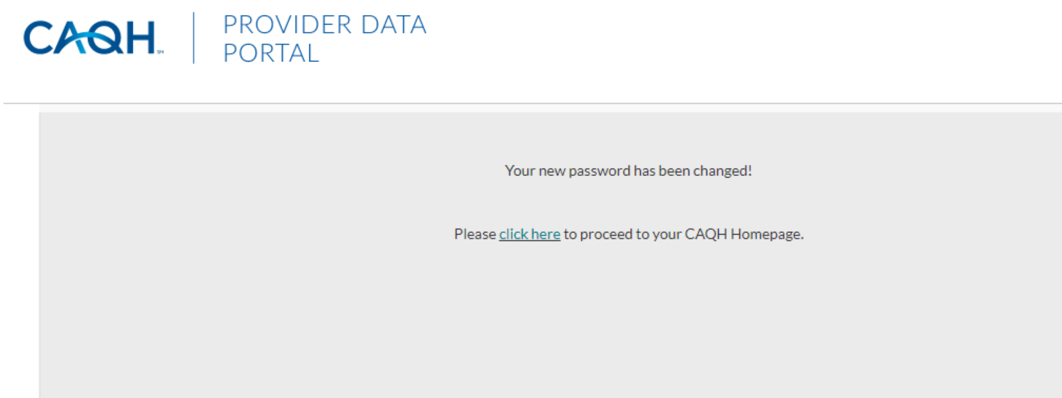
If you forgot your Password, you may select the “Forgot Password” link on the CAQH Credentialing sign-in page. Enter your username and email address to reset password. An email with a link will be sent to you to reset your password.



Once you select the link in the email sent to you, enter and re-enter your new password, then select “Reset Password”.



The Password Change confirmation will appear when your password has been successfully reset. You can then log into CAQH Provider Data Portal using your new password.

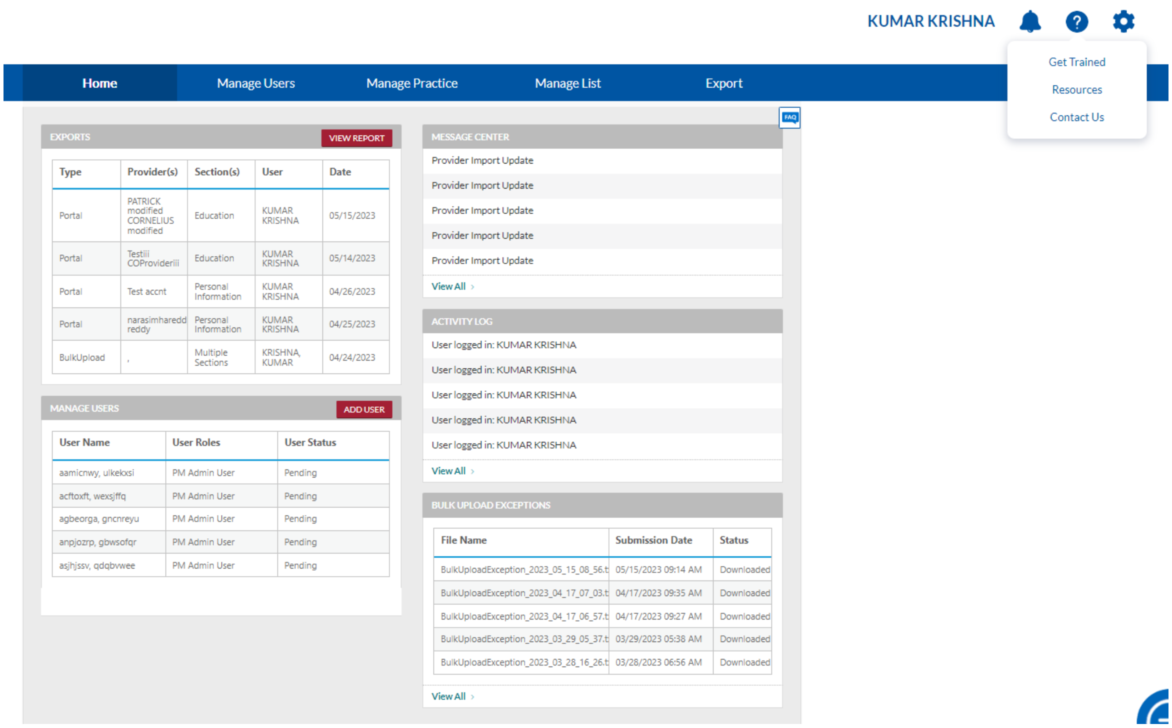


3. Home Page

You will see the CAQH Provider Data Portal for Practice Managers “Home” page after a successful login.

Tip:

- If you need assistance on the Home page, you can access the “Help” link that is displayed in the top right-hand corner on the Home page.

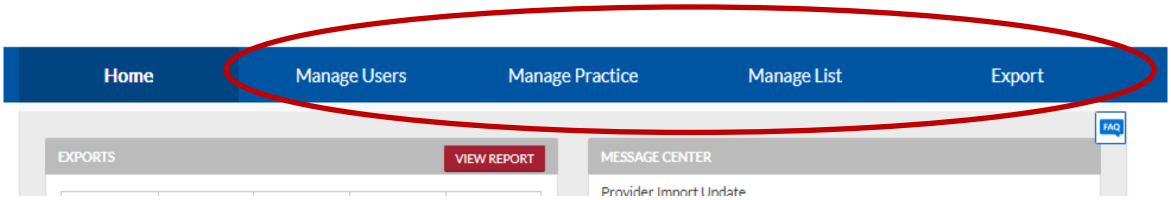


The Home page displays five components:

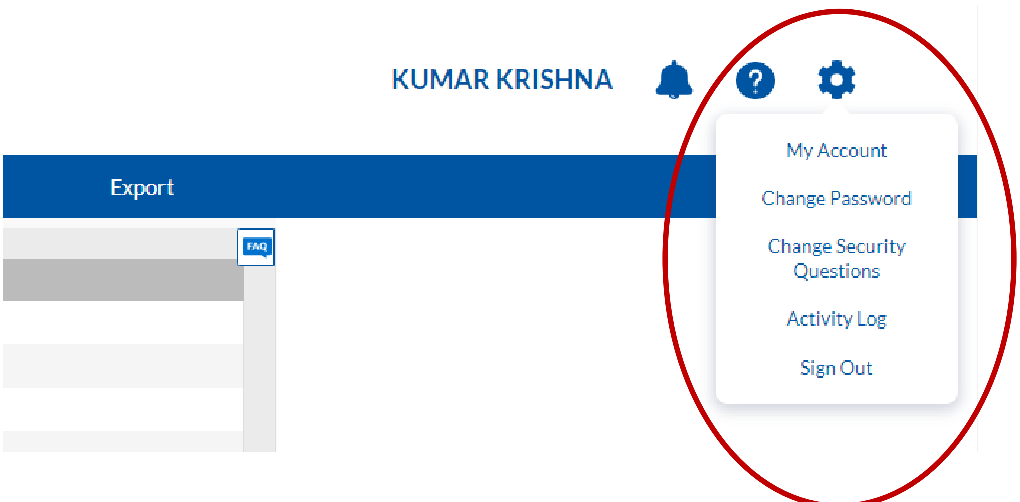
1. Exports
    - The Exports section displays a summary of recent exports, the related user who performed the export, and the date exported.
2. Manage Users
    - This section displays a list of most recent users, their roles and statuses. Only Administrators can view the Manage Users section.
3. Message Center
    - The Message Center section displays messages related to your account.
4. Activity Log
    - The Activity Log section displays recent users who have logged into the account and recent activity within the account.
5. Bulk Upload Exceptions
    - This section displays a list of Exception Reports from a Bulk Upload processed file. Only users with Bulk Upload access can view the Bulk Upload Exceptions section.

In addition, to these components, across the top of the Home page is a navigation menu, which allows you to navigate to the four sections of the Practice Manager Module:

- **Manage Users** – Administrator Users can click here to add or edit account users (see Chapter 4).
- **Manage Practice** – Click here to enter information common across multiple providers (see Chapter 5).
- **Manage List** – Click here to add, edit, and delete providers on your provider list (see Chapter 6).
- **Export** – Click here to begin the export data process to multiple or individual provider accounts (see Chapter 8).

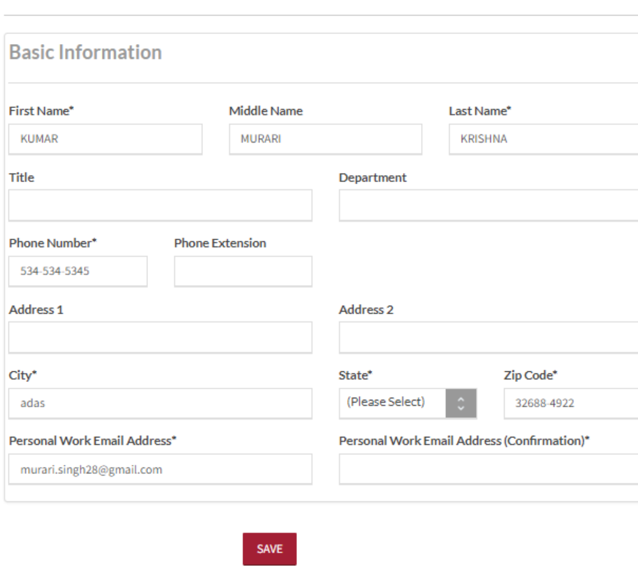


A drop-down menu also is available next to the user's name in the upper right-hand corner.



From this drop-down menu, you can perform the following:

1. **My Account** – Click here to edit or update personal account information. Note: the fields marked with an asterisk (*) are required. Select "Save" when you are finished updating your information.



2. **Resources** – Click here to access system reference materials, such as the Bulk Upload File Specifications.
3. **Change Password** – Click here to update your password.
4. **Security Questions** – Click here to update your security questions.
5. **Activity Log** – Click here to view your activity log, which shows you the types of activities you have completed recently, along with the date and time of those activities. You are able to select the arrow next to the “Activity Subject” to expand the activity details.

ACTIVITY LOG

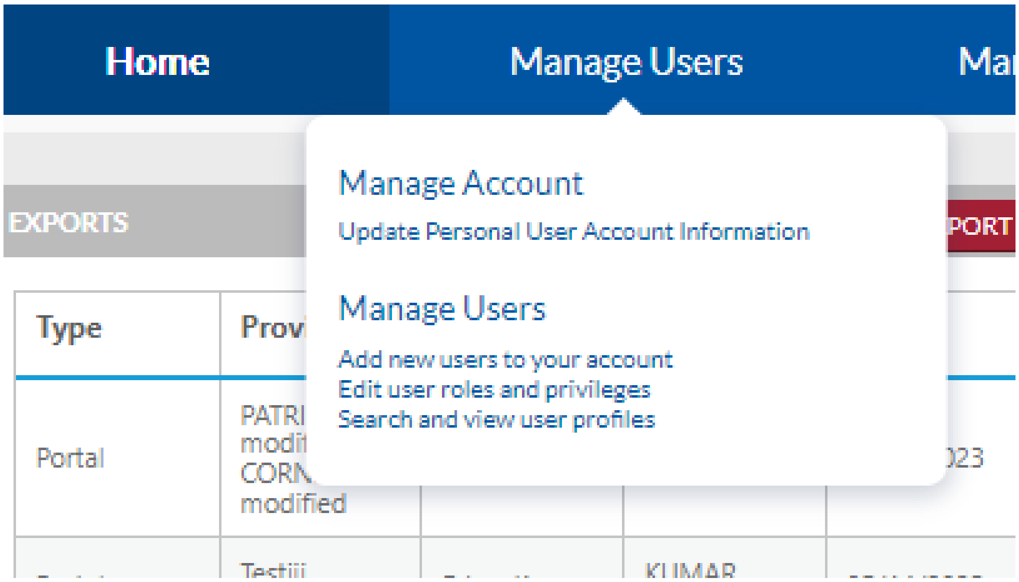
Expand to view Activity Details

	Activity Subject	Date
▸	User logged in: KUMAR KRISHNA	05/26/2023 10:02 AM
▸	User logged in: KUMAR KRISHNA	05/25/2023 08:33 PM
▸	User logged in: KUMAR KRISHNA	05/25/2023 07:37 PM
▸	User logged in: KUMAR KRISHNA	05/25/2023 07:34 PM
▸	User logged in: KUMAR KRISHNA	05/25/2023 07:24 PM
▸	User logged in: KUMAR KRISHNA	05/25/2023 07:18 PM
▸	User logged in: KUMAR KRISHNA	05/25/2023 06:46 PM
▸	User logged in: KUMAR KRISHNA	05/25/2023 06:43 PM
▸	User logged in: KUMAR KRISHNA	05/25/2023 06:38 PM
▸	User logged in: KUMAR KRISHNA	05/25/2023 06:19 PM

1 2 3 4 5 6 7 8 ... 1 of 100 pages (1000 items)

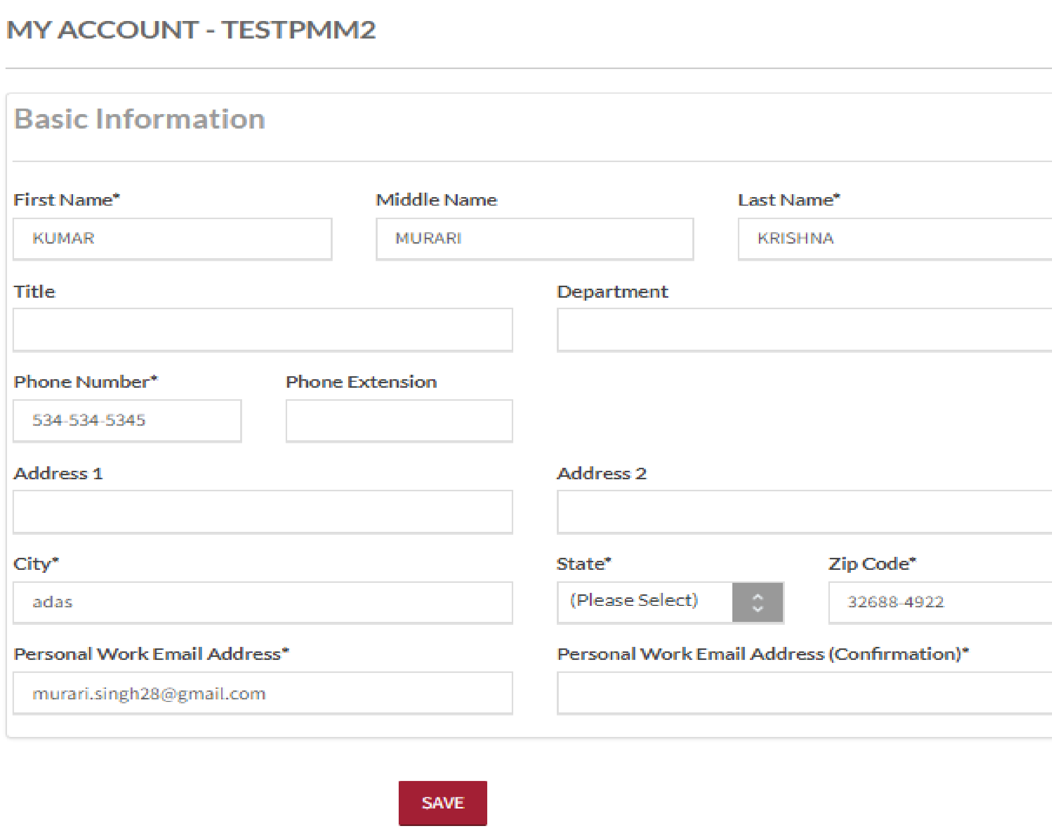
4. Manage User

If you are an Administrator, you will have access to the “Manage User” section, where you have the ability to add, edit or delete user accounts. From the Home Page, click on “Manage Users” on the top navigation bar to begin the process.



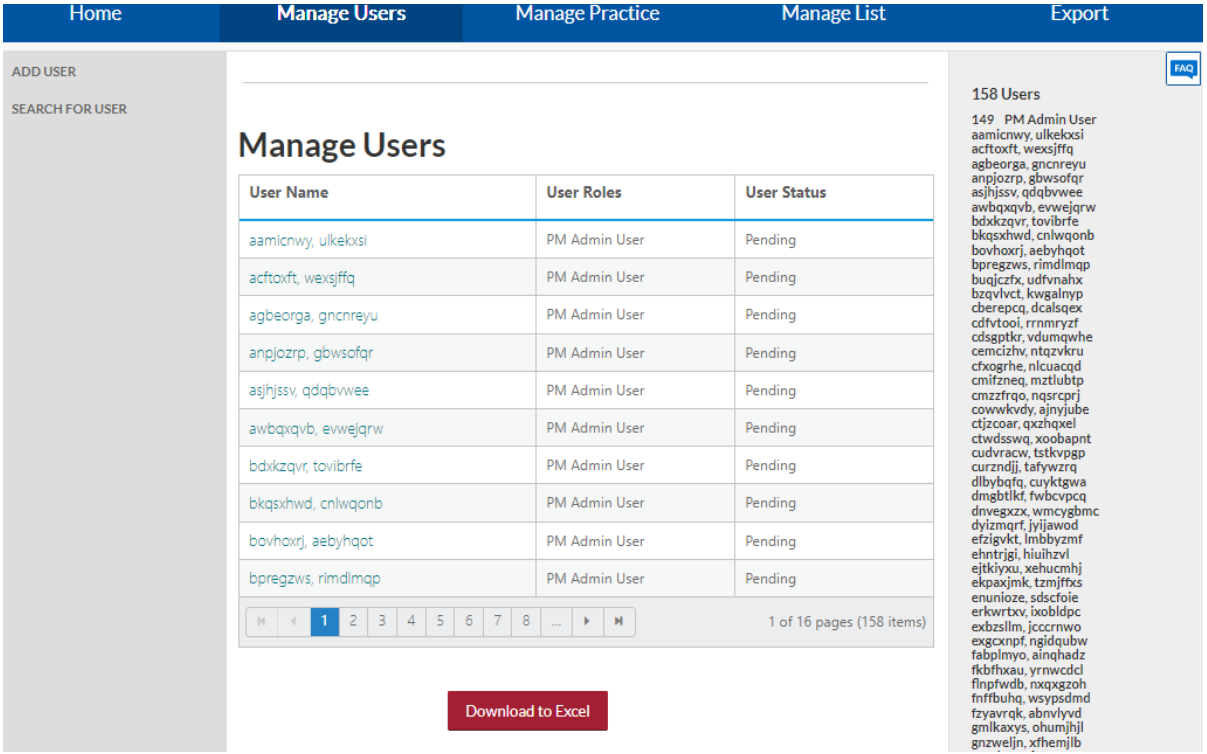
4.1. Manage User

Click here to edit or update your personal account information. Note: the fields marked with an asterisk (*) are required. Select “Save” when you are finished updating your information.



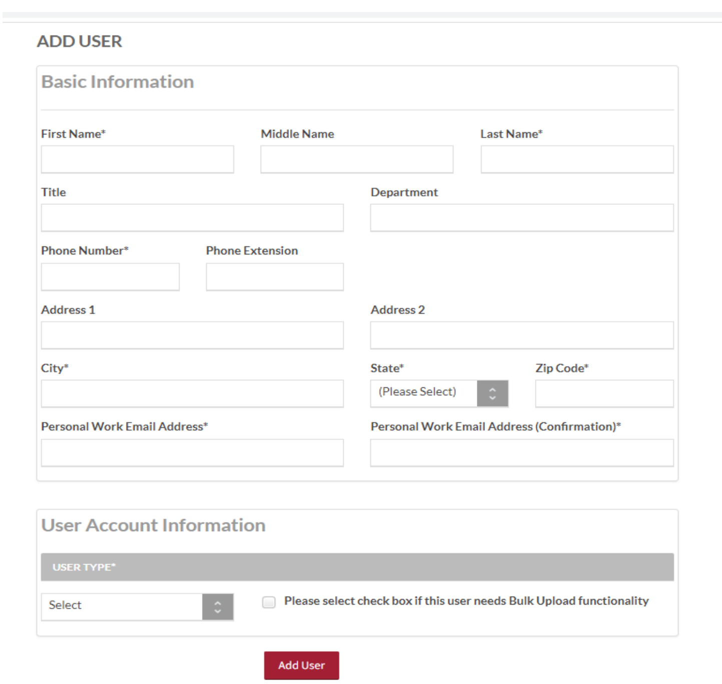
4.2. Manage Users

Click here to add new users to your account, edit user roles and privileges, and search and view user profiles.



4.3. Add User

An Administrator can create new Administrators or Basic Users by accessing the “Add User” link on the left-hand navigation pane. The “Add User” screen will appear.

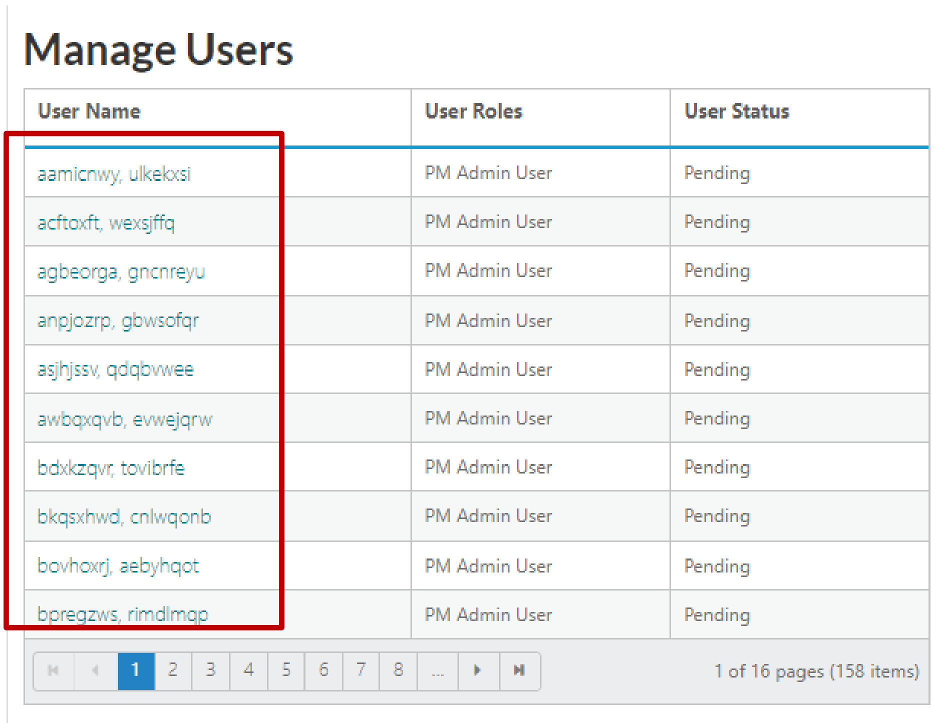


To add a user, complete the fields and click on “Add User”.

- Fields marked with an asterisk (*) are required.
- At the bottom of the screen, you may define the user role as another Administrator or as a Basic User. The only difference between these roles is that Administrators are able to view the “Manage Users” section.
- You can also select the check box if the user needs Bulk Upload functionality. If the check box is selected, the system will notify CAQH to review the user’s account for Bulk Upload functionality. CAQH will then review the user before granting or denying Bulk Upload functionality. Meanwhile, the user status will be set to Pending.

4.4. Edit User

The Administrator can edit user information by selecting a username in the “Manage Users” screen.



Manage Users

User Name	User Roles	User Status
aamicnwy, ulkekxsi	PM Admin User	Pending
acftoxft, wexsjffq	PM Admin User	Pending
agbeorga, gncnreyu	PM Admin User	Pending
anpjozrp, gbwsofqr	PM Admin User	Pending
asjhjssv, qdqbvwee	PM Admin User	Pending
awbqxqvb, evwejqrw	PM Admin User	Pending
bdxkzqvr, tovibrfe	PM Admin User	Pending
bkqsxhwd, cnlwqonb	PM Admin User	Pending
bovhoxrj, aebyhqot	PM Admin User	Pending
bpregzws, rimdlmqp	PM Admin User	Pending

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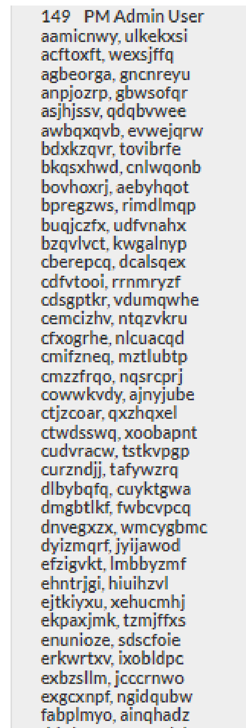
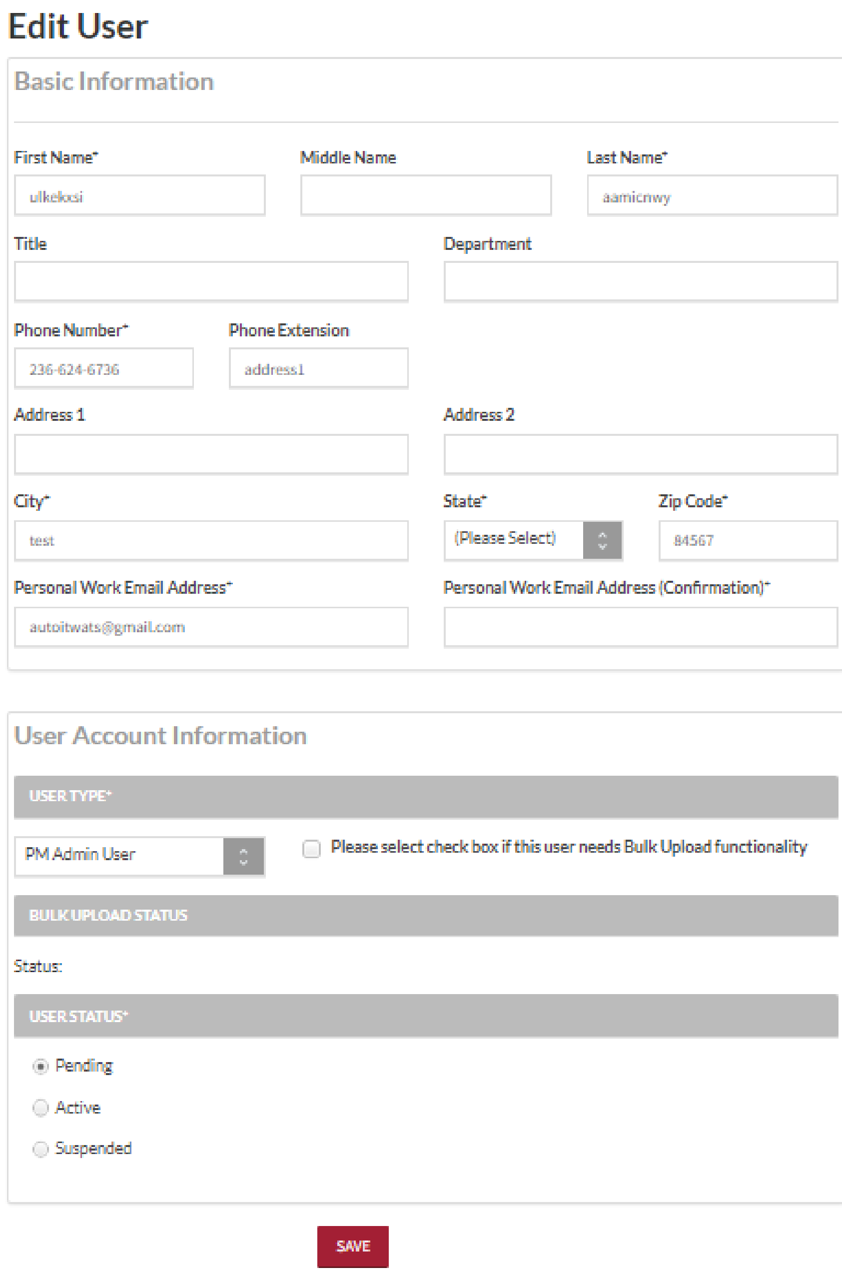


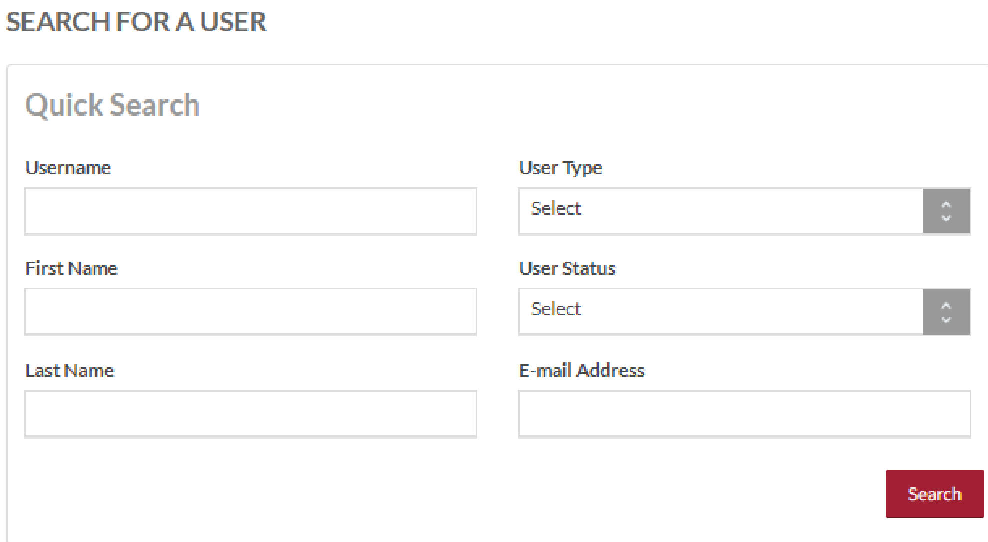
The “Edit User” screen will display. Here you can edit the user’s account information, their user role (Administrator or Basic), and their user status (Pending, Active, or Suspended).



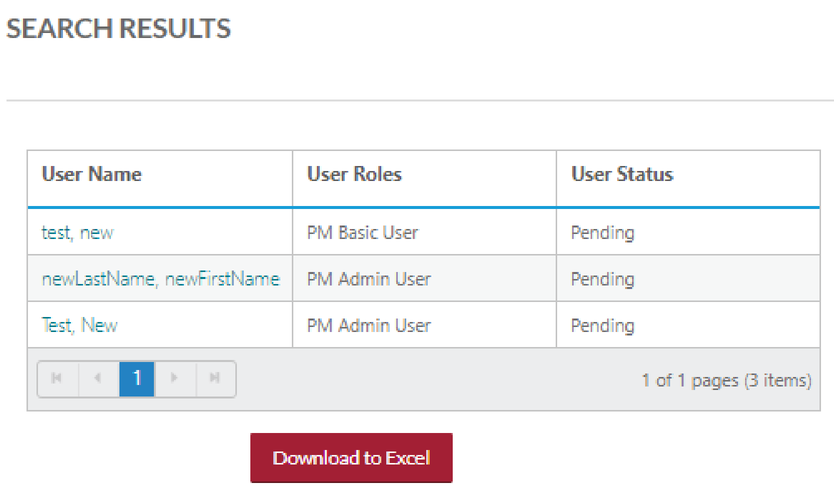
4.5. Search for User

An Administrator can search for a user by selecting “Search for User” and completing any of the following fields:

- Username
- User Type: PM Admin/PM Basic User
- First Name
- Last Name
- User Status: Pending, Active or Suspended
- E-mail Address



A “Search Results” screen will display a list of users that meet your search criteria. You are able to select a user’s name to view more details on that user.



5. Manage Practice

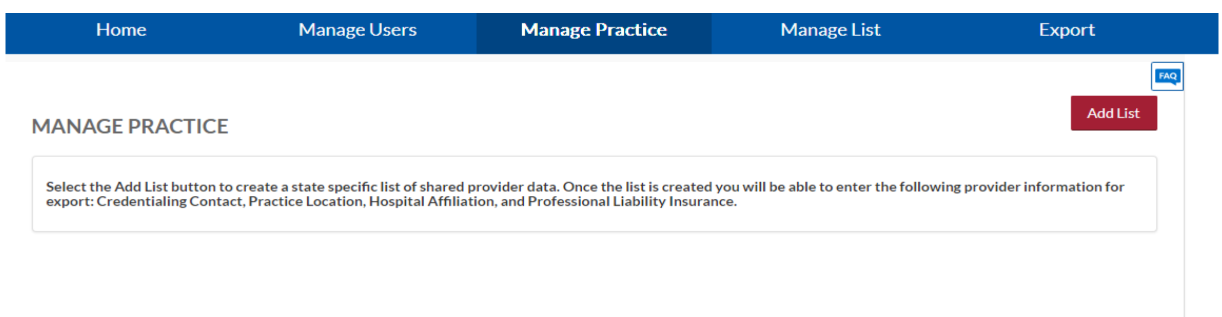
From the Home Page, click on "Manage Practice" on the top navigation bar to begin to enter data common across multiple providers. You are able to create and save the four common provider profile information sections which include the following:

- Credentialing Contact
- Practice Location
- Hospital Affiliation
- Professional Liability Insurance

Tips:

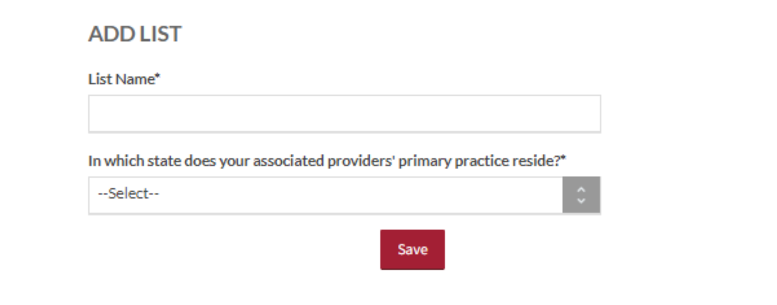
1. Throughout the system, fields that a provider will be required to enter prior to attestation are indicated with a red asterisk (*).
2. If you need assistance, you can access the "?" link that is displayed on the right-hand side of the screen.
3. Use "Go to previous section" or "Save & Continue" to page forward or backward within sections.
4. It is important to click on the "Save & Continue" button to save your information. If you close the browser without clicking "Save & Continue", you will lose your information.

On the first login, the user will not see any lists or common data.



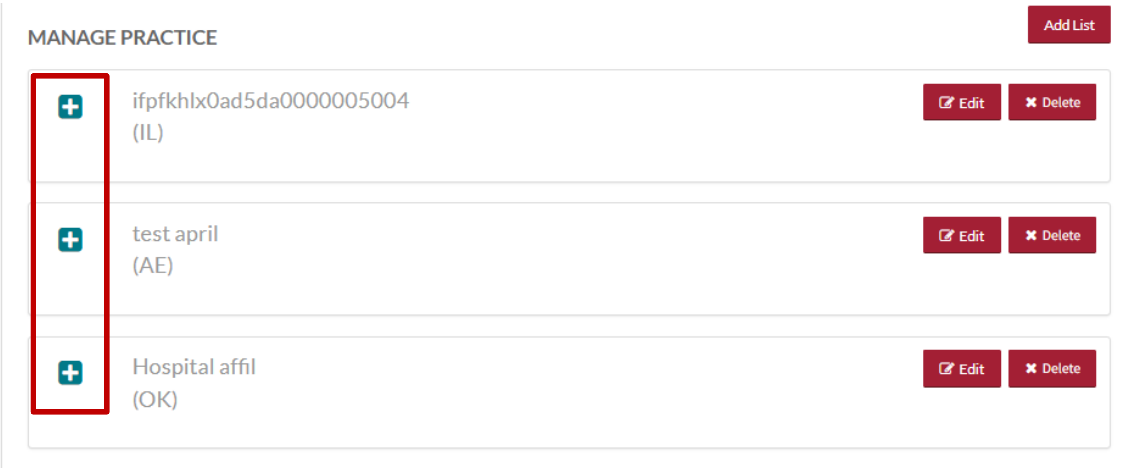
5.1. Add List

From the screen above, select "Add List" to create a practice group name and its associated practice state. In the CAQH Provider Data Portal for Practice Managers, you will need to maintain state specific lists to drive any state mandated or voluntary form questions. Once you have added that information, select "Save".



The following screen will display, summarizing the practice groups you have created.

- Click “Add List” to add an additional practice group to your list.
- Click “Edit” to edit the name of a practice group within your list.
- Click “Delete” to delete the practice group from your list.
- Use the “+” sign to expand and view the common sections within each practice group.

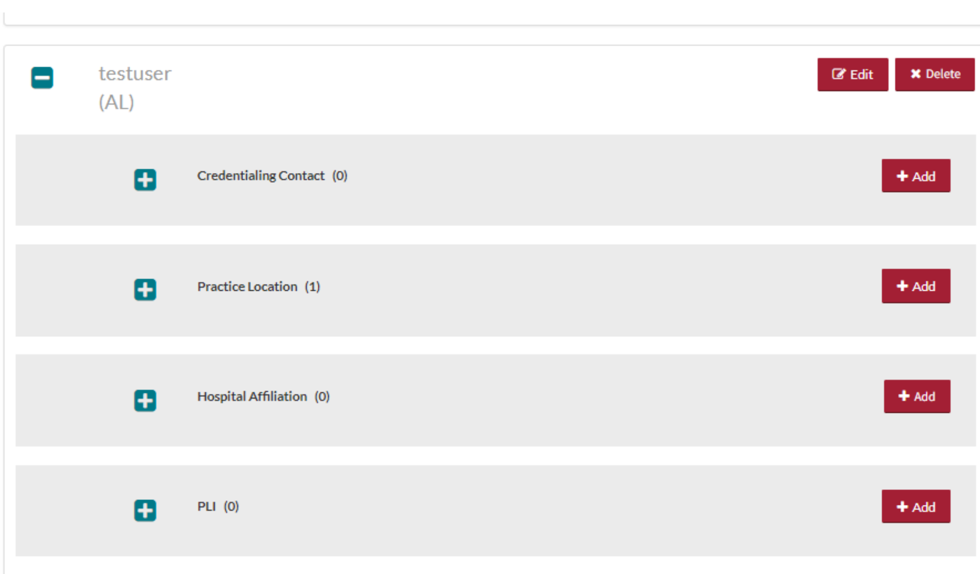


Within each practice group, there are four common sections where you may enter data for multiple providers.

1. **Credentialing Contact:** used to create multiple Credentialing Contacts within each list.
2. **Practice Location:** used to create multiple Practice Locations within each list.
3. **Hospital Affiliation:** used to create multiple Hospital Affiliations within each list.
4. **Professional Liability Insurance (PLI):** used to create multiple Professional Liability Insurance accounts within each list.

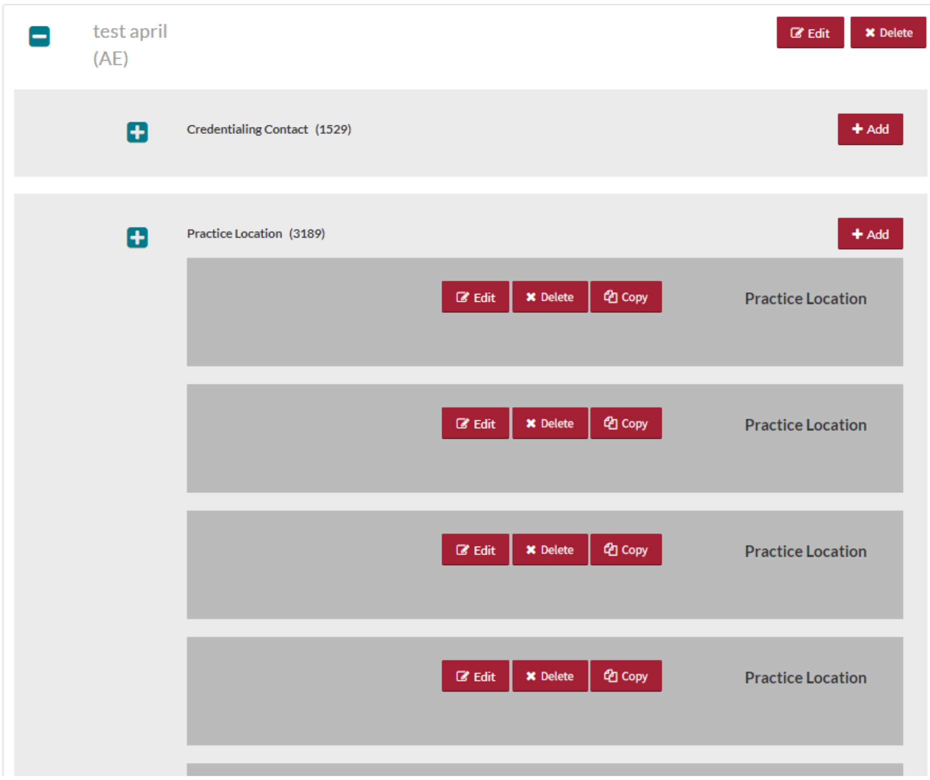
The information entered and saved in each of these sections can be exported to a single provider or multiple providers.

- To expand within each section, use the show more (+) button for a specific list.
- To add data to a section, click “Add”.



When you click on the show more (+) button, the applicable section will expand. Below shows an example of the Practice Location section expanded. Within each section you can perform the following:

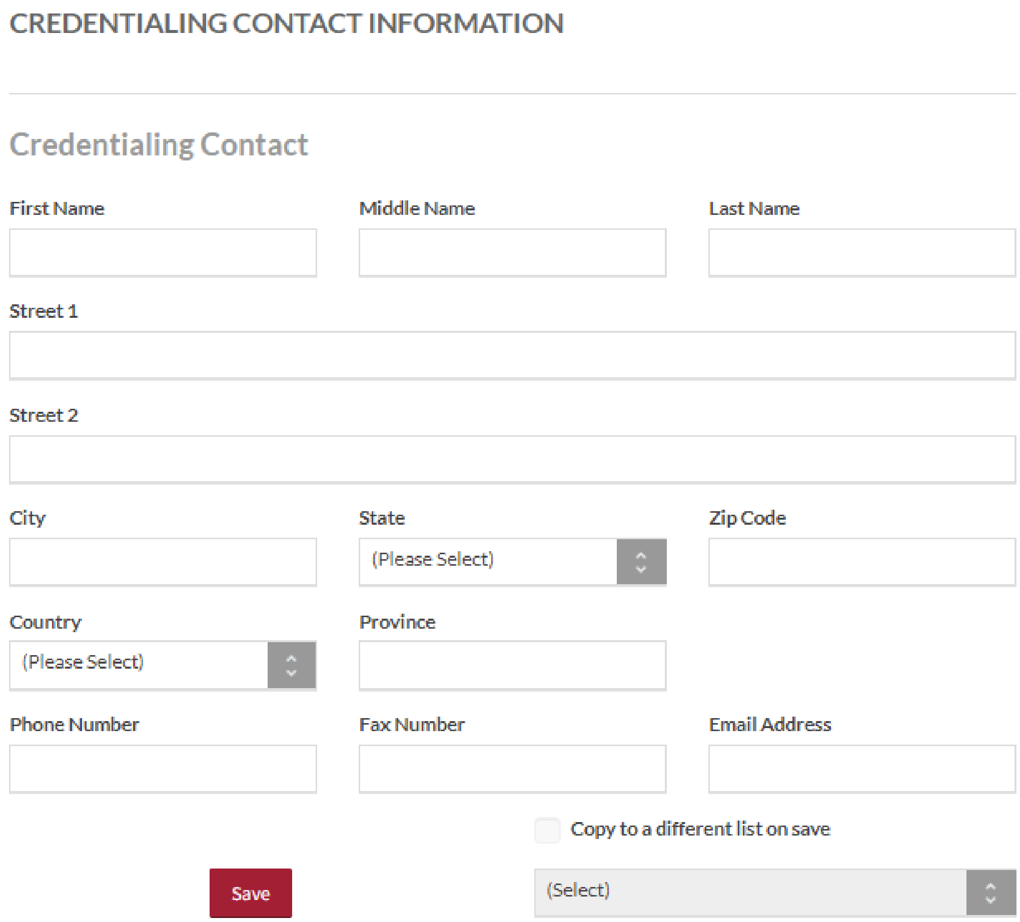
- Select “Edit” to edit the information within a practice location.
- Select “Copy” to create a duplicate of a practice location and its related information.
- Select “Delete” to remove a practice location. Please note that by selecting “Delete”, all information entered for that practice location will be deleted.



The following pages provide helpful tips on completing each of the four common sections.

5.2. Credentialing Contact

Select “Add” or “Edit” to enter information for a credentialing contact. The Credentialing Contact section asks for specific contact information for your providers’ credentialing contacts, e.g., name, address, phone number, and email.

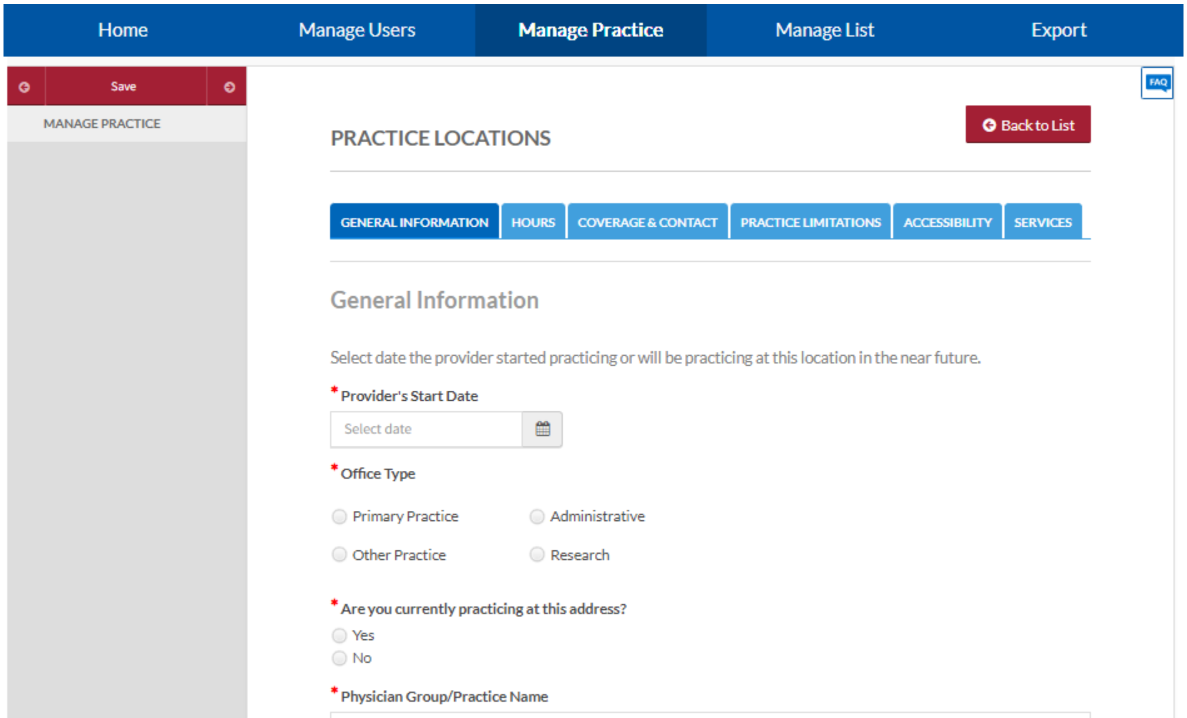


5.3. Practice Location

Select “Add” or “Edit” to enter information for a practice location. The Practice Location section asks for detailed information regarding your providers’ practice location(s) including general contact information, hours, covering colleagues, practice limitations, accessibility and services provided.

Tips:

- Throughout the screens, required fields that providers must complete prior to their attestation are indicated with a red asterisk (*). To export data, all required fields do not need to be completed by a practice manager, but they will be required before the provider can attest.
- Use “Go to previous section” or “Save & Continue” to page forward or backward within sections.
- It is important to click on the “Save” button or “Save & Continue” button to save your information. If you close the browser without clicking “Save” or “Save & Continue”, you will lose your information.
- Questions presented to you may vary based on the provider’s primary practice state.



The subsections are listed below and may vary based on the practice state.

- General Information
    - Physician Group/Practice Name

Please enter the Practice Name as it appears on a provider's claim submission so it will match the name for the location that is known to participating organizations with whom the provider contracts. In most cases, this will not be the practitioner's name. In some cases, this may be the name as it appears on the W9.

- Address

CAQH requests that you enter the appropriate address for the actual physical location of the practice. If you do not have a physical practice location, you may enter a P.O. Box; however, please note that health plans intend to use this information for their directories. If you would like to enter a P.O. Box for the billing address, please enter this information in the Billing Contact section at the bottom of this page.

- Group Medicaid Number
- Group Medicare Number
- NPI Type 2- Enter your provider's group National Provider Identification Number
- Phone Numbers
- Phone Coverage
- Tax Identification Number
- Hours
- Office Hours
- Patients- Indicate the types of patients accepted into the practice.
- Coverage & Contact
- Colleagues
- Covering Colleagues
- Mid-Level Practitioners

Mid-level practitioners include P.A. (physician's assistant), N.M.W (nurse midwife), N.P (nurse practitioner), or R.N.F.A (registered nurse first assistant).

  - Office Manager or Business Staff Contact
  - Billing Contact
  - Payment and Remittance
  - Practice Limitations

A limitation is any restriction the practice has set on the gender or age of the patient population.

  - Gender Limitations
  - Age Limitations
  - Other Limitation

- Accessibility
  - ADA Accessibility

The Americans with Disabilities Act (ADA) ensures access to the physical environment for people with disabilities. The ADA Standards establish design requirements for the construction and alteration of facilities subject to the law. These enforceable standards apply to places of public accommodation, commercial facilities, and state and local government facilities.

  - Handicapped Accessibility
  - Public Transportation Accessibility
  - Other Accessibility Services
  - Disabled Accessibility
  - Services – Indicate what services are provided at this practice location.

Clinical Laboratory Improvement Amendments (CLIA) – Diagnostic testing helps health care providers screen for or monitor specific diseases or conditions. It also helps assess patient health to make clinical decisions for patient care. The Clinical Laboratory Improvement Amendments (CLIA) regulate laboratory testing and require clinical laboratories to be certificated by their state as well as the Center for Medicare and Medicaid Services (CMS) before they can accept human samples for diagnostic testing. Laboratories can obtain multiple types of CLIA certificates, based on the kinds of diagnostic tests they conduct.

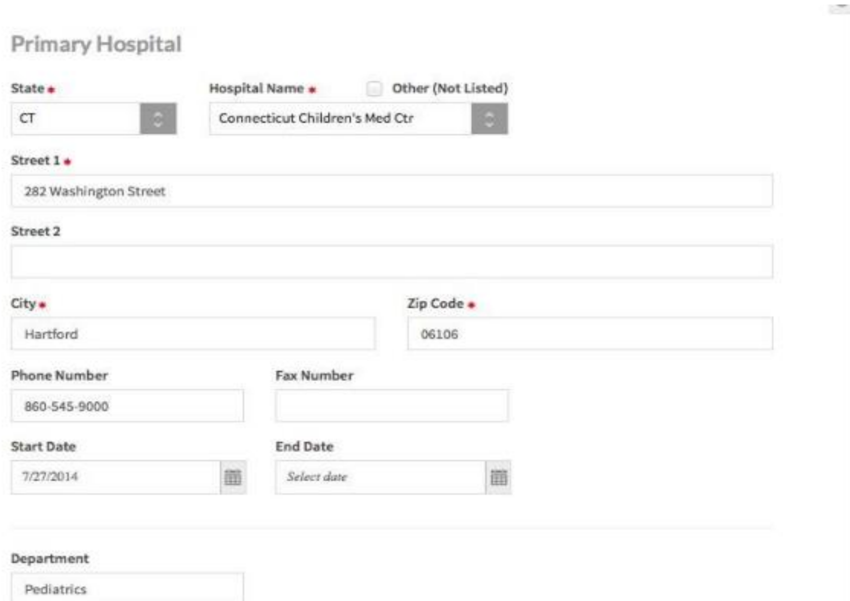
  - Interpretation Services

5.4. Hospital Affiliation

Select "Add" or "Edit" to enter information for a hospital affiliation. The Hospital Affiliation section asks for detailed information regarding your providers' hospital affiliations, including the hospital address, phone number, start and end dates, and department director information.

Tips:

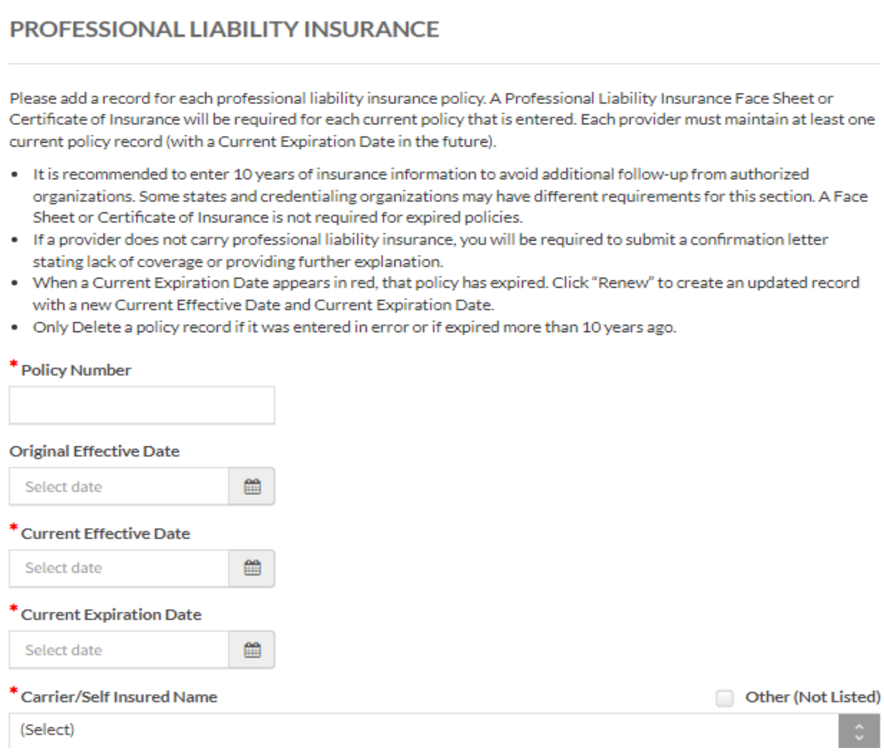
1. Throughout the screens, required fields that providers must complete prior to their attestation are indicated with a red asterisk (*). To export data, all required fields do not need to be completed by a practice manager, but they will be required before the provider can attest.
2. Use "Go to previous section" or "Save & Continue" to page forward or backward within sections.
3. It is important to click on the "Save" or "Save & Continue" b button to save your information. If you close the browser without clicking "Save" or "Save & Continue", you will lose your information.
4. Questions presented to you may vary based on the provider's primary practice state



The Professional Liability Insurance section asks for detailed information regarding your providers' professional liability insurance. Select "Add" or "Edit" to enter information for your providers' professional liability insurance.

Tips:

1. Required fields that providers must complete prior to their attestation are indicated with a red asterisk (*). To export data, all required fields do not need to be completed by a practice manager, but they will be required before the provider can attest.
2. Questions presented to you may vary based on the provider's primary practice state.



The questions asked in this section include the following:

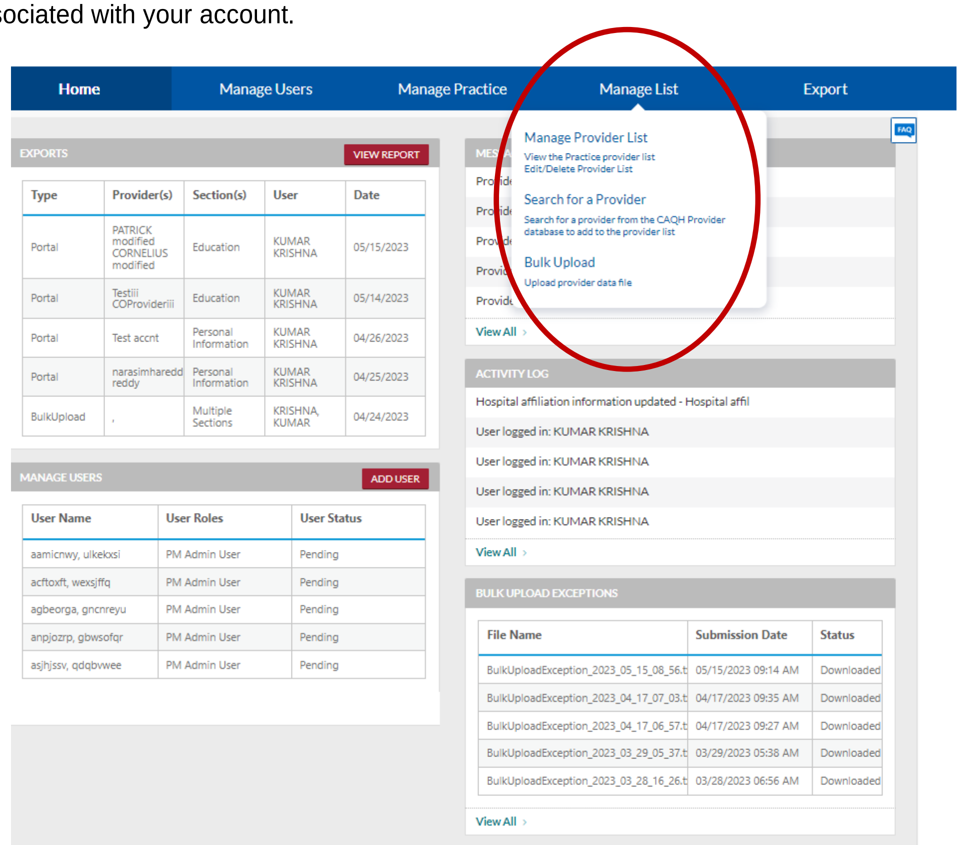
- Self-insured
    - Self-insured providers are protected from professional liability claims by a program of self-insurance where expense payments and those to satisfy professional liability claims are made from a self-insurance trust fund. In other words, self-insured providers are not transferring financial risk for professional liability claims, and expenses to defend those claims, to an insurance carrier.
- Insurance name
    - If your provider does not carry professional liability insurance, select 'Not Insured' in the 'Carrier/Self Insured Name'. The remaining fields do not need to be completed. In addition, the provider will not be required to submit a professional liability insurance face sheet. However, the provider may need to submit a letter of credit to the health plan in lieu of the required professional liability insurance face sheet. If you have questions regarding your state's regulations, please refer to your affiliated health plan for clarification.
    - If your provider also has coverage under a Patient Compensation Fund, you still must complete all the questions in the 'Current Professional Liability Carrier' section as they relate to the provider's primary malpractice carrier.
- Address
- Phone number
- Original effective date
- Current effective date
- Current expiration date
- Policy number
- Type of coverage

Note: Individual coverage is any malpractice liability insurance coverage that is not shared by other providers, such as a group, IPA or hospital policy.

- Amount of coverage per occurrence
- Amount of coverage per aggregate

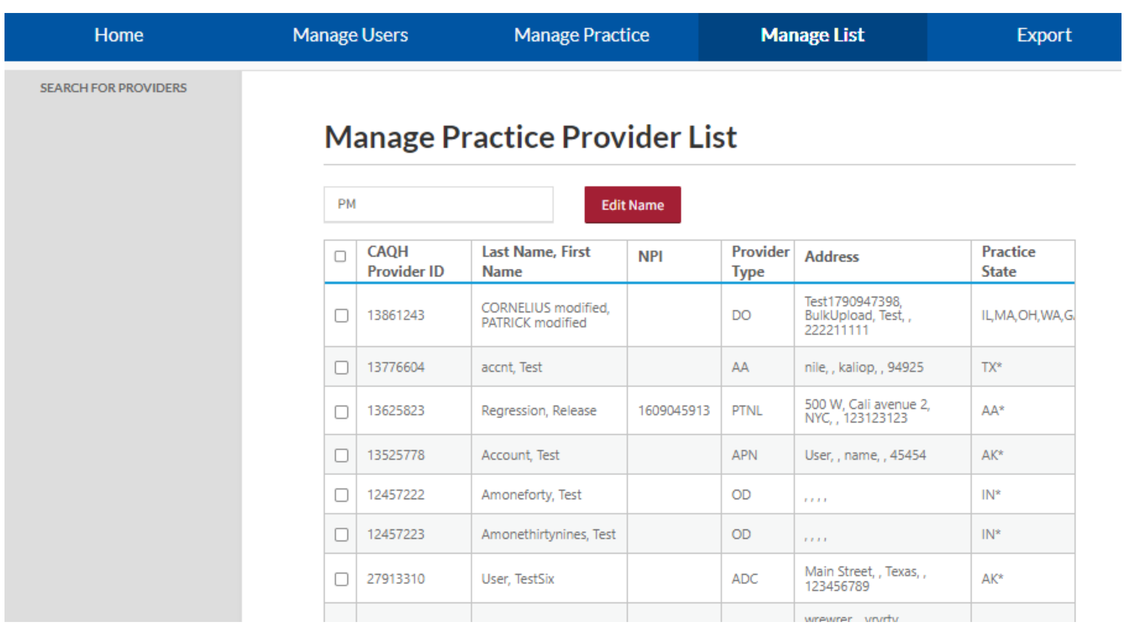
6. Manage Provider List

From the Home Page, click on “Manage List” on the top navigation bar to access and manage the list of providers associated with your account.

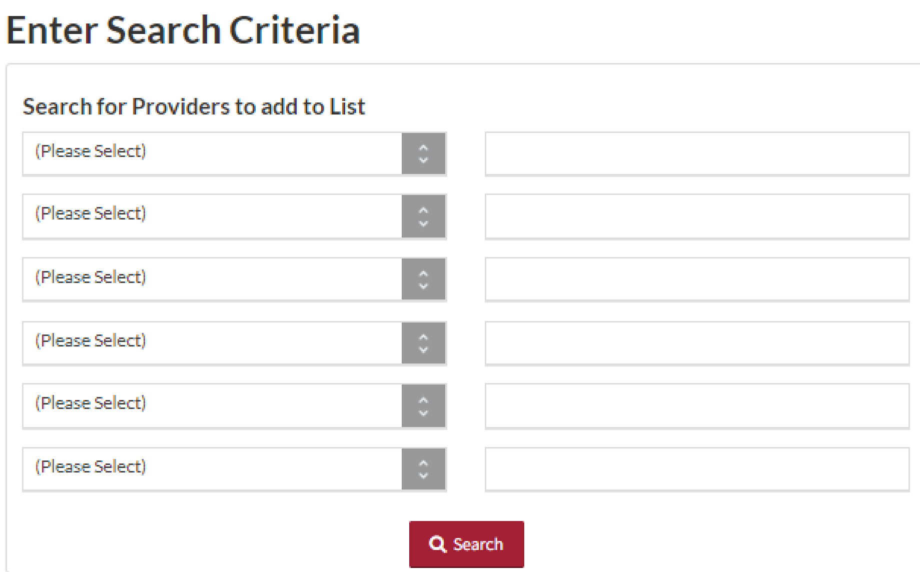


Click on “Manage Provider List” to view the list of providers associated with your account.

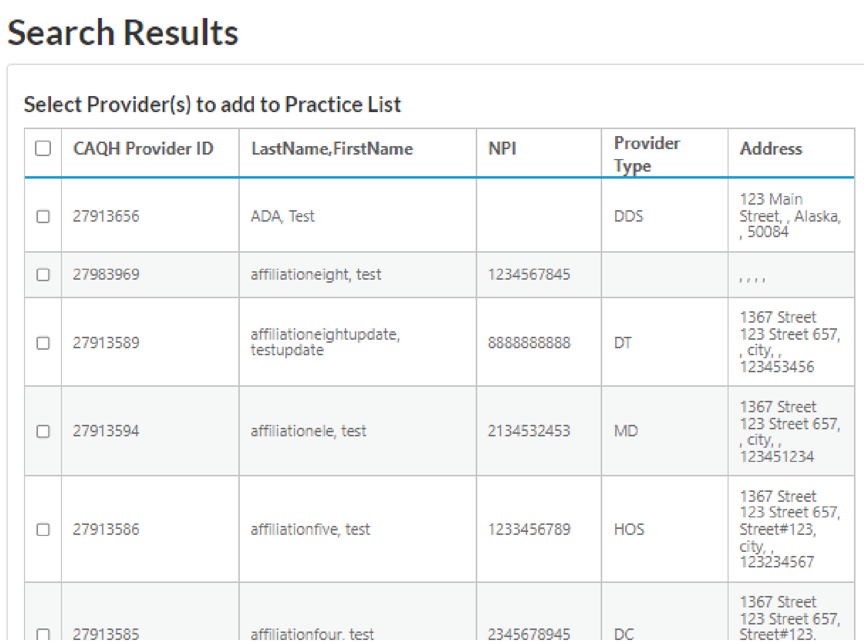
- For new users, upon initial login, the “Manage Provider List” will not contain any providers. Once a list is established, the “Manage Provider List” will be populated.
- You can delete providers from your list by clicking on the selection box next to a provider and then selecting “Delete”.
- You can also download the entire list to an Excel sheet by selecting the “Download to Excel” button.



Click on “Search for a Provider” to search for a provider from the CAQH database. This navigates to a search page to enter search criteria, including the provider’s name, CAQH Provider ID, NPI, etc.



The “Search Results” page is displayed after a successful search is completed.



Search Results

Select Provider(s) to add to Practice List

☐	CAQH Provider ID	LastName,FirstName	NPI	Provider Type	Address
☐	27913656	ADA, Test		DDS	123 Main Street, , Alaska, , 50084
☐	27983969	affiliationeight, test	1234567845		, , , ,
☐	27913589	affiliationeightupdate, testupdate	8888888888	DT	1367 Street 123 Street 657, , city, , 123453456
☐	27913594	affiliationele, test	2134532453	MD	1367 Street 123 Street 657, , city, , 123451234
☐	27913586	affiliationfive, test	1233456789	HOS	1367 Street 123 Street 657, Street#123, city, , 123234567
☐	27913585	affiliationfour, test	2345678945	DC	1367 Street 123 Street 657, Street#123,

- If the selected search criteria filters do not show any results, the system will inform you.
- You can select providers from the search results and add them to your provider list by selecting the check box next to a provider and then selecting the “Add Provider(s)” button at the bottom of the results page.
- Alternatively, you can utilize the select all checkboxes in the header row to select all providers at once.

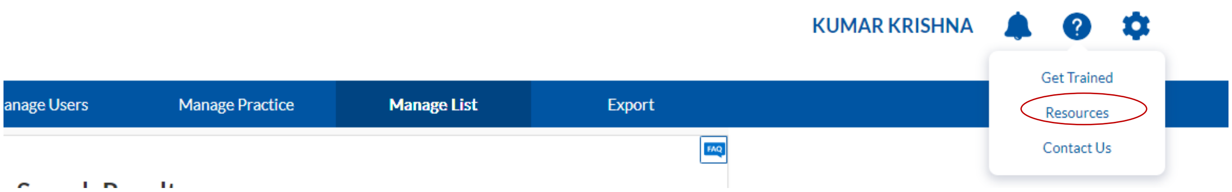
7. Bulk Upload

This section provides details to users who have been granted access by CAQH to submit a file through the Bulk Upload functionality. The purpose of the Bulk Upload functionality is to assist large practices with the data entry process of the common data profile sections. The Bulk Upload functionality allows large practice groups to upload a data file for all providers.

7.1. Creating a Bulk Upload File

The “Bulk Upload Submission Instructions” are located on the “Resources” page, accessible from the drop-down menu on the top right of the “Home” page. This document provides the file template and file specification requirements for the Bulk Upload file.

The submitted Bulk Upload file may contain new records, changed records or deleted records. CAQH will process each record, identifying any changes based on the “Action Flag”.

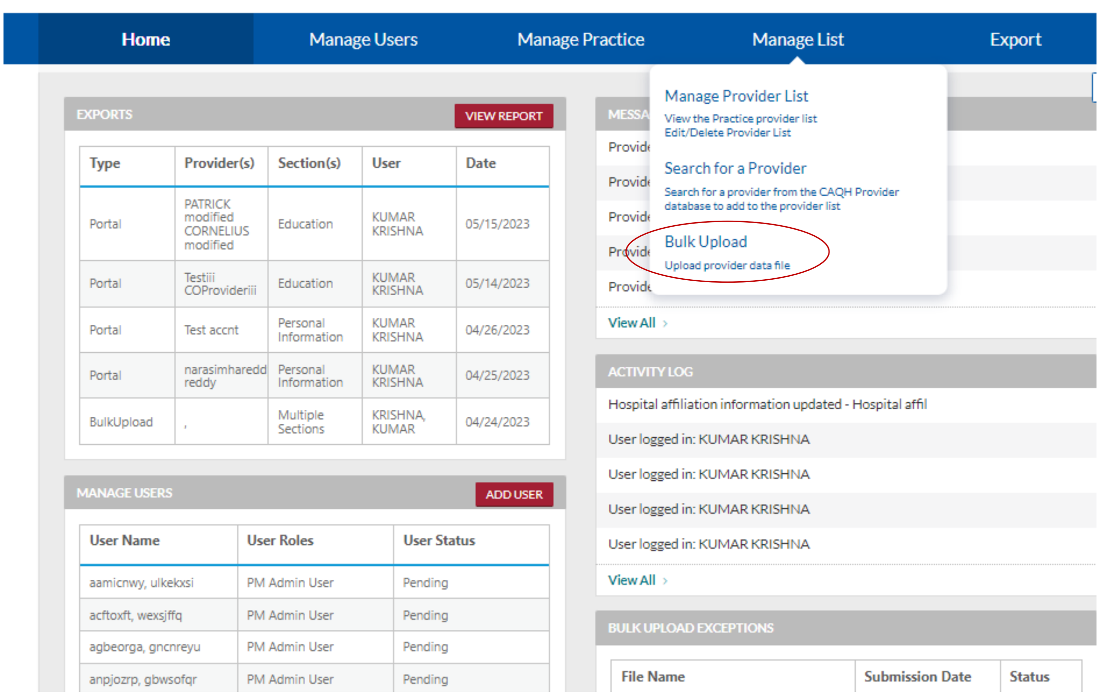


The Bulk Upload file must be named as listed in the table below.

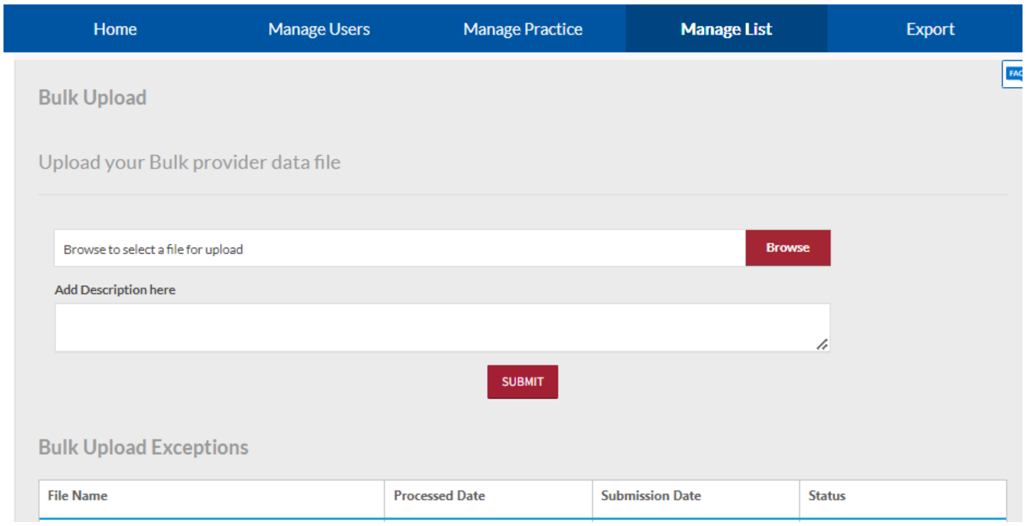
File Name	Description	Frequency	Delimiter
ProviderBulkUpload_YYYY_MM_DD_HH_MM.txt	The file name will be required when submitted by PM user.	Ad hoc	Pipe delimited

7.2. Uploading a Bulk Upload File

You can submit the Bulk Upload File to an “Incoming” folder in the CAQH secure FTP server or through the Bulk Upload page on the portal. For users with access to the “Bulk Upload” feature, you can access the bulk upload feature on the portal by clicking on “Bulk Upload” from the “Manage List” navigation menu.



Click on “Browse” to select the file you would like to upload. If desired, you can add a text description of your file. Select “Submit” to submit the file for processing. When a Bulk Upload file is submitted that does not meet basic validations, the system creates a bulk upload exceptions report. This report will include any provider data that could not be processed because the file format did not meet the required file specifications.

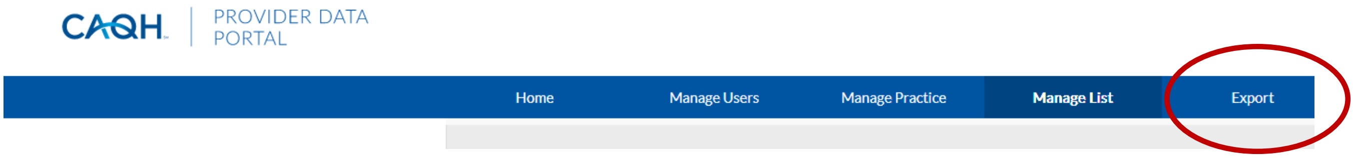


You can submit multiple Bulk Upload files; however, the files will be processed in the order in which they were received.

Once the file is processed, the data will automatically be exported to the individual provider data profiles. The provider will be able review the data and choose to import the data if desired. The provider will still need to log into ada.org/godigital to complete any remaining outstanding required fields and complete the attestation process.

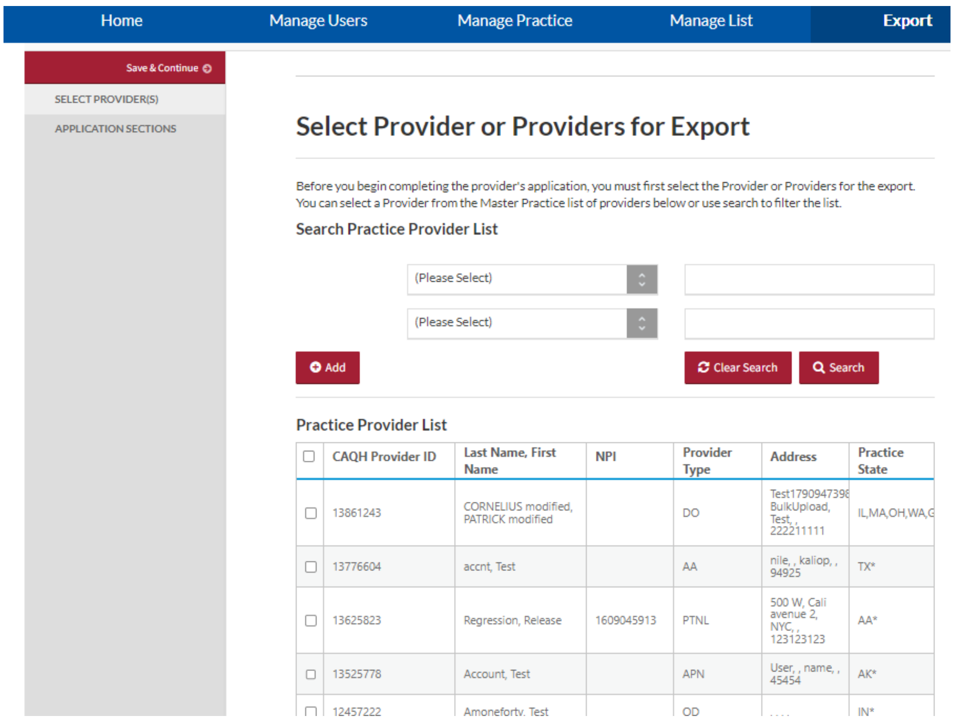
8. Export

From the Home Page, click “Export” on the top navigation bar to begin the process of exporting your data to provider accounts.



8.1. Select Provider(s) to Export

The initial step in the Export process is to select the provider(s) from your Provider List. You can select a provider or a group of providers from the Provider List created in the Manage Provider List section. As the Provider List may be lengthy, you can use the search feature to narrow the results.



You can search for a provider by the following:

- CAQH Provider ID
- CAQH Provider Type
- NPI
- TIN
- First Name
- Last Name

Select from the drop-down list and enter additional search criteria in the text box then select “Search”.

You can also “Add” or “Clear Search” criteria using the relevant buttons.

To export the provider information for a different state, select the “Yes” radio button, and then select the desired state from the drop-down menu. If a provider has multiple practice states, you will have to export the data individually by each state.

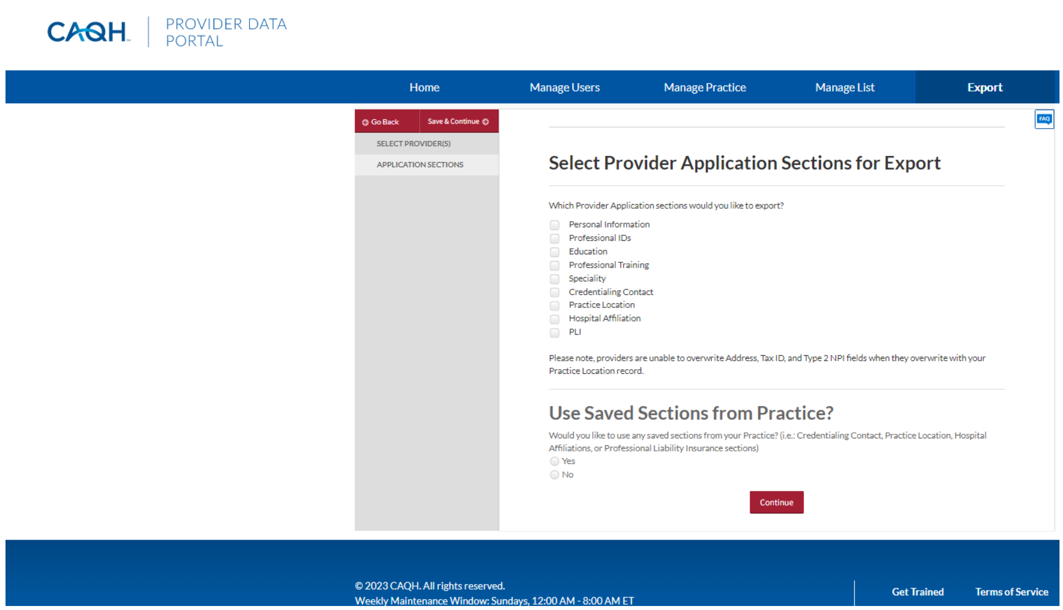
Once you have selected the provider(s) to export data to select “Add to Export”.

8.2. Select Sections for Export

The second step to the export process is to select the sections for export.

8.2.1. Single Provider Export

When exporting to a single provider, additional data profile sections are available to you to export. If a single provider with a single practice state is selected for export, the system will automatically load the applicable state’s application form for data entry. If you indicated only one provider for export, the following screen will display.



Select the sections for export by selecting the checkbox that corresponds to each section. Below are the nine application sections you can choose to export to a single provider:

1. Personal Information
2. Professional IDs
3. Education
4. Professional Training
5. Specialties
6. Credentialing Contact

7. Practice Location.
8. Hospital Affiliations
9. Professional Liability Insurance (PLI)

You must also indicate if you would like to export saved sections from the Manage Practice section of the Practice Manager Module. This includes the following common data profile sections:

- Credentialing Contact
- Professional Liability Insurance (PLI)
- Practice Location
- Hospital Affiliation information

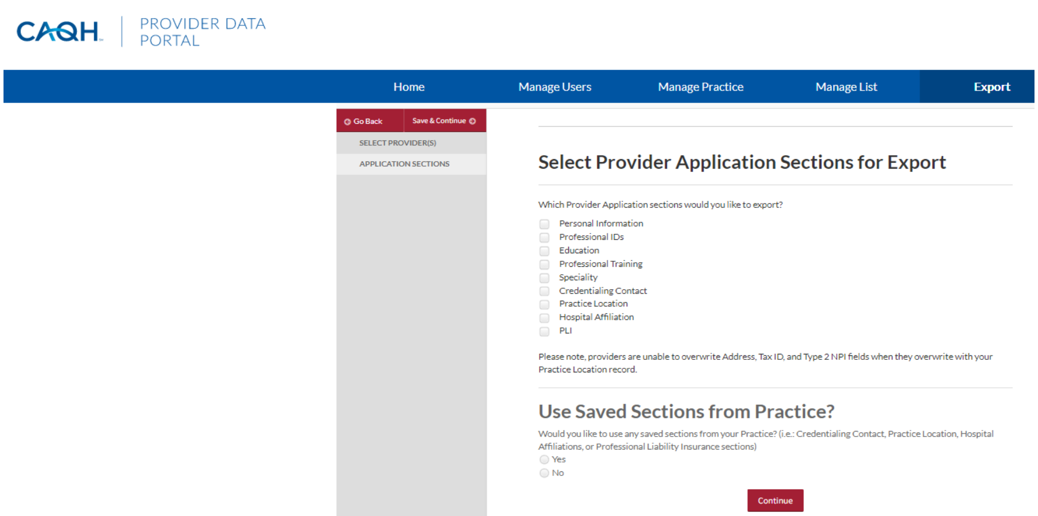
If you select “No”, the above four sections (if you selected all four) will be presented to you for data entry once you select “Continue”.

If you select “Yes”, then you must select the Practice List that contains the provider profile information you will be exporting.

Select “Continue”.

8.2.2. Multiple Providers Export

If you indicated multiple providers for export, the following screen will display. When exporting to multiple providers, you will only be able to select from the four common data profile sections for export (Credentialing Contact, Practice Location, Hospital Affiliations, and Professional Liability Insurance). The checkboxes for the sections available for single provider exports will not be active. Select the sections for export by selecting the checkbox that corresponds to each section.



You must also indicate if you would like to export saved sections from the Manage Practice section of the Practice Manager Module.

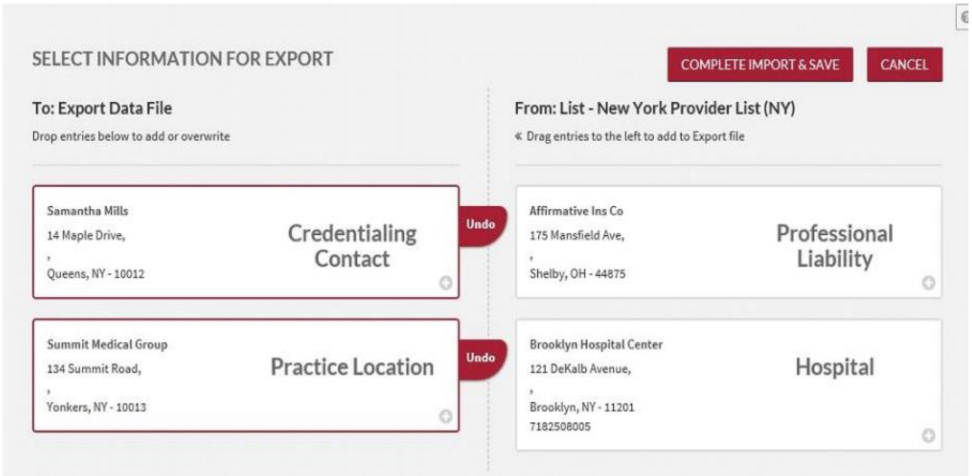
If you select “No”, the above four sections (if you selected all four) will be presented to you for data entry once you select “Continue”.

If you select “Yes”, then you must select the Practice List that contains the provider profile information you will be exporting.

Select “Continue”.

8.3. Using Saved Sections

If you choose to use saved common data, the selected common sections will be populated using the saved common sections stored in Manage Practice. On the page below, you must drag and drop the common provider information by section over to export. You can drag and drop as many sections as displayed and have the option to “Undo” your selection. Once finished, select “Complete Import & Save”.



8.4. Review Export Information

During this export stage, you can input and/or review information within the sections you selected for export.

Note: If you selected a single provider to export and selected to export any of the sections applicable only to the single provider export, i.e., Personal Information, Professional IDs, Education, Professional Training, or Specialty, these sections will be presented to you at this time to complete. Because this data is only applicable to an individual provider, the data you enter into these sections will not be saved for future use in your Practice Manager account.

Tips:

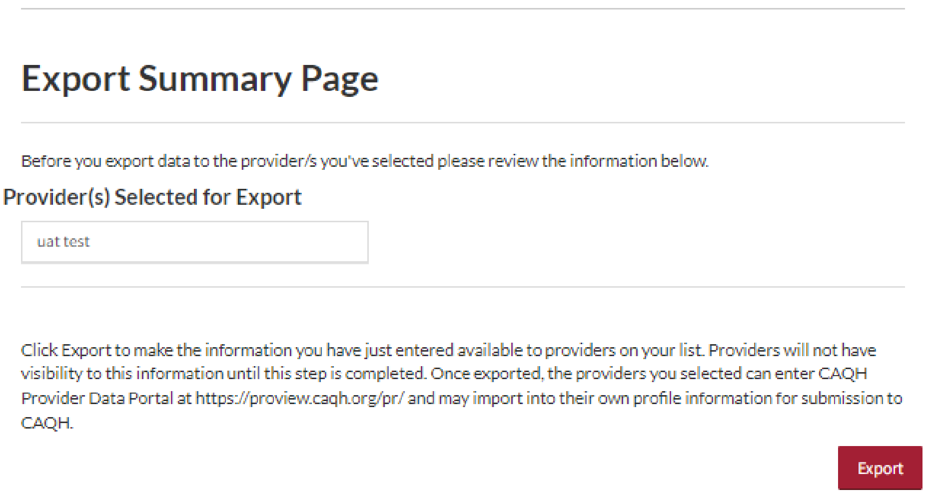
1. Throughout the screens, required fields that providers must complete prior to their attestation are indicated with a red asterisk (*). To export data, all required fields do not need to be completed by a practice manager, but they will be required before the provider can attest.
2. Use “Go to previous section” or “Save & Continue” to page forward or backward within sections.
3. It is important to click on the “Save” or “Save & Continue” button to save your information. If you close the browser without clicking “Save” or “Save & Continue”, you will lose your information.
4. Questions presented to you may vary based on the provider’s primary practice state.

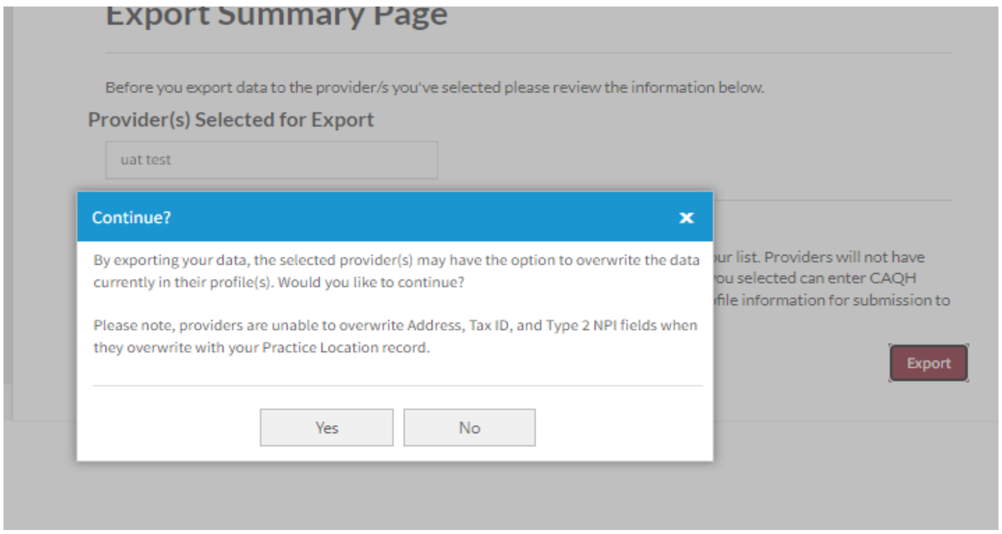
8.5. Export Summary Page

This page shows you which providers were selected, as shown below, in addition to the sections you previously chose to save. Once you have verified the following information, select “Export”.

- After the data is exported, you will not be able to see any changes to the data that the provider may make.
- You are able to see a record of the export in the “Activity Log” and the “Export History Log” on the Home page.

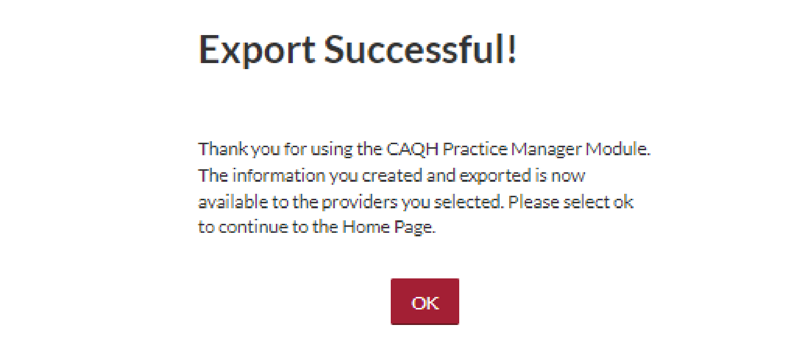
NOTE: During future exports, the only provider profile information that is saved in the Practice Manager Module is information that is stored in the four common sections (Credentialing Contact, Practice Location, Hospital Affiliation, and Professional Liability Insurance).





8.6. Export Confirmation

The “Export Successful” screen is displayed only if the export of information is successful and available to the selected providers as shown below. Selecting “OK” will bring you back to the Home page.



9. Appendix

9.1. Provider Status

Provider statuses are defined below and are system populated or manually changed by CAQH based on the status of the provider's data profile:

Status	Definition
New Provider	Provider has been entered into the system but has not been sent a registration kit.
Initial Outreach	Provider has been sent outreach but has not yet registered.
First Provider Contact	Provider has called or logged into CAQH Provider Data Portal.
Profile Data Submitted	Provider has progressed through CAQH Provider Data Portal and "attested". Still waiting for supporting documents.
Initial Profile Complete	Information has been attested to and supporting documents received.
Re-Attestation	After the provider has reached Initial Application Complete, and the provider is keeping information current and "attesting".
Expired Attestation	After attestation is greater than 120 days old.
Opt Out	Provider has asked to be removed from the CAQH database.
Provider Retired	Support Center is contacted that provider has retired from the practice.
Provider Deceased	Support Center is notified that provider is deceased.

9.2. Training Information

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.

PRACTITIONERS, GROUPS, 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.
    a. Practitioners log in to https://proview.caqh.org/PR.
    b. Groups log in to https://proview.caqh.org/EPM.
    c. 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.

9.3. Help Desk Information

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).

PRACTITIONERS, GROUPS, 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.
  - Practice Managers log in to https://proview.caqh.org/PM.
  - Groups chat coming soon.
- Call us at 888-599-1771.
  - Phone Hours: Monday – Friday: 8:00 AM - 8:00 PM (ET).

Revision Log

Version	Updates
1.0	Original
2.0	Updated with the rebranding.

Connect. Solve. Transform.℠

CAQH℠