



CAQH Provider Data Portal

---

# Practice Manager User Guide

Version #2.0

Last Updated: 06/12/2023



# Practice Manager User Guide

Version # 2.0

Last Updated: 06/12/2023

© 2023 CAQH All rights reserved

## Contents

<b>1. Introduction</b>	4
1.1. CAQH Provider Data Portal Overview	4
<b>2. Registration</b>	5
2.1. New Users- Administrators	5
2.2. New Users	5
2.3. Self-Registration	6
2.4. Creating a Username and Password	7
2.5. Forgotten Username and/or Password	9
<b>3. Home Page</b>	11
<b>4. Manage User</b>	14
4.1. Manage User	14
4.2. Manage Users	15
4.3. Add User	15
4.4. Edit User	16
4.5. Search for User	17
<b>5. Manage Practice</b>	19
5.1. Add List	19
5.2. Credentialing Contact	22
5.3. Practice Location	22
5.4. Hospital Affiliation	24
<b>6. Manage Provider List</b>	27
<b>7. Bulk Upload</b>	29
7.1. Creating a Bulk Upload File	29
7.2. Uploading a Bulk Upload File	29
<b>8. Export</b>	31
8.1. Select Provider(s) to Export	31
8.2. Select Sections for Export	32
8.2.1. Single Provider Export	32
8.2.2. Multiple Providers Export	33
8.3. Using Saved Sections	34
8.4. Review Export Information	34
8.5. Export Summary Page	34
8.6. Export Confirmation	35

<b>9. Appendix</b> .....	36
9.1. Provider Status.....	36
9.2. Training Information .....	36
9.3. Help Desk Information.....	37

# 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.

The screenshot shows a web interface with a navigation bar at the top containing four tabs: "Provider", "Provider Groups", "Practice Managers" (which is highlighted with a blue underline), and "Participating Organizations". Below the navigation bar, the page is split into two main sections. The left section, titled "Provider Data Portal" in large blue font, includes the text "Formerly CAQH ProView" and a welcome message: "Welcome to the CAQH Provider Data Portal formerly known as CAQH ProView. CAQH Provider Data Portal eliminates duplicative paperwork with organizations that require your professional and practice information for claims administration, credentialing, directory services, and more." Below this, it states: "The Practice Manager workflow is designed for office managers, allowing for 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." Further down, it says: "Help reduce inquiries for your administrative information and save even more time by helping your providers complete their profile information. Sign in on the right or click to register and create a new practice manager account." At the bottom of this section, under the heading "CAQH Reference Material", there are three links: "Provider Data Dentist Practice Manager User Guide", "Provider Data Practice Manager User Guide v1.3", and "Provider Data for Groups Registration and Information". The right section, titled "Sign In" in large blue font, contains a form with fields for "Username" and "Password", each with a "Forgot" link below it. There is also a "Remember me" checkbox. A blue "Sign In" button is positioned below the form. At the bottom of the right section, the text "Need Access?" is followed by a link "Click here to register".

### 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.

### CAQH Practice Manager Self Registration

#### Practice Information

* Practice Name	* Practice TIN	
<input type="text"/>	<input type="text"/>	
Practice Department	Practice NPI	
<input type="text"/>	<input type="text"/>	
* Practice Phone	Extension	
<input type="text"/>	<input type="text"/>	
* Practice Address		
<input type="text"/>		
Address 2		
<input type="text"/>		
* City	* State	* Zip Code
<input type="text"/>	(Please Select) <input type="text"/>	<input type="text"/>
* Practice E-mail Address		
<input type="text"/>		
* Practice E-mail Address (Confirmation)		
<input type="text"/>		

#### User Information

You will also need to provide your user account information.

### User Information

\* First Name

Middle Name

\* Last Name

\* Phone Number

Extension

\* Personal Work E-mail Address

\* Personal Work E-mail Address (Confirmation)

Number of Providers in Practice

(Please Select)

## 2.4. Creating a Username and Password

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

### Account Information

**Please enter a username**  
Your username must be at least 8 characters. It can be made up of numbers and/or letters, but it cannot include special characters like @ or #.

\* Username

**Please enter a password**  
Your password must be at least 8 characters and cannot be the same as your username. If your old password meets these requirements, you may enter it here.

\* Password

\* Re-enter 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--

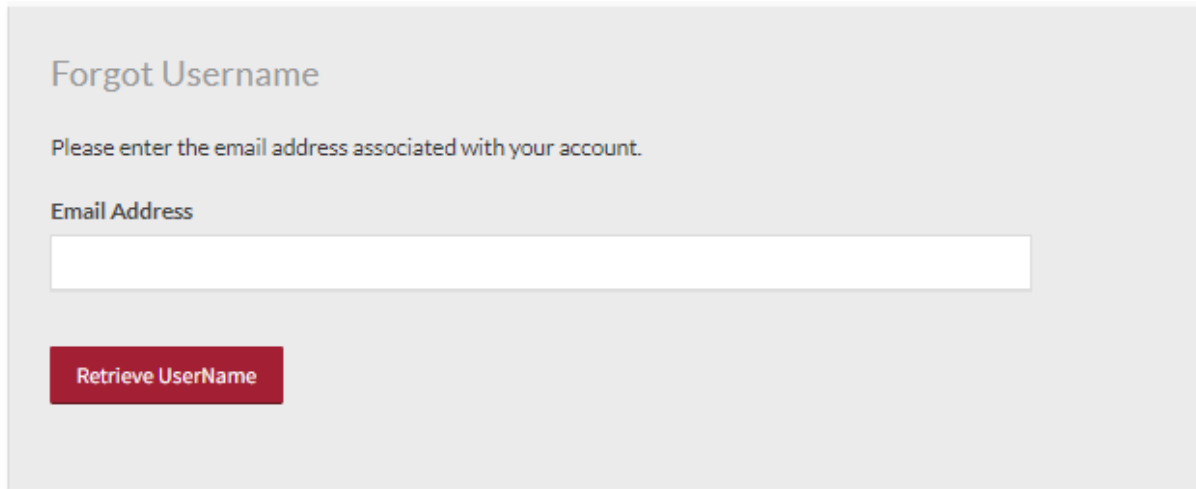
\* Security Answer 3

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.



The screenshot shows a form titled "Forgot Username" on a light gray background. Below the title is the instruction: "Please enter the email address associated with your account." There is a text input field labeled "Email Address" which is currently empty. Below the input field is a red button with the text "Retrieve UserName" in white.

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.



---

## Forgot password?

You've come to the right place to reset your password.  
Please provide the information below to help us find your account.

Username

I have read and agree to the [CAQH Terms of Service](#).

Continue

[Forgot Username](#)

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

Reset Password

Please reset your Password by entering the information below.

Password

Re-enter Password

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.

Your new password has been changed!

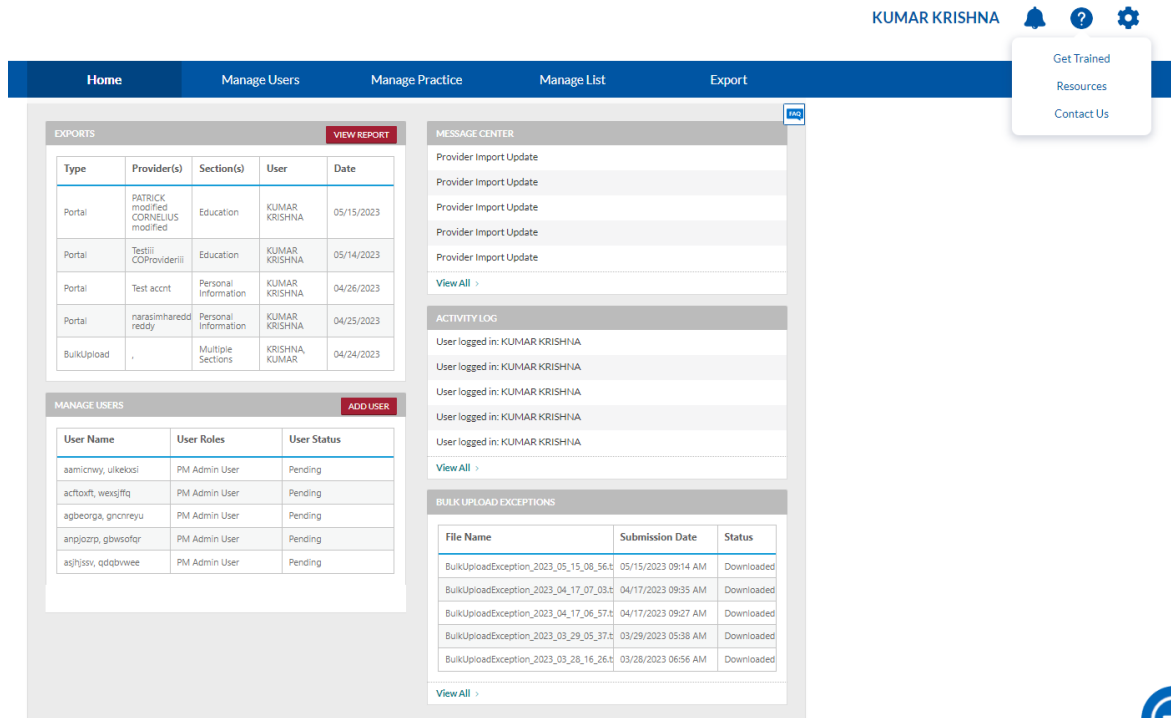
Please [click here](#) to proceed to your CAQH Homepage.

### 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.

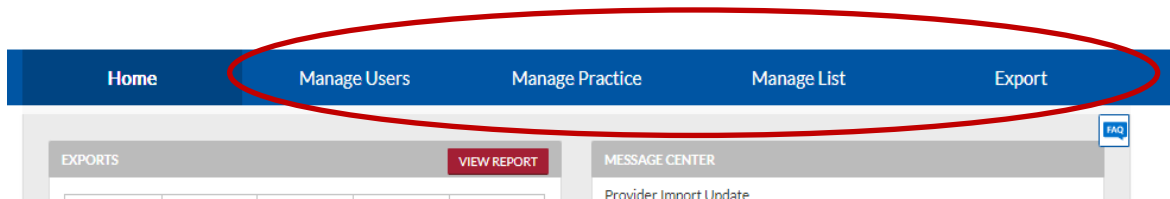


The Home page displays five components:

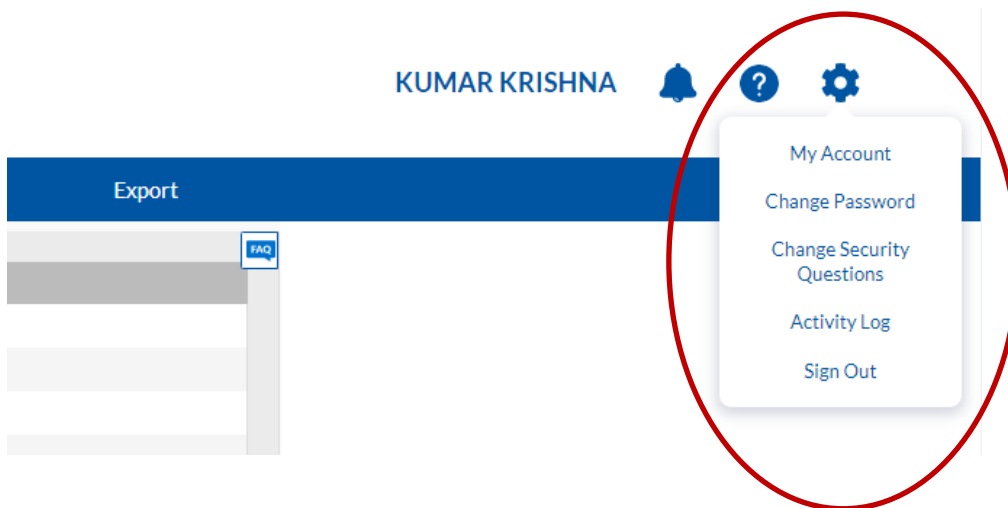
1. Exports
  - The Exports section displays a summary of recent exports, the related user who performed the export, and the date exported.
2. Manage Users
  - This section displays a list of most recent users, their roles and statuses. Only Administrators can view the Manage Users section.
3. Message 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.

A screenshot of the 'Basic Information' form for editing a user profile. The form is titled 'Basic Information' and contains several input fields. The fields are: 'First Name\*' (KUMAR), 'Middle Name' (MURARI), 'Last Name\*' (KRISHNA), 'Title', 'Department', 'Phone Number\*' (534-534-5345), 'Phone Extension', 'Address 1', 'Address 2', 'City\*' (adas), 'State\*' (Please Select), 'Zip Code\*' (32688-4922), 'Personal Work Email Address\*' (murari.singh28@gmail.com), and 'Personal Work Email Address (Confirmation)\*'. A red 'SAVE' button is located at the bottom of the form.

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

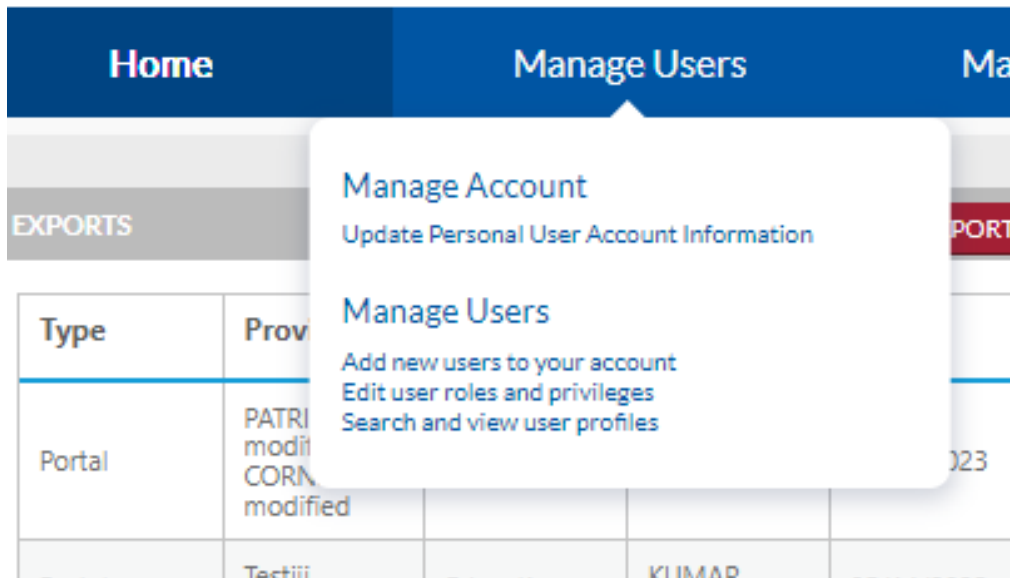
Expand to view Activity Details

▶ 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.

#### MY ACCOUNT - TESTPMM2

Basic Information		
First Name*	Middle Name	Last Name*
<input type="text" value="KUMAR"/>	<input type="text" value="MURARI"/>	<input type="text" value="KRISHNA"/>
Title	Department	
<input type="text"/>	<input type="text"/>	
Phone Number*	Phone Extension	
<input type="text" value="534-534-5345"/>	<input type="text"/>	
Address 1		Address 2
<input type="text"/>		<input type="text"/>
City*	State*	Zip Code*
<input type="text" value="adas"/>	<input type="text" value="(Please Select)"/>	<input type="text" value="32688-4922"/>
Personal Work Email Address*		Personal Work Email Address (Confirmation)*
<input type="text" value="murari.singh28@gmail.com"/>		<input type="text"/>

SAVE

## 4.2. Manage Users

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

The screenshot shows the 'Manage Users' page with a navigation bar at the top containing 'Home', 'Manage Users', 'Manage Practice', 'Manage List', and 'Export'. On the left, there is a sidebar with 'ADD USER' and 'SEARCH FOR USER'. The main content area features a 'Manage Users' title and a table with the following data:

User Name	User Roles	User Status
aamicnwy, ulkeloxsi	PM Admin User	Pending
actfoxt, wexsjffq	PM Admin User	Pending
agbeorga, gncnreyu	PM Admin User	Pending
anjjozrp, gbwsqfqr	PM Admin User	Pending
asjhjssv, qdqbwwee	PM Admin User	Pending
awbqxqvb, ewwejqrw	PM Admin User	Pending
bdxkzqr, tovibrfe	PM Admin User	Pending
bkqshwd, cnlwqonb	PM Admin User	Pending
bovhoxrj, aebhqot	PM Admin User	Pending
bpregzws, rimdlmqp	PM Admin User	Pending

Below the table is a pagination control showing '1 of 16 pages (158 items)' and a 'Download to Excel' button. On the right side, there is a sidebar with '158 Users' and a list of user names.

## 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.

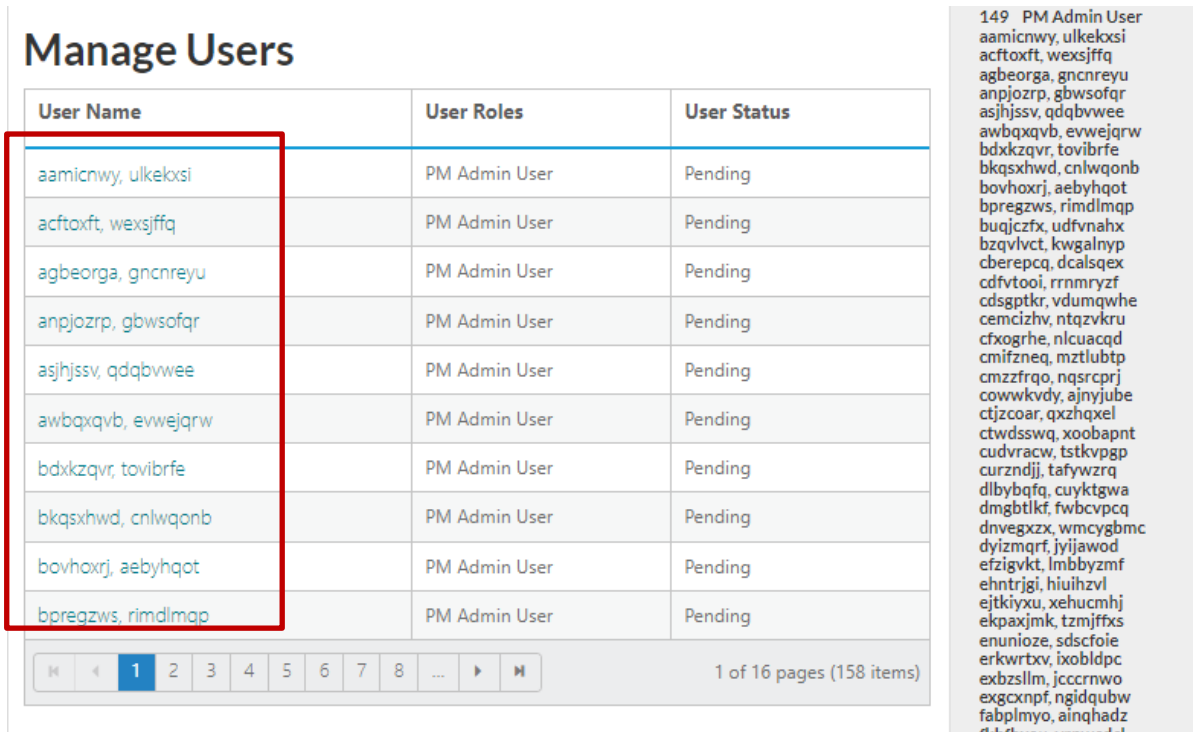
The screenshot shows the 'ADD USER' form with two main sections: 'Basic Information' and 'User Account Information'. The 'Basic Information' section includes fields for First Name\*, Middle Name, Last Name\*, Title, Department, Phone Number\*, Phone Extension, Address 1, Address 2, City\*, State\* (with a dropdown menu), and Zip Code\*. The 'User Account Information' section includes a 'USER TYPE\*' dropdown menu and a checkbox labeled 'Please select check box if this user needs Bulk Upload functionality'. At the bottom of the form is an 'Add User' button.

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.



The screenshot shows the "Manage Users" interface. It features a table with columns for "User Name", "User Roles", and "User Status". A red box highlights the first nine rows of the table. To the right of the table is a detailed view of the selected user, "149 PM Admin User", listing their username and role.

User Name	User Roles	User Status
aamicnwy, ulkelxsi	PM Admin User	Pending
acftoxft, wexsjffq	PM Admin User	Pending
agbeorga, gncnreyu	PM Admin User	Pending
anjjozrp, gbwsqofr	PM Admin User	Pending
asjhjssv, qdqbwwee	PM Admin User	Pending
awbqxqvb, ewwejqrw	PM Admin User	Pending
bdxkzqvr, tovirbfe	PM Admin User	Pending
bkqsxhwd, cnlwqonb	PM Admin User	Pending
bovhoxrj, aebyhqot	PM Admin User	Pending
bpreqzws, rimdlmap	PM Admin User	Pending

149 PM Admin User  
aamicnwy, ulkelxsi  
acftoxft, wexsjffq  
agbeorga, gncnreyu  
anjjozrp, gbwsqofr  
asjhjssv, qdqbwwee  
awbqxqvb, ewwejqrw  
bdxkzqvr, tovirbfe  
bkqsxhwd, cnlwqonb  
bovhoxrj, aebyhqot  
bpreqzws, rimdlmap

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).



## Edit User

### Basic Information

First Name*	Middle Name	Last Name*
<input type="text" value="ulkekosi"/>	<input type="text"/>	<input type="text" value="aamicrwy"/>
Title	Department	
<input type="text"/>	<input type="text"/>	
Phone Number*	Phone Extension	
<input type="text" value="236-624-6736"/>	<input type="text" value="address1"/>	
Address 1	Address 2	
<input type="text"/>	<input type="text"/>	
City*	State*	Zip Code*
<input type="text" value="test"/>	<input type="text" value="(Please Select)"/>	<input type="text" value="84567"/>
Personal Work Email Address*	Personal Work Email Address (Confirmation)*	
<input type="text" value="autoitwats@gmail.com"/>	<input type="text"/>	

### User Account Information

**USER TYPE\***

Please select check box if this user needs Bulk Upload functionality

**BULK UPLOAD STATUS**

Status:

**USER STATUS\***

Pending

Active

Suspended

SAVE

### 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

## SEARCH FOR A USER

### Quick Search

<b>Username</b> <input type="text"/>	<b>User Type</b> Select <input type="button" value="v"/>
<b>First Name</b> <input type="text"/>	<b>User Status</b> Select <input type="button" value="v"/>
<b>Last Name</b> <input type="text"/>	<b>E-mail Address</b> <input type="text"/>

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.

## SEARCH RESULTS

User Name	User Roles	User Status
test, new	PM Basic User	Pending
newLastName, newFirstName	PM Admin User	Pending
Test, New	PM Admin User	Pending

« ‹ 1 › » 1 of 1 pages (3 items)

## 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:

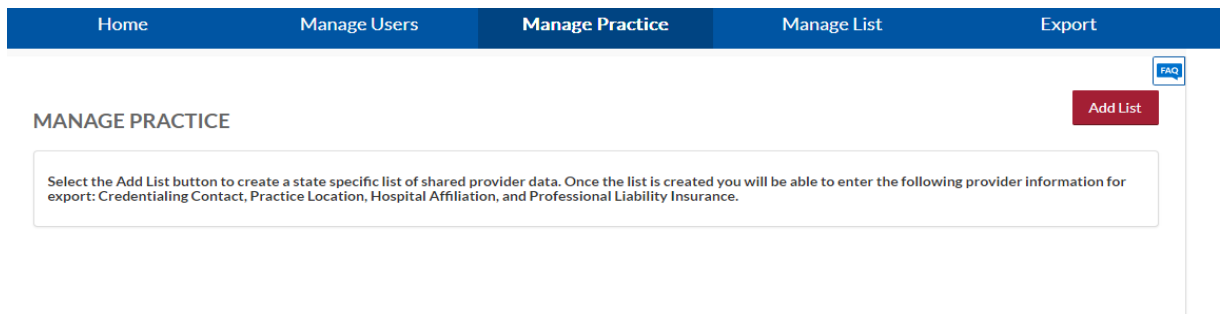
- Credentialing Contact
- Practice Location
- Hospital Affiliation
- Professional Liability Insurance



### 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”.

**ADD LIST**

List Name\*

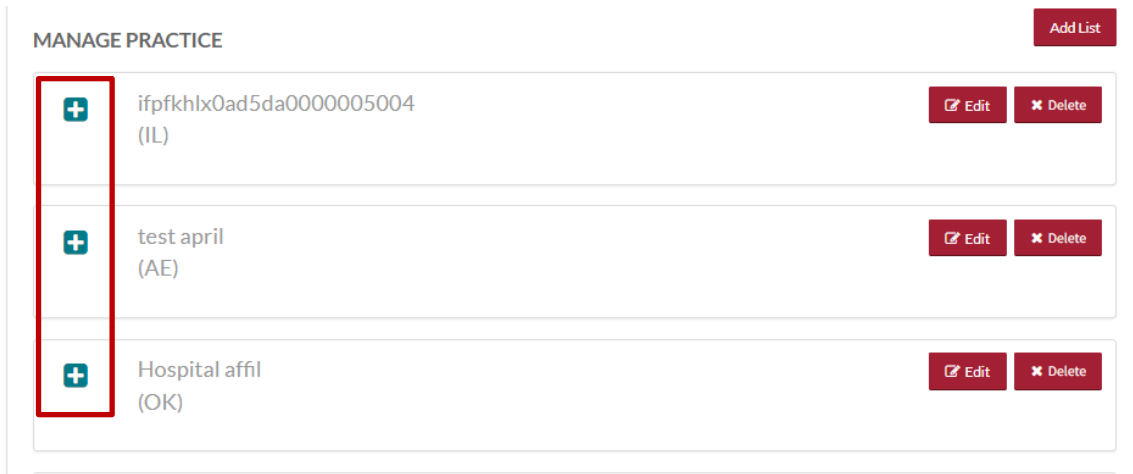
In which state does your associated providers' primary practice reside?\*

--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.

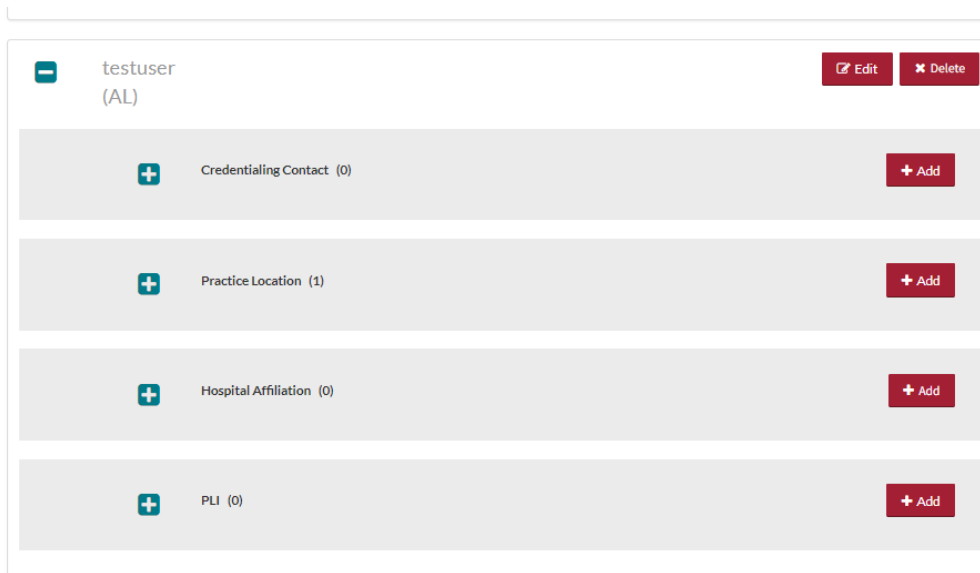


Within each practice group, there are four common sections where you may enter data for multiple providers.

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.

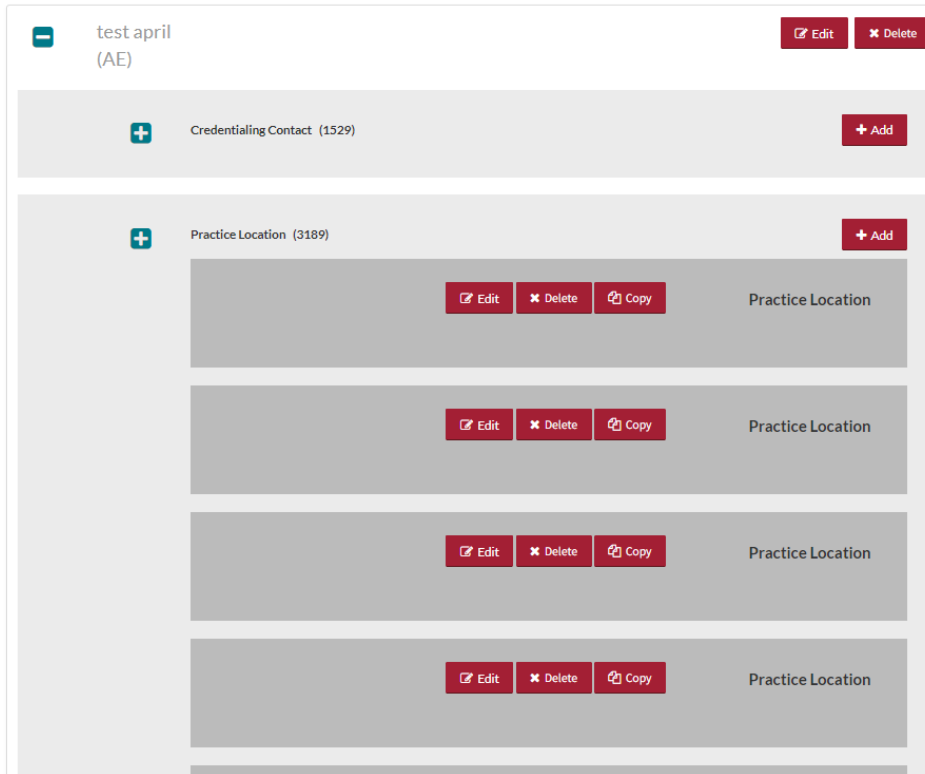
The information entered and saved in each of these sections can be exported to a single provider or multiple providers.

- 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.

### CREDENTIALING CONTACT INFORMATION

#### Credentialing Contact

First Name	Middle Name	Last Name
<input type="text"/>	<input type="text"/>	<input type="text"/>
Street 1		
<input type="text"/>		
Street 2		
<input type="text"/>		
City	State	Zip Code
<input type="text"/>	(Please Select) <input type="button" value="v"/>	<input type="text"/>
Country	Province	
(Please Select) <input type="button" value="v"/>	<input type="text"/>	
Phone Number	Fax Number	Email Address
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Copy to a different list on save		
<input type="button" value="Save"/>	(Select) <input type="button" value="v"/>	

## 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" 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



## Primary Hospital

**State \***  **Hospital Name \***  Other (Not Listed)

**Street 1 \***

**Street 2**

**City \***  **Zip Code \***

**Phone Number**  **Fax Number**

**Start Date**  **End Date**

**Department**

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.


## PROFESSIONAL LIABILITY INSURANCE

Please add a record for each professional liability insurance policy. A Professional Liability Insurance Face Sheet or Certificate of Insurance will be required for each current policy that is entered. Each provider must maintain at least one current policy record (with a Current Expiration Date in the future).


- It is recommended to enter 10 years of insurance information to avoid additional follow-up from authorized organizations. Some states and credentialing organizations may have different requirements for this section. A Face Sheet or Certificate of Insurance is not required for expired policies.
- If a provider does not carry professional liability insurance, you will be required to submit a confirmation letter stating lack of coverage or providing further explanation.
- When a Current Expiration Date appears in red, that policy has expired. Click "Renew" to create an updated record with a new Current Effective Date and Current Expiration Date.
- Only Delete a policy record if it was entered in error or if expired more than 10 years ago.

\* Policy Number

Original Effective Date

\* Current Effective Date

\* Current Expiration Date

\* Carrier/Self Insured Name

  Other (Not Listed) 

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.

The screenshot shows the top navigation bar with 'Manage List' highlighted. A dropdown menu is open, showing options: 'Manage Provider List', 'Search for a Provider', and 'Bulk Upload'. The 'Manage List' option is circled in red.

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.

The screenshot shows the 'Manage Practice Provider List' page. It features a search bar with 'PM' entered and an 'Edit Name' button. Below is a table with columns: CAQH Provider ID, Last Name, First Name, NPI, Provider Type, Address, and Practice State.

<input type="checkbox"/>	CAQH Provider ID	Last Name, First Name	NPI	Provider Type	Address	Practice State
<input type="checkbox"/>	13861243	CORNELIUS modified, PATRICK modified		DO	Test1790947398, BulkUpload, Test, , 222211111	IL,MA,OH,WA,G
<input type="checkbox"/>	13776604	acctnt, Test		AA	nlie, , kaliop, , 94925	TX*
<input type="checkbox"/>	13625823	Regression, Release	1609045913	PTNL	500 W, Cali avenue 2, NYC, , 123123123	AA*
<input type="checkbox"/>	13525778	Account, Test		APN	User, , name, , 45454	AK*
<input type="checkbox"/>	12457222	Amonforty, Test		OD	....	IN*
<input type="checkbox"/>	12457223	Amonthirtytnines, Test		OD	....	IN*
<input type="checkbox"/>	27913310	User, TestSix		ADC	Main Street, , Texas, , 123456789	AK*

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.

## Enter Search Criteria

**Search for Providers to add to List**

(Please Select) <span style="float: right;">⌵</span>	
(Please Select) <span style="float: right;">⌵</span>	
(Please Select) <span style="float: right;">⌵</span>	
(Please Select) <span style="float: right;">⌵</span>	
(Please Select) <span style="float: right;">⌵</span>	
(Please Select) <span style="float: right;">⌵</span>	

🔍 Search

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
<input type="checkbox"/>	27913656	ADA, Test		DDS	123 Main Street, , Alaska, , 50084
<input type="checkbox"/>	27983969	affiliationeight, test	1234567845		, , , ,
<input type="checkbox"/>	27913589	affiliationeightupdate, testupdate	8888888888	DT	1367 Street 123 Street 657, , city, , 123453456
<input type="checkbox"/>	27913594	affiliationele, test	2134532453	MD	1367 Street 123 Street 657, , city, , 123451234
<input type="checkbox"/>	27913586	affiliationfive, test	1233456789	HOS	1367 Street 123 Street 657, Street#123, city, , 123234567
<input type="checkbox"/>	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.

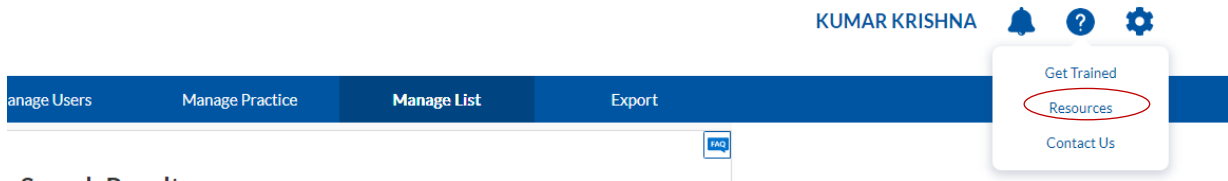
## 7. Bulk Upload

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”.

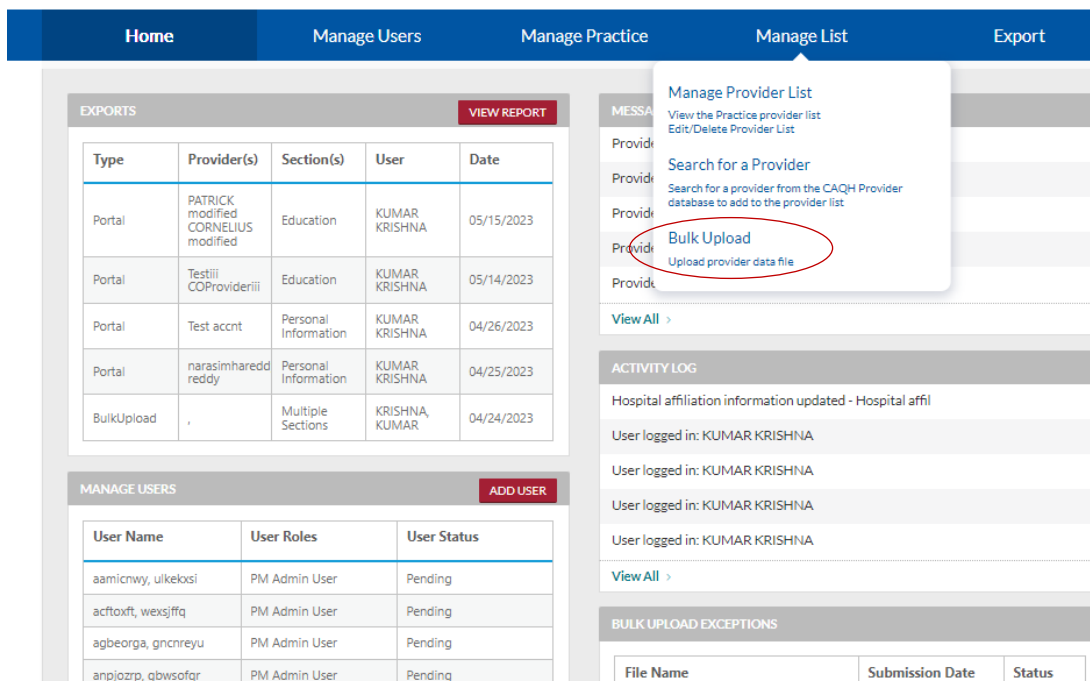


The Bulk Upload file must be named as listed in the table below.

File Name	Description	Frequency	Delimiter
<b>ProviderBulkUpload_YYYY_MM_DD_HH_MM.txt</b>	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.

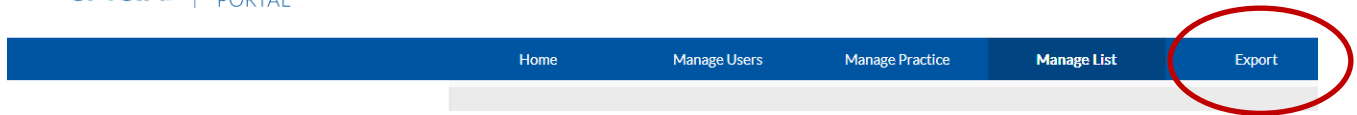
The screenshot shows a web interface with a blue navigation bar at the top containing the following items: Home, Manage Users, Manage Practice, Manage List, and Export. Below the navigation bar is a section titled "Bulk Upload" with a sub-header "Upload your Bulk provider data file". This section contains a file selection field with the placeholder text "Browse to select a file for upload" and a red "Browse" button. Below the file field is a text area with the placeholder "Add Description here" and a red "SUBMIT" button. At the bottom of the "Bulk Upload" section is a table titled "Bulk Upload Exceptions". The table has four columns: "File Name", "Processed Date", "Submission Date", and "Status".

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](http://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.

A screenshot of the 'Select Provider or Providers for Export' page. The page has a dark blue navigation bar with 'Home', 'Manage Users', 'Manage Practice', 'Manage List', and 'Export'. Below the navigation bar is a sidebar with 'Save & Continue' and 'SELECT PROVIDER(S)'. The main content area is titled 'Select Provider or Providers for Export' and contains instructions, a search form, and a table of providers.

Before you begin completing the provider's application, you must first select the Provider or Providers for the export. You can select a Provider from the Master Practice list of providers below or use search to filter the list.

Search Practice Provider List

(Please Select) [dropdown] [text box]

(Please Select) [dropdown] [text box]

[Add] [Clear Search] [Search]

Practice Provider List

<input type="checkbox"/>	CAQH Provider ID	Last Name, First Name	NPI	Provider Type	Address	Practice State
<input type="checkbox"/>	13861243	CORNELIUS modified, PATRICK modified		DO	Test1790947396 BulkUpload, Test, 222211111	IL,MA,OH,WA,G
<input type="checkbox"/>	13776604	accnt, Test		AA	nile, kallio, , 94925	TX*
<input type="checkbox"/>	13625823	Regression, Release	1609045913	PTNL	500 W. Cali avenue 2, NYC, , 123123123	AA*
<input type="checkbox"/>	13525778	Account, Test		APN	User, name, , 45454	AK*
<input type="checkbox"/>	12457222	Amonfortv. Test		OD	....	IN*

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.

Would you like to export provider information for a different state.

- Yes
- No

Please select the new practice state?

Add to Export

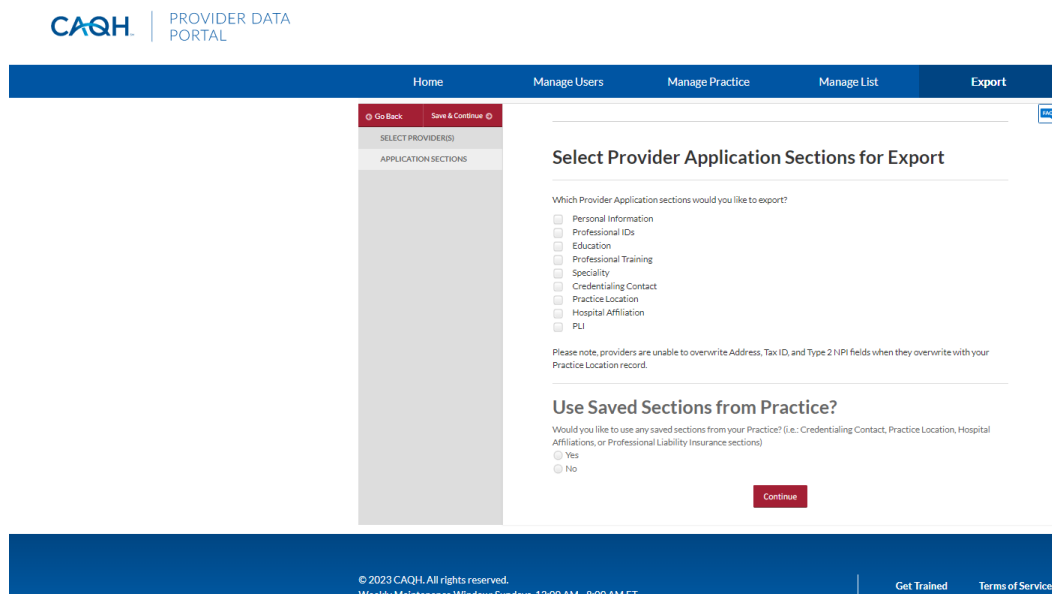
Once you have selected the provider(s) to export data to select “Add to Export”.

## 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.

The screenshot shows the CAQH Provider Data Portal interface. At the top, there is a navigation bar with the following tabs: Home, Manage Users, Manage Practice, Manage List, and Export. The main content area is titled "Select Provider Application Sections for Export". It contains a sidebar on the left with "SELECT PROVIDERS" and "APPLICATION SECTIONS". The main content area asks "Which Provider Application sections would you like to export?" and lists the following sections with checkboxes: Personal Information, Professional IDs, Education, Professional Training, Speciality, Credentialing Contact, Practice Location, Hospital Affiliation, and PLI. Below this, there is a section titled "Use Saved Sections from Practice?" with the text "Would you like to use any saved sections from your Practice? (i.e.: Credentialing Contact, Practice Location, Hospital Affiliations, or Professional Liability Insurance sections)" and radio buttons for "Yes" and "No". A "Continue" button is located at the bottom right of the form.

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”.

The screenshot shows a web interface for selecting information for export. It is divided into two main areas: 'To: Export Data File' and 'From: List - New York Provider List (NY)'. Each area contains several sections representing different types of information. In the 'To' area, there are sections for 'Credentialing Contact' and 'Practice Location'. In the 'From' area, there are sections for 'Professional Liability' and 'Hospital'. Each section contains provider details and a section name. Red 'Undo' buttons are located between the sections in both areas. At the top right, there are two buttons: 'COMPLETE IMPORT & SAVE' and 'CANCEL'.

### 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).

---

## Export Summary Page

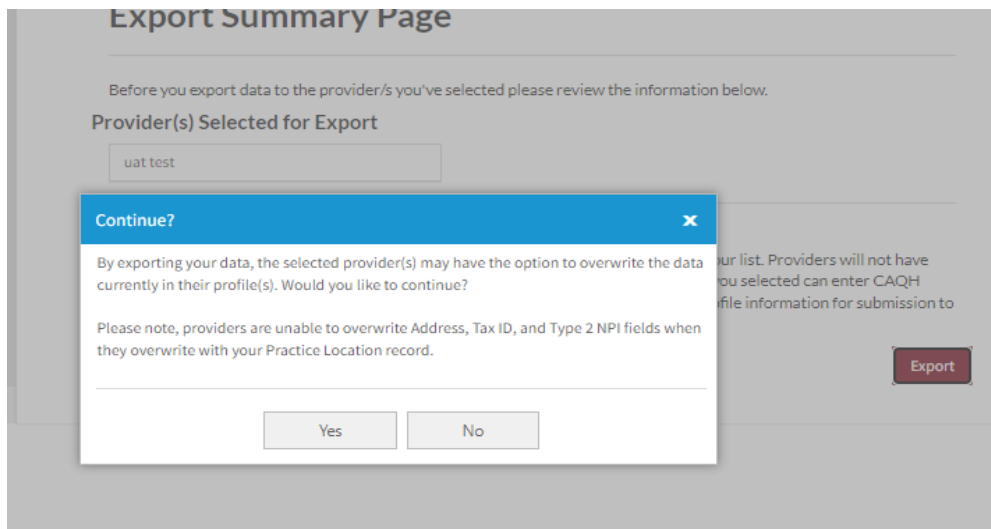
---

Before you export data to the provider/s you've selected please review the information below.

### Provider(s) Selected for Export

Click Export to make the information you have just entered available to providers on your list. Providers will not have visibility to this information until this step is completed. Once exported, the providers you selected can enter CAQH Provider Data Portal at <https://proview.caqh.org/pr/> and may import into their own profile information for submission to CAQH.

Export



## 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.

## Export Successful!

Thank you for using the CAQH Practice Manager Module.  
The information you created and exported is now available to the providers you selected. Please select ok to continue to the Home Page.

OK

## 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.**<sup>™</sup>

CAQH<sup>SM</sup>