CAQH ProView
File Upload/Download Instructions via SFTP

At launch of CAQH ProView, the URL for the file server will change. Listed below are instructions on how to upload and download files from CAQH ProView's new server. Please note the following:

- There will be 2 folders available on the CAQH ProView server – Incoming and Outgoing.
- If your folder configuration was previously set at \username\Outgoing, you will need to reconfigure to \Outgoing. If your folder configuration was previously set at \username\Incoming, you will need to reconfigure to \Incoming.
- These folders will be empty at launch, since files from the existing FTP server will not be copied over.
- The credentials necessary to access the SFTP server will be at the user level, i.e. the individual user's CAQH ProView username and password.

MANUAL UPLOAD/DOWNLOAD: If your organization currently manually uploads/downloads files from CAQH's FTP server, follow the steps below to access CAQH ProView SFTP server once the system launches:

1. Before accessing the SFTP server, login to the CAQH ProView application to update your username/password based on the enhanced security requirements.
2. Ensure that your software can support a SSH/SFTP connection.
3. Update the old FTP url (ftpupd.caqh.org) with the new SFTP url (sftp.proview.caqh.org). Port number will remain as 22.
4. Set connection to SSH/SFTP.
5. If your folder configuration was previously set at \username\Outgoing, you will need to reconfigure to \Outgoing. If your folder configuration was previously set at \username\Incoming, you will need to reconfigure to \Incoming.
6. Connect.
7. Login using your updated CAQH ProView username/password.
8. Start using the new SFTP server to upload and download files from CAQH.

AUTOMATED UPLOAD/DOWNLOAD: If your organization connects to CAQH's FTP server through automated scripts, follow the steps below to access CAQH ProView's SFTP server once the system launches:

1. Before accessing the SFTP server, login to the CAQH ProView application to update your username/password based on the enhanced security requirements.
2. Ensure that software can support a SSH/SFTP connection.
3. Update the old FTP url (ftpupd.caqh.org) with the new SFTP url (sftp.proview.caqh.org). Port number will remain as 22.
4. If your folder configuration was previously set at \username\Outgoing, you will need to reconfigure to \Outgoing. If your folder configuration was previously set at \username\Incoming, you will need to reconfigure to \Incoming.
5. Ensure that updated scripts to connect to the new SFTP server with the new user credentials are deployed.