DataSpring
Powered by CAQH

DataSpring | **CAQH Provider Data Portal ®**

Dentist Practice Manager Module User Guide

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Table of Contents

1 Introduction 6
1.1 Overview 6
1.2 Scope 6
2 Accessing the Provider Data Portal 7
2.1 Self-Registration 8
2.2 Creating a Username and Password 10
2.3 Forgot Password 11
2.4 Forgot Username 13
3 Practice Manager Overview 14
3.1 Home Page 15
3.2 Navigation Menu 15
3.3 Activity Log 16
4 Managing Users 17
4.1 Adding a User 18
4.2 Editing User Information 21
4.3 Search for a User 23
4.4 Mange Account 24
5 Manage Practice 25
5.1 Add List 25
5.1.1 Credentialing Contact 26
5.1.2 Practice Location 28
5.1.3 Hospital Affiliation 30
5.1.4 Professional Liability Insurance 31
5.2 Edit List 32
5.3 Delete List 33
6 Manage List 34
6.1 Delete a Dentist 35
6.2 Search for a Provider 35
7 Bulk Upload 38
7.1 Creating a Bulk Upload File 38
7.2 Uploading a Bulk Upload File 39
8 Export 40
8.1 Export Provider(s) 41
Appendix A Reference Information 44
A.1 Provider Status Reference Information 44
A.2 Provider Type Reference Information 45

Appendix B Training and Solutions Center Information 47
B.1 Training Information 47
B.1.1 Participating Organizations 47
B.1.2 Practitioners, Groups Users, and Practice Managers 47
B.2 Solutions Center Information 47
B.2.1 Participating Organizations 47
B.2.2 Practitioners, Groups Users, and Practice Managers 47
Appendix C Revision History 48

List of Tables

Table 1: Provider Status Reference Information 44
Table 2: Provider Type Abbreviations 45

List of Graphics

Graphic 1: Sign In Page 7
Graphic 2: Registration – Practice Information 8
Graphic 3: Registration – User Information 9
Graphic 4: Registration – Account Information 9
Graphic 5: Registration – Security Questions 10
Graphic 6: Account Information Page 10
Graphic 7: Security Questions Page 11
Graphic 8: Forgot Password Option 11
Graphic 9: Forgot Password Page 12
Graphic 10: Reset Password Page 12
Graphic 11: Forgot Username Option 13
Graphic 12: Forgot Username 13
Graphic 13: Home Page 15
Graphic 14: Activity Log Page 16
Graphic 15: Manage Users Option 17
Graphic 16: Manage Users Page 17
Graphic 17: Manage Users Page - Add User 18
Graphic 18: Add User – Basic Information 18
Graphic 19: Add User – User Account Information 19
Graphic 20: Add User – Pending User Status 19
Graphic 21: Create Username and Password 20
Graphic 22: Create Security Questions and Answers 20
Graphic 23: Add User – Active User Status 21
Graphic 24: Edit User Page 22
Graphic 25: Search for User Option 23
Graphic 26: Search for a User Page 23
Graphic 27: Search Results 23
Graphic 28: Manage Account Page 24

Graphic 29: Manage Practice Page 25
Graphic 30: Add List 25
Graphic 31: List Details 26
Graphic 32: Add Credentialing Contact Button 26
Graphic 33: Add Credentialing Contact Information 27
Graphic 34: Manage Credentialing Contact 27
Graphic 35: Add Practice Location Button 28
Graphic 36: Add Practice Location Page 28
Graphic 37: Manage Practice Location 29
Graphic 38: Add Hospital Affiliation Button 30
Graphic 39: Add Hospital Affiliation Dialog 30
Graphic 40: Manage Hospital Affiliation 30
Graphic 41: Add PLI Button 31
Graphic 42: Add PLI Information 31
Graphic 43: Manage PLI Information 32
Graphic 44: Edit List 32
Graphic 45: Delete List Dialog 33
Graphic 46: Manage Provider List Menu Option 34
Graphic 47: Manage Practice Provider List Page 34
Graphic 48: Delete Dentist Dialog 35
Graphic 49: Provider Search Options 35
Graphic 50: Enter Search Criteria Page 36
Graphic 51: Search Results 36
Graphic 52: Add Dentist Dialog 37
Graphic 53: Resources Page Materials 38
Graphic 54: Bulk Upload Menu Option 39
Graphic 55: Upload Bulk File 39
Graphic 56: Export Menus Option 40
Graphic 57: Select Provider or Providers for Export Page 40
Graphic 58: Select Dentists to Export 41
Graphic 59: Select Provider Application Sections for Export Page 42
Graphic 60: Using Saved Sections 42
Graphic 61: Export Summary Page 43
Graphic 62: Confirm Export Dialog 43

1 Introduction

1.1 Overview

DataSpring, powered by CAQH, is the trusted data connector at the core of healthcare, powering the industry with accurate, authorized data from providers and payers to create a more connected ecosystem for all. The DataSpring CAQH Provider Data Portal eliminates duplicative paperwork for organizations that may require provider profile information. DataSpring's comprehensive repository of provider data can serve a variety of business needs for your organization, including claims administration, credentialing, and directory services.

If you are an office manager or administrator who assists with gathering information for credentialing or other administrative purposes for multiple Dentists, DataSpring for Practice Managers, powered by CAQH, may facilitate your data entry process. The American Dental Association (ADA) and DataSpring work together to make it easier for Dentists to enter and share their professional and practice data with dental plans and other healthcare organizations. Dentists can enter their professional and practice information once and submit it to multiple participating dental plans and organizations, reducing their administrative burden and speeding the credentialing process. This data can also be used to update provider directories and other business needs.

This service works with information that U.S. practicing Dentists have already entered in their profiles on ADA.org/godigital. After logging into My ADA, and accepting the terms and conditions, Dentists are redirected to the Provider Data Portal Welcome Page. There, they may see certain prepopulated information from the ADA, or the information they attested to previously, making it easier and quicker for them to complete and attest to their profile. The following is a high-level overview of the DataSpring for Practice Managers process:

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

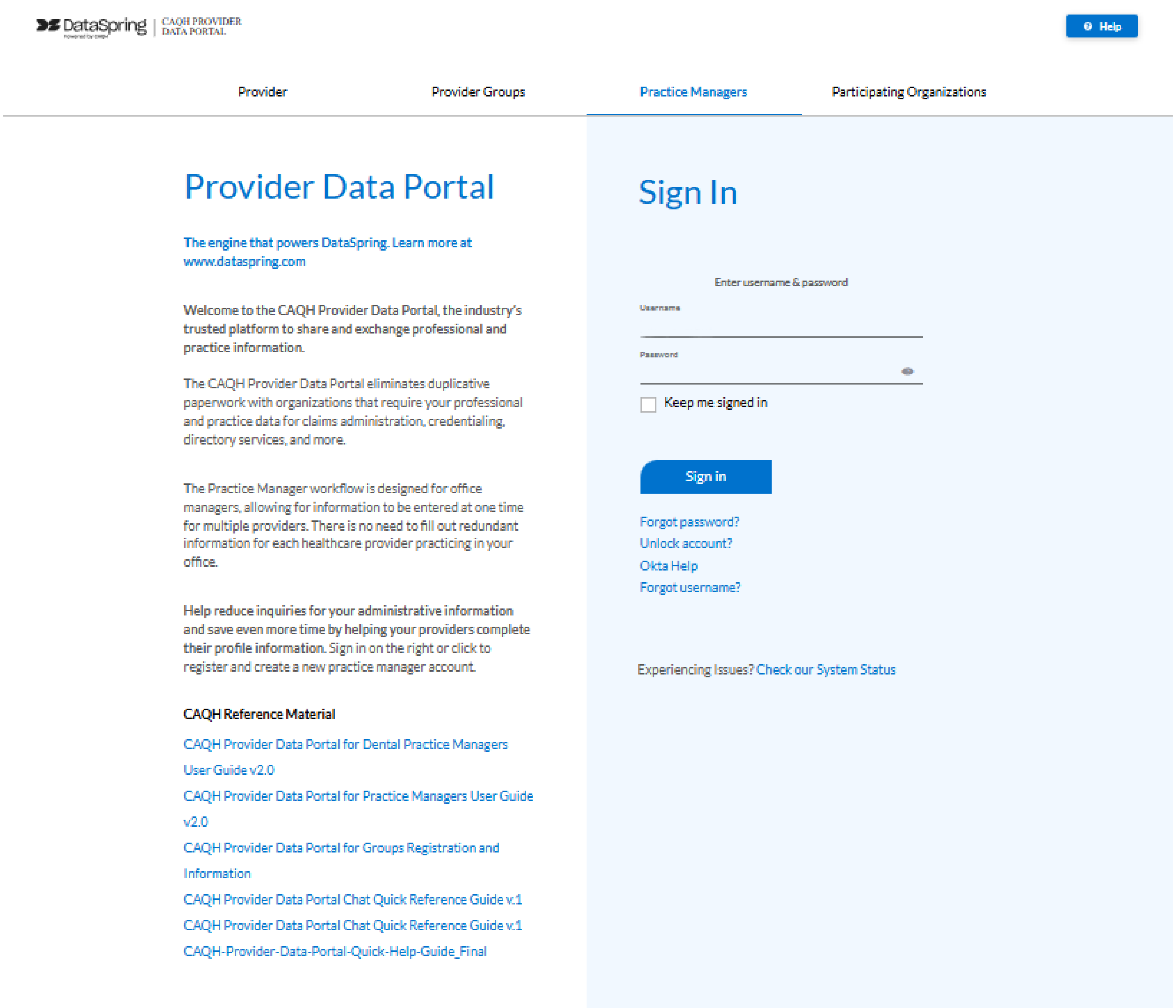
1.2 Scope

This document is intended to serve as a reference for how to navigate the DataSpring for Practice Managers solution. It provides steps on how to search for Dentists, view details about a Dentist, and roster and de-roster Dentists.

2 Accessing the Provider Data Portal

Registration is required to obtain access to the Provider Data Portal. You must navigate to https://proview.caqh.org/pm and complete the registration process before you can sign in.

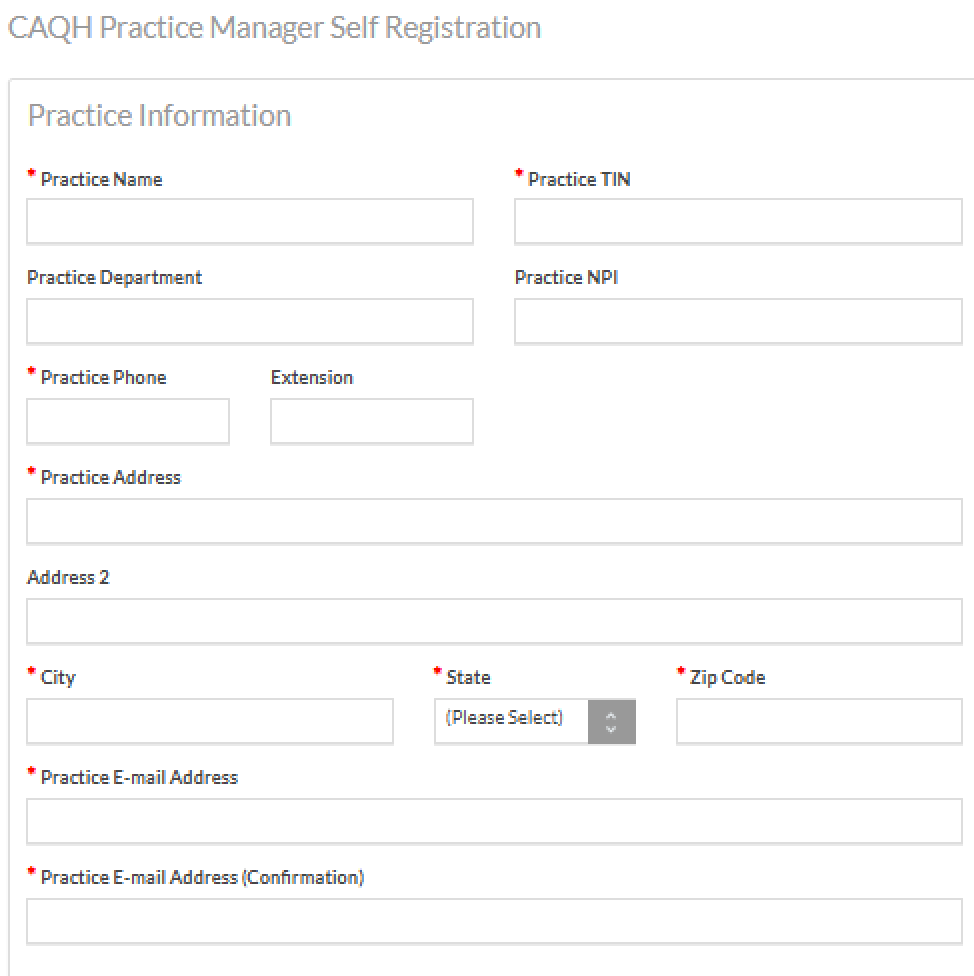
NOTE: *Use an updated browser that includes recent security patches, features, and performance improvements, such as Chrome or Edge to continue accessing the portal. Microsoft IE is no longer supported as of 12/9/2024.*



Graphic 1: Sign In Page

2.1 Self-Registration

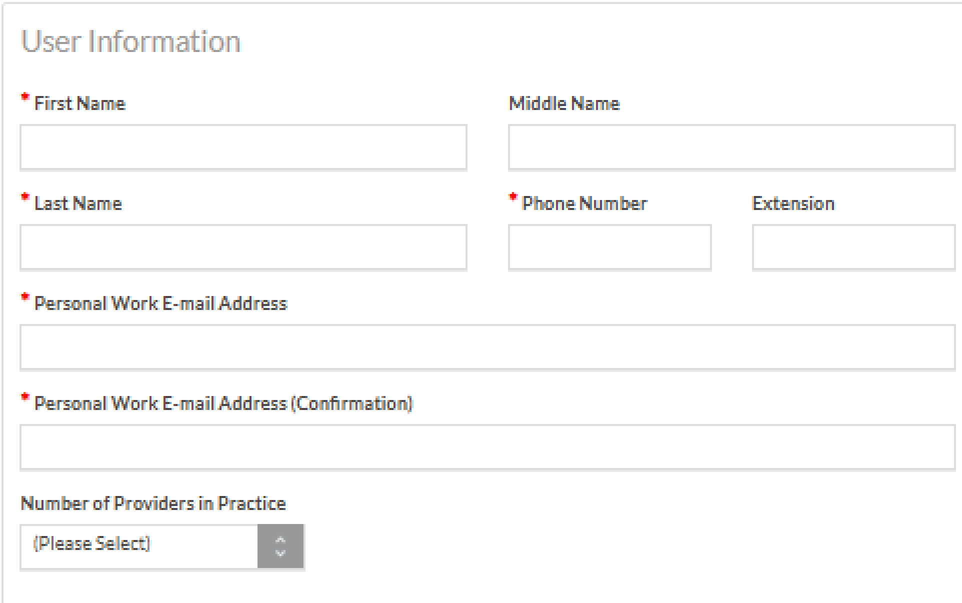
If you are a new customer, navigate to https://proview.caqh.org/pm and select the **Click here to register** link to complete the self-registration process. Each user who self-registers is automatically established as an Administrator, which allows them to add or edit Basic User accounts. A Basic User cannot add or edit other users, but has other privileges and views similar to the Administrator. Each account must have one Administrator.


CAQH Practice Manager Self Registration

Practice Information

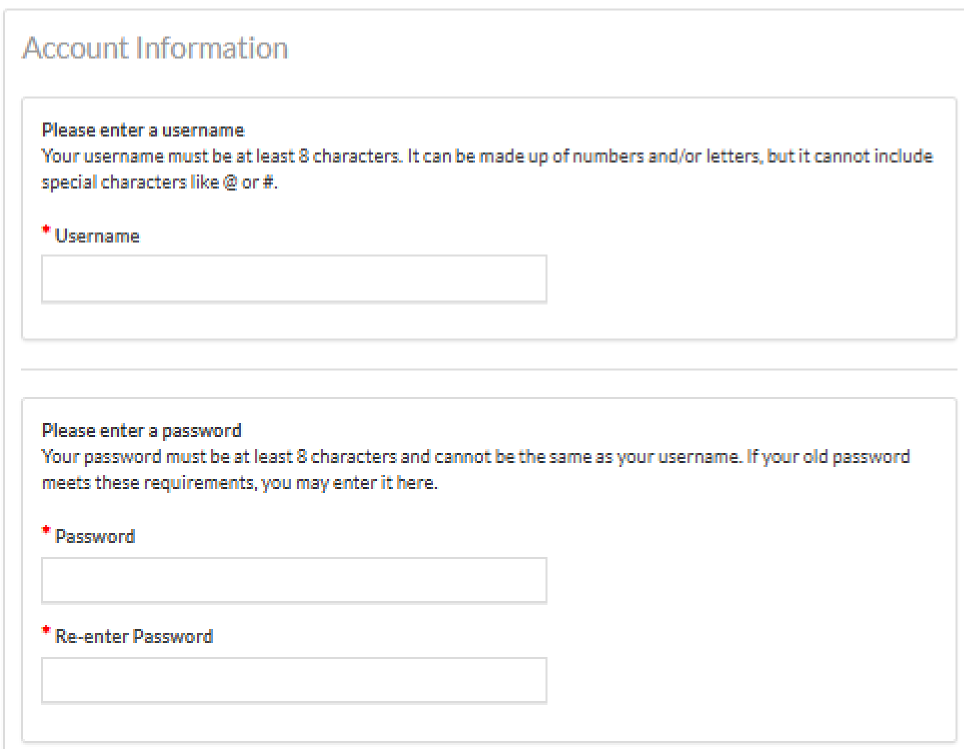
* Practice Name
* Practice TIN
Practice Department
Practice NPI
* Practice Phone
Extension
* Practice Address
Address 2
* City
* State (Please Select)
* Zip Code
* Practice E-mail Address
* Practice E-mail Address (Confirmation)

Graphic 2: Registration – Practice Information

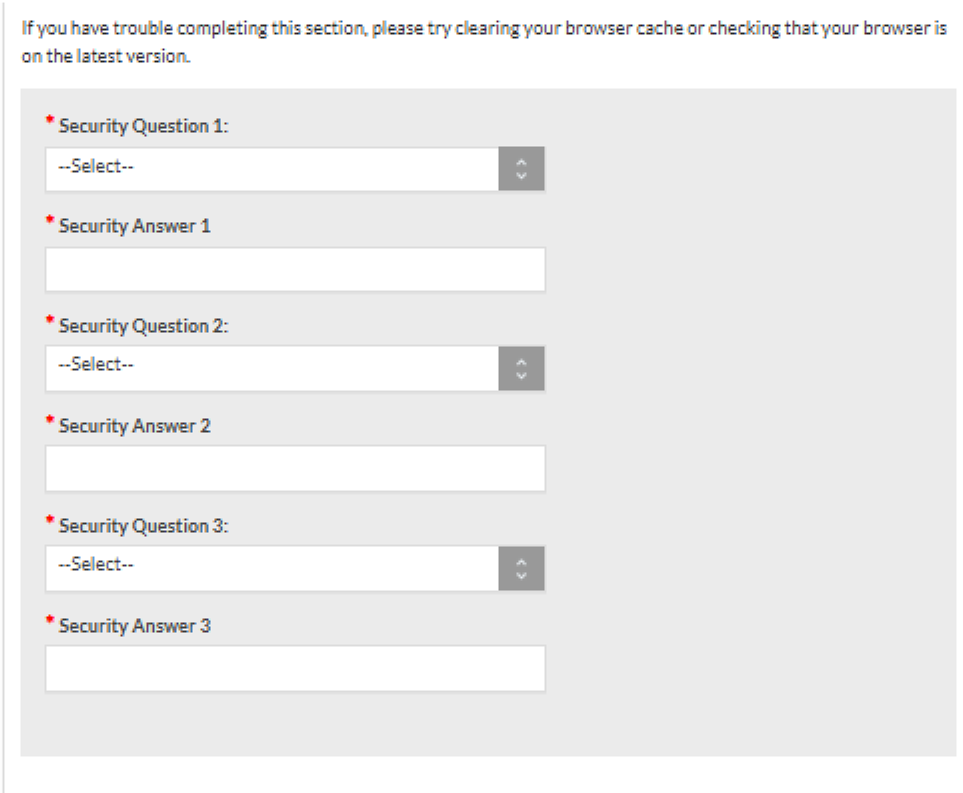


Graphic 3: Registration – User Information

All users must have a unique username and password to meet DataSpring login requirements.



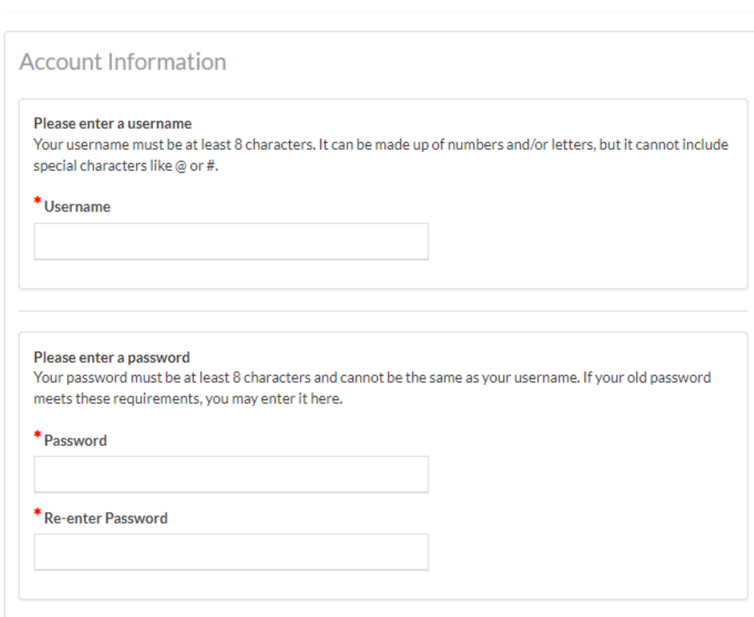
Graphic 4: Registration – Account Information



Graphic 5: Registration – Security Questions

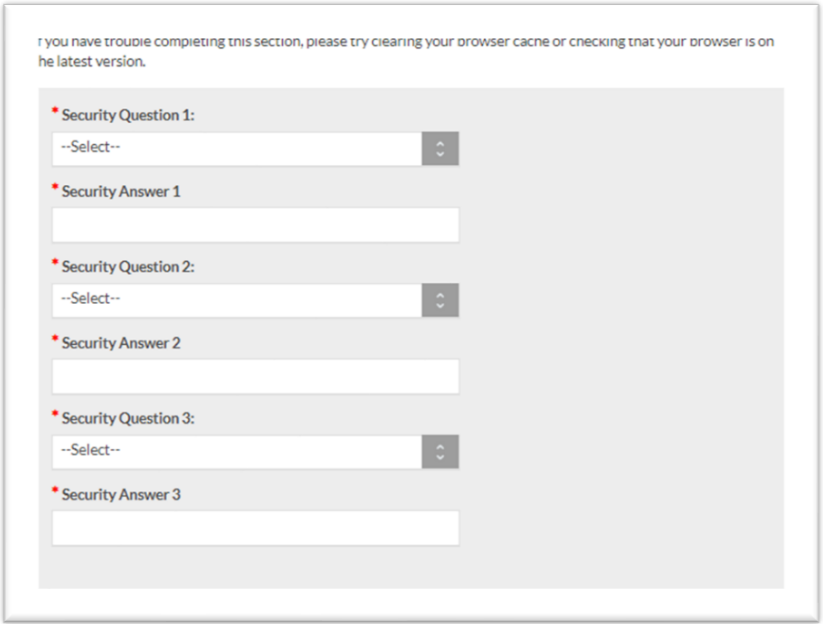
2.2 Creating a Username and Password

All users must have a unique username and password to meet DataSpring login requirements. If you are a new user, you will receive an email with a link to create a username and password.



Graphic 6: Account Information Page

Users must create security questions to facilitate account access in case of a forgotten username and/or password. Select three security questions and provide a unique answer for each.



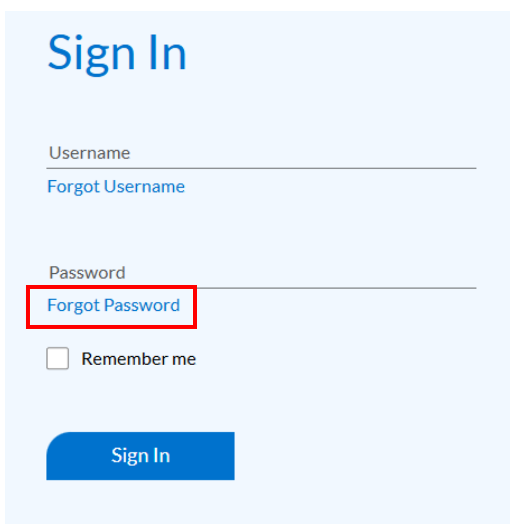
Graphic 7: Security Questions Page

After entering a username and password and creating security questions, click the **Submit** or **Create Account** button. A confirmation is displayed indicating that account registration was successful.

2.3 Forgot Password

If you forgot your password, perform the following steps to reset your password.

1. Click the **Forgot password** option on the Sign In page.



Graphic 8: Forgot Password Option

2. The Forgot Password page is displayed. Enter your **Username** and click the **Reset Password** button.

Graphic 9: Forgot Password Page

3. You will receive an email asking you to reset your password. Click the **Reset Password** link in the email. The email expires in five (5) minutes.
4. The Reset Password page is displayed. Enter and re-enter a new password based on the requirements displayed, and then click the **Reset Password** button.

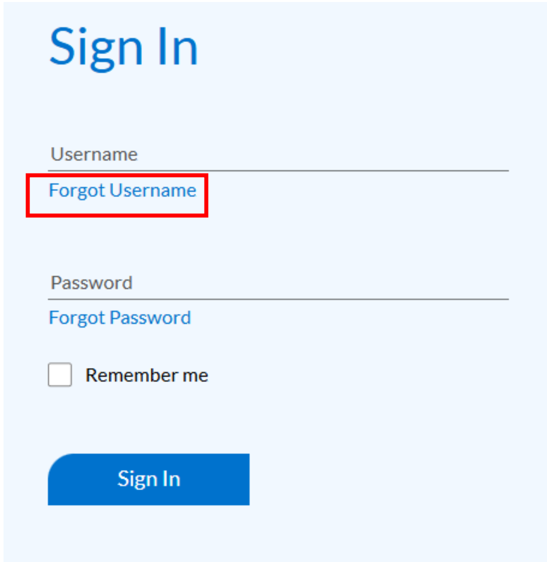
Graphic 10: Reset Password Page

5. Text is displayed indicating that your password was reset successfully. Click the **click here** link to proceed to the Sign In page.

2.4 Forgot Username

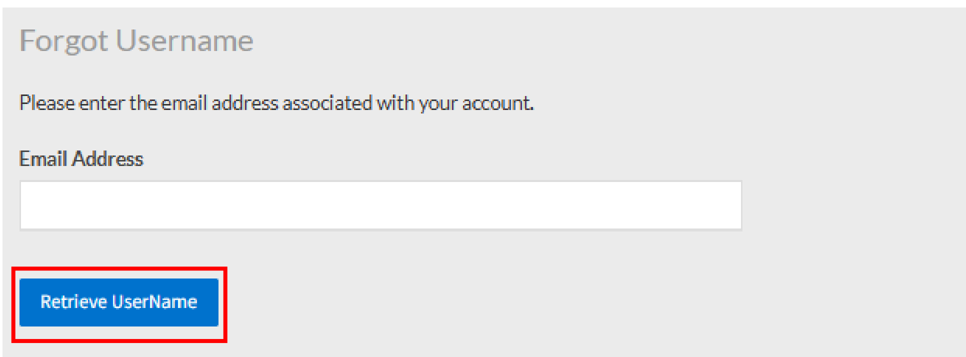
If you forgot your username, perform the following steps to retrieve it.

1. Click the **Forgot username** option on the Sign In page.



Graphic 11: Forgot Username Option

2. Enter your email address and then click the **Retrieve UserName** button.



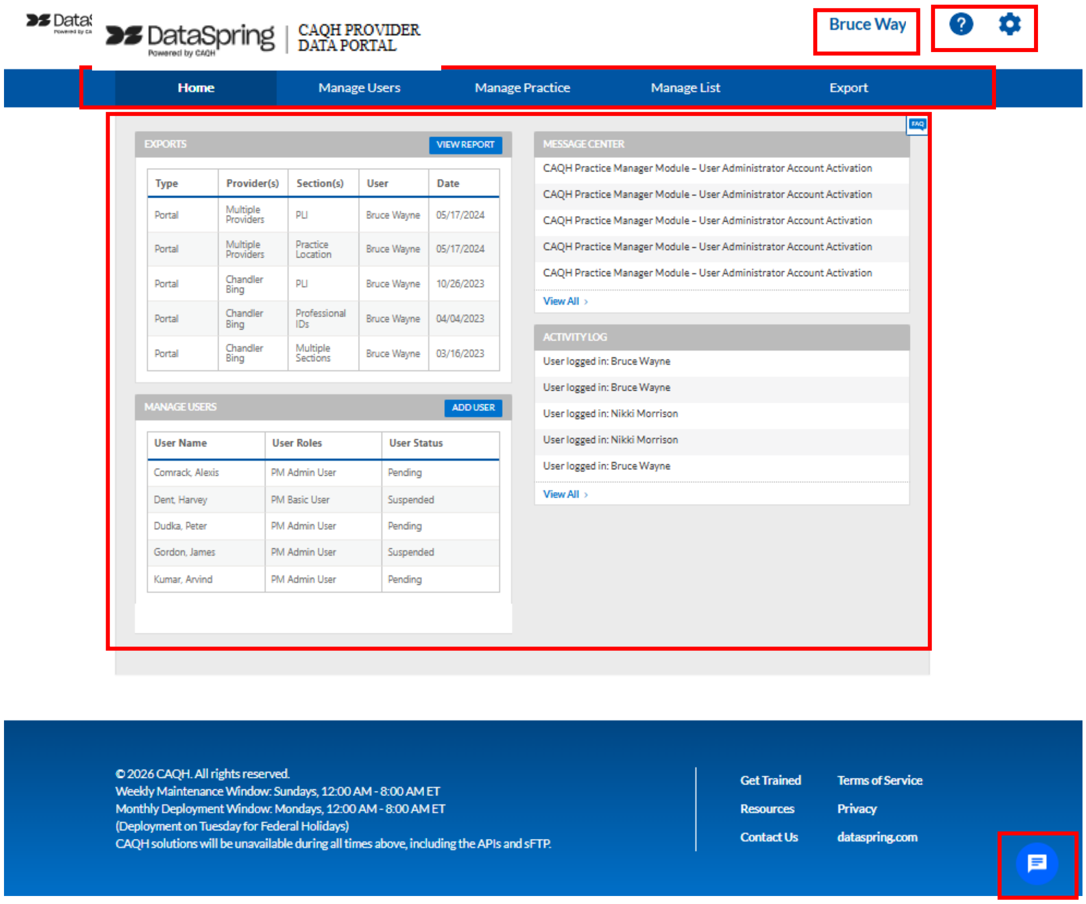
Graphic 12: Forgot Username

3. You will receive an email containing your username at your account-registered email address. Enter your username and password to sign in to the Provider Data Portal.

3 Practice Manager Overview

The following is an overview of the components of the Practice Manager solution, available via the Provider Data Portal Home page.

- User information, including your username, is displayed at the top of the page.
- Various Help icons are displayed in the upper-right corner of the page.
  - The **question mark** icon contains links to the CAQH University, where you can access various training resources, the Resources page, where you can access documentation, and contact information.
  - The **settings** icon contains links that allow you to access your account information, access security settings to change your password, view the activity log, and sign out of the portal.
- The top navigation menu allows you to access various areas of functionality.
- Four areas of functionality are displayed in the body of the page.
  - **Exports:** Displays a summary of recent exports, the related user who performed the export, and the date exported.
  - **Manage Users:** Displays a list of the most recent users, their roles, and statuses (Administrator only).
  - **Message Center:** Displays system messages related to your account.
  - **Activity Log:** Displays recent users who have logged into the account and recent activity within the account. This is also available from the **Activity Log** option in the **settings** icon.
  - **Bulk Upload Exceptions:** For users with Bulk Upload access, displays a list of Exception Reports from a Bulk Upload processed file.
- The **chat** icon in the lower-right corner of the page allows you to access the Solutions Center virtual agent.



Graphic 13: Home Page

3.1 Home Page

The Home page is displayed after successfully logging in. Based on your user role, as established by your administrator, your page view and the areas accessible to you will vary.

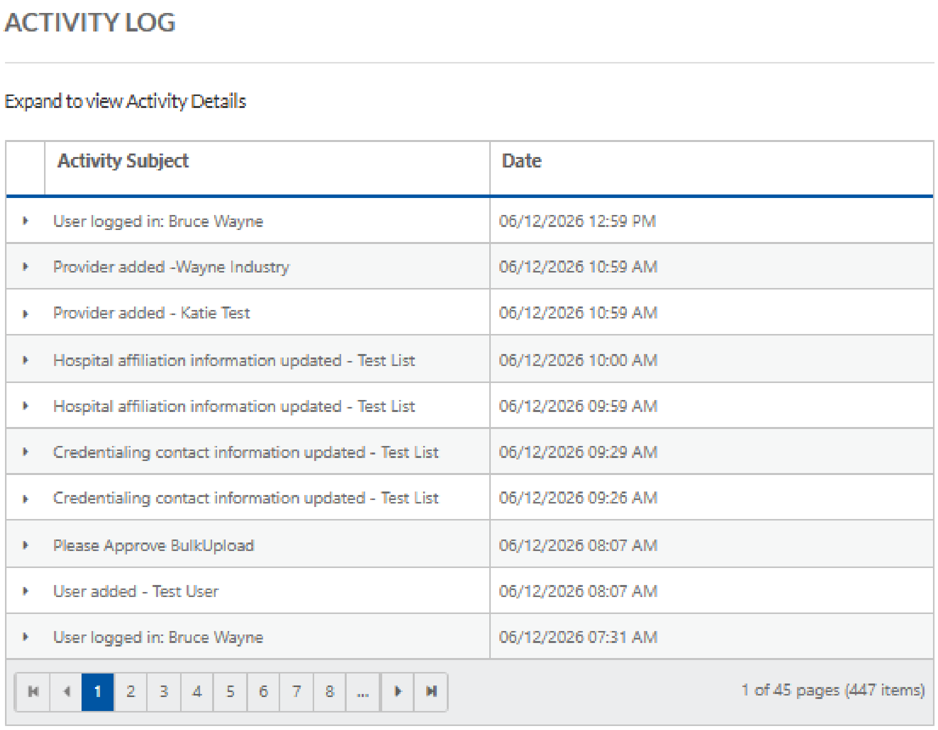
3.2 Navigation Menu

The top navigation menu allows you to navigate various sections of the portal.

- **Manage Users:** Allows an Administrator to update their account information and add or edit account users.
- **Manage Practice:** Allows you to enter information common across multiple Dentists.
- **Manage List:** Allows you to manage your Dentist list. Users with the necessary permissions will see an additional menu option which allows them to upload a data file containing all the Dentists they manage.
- **Export:** Allows you to begin the export data process to multiple or individual Dentist accounts.

3.3 Activity Log

The Activity Log page is displayed after selecting the **Activity Log** option from the **settings** menu. This page displays a list of activities completed in the system by all users under your account, along with their date and timestamp. Click on an entry in the list to expand it and view additional details.



ACTIVITY LOG

Expand to view Activity Details

Activity Subject	Date
User logged in: Bruce Wayne	06/12/2026 12:59 PM
Provider added -Wayne Industry	06/12/2026 10:59 AM
Provider added - Katie Test	06/12/2026 10:59 AM
Hospital affiliation information updated - Test List	06/12/2026 10:00 AM
Hospital affiliation information updated - Test List	06/12/2026 09:59 AM
Credentialing contact information updated - Test List	06/12/2026 09:29 AM
Credentialing contact information updated - Test List	06/12/2026 09:26 AM
Please Approve BulkUpload	06/12/2026 08:07 AM
User added - Test User	06/12/2026 08:07 AM
User logged in: Bruce Wayne	06/12/2026 07:31 AM

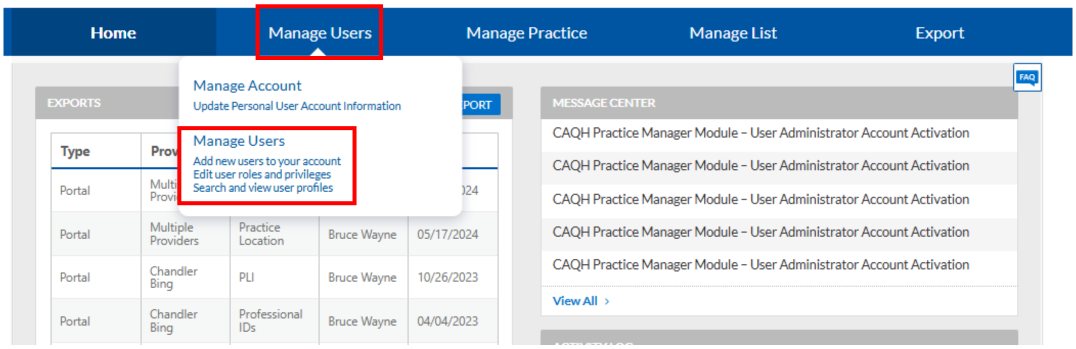
1 2 3 4 5 6 7 8 ... 1 of 45 pages (447 items)

Graphic 14: Activity Log Page

4 Managing Users

An Administrator can edit their own user information, add a new user, or edit an existing user's information on the Manage Users page.

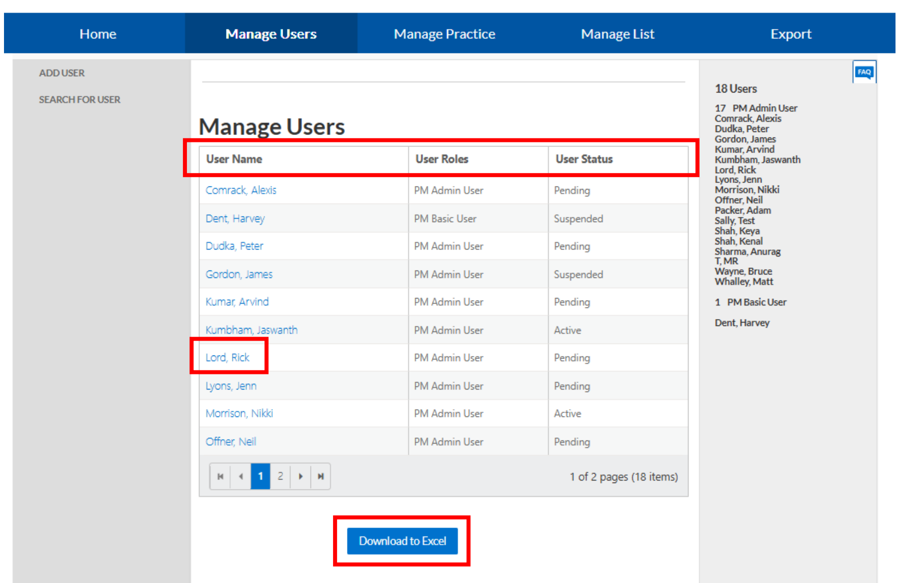
***NOTE:** If you need assistance, click the **FAQ** icon that is displayed on the right-hand side of the screen.*



Graphic 15: Manage Users Option

The Manage Users page is displayed after hovering over the **Manage Users** tab in the top navigation menu and selecting the **Manage Users** option. This page contains a list of all the users who currently have access to your organization's Provider Data Portal account. The total number of users for your organization, as well as a breakdown of users by type, is displayed on the right-hand side of the page.

- Clicking the **User Name**, **User Roles**, or **User Status** column header sorts users by that column.
- Clicking on a **User Name** link opens a page containing additional details about that user.
- Clicking the **Download to Excel** button allows you to download user information in Excel format.

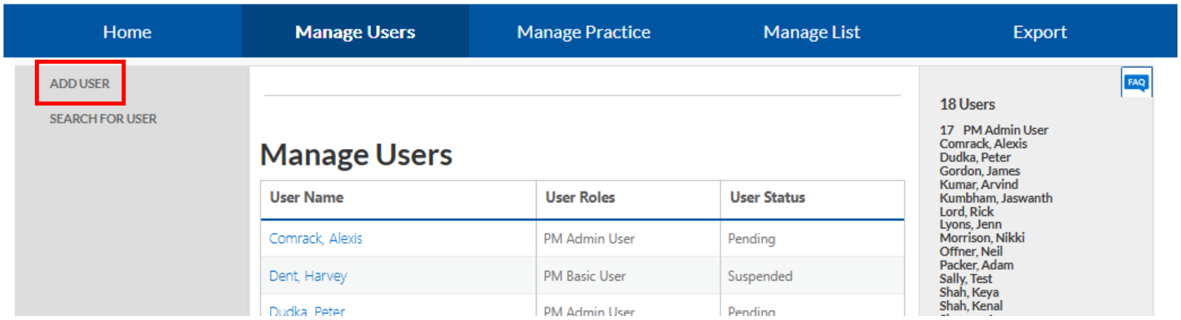


Graphic 16: Manage Users Page

4.1 Adding a User

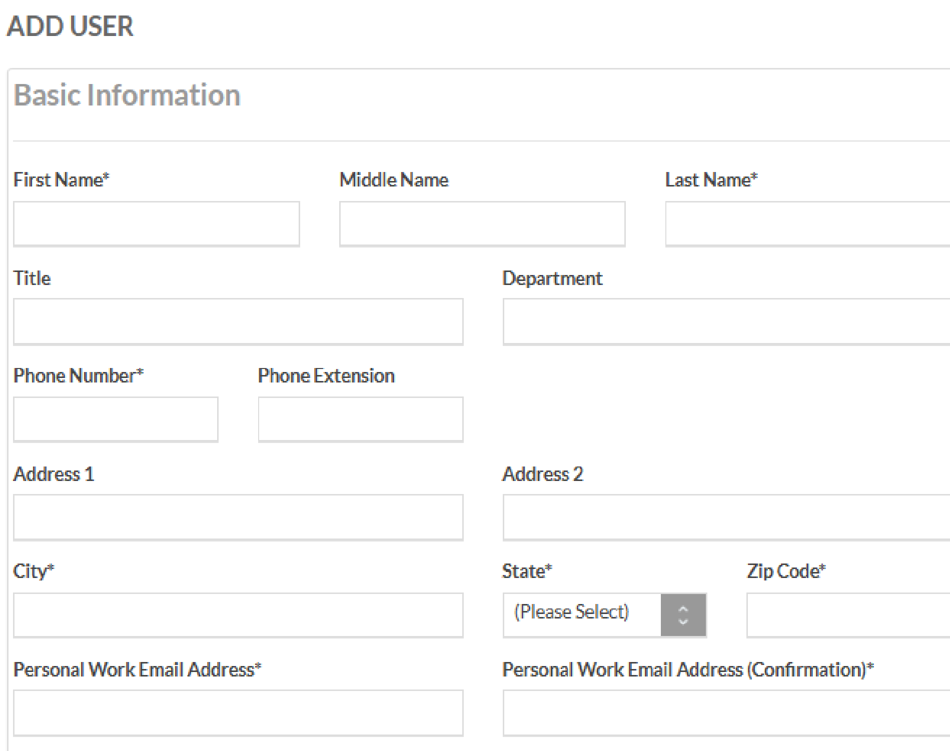
To add a new user:

1. Select the **Manage Users** option from the **Manage Users** tab of the top navigation menu.
2. Click the **Add User** option in the left navigation menu of the Manage Users page.



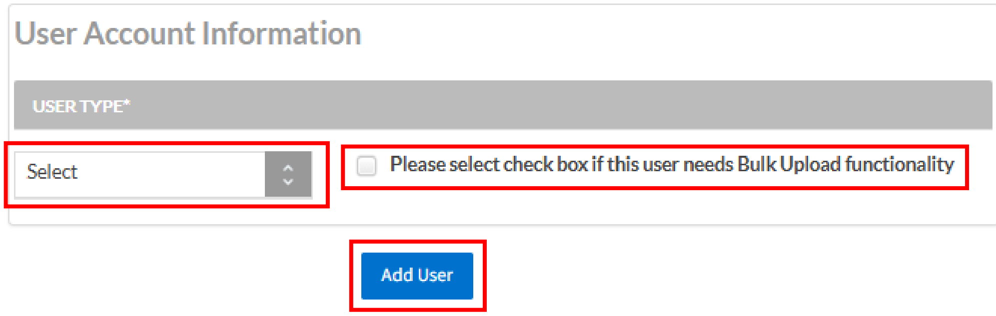
Graphic 17: Manage Users Page - Add User

3. The Add User page is displayed. Enter information for the new user. Required fields are marked with an asterisk.



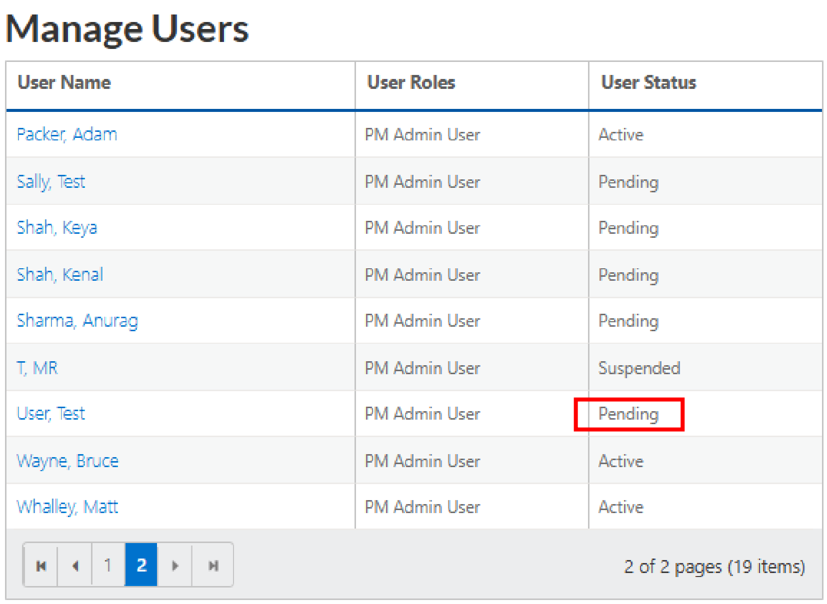
Graphic 18: Add User – Basic Information

4. In the User Account Information section of the page, indicate the **User Type** and select whether the user should have bulk upload functionality.
5. Click the **Add User** button.



Graphic 19: Add User – User Account Information

– By default, the new user's status is Pending.



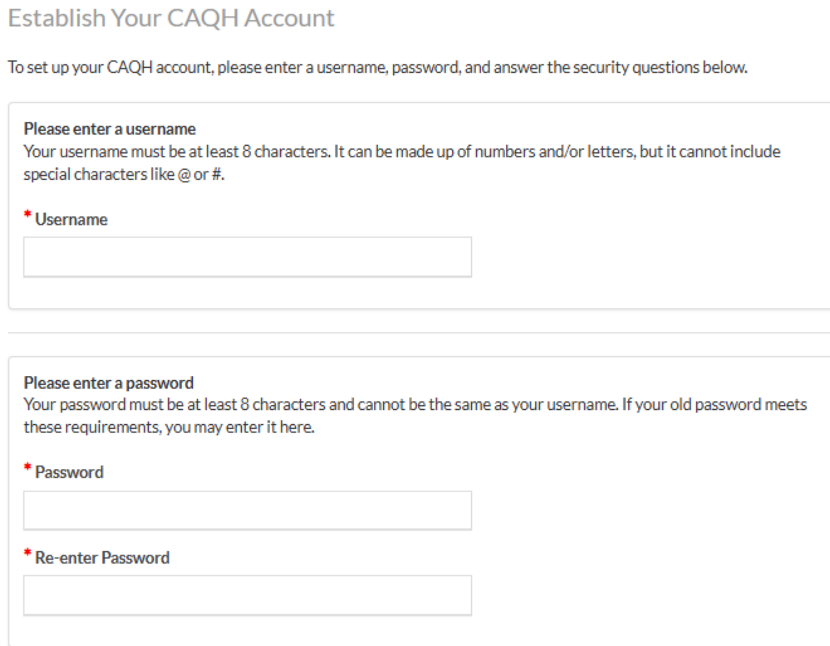
Manage Users

User Name	User Roles	User Status
Packer, Adam	PM Admin User	Active
Sally, Test	PM Admin User	Pending
Shah, Keya	PM Admin User	Pending
Shah, Kenal	PM Admin User	Pending
Sharma, Anurag	PM Admin User	Pending
T, MR	PM Admin User	Suspended
User, Test	PM Admin User	Pending
Wayne, Bruce	PM Admin User	Active
Whalley, Matt	PM Admin User	Active

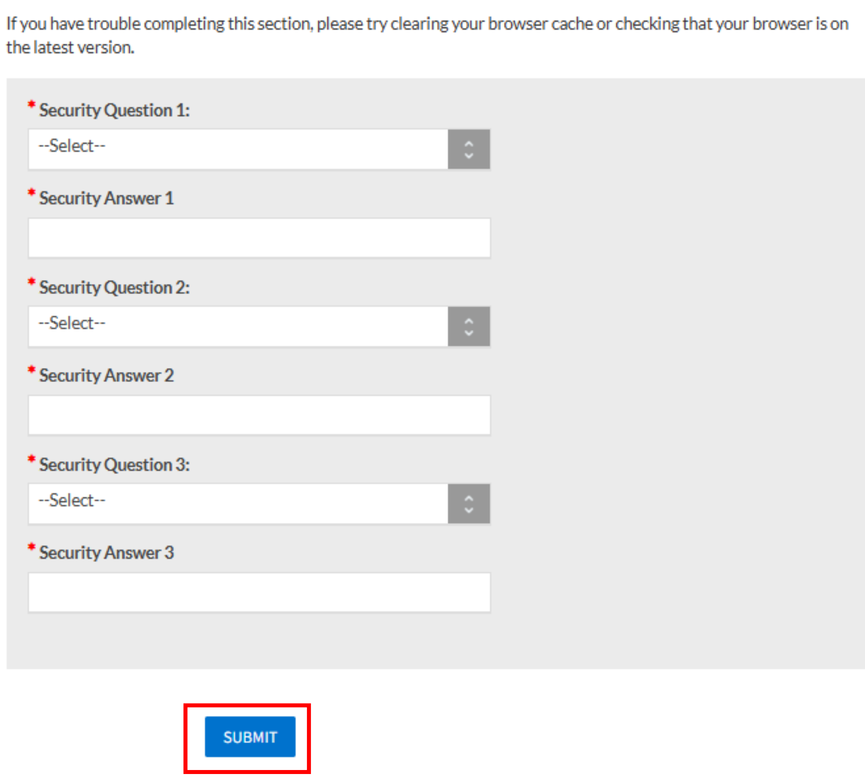
1 2 — 2 of 2 pages (19 items)

Graphic 20: Add User – Pending User Status

6. The new user will receive an account activation email. The user needs to click the link in the email and set up their unique username, password, and security questions and answers.



Graphic 21: Create Username and Password



Graphic 22: Create Security Questions and Answers

7. When finished, the user must click the **Submit** button.

– The user's status is now Active.

Manage Users

User Name	User Roles	User Status
Packer, Adam	PM Admin User	Active
Sally, Test	PM Admin User	Pending
Shah, Keya	PM Admin User	Pending
Shah, Kenal	PM Admin User	Pending
Sharma, Anurag	PM Admin User	Pending
T, MR	PM Admin User	Suspended
User, Test	PM Admin User	Active
Wayne, Bruce	PM Admin User	Active
Whalley, Matt	PM Admin User	Active

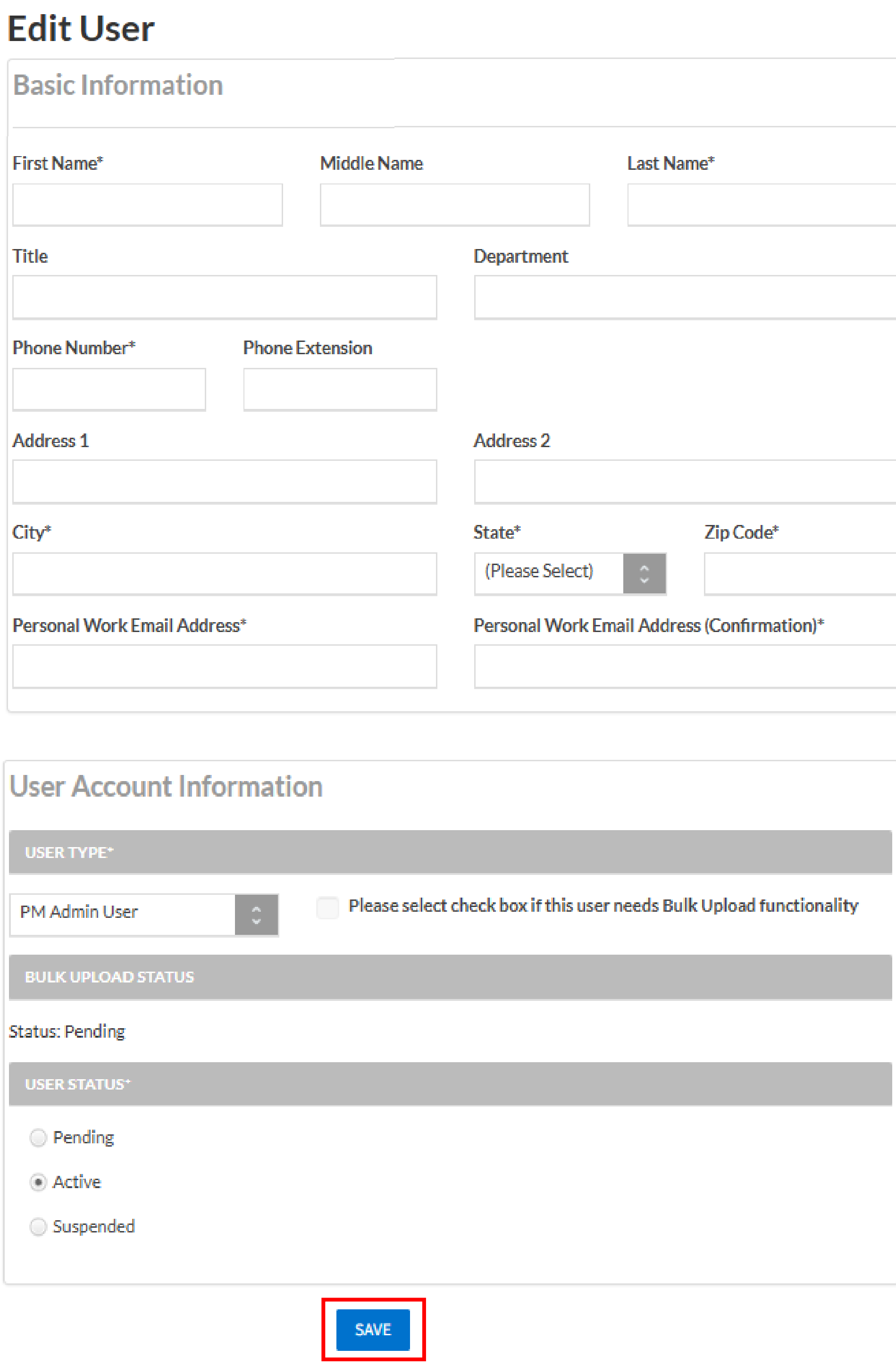
1 2 — 2 of 2 pages (19 items)

Graphic 23: Add User – Active User Status

4.2 Editing User Information

To edit an existing user's information:

1. Select the **Manage Users** option from the **Manage Users** tab of the top navigation menu.
2. Click the **User Name** link on the Manage Users page for the user whose information you wish to edit.
3. The Edit User page is displayed.
   - In the **Basic Information** section of the page, edit the user's account information as needed.
   - In the **User Account Information** section of the page, you can adjust the user's status to activate or suspend their account, enable or disable access to Bulk Upload functionality, or change the user type (Administrator or Basic).



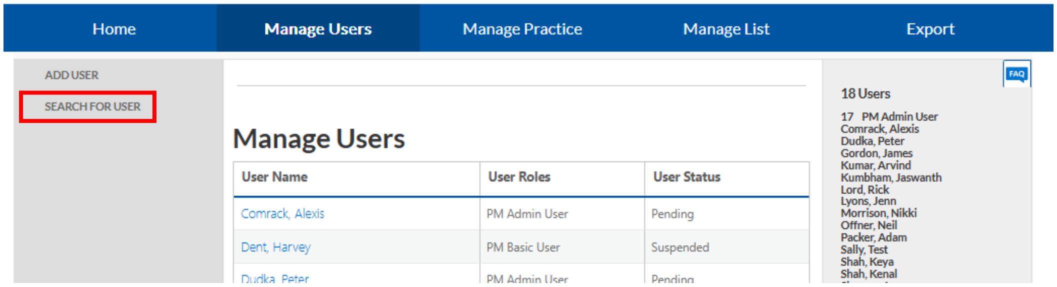
Graphic 24: Edit User Page

4. When finished, click the **Save** button.

4.3 Search for a User

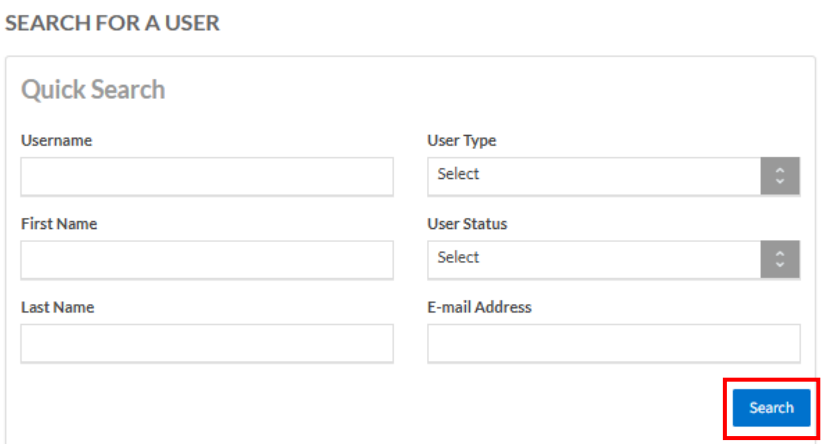
To perform a basic search to locate a specific user:

5. Select the **Search for User** option on the Manage Users page.



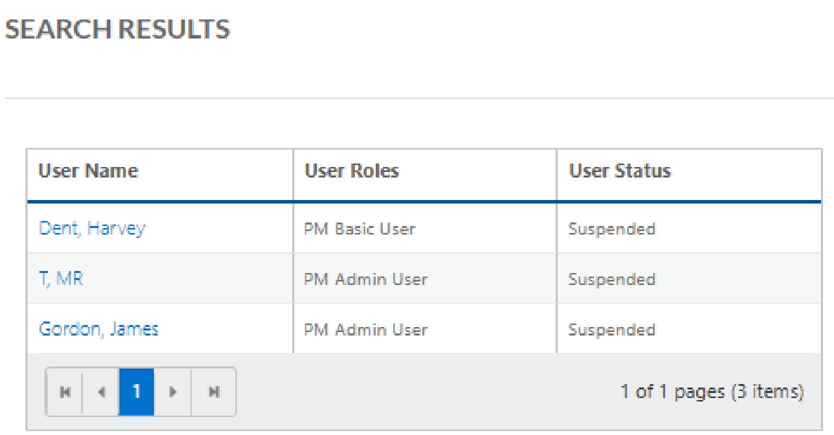
Graphic 25: Search for User Option

6. The Search for a User page is displayed. Enter search criteria for any of the available fields and then click the **Search** button:



Graphic 26: Search for a User Page

7. The page will refresh and display results matching your search criteria. Click the **User Name** link to view more information about a user.

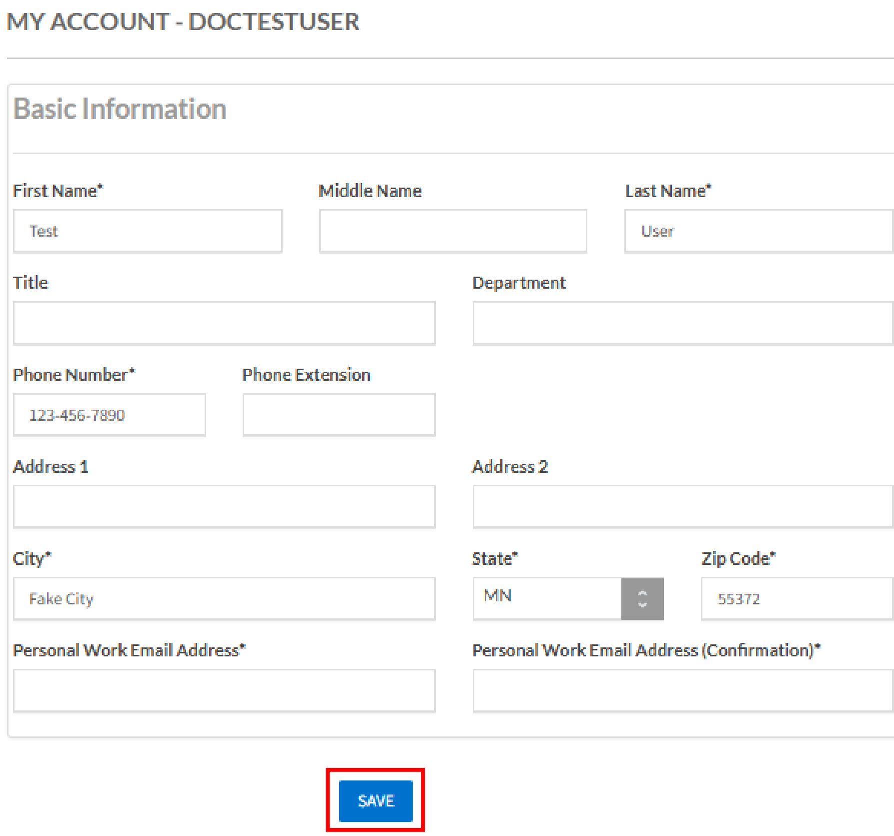


Graphic 27: Search Results

4.4 Mange Account

The Manage Account page is displayed after hovering over the **Manage Users** tab in the top navigation menu and selecting the **Manage Account** option. This page displays your account information and allows you to edit this information. Update your information as needed and then click the **Save** button.

This page is also displayed after selecting the **My Account** option from the **settings** icon.



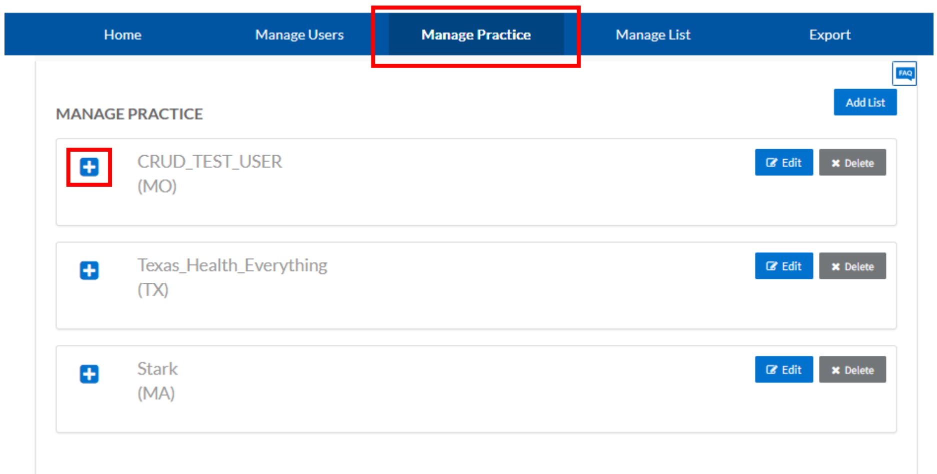
Graphic 28: Manage Account Page

5 Manage Practice

The Manage Practice page is displayed after selecting the **Manage Practice** tab from the top navigation menu. This page allows you to enter data that is common across multiple Dentists by creating lists of common profile information sections. These sections include:

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

Your existing lists are displayed in the body of the page. Click the icon to expand the list and view additional information. You can edit or delete an existing list, or add a new list.

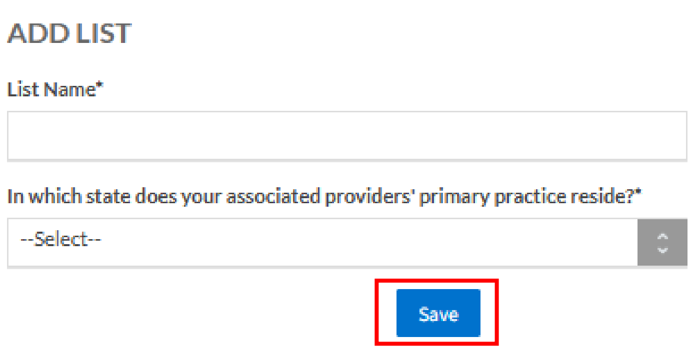


Graphic 29: Manage Practice Page

5.1 Add List

To add a new list

1. Click the **Add List** button on the Manage Practice page.
2. Enter a **List Name** and select the Dentist's primary practice state. It is important to maintain state-specific lists to drive any state-mandated or voluntary form questions.
3. Click the **Save** button.



Graphic 30: Add List

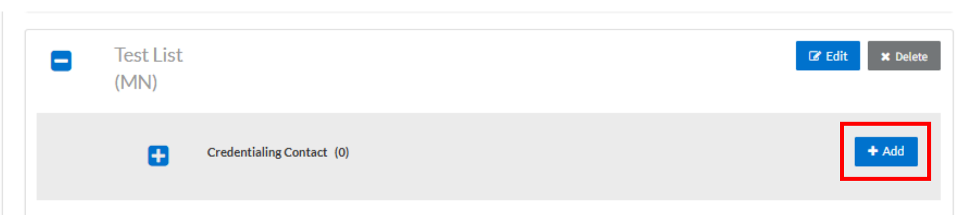
4. Your list will be added to the list on the Manage Practice page. Click the icon to expand the list to view details.
   – Click the icon to expand a section to view details.
   – Click the Add button to enter information for the corresponding section. Once information is configured for a section, additional options are displayed (edit, delete, and copy).

Graphic 31: List Details

5.1.1 Credentialing Contact

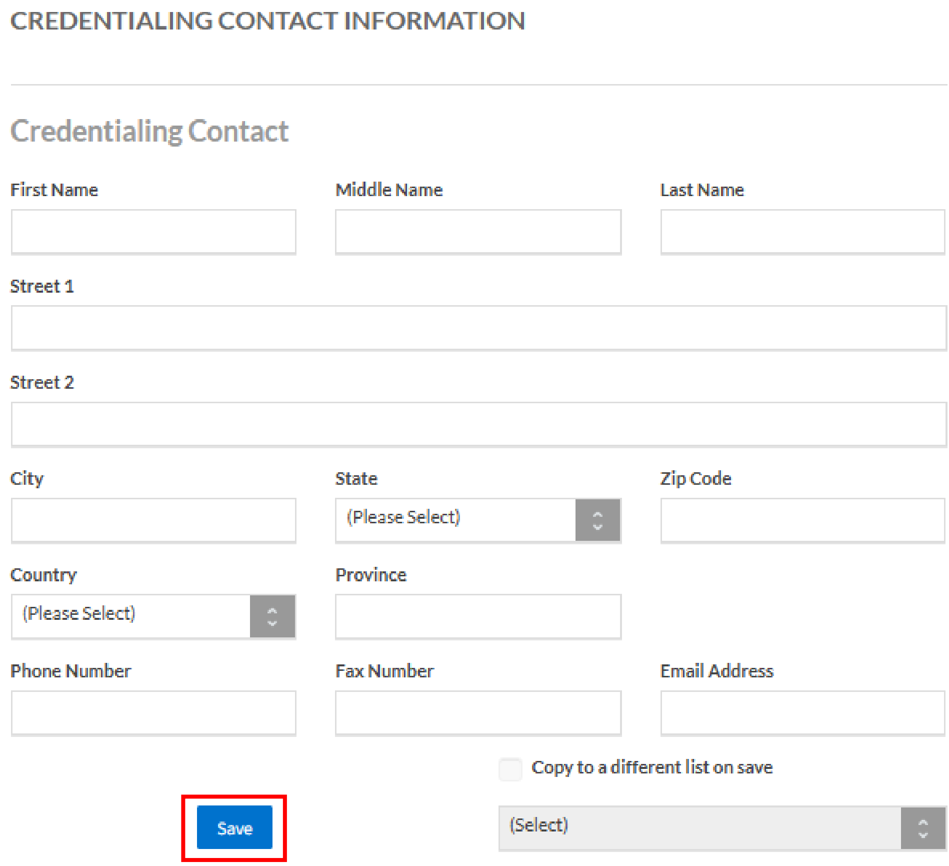
To enter Credentialing Contact information for a list:

1. On the Manage Practice page, click the icon to expand the list to view details.
2. Click the **Add** button in the **Credentialing Contact** section.



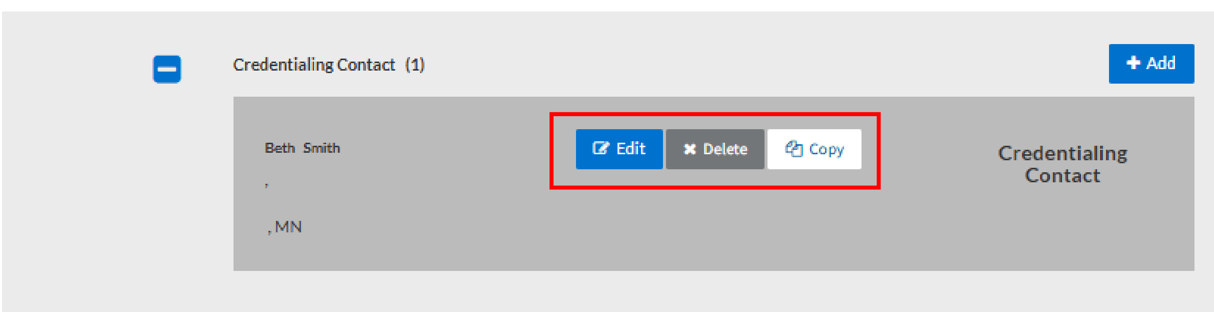
Graphic 32: Add Credentialing Contact Button

3. Enter information for the credentialing contact and then click the **Save** button.



Graphic 33: Add Credentialing Contact Information

4. The credentialing contact is added to your list. You can edit the contact's information, delete the contact, or copy the contact's information to make a duplicate entry in the list using the buttons displayed.

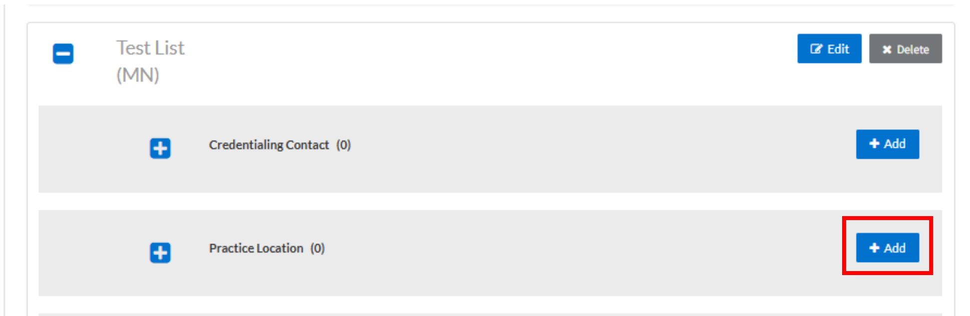


Graphic 34: Manage Credentialing Contact

5.1.2 Practice Location

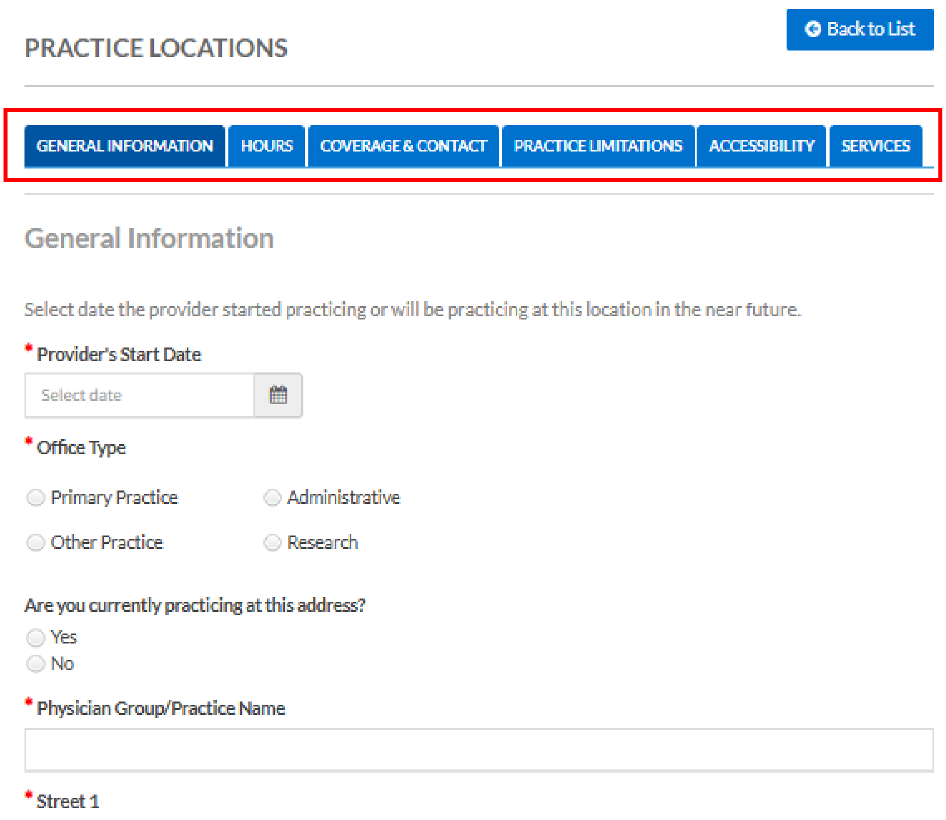
To enter Practice Location information for a list:

1. On the Manage Practice page, click the icon to expand the list to view details.
2. Click the **Add** button in the **Practice Location** section.



Graphic 35: Add Practice Location Button

3. The Practice Locations page is displayed. Practice location information is entered using multiple tabs. Complete all required information for a tab. Use the **Save and Go Back**, **Save**, and **Save & Continue** buttons at the bottom of each page to save your information and proceed to the next tab.

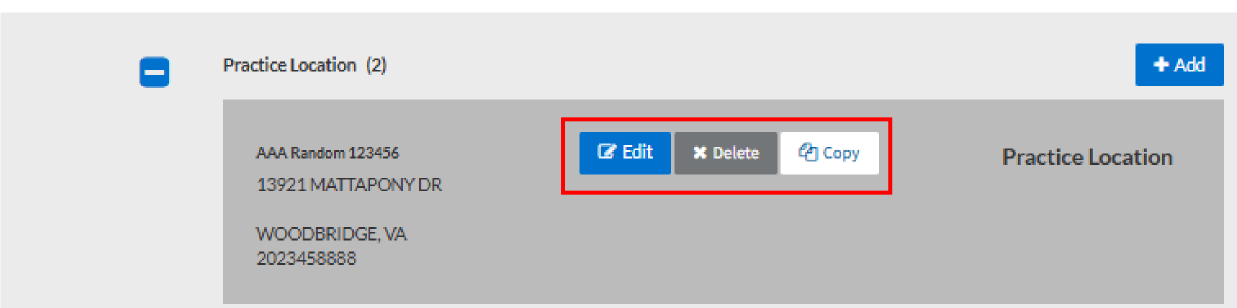


Graphic 36: Add Practice Location Page

Tabs may vary by practice state.

- **General Information**
  - Physician Group/Practice Name - Please enter practice information as it appears on a Dentist's claim submission so it will match the name for the location that is known to participating organizations with whom the Dentist contracts. In most cases, this will not be the Dentist's name. In some cases, this may be the name as it appears on the W9.
  - Address - Enter the 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.
  - NPI Type 2: Enter your Dentist's group National Provider Identification Number
- **Hours:** Indicate the office hours and types of patients accepted into the practice.
- **Coverage & Contact:** Indicate the types of coverage provided at the practice.
- **Practice Limitations:** Indicate any limitations of the practice. A limitation is any restriction the practice has set on the gender or age of the patient population.
- **Accessibility:** Indicate the types of accessibility at the practice.
  - 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.
- **Services:** Indicate the services provided at the 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 certified 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.

4. The practice location is added to your list. You can edit the location's information, delete the location, or copy the location's information to make a duplicate entry in the list using the buttons displayed.

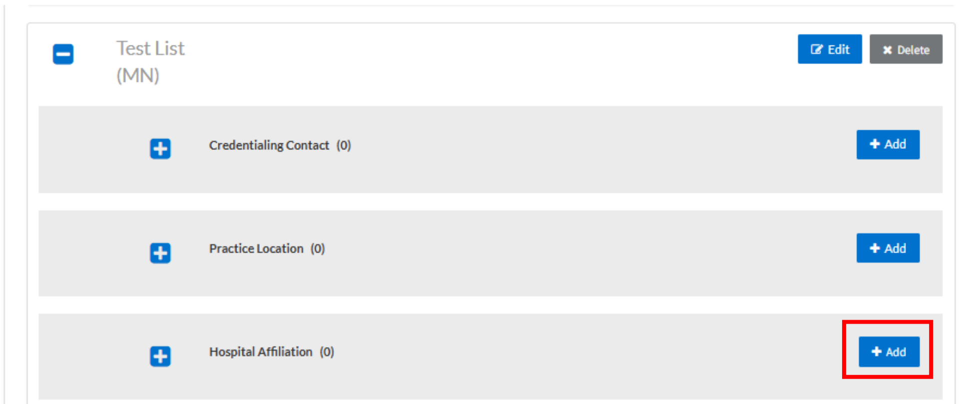


Graphic 37: Manage Practice Location

5.1.3 Hospital Affiliation

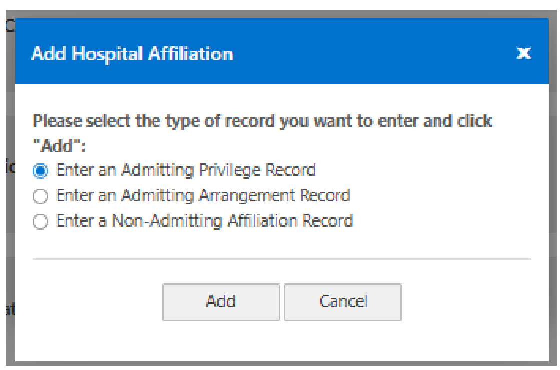
To enter Hospital Affiliation information for a list:

1. On the Manage Practice page, click the icon to expand the list to view details.
2. Click the **Add** button in the **Hospital Affiliation** section.



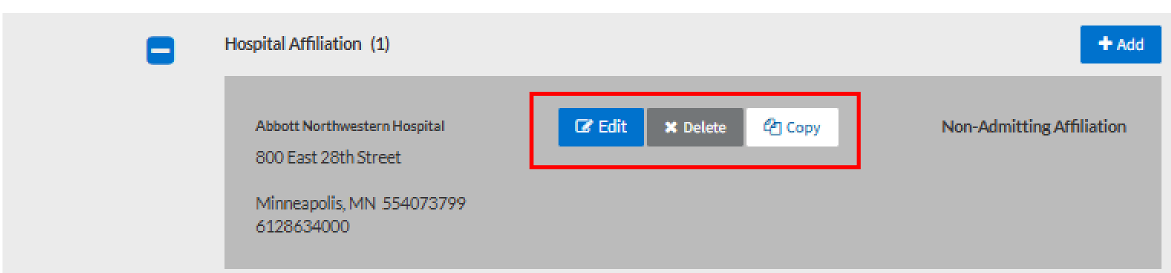
Graphic 38: Add Hospital Affiliation Button

3. The **Add Hospital Affiliation** dialog is displayed. Select the type of record you want to enter and then click the **Add** button.



Graphic 39: Add Hospital Affiliation Dialog

4. Enter information for the hospital affiliation and then click the **Save** button.
5. The hospital affiliation is added to your list. You can edit the affiliation's information, delete the affiliation, or copy the affiliation's information to make a duplicate entry in the list using the buttons displayed.

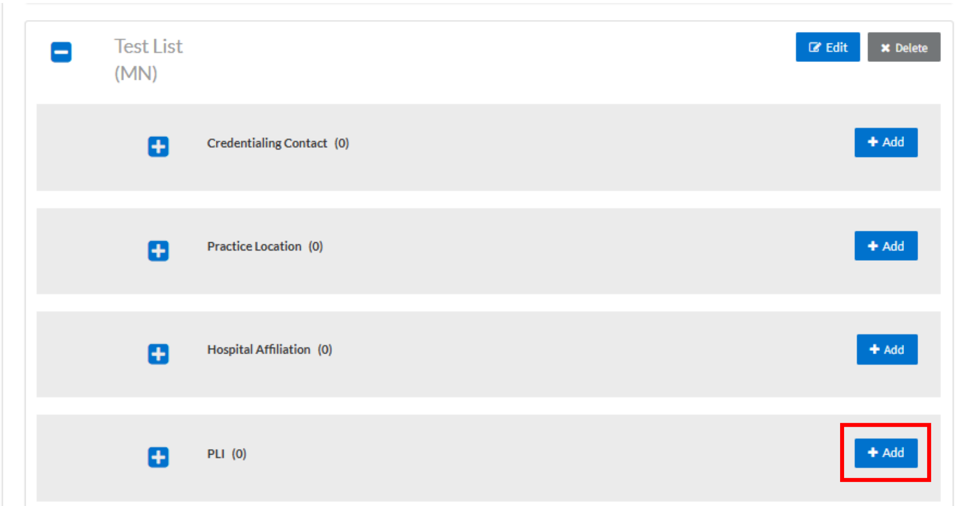


Graphic 40: Manage Hospital Affiliation

5.1.4 Professional Liability Insurance

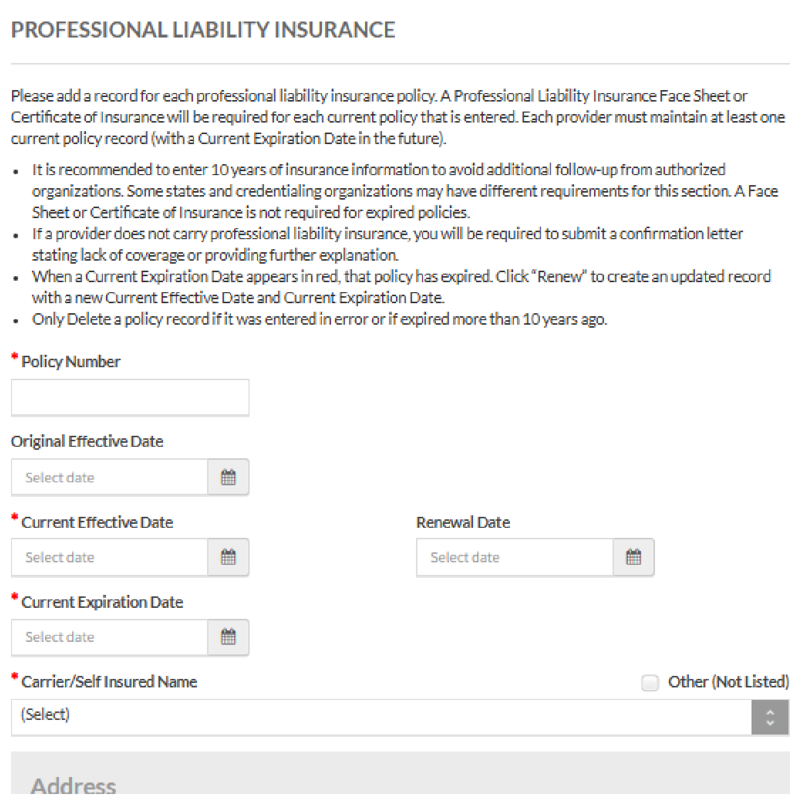
To enter Professional Liability Insurance (PLI) information for a list:

1. On the Manage Practice page, click the icon to expand the list to view details.
2. Click the **Add** button in the **PLI** section.



Graphic 41: Add PLI Button

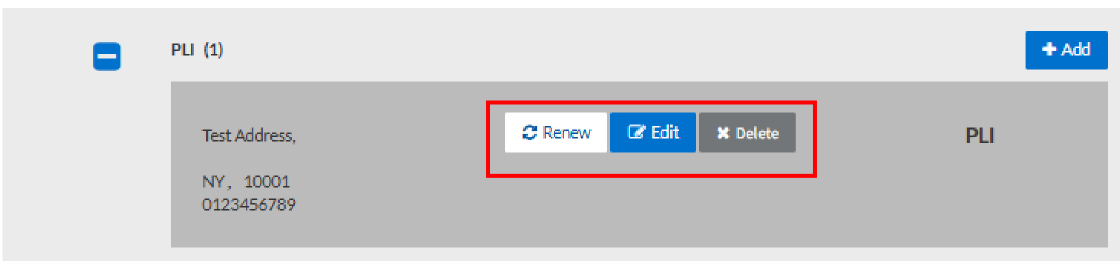
3. Enter professional liability insurance information and then click the **Save** button.



Graphic 42: Add PLI Information

- Self-insured: Self-insured Dentists 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 Dentists are not transferring financial risk for professional liability claims and expenses to defend those claims to an insurance carrier.
- If your Dentist does not carry professional liability insurance, select **Not Insured** for the **Carrier/Self Insured Name** field. The remaining fields do not need to be completed. In addition, the Dentist 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 Dentist 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 Dentist's primary malpractice carrier.
- Individual coverage is any malpractice liability insurance coverage that is not shared by other Dentists , such as a group, IPA or hospital policy.

4. The PLI record is added to your list. You can edit PLI information, delete the PLI record, or renew PLI information using the buttons displayed.

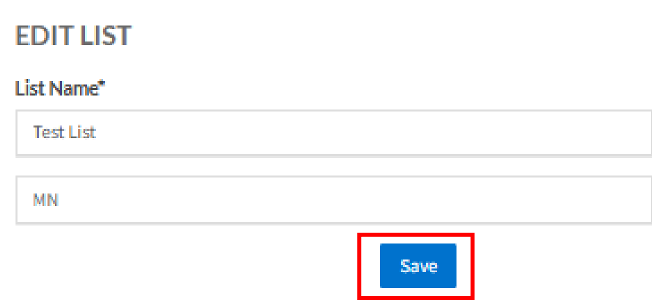


Graphic 43: Manage PLI Information

5.2 Edit List

To edit the details of an existing list:

1. Click the **Edit List** button on the Manage Practice page for the list you wish to update.
2. Edit the **List Name** and then click the **Save** button.



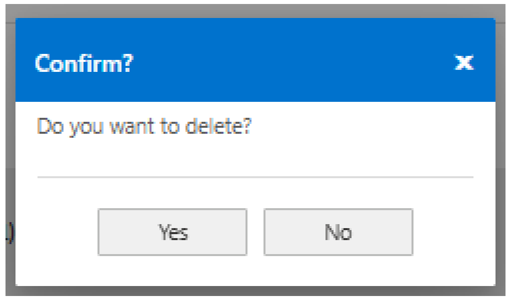
Graphic 44: Edit List

3. Your updated list is displayed on the Manage Practice page.

5.3 Delete List

To delete an existing list:

1. Click the **Delete List** button on the Manage Practice page for the list you wish to remove.
2. A dialog is displayed. Click **Yes** to delete the list.



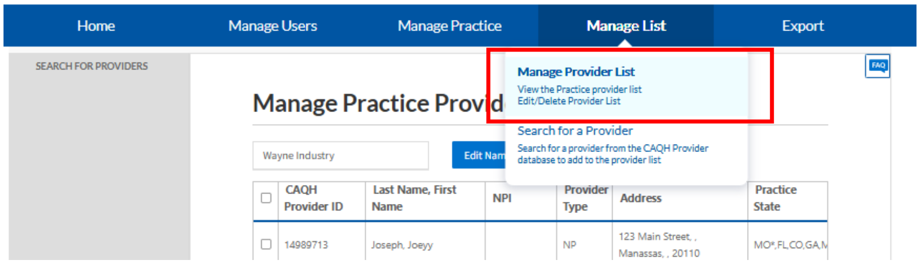
Graphic 45: Delete List Dialog

3. The list is no longer displayed on the Manage Practice page.

6 Manage List

You can view and manage the list of Dentists associated with your account on the Manage Practice Provider List page. To open this page, select the **Manage Provider List** option from the **Manage List** tab of the top navigation menu.

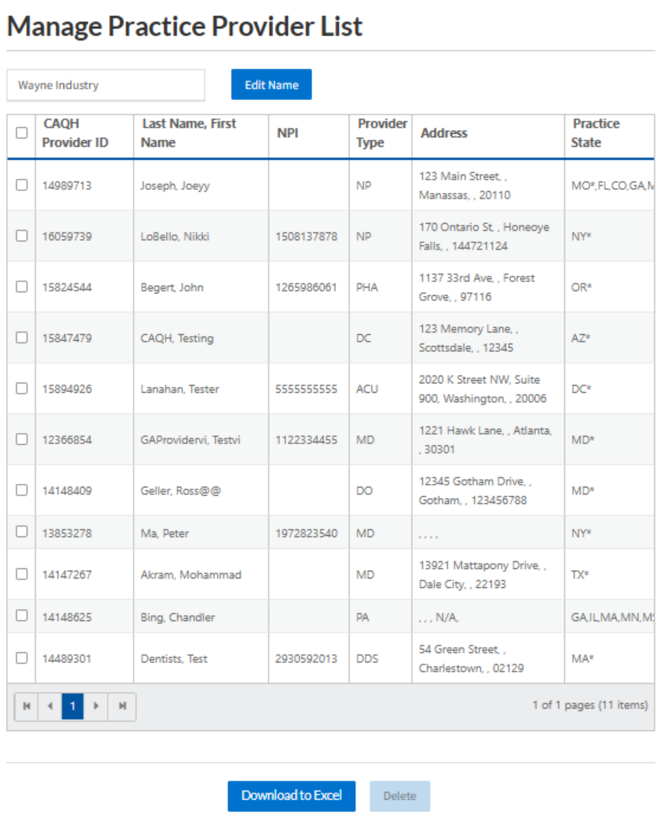
***NOTE:** If you need assistance, click the **FAQ** icon that is displayed on the right-hand side of the screen.*



Graphic 46: Manage Provider List Menu Option

The Manage Practice Provider List page is displayed, which contains a list of the Dentists associated with your account.

- Clicking a column heading sorts information by that column.
- Clicking the **Edit Name** link allows you to edit the name of the list.
- Clicking the **Delete** button allows you to delete a Dentist from the list.
- Clicking the **Download to Excel** button allows you to download the list in Excel format.



Manage Practice Provider List

Wayne Industry | Edit Name

CAQH Provider ID	Last Name, First Name	NPI	Provider Type	Address	Practice State
14989713	Joseph, Joeyy		NP	123 Main Street, , Manassas, , 20110	MO*,FL,CO,GA,M
16059739	LoBello, Nikki	1508137878	NP	170 Ontario St, , Honeoye Falls, , 144721124	NY*
15824544	Begert, John	1265986061	PHA	1137 33rd Ave, , Forest Grove, , 97116	OR*
15847479	CAQH, Testing		DC	123 Memory Lane, , Scottsdale, , 12345	AZ*
15894926	Lanahan, Tester	5555555555	ACU	2020 K Street NW, Suite 900, Washington, , 20006	DC*
12366854	GAProviderví, Teství	1122334455	MD	1221 Hawk Lane, , Atlanta, , 30301	MD*
14148409	Geller, Ross@@		DO	12345 Gotham Drive, , Gotham, , 123456788	MD*
13853278	Ma, Peter	1972823540	MD	, , , ,	NY*
14147267	Akram, Mohammad		MD	13921 Mattapony Drive, , Dale City, , 22193	TX*
14148625	Bing, Chandler		PA	, , , N/A,	GA,IL,MA,MN,M
14489301	Dentists, Test	2930592013	DDS	54 Green Street, , Charlestown, , 02129	MA*

1 of 1 pages (11 items)

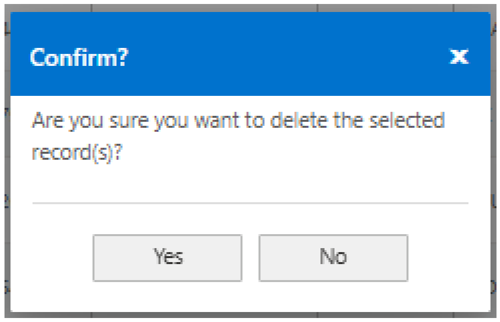
Download to Excel | Delete

Graphic 47: Manage Practice Provider List Page

6.1 Delete a Dentist

To delete a Dentist from the list:

1. Locate the name of the Dentist you wish to delete in the list on the Manage Practice Provider List page.
2. Select the checkbox for the Dentist you wish to delete and then click the **Delete** button.
3. A dialog is displayed. Click **Yes** to delete the selected Dentist .



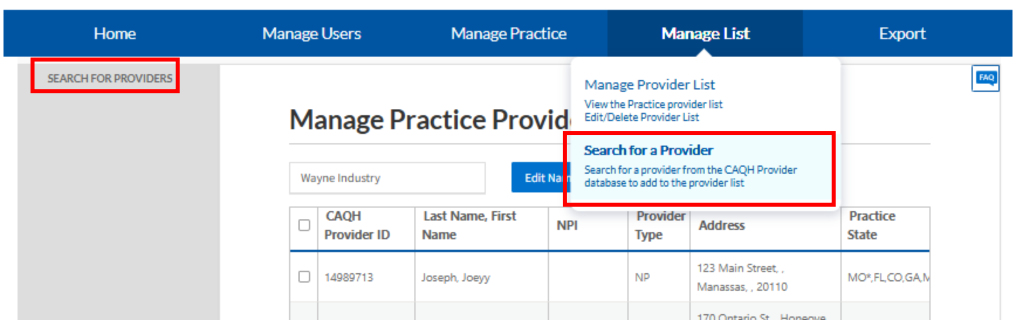
Graphic 48: Delete Dentist Dialog

4. The Dentist record is deleted and no longer displayed in the list.

6.2 Search for a Provider

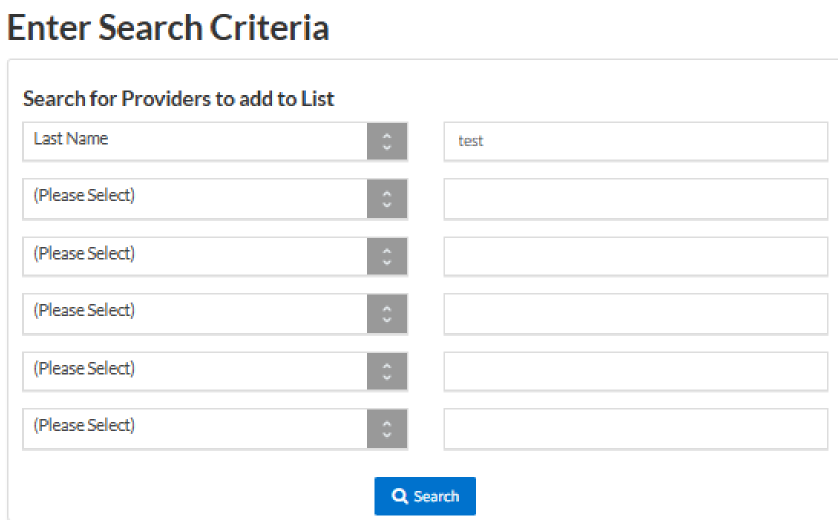
To locate a specific Dentist and add them to your list:

1. Select the **Search for Providers** option on the Manage Practice Provider List page or hover over the **Manage List** option in the top navigation menu and then select the **Search for a Provider** option.



Graphic 49: Provider Search Options

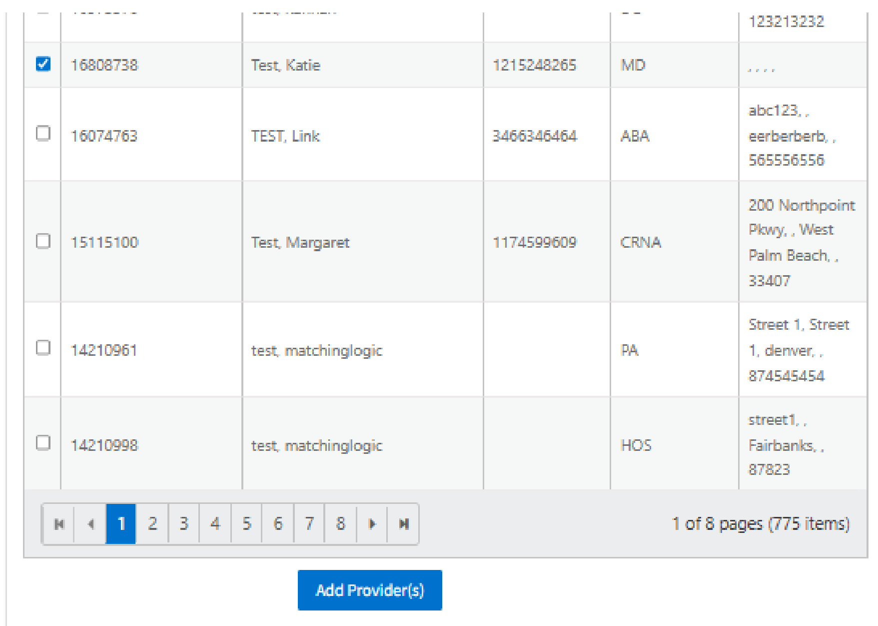
2. The Enter Search Criteria page is displayed. Use the drop-down menus to select your search option, enter search criteria into the corresponding field, and then click the **Search** button.



Graphic 50: Enter Search Criteria Page

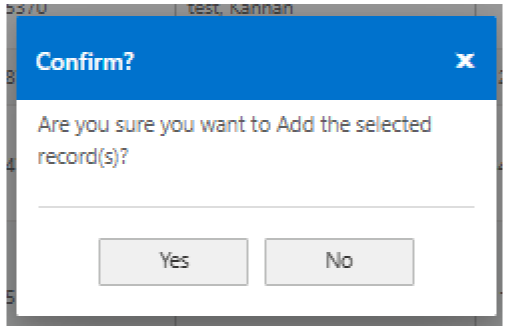
3. Results matching your search criteria are displayed.
4. Locate the Dentist you wish to add to your list. Select the checkbox for the Dentist and then click the Add Provider(s) button.

NOTE: *You can select all checkboxes in the header row to select all Dentists at once.*



Graphic 51: Search Results

5. A dialog is displayed. Click **Yes** to add the Dentist to your list.



Graphic 52: Add Dentist Dialog

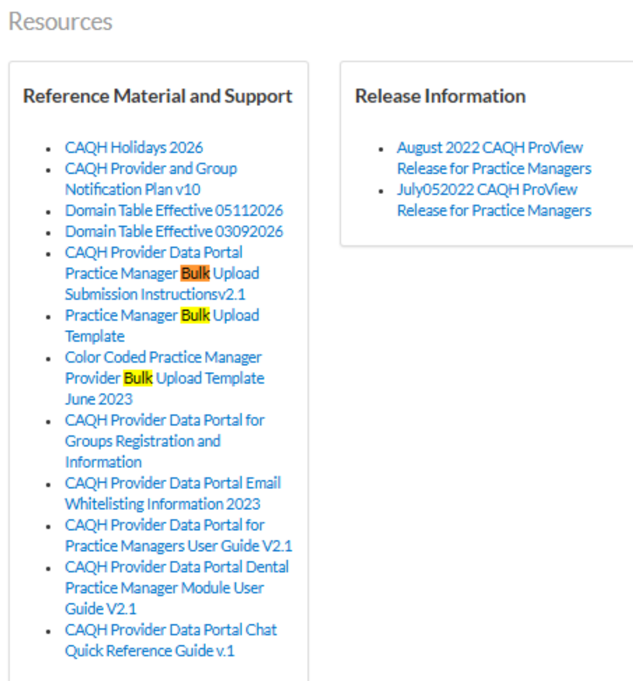
6. The page is refreshed, and the Dentist is now displayed in your list on the Manage Practice Provider List page.

7 Bulk Upload

Users with the necessary permissions have the **Bulk Upload** option in the top navigation menu. From the Bulk Upload page, you can submit a file containing all the Dentists you manage. This functionality is meant to assist large practices by streamlining the data entry process for some of the common data profile sections.

7.1 Creating a Bulk Upload File

Dedicated documentation, including Bulk Upload Submission Instructions, is located on the **Resources** page of the portal. Click the **question mark** icon and then select the **Resources** link to access this documentation. A file template and file specification requirements for the Bulk Upload file are available.



Graphic 53: Resources Page Materials

The submitted Bulk Upload file may contain new records, updated records, or deleted records. DataSpring will process each record and identify any changes based on the "Action Flag".

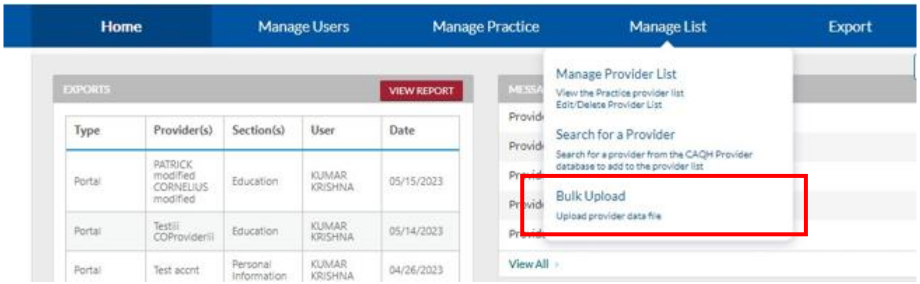
The Bulk Upload file must be named as shown below:

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

To upload a Bulk Upload File:

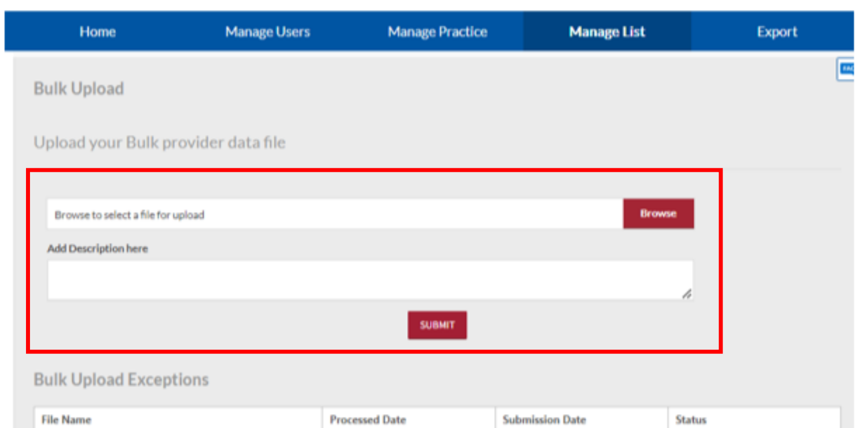
1. Hover over the **Mange List** option in the top navigation menu and select the **Bulk Upload** option.



Graphic 54: Bulk Upload Menu Option

2. Click the **Browse** button to select the file you wish to upload. You can add a text description of your file if applicable.
3. Click the **Submit** button 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 Dentist data that could not be processed because the file format did not meet the required file specifications.

NOTE: *You can submit multiple Bulk Upload files; however, files are processed in the order in which they were received.*



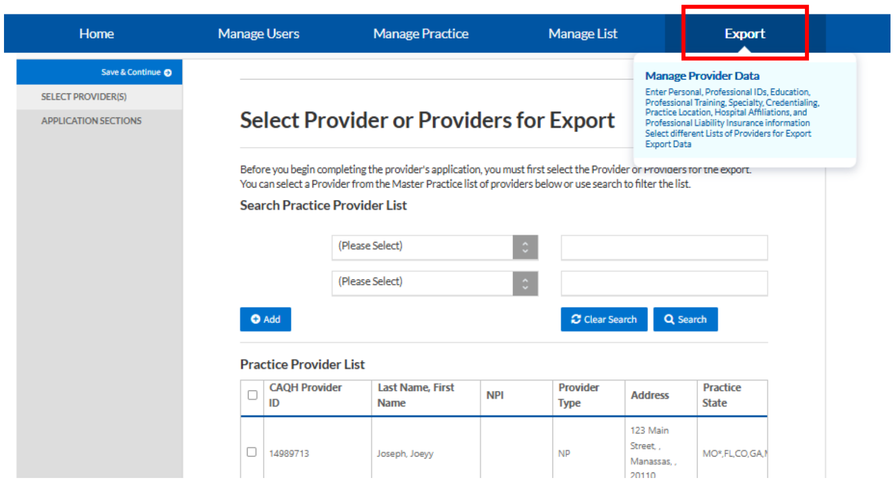
Graphic 55: Upload Bulk File

4. Once the file is processed, data will automatically be exported to the individual Dentist data profiles. The Dentist can review the data and choose to import the data if desired. The Dentist will still need to log in and complete any remaining outstanding required fields and complete the attestation process.

8 Export

The Select Provider or Providers for Export page is displayed after selecting the **Export** option from the top navigation menu. From this page, you can begin the export data process to multiple or individual Dentist accounts.

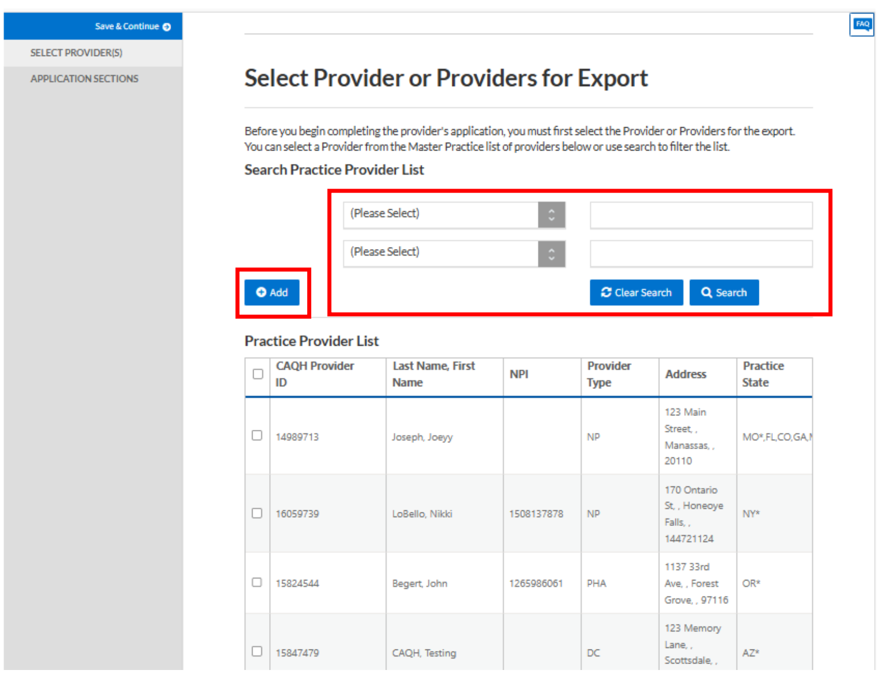
NOTE: *If you need assistance, click the* ***FAQ*** *icon that is displayed on the right-hand side of the screen.*



Graphic 56: Export Menus Option

The Select Provider or Providers for Export page contains your full Dentist list.

- Clicking a column heading sorts information by that column.
- Use the search options to refine the list or locate a specific Dentist.
- Clicking the **Add** button adds an additional search field.

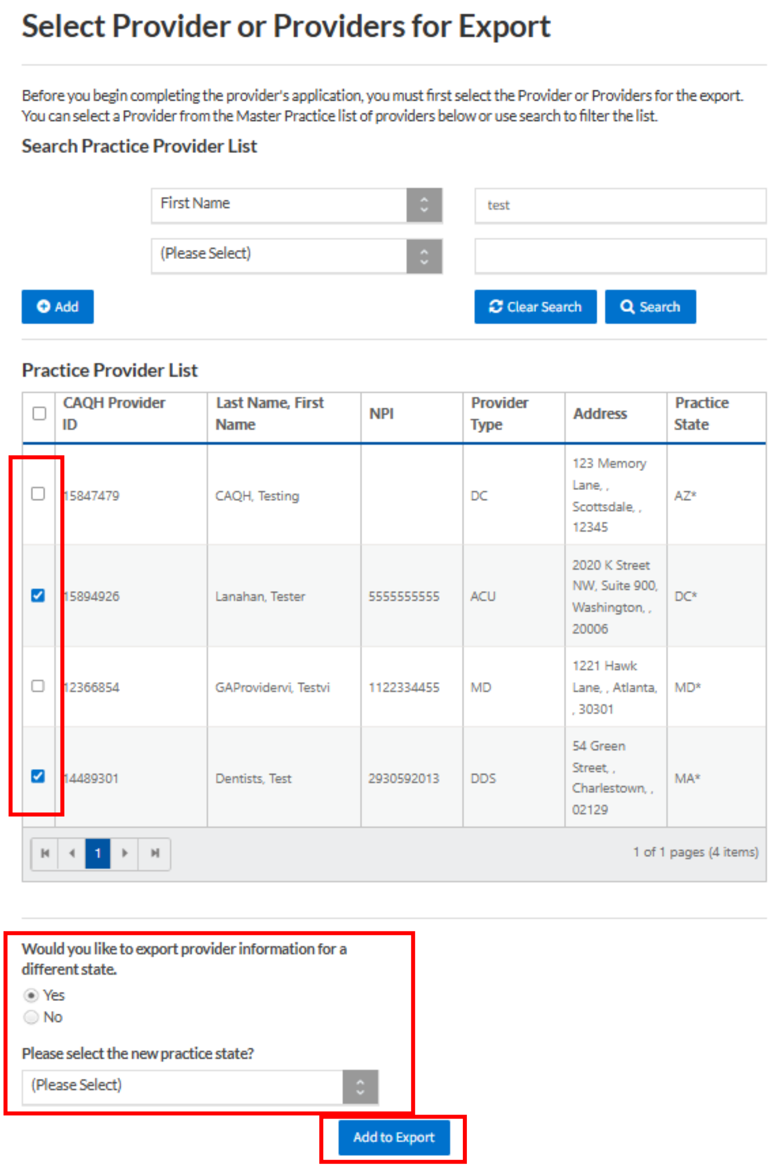


Graphic 57: Select Provider or Providers for Export Page

8.1 Export Provider(s)

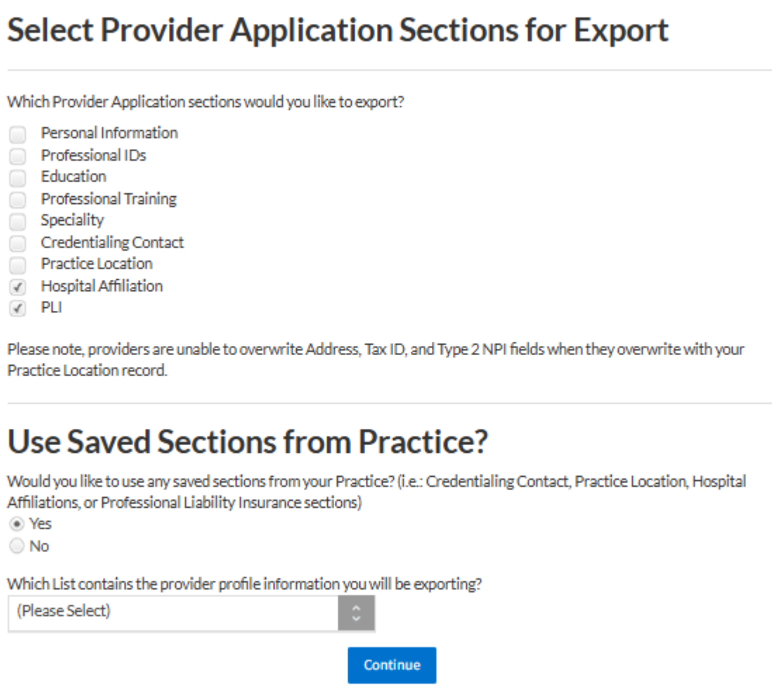
To export one or more Dentists:

1. Select one or more Dentists from your list by clicking the checkmark in their corresponding row. You can select a single Dentist or multiple. Use the search functions as needed to refine the list.
2. Select **Yes** and then select a state using the drop-down menu if you would like to export information for a different state.
3. Click the **Add to Export** button.



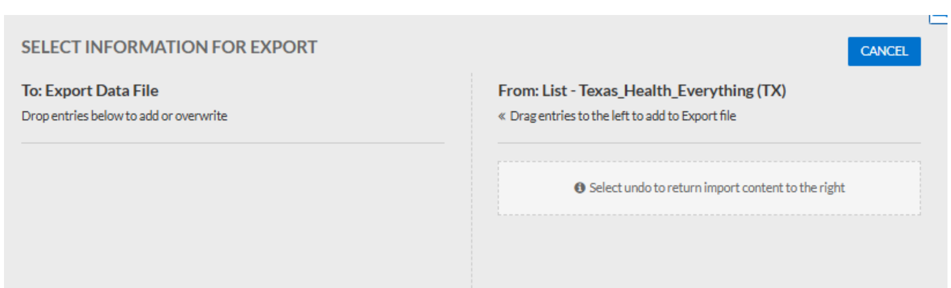
Graphic 58: Select Dentists to Export

4. The Select Provider Application Sections for Export page is displayed. Select which application section(s) you wish to export.
   - If you are exporting a single Dentist, all options are selectable.
   - If you are exporting multiple Dentists, only the Credentialing Contact, Practice Location, Hospital Affiliation, and Professional Liability Insurance (PLI) options are selectable.
5. Indicate whether you wish to use any saved sections.
   - If **Yes**, use the drop-down menu to select the list that contains the information to be exported.
6. Click the **Continue** button.



Graphic 59: Select Provider Application Sections for Export Page

   - If you choose to use saved sections, information is populated. Drag and drop information from the **From** side to the **To** side for it to be included in the export. You can drag and drop as many sections as required. Use the **Undo** option to revert a selection. Click **Complete Import & Save** when finished.

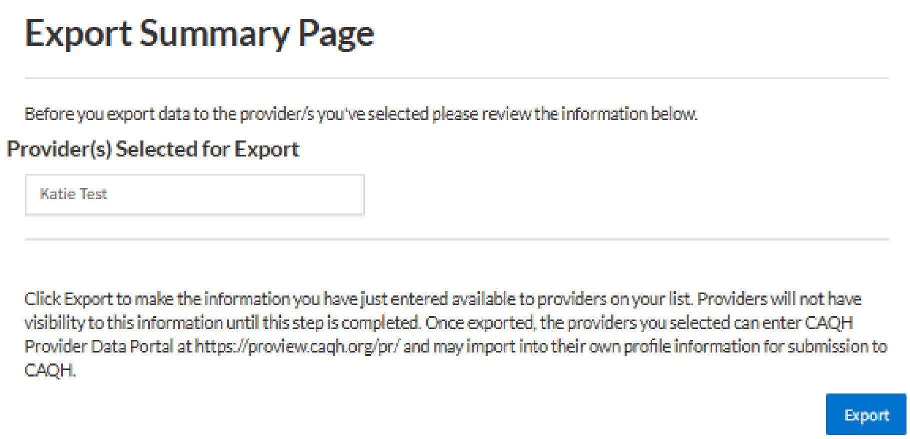


Graphic 60: Using Saved Sections

  – If you did not choose to use saved sections, enter the required information for each section you selected on the Select Provider Application Sections for Export Page.

7. Once you have configured all required information, the Export Summary Page is displayed. Click the **Export** button.

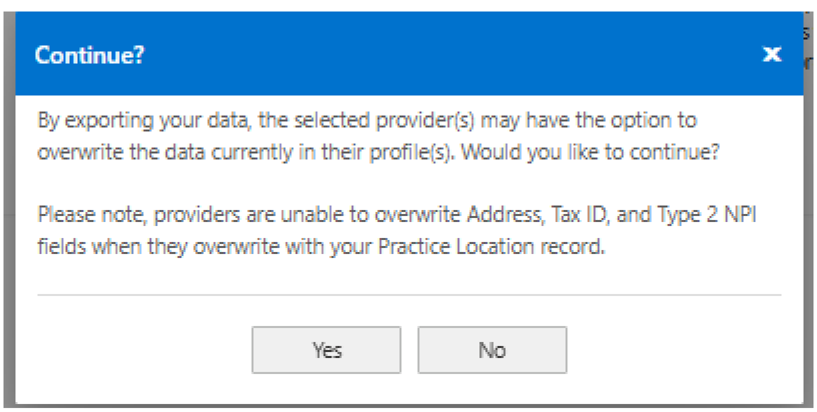
NOTE: *After the data is exported, you will not be able to see any changes to the data that the Dentist may make. You can see a record of the export in the Activity Log and the Export History Log available from the Home page.*



Graphic 61: Export Summary Page

8. A dialog is displayed. Click **Yes** to confirm the export.

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



Graphic 62: Confirm Export Dialog

9. **Export Successful** is displayed if the export is successful and available to the selected Dentist(s). Click **OK** to return to the Home page.

Appendix A Reference Information

A.1 Provider Status Reference Information

The following defines the various Provider Statutes in the system.

Table 1: Provider Status Reference Information

Status	Description
Alternate Outreach	▪ When the current Provider Status is **Initial Outreach** and Practitioner changes Primary Email Address at registration, OR ▪ When the Practitioner’s current Provider Status is **Initial Outreach**, and the Welcome Email bounced back, the Welcome Letter is resent via a new email address if an email bounce back is received.
Expired Attestation	▪ When a Practitioner’s Primary Practice State ***IS NOT*** IL (Illinois), AND the Practitioner has not attested within the last 120 days, OR ▪ When a Practitioner’s Primary Practice State ***IS*** IL (Illinois), AND the practitioner has not attested within the last 180 days.
First Provider Contact	▪ New Practitioner has registered and logs into the Provider Data Portal with a username and password, OR ▪ When a new Practitioner contacts the Help Desk.
Initial Outreach	▪ When the system sends a Welcome Email, OR ▪ When DataSpring Operations sends a Welcome Letter through USPS. ***NOTE:*** *Effective 06/08/2020, DataSpring no longer sends registration kits via the United States Postal Service (USPS).*
Initial Profile Complete	Practitioner has attested for the first time, and all required documents have been approved.
New Provider	Practitioner record created.
OptOut	Practitioner has confirmed to DataSpring Operations that they no longer wish to participate in the Provider Data Portal.
Profile Data Submitted	Practitioner has attested for the first time, and all required documents have not been approved.
Provider Deceased	Practitioner confirmed by DataSpring Operations as deceased.
Provider Retired	Practitioner confirmed by DataSpring Operations as retired.
Re-Attestation	Practitioner’s attestation after their first attestation.
Returned mail	When the Welcome Letter to a Practitioner is returned by USPS as **Return to Sender** due to a bad mailing address, and no alternate email or mailing addresses are available. ***NOTE:*** *Effective 06/08/2020, DataSpring no longer sends registration kits via the United States Postal Service (USPS).*
Undeliverable	When the Welcome Letter to a Practitioner is returned as **Undeliverable** due to a bad address and no alternate email or mailing addresses are available. ***NOTE:*** *Effective 06/08/2020, DataSpring no longer sends registration kits via the United States Postal Service (USPS).*

A.2 Provider Type Reference Information

The following is a list of provider type abbreviations.

Table 2: Provider Type Abbreviations

Abbreviation	Description
AA	Anesthesia Assistant
ABA	Applied Behavioral Analyst
ACU	Acupuncturist
ADC	Alcohol/Drug Counselor
APN	Advanced Practice Nurse
AT	Athletic Trainers
AUD	Audiologist
BT	Biofeedback Technician
CNS	Clinical Nurse Specialist
CP	Clinical Psychologist
CRNA	Certified Registered Nurse Anesthetist
CSP	Christian Science Practitioner
CSW	Clinical Social Worker
DC	Doctor of Chiropractic
DDS	Doctor of Dental Surgery
DMD	Doctor of Dental Medicine
DO	Osteopathic Doctor
DPM	Doctor of Podiatric Medicine
DT	Dietician
GC	Genetic Counselor
HOS	Hospitalist – MD, Hospitalist – DO
LN	Nutritionist
LPN	Licensed Practical Nurse
MD	Medical Doctor
MFT	Marriage/Family Therapist
MT	Massage Therapist
MW	Midwife
NP	Nurse Practitioner
OD	Optometrist
OPT	Optician
OT	Occupational Therapist
PA	Physician Assistant
PC	Professional Counselor
PHA	Pharmacist
PT	Physical Therapist
RN	Registered Nurse

Table 2: Provider Type Abbreviations

Abbreviation	Description
RNFA	Registered Nurse First Assistant
RT	Respiratory Therapist
SA	Surgical Assistant
SLP	Speech Pathologist

Appendix B Training and Solutions Center Information

B.1 Training Information

B.1.1 Participating Organizations

Users may access our free, on-demand training center for training on DataSpring 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.

B.1.2 Practitioners, Groups Users, and Practice Managers

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

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

B.2 Solutions Center Information

B.2.1 Participating Organizations

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

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

Call us at 888-600-9802.

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

B.2.2 Practitioners, Groups Users, and Practice Managers

Log in to your portal to chat with us.

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

Call us at 888-599-1771.

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

Appendix C Revision History

Date	Version	Revision
	1.0	First draft.
	2.0	Updated document branding (ProView to Provider Data Portal, etc.).
NOTE: *Prior to version 2.0, the release date was not tracked in the Revision History table.*		
06/15/2026	3.0	CAQH is now DataSpring. Updated document branding to align with DataSpring standards.

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