



DataSpring | CAQH Provider Data Portal[®] **Practice Manager User Guide**

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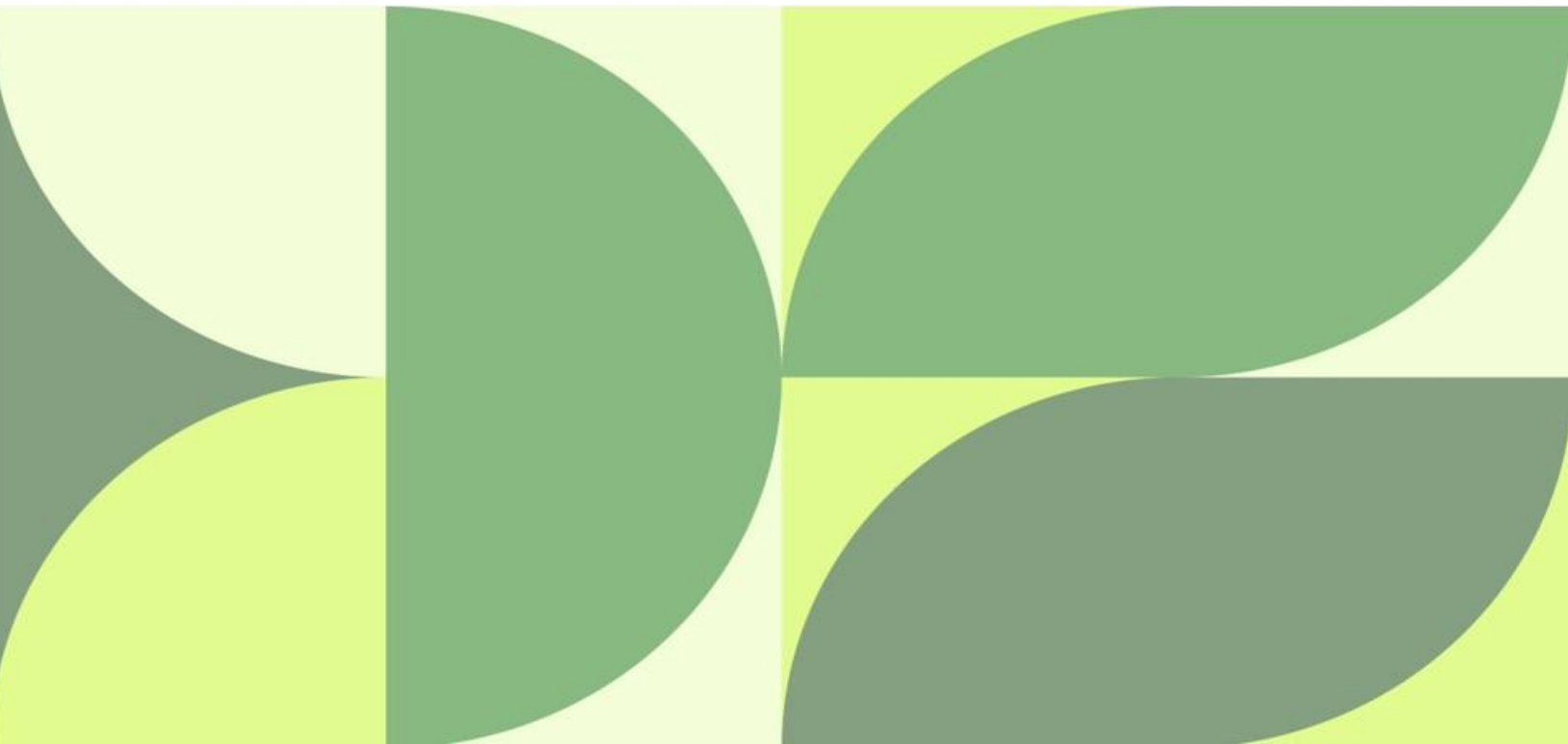


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1 Introduction

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 Practitioner, DataSpring for Practice Managers, powered by CAQH, may facilitate your data entry process.

The following is a high-level overview of the DataSpring for Practice Managers process:

1. A Practitioner 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 Practitioners.
3. The Practice Manager adds the applicable Practitioner to their Provider List.
4. The Practice Manager exports the applicable sections and indicates which Practitioner from the Provider List the data should be exported to.
5. The Practitioner 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 Practitioner completes any remaining required fields and the authorization section, which allows health plans access to the data profile.
7. The Practitioner completes the attestation and uploads any required supporting documentation.
8. DataSpring reviews the Practitioner'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 Practitioner's completed data profile is available to the Participating Organization.

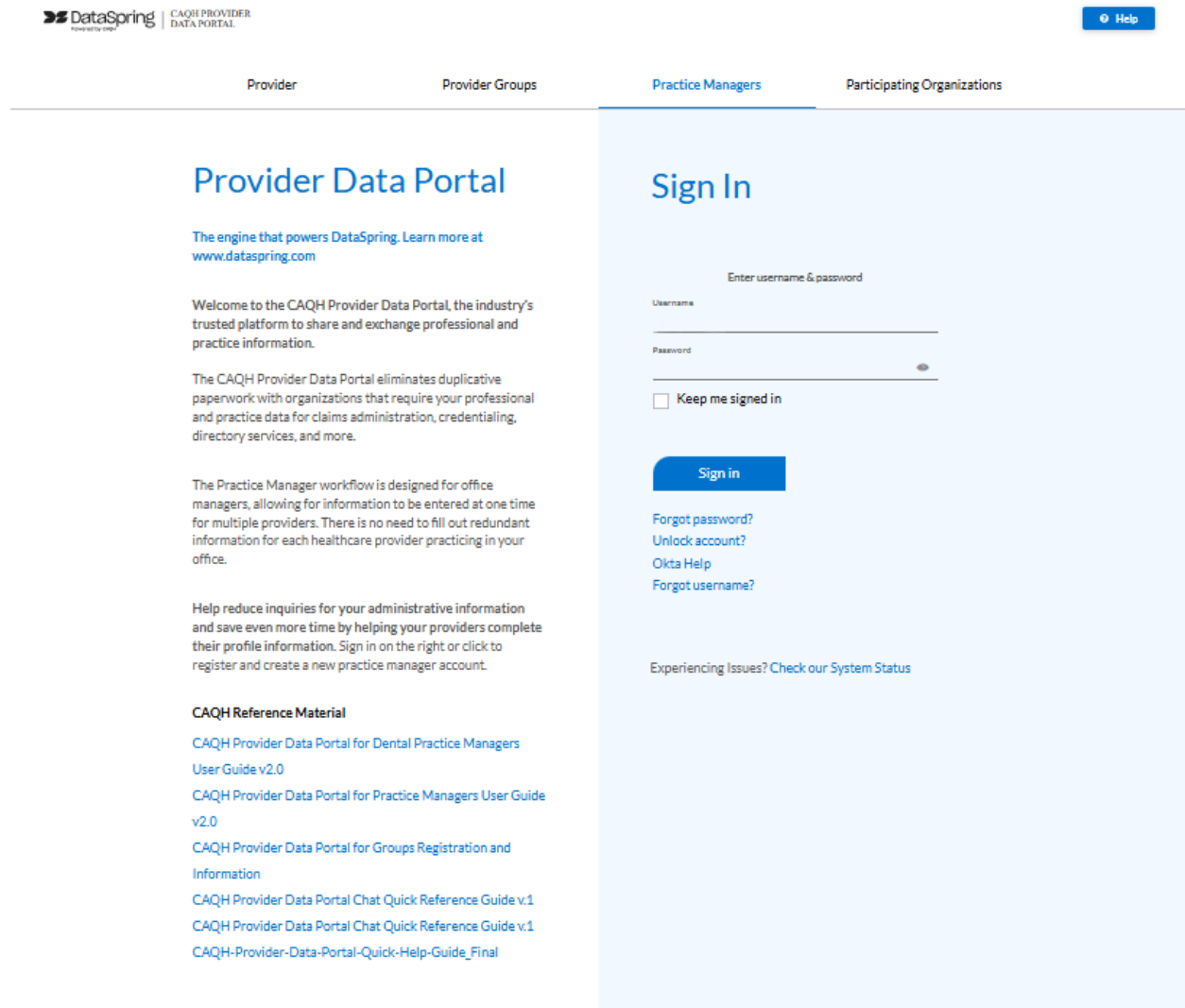
1.2 Scope

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 Practitioners, view details about a Practitioner, and roster and de-roster Practitioners.

2 Accessing the Provider Data Portal

Registration is required for all Practice Managers 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

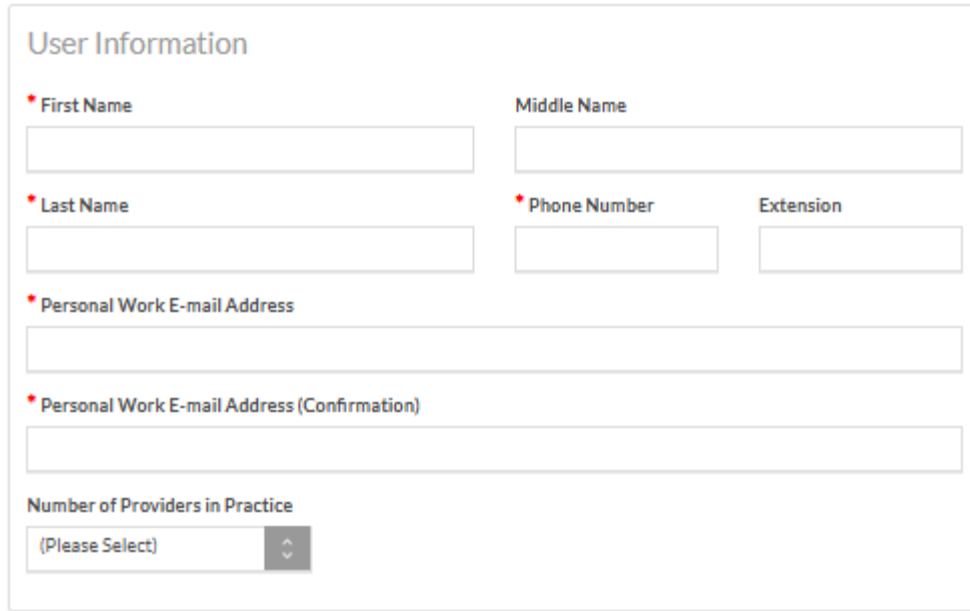
If you are a new customer, navigate to <https://proview.caqh.org/pm> and select the **Click here to register** link to complete the self-registration process. Each user who self-registers is automatically established as an Administrator, which allows them to add or edit Basic User accounts. A Basic User 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

The screenshot shows a web form titled "Practice Information" for CAQH Practice Manager Self Registration. The form contains the following fields and controls:

- * Practice Name**: Text input field.
- * Practice TIN**: Text input field.
- Practice Department**: Text input field.
- Practice NPI**: Text input field.
- * Practice Phone**: Text input field.
- Extension**: Text input field.
- * Practice Address**: Text input field.
- Address 2**: Text input field.
- * City**: Text input field.
- * State**: Dropdown menu with "(Please Select)" and up/down arrows.
- * Zip Code**: Text input field.
- * Practice E-mail Address**: Text input field.
- * Practice E-mail Address (Confirmation)**: Text input field.

Graphic 2: Registration – Practice Information

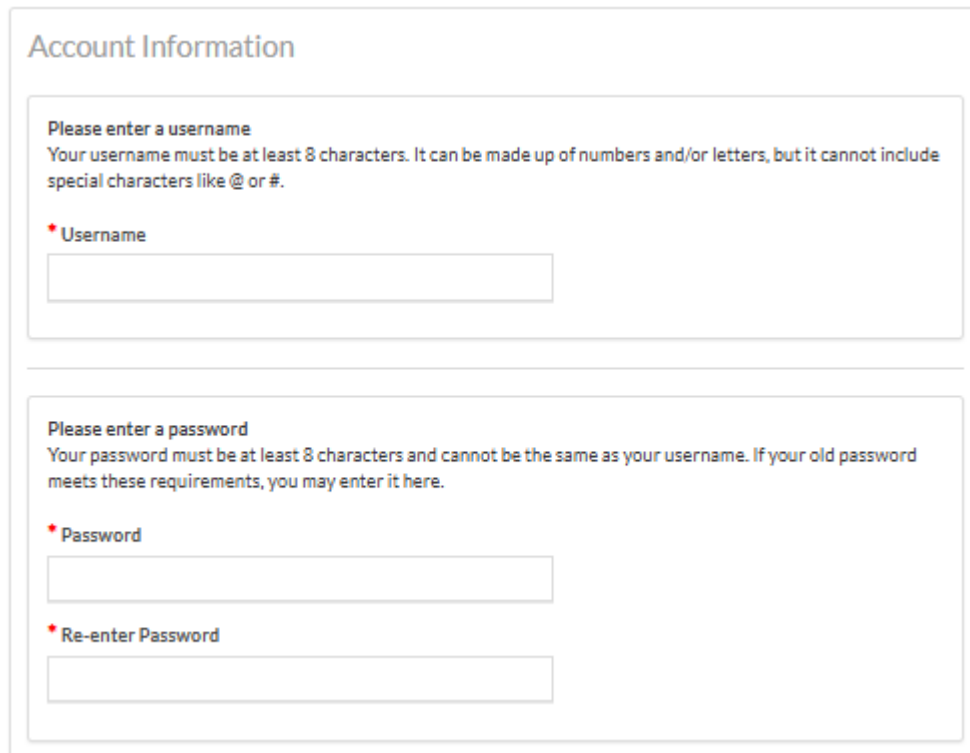


The form is titled "User Information" and contains the following fields:

- * First Name**: Text input field.
- Middle Name**: Text input field.
- * Last Name**: Text input field.
- * Phone Number**: Text input field.
- Extension**: Text input field.
- * Personal Work E-mail Address**: Text input field.
- * Personal Work E-mail Address (Confirmation)**: Text input field.
- Number of Providers in Practice**: A dropdown menu with "(Please Select)" as the current selection.

Graphic 3: Registration – User Information

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



The form is titled "Account Information" and contains the following sections and fields:

- Please enter a username**: Instructional text stating "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**: Text input field.
- Please enter a password**: Instructional text stating "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**: Text input field.
- * Re-enter Password**: Text input field.

Graphic 4: Registration – Account Information

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:

* Security Answer 1

* Security Question 2:

* Security Answer 2

* Security Question 3:

* Security Answer 3

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.

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

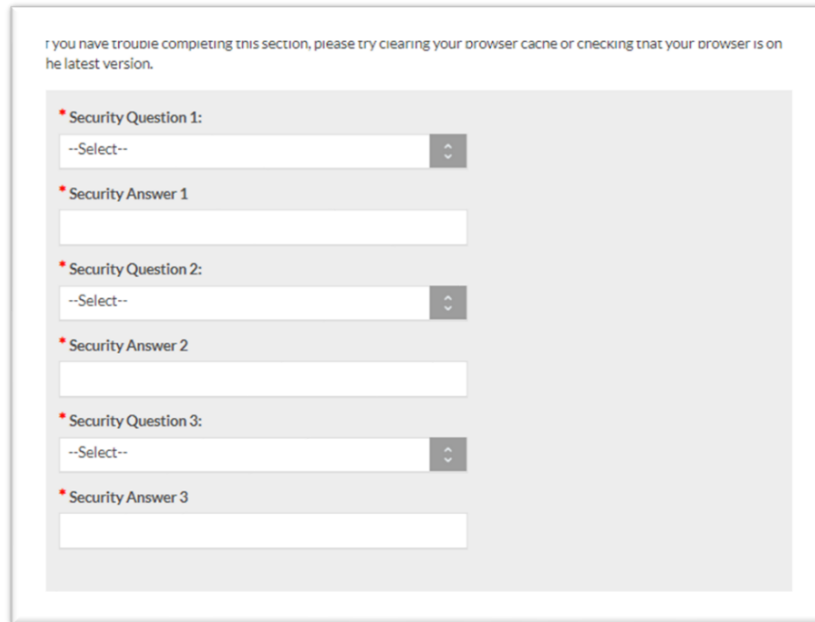
Please enter a password
Your password must be at least 8 characters and cannot be the same as your username. If your old password meets these requirements, you may enter it here.

* Password

* Re-enter Password

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.



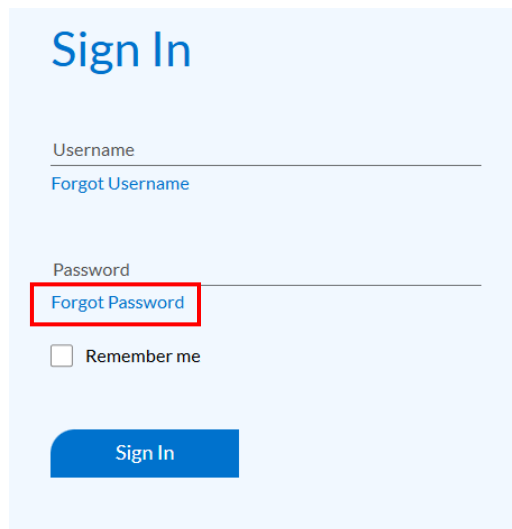
Graphic 7: Security Questions Page

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

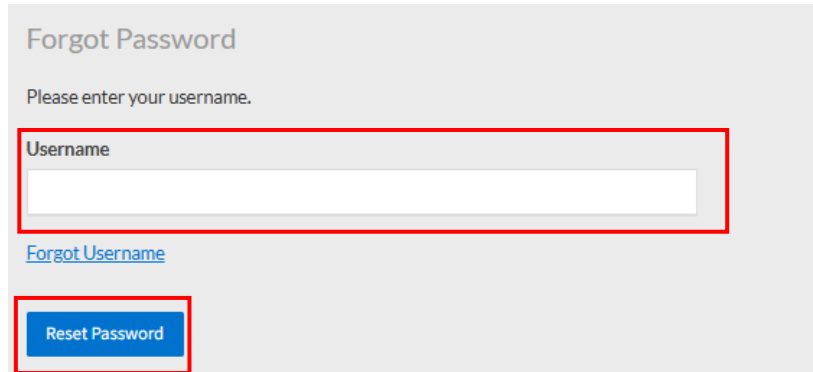
If you forgot your password, perform the following steps to reset your password.

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.



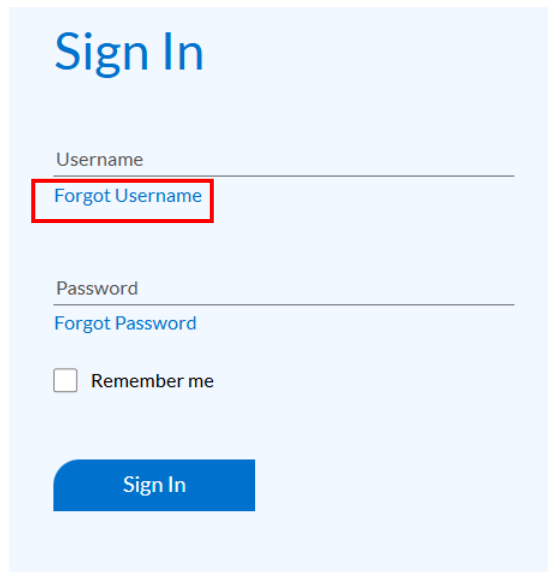
Graphic 10: Reset Password Page

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.

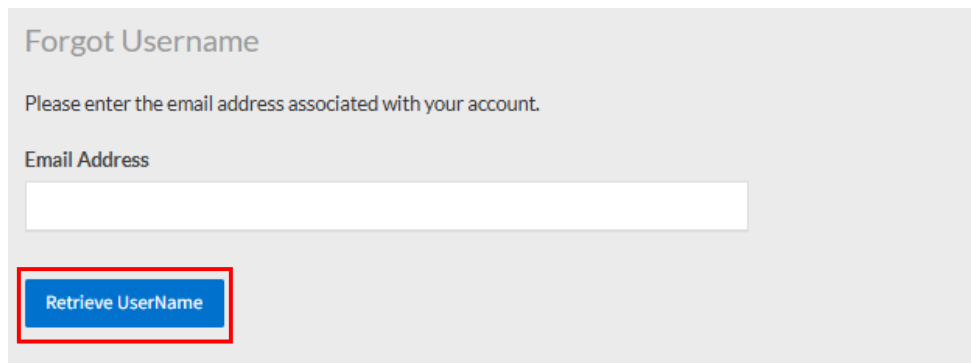
1. Click the **Forgot username** option on the Sign In page.



The image shows a 'Sign In' page with a light blue background. At the top, the text 'Sign In' is displayed in a large blue font. Below this, there are two input fields. The first is labeled 'Username' and contains a blue link 'Forgot Username' which is highlighted with a red rectangular box. The second is labeled 'Password' and contains a blue link 'Forgot Password'. Below the password field, there is a checkbox labeled 'Remember me'. At the bottom of the form is a blue button with the text 'Sign In'.

Graphic 11: Forgot Username Option

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



The image shows a 'Forgot Username' page with a light gray background. At the top, the text 'Forgot Username' is displayed in a gray font. Below this, there is a line of text: 'Please enter the email address associated with your account.' Underneath is an input field labeled 'Email Address'. At the bottom of the form is a blue button with the text 'Retrieve UserName', which is highlighted with a red rectangular box.

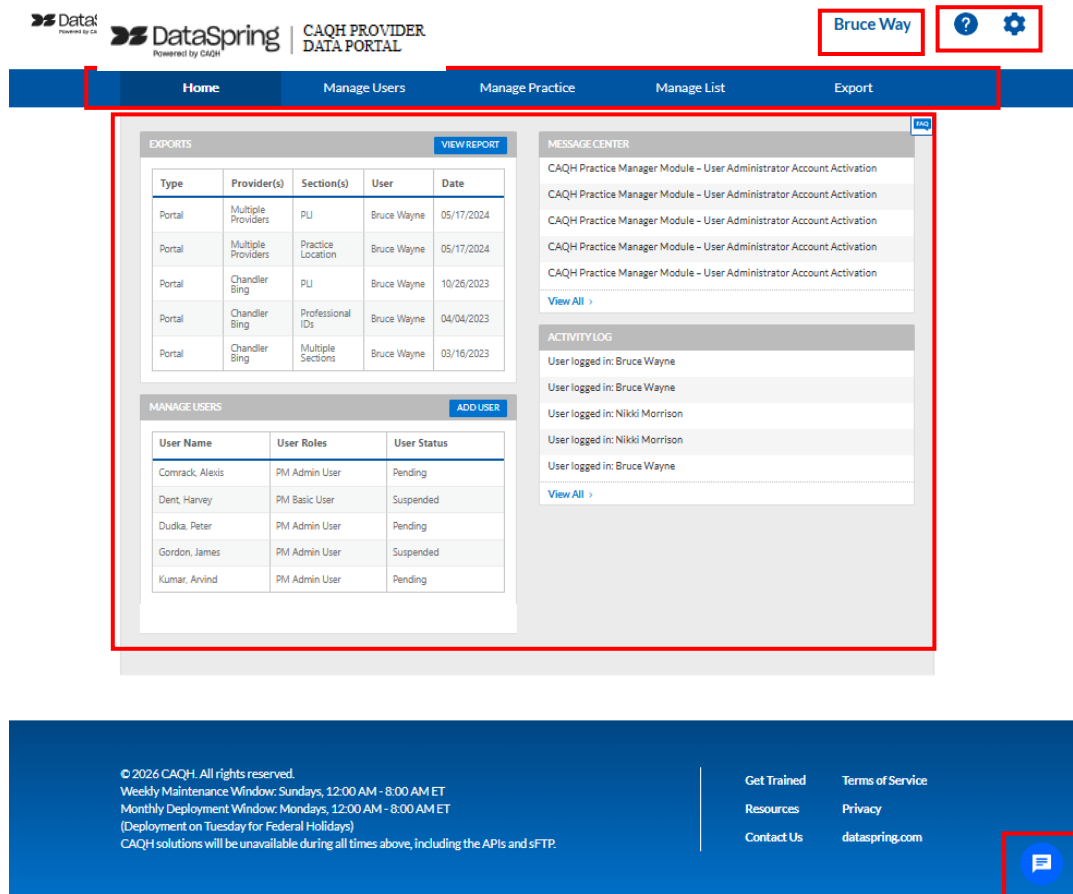
Graphic 12: Forgot Username

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 Practitioners.
- **Manage List:** Allows you to [manage](#) your Practitioner list. Users with the necessary permissions will see an additional menu option which allows them to [upload](#) a data file containing all the Practitioners they manage.
- **Export:** Allows you to begin the [export](#) data process to multiple or individual Practitioner 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 |

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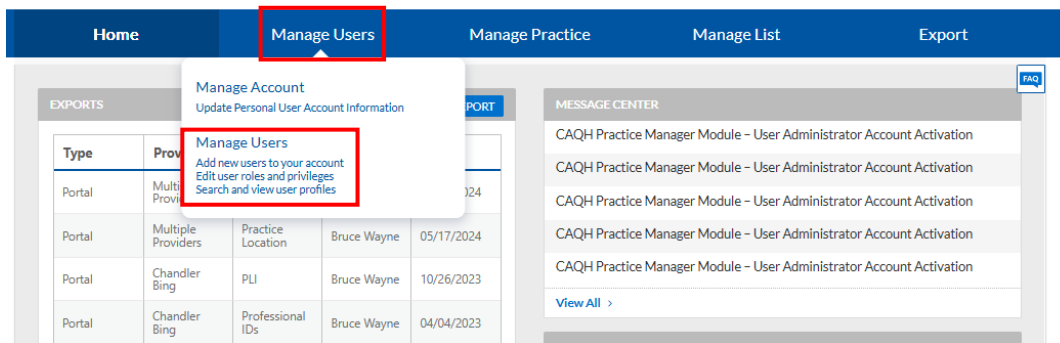
1 of 45 pages (447 items)

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.

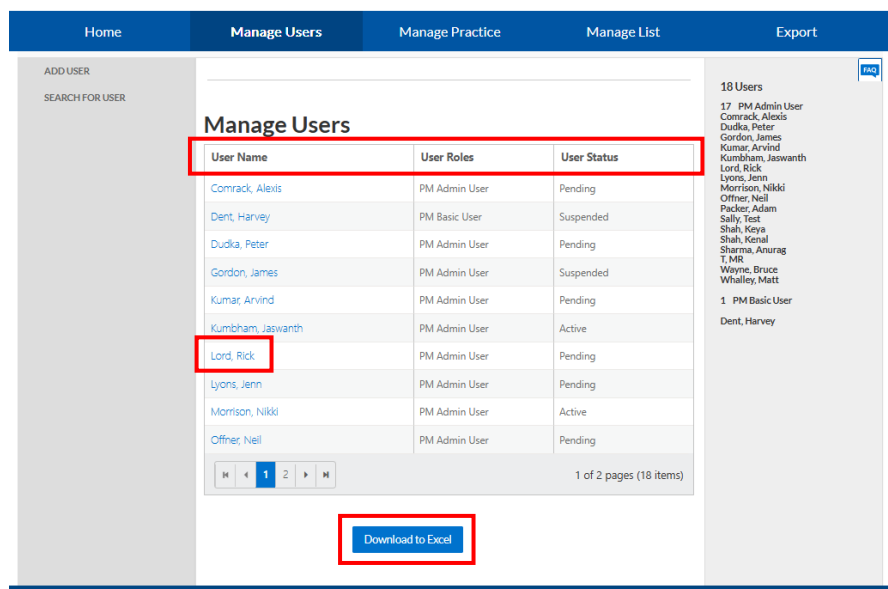
NOTE: If you need assistance, click the **FAQ** icon that is displayed on the right-hand side of the screen.



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.

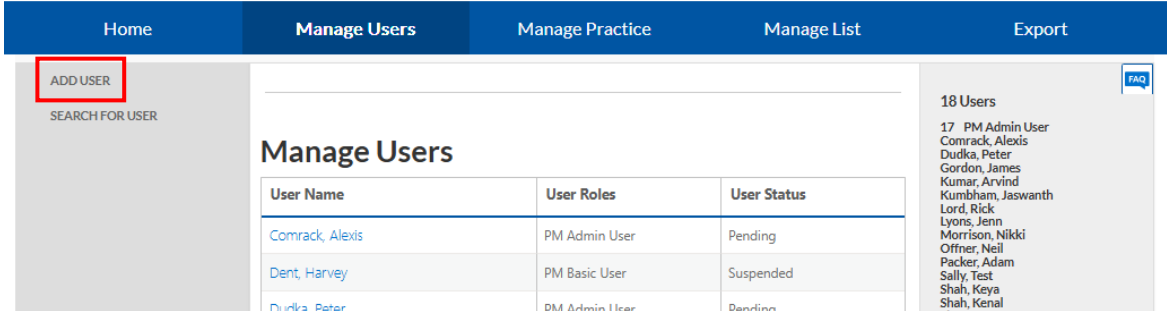


Graphic 16: Manage Users Page

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.

ADD USER

Basic Information

First Name* Middle Name Last Name*

Title Department

Phone Number* Phone Extension

Address 1 Address 2

City* State* Zip Code*

Personal Work Email Address* Personal Work Email Address (Confirmation)*

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.

User Account Information

USER TYPE*

Select

Please select check box if this user needs Bulk Upload functionality

Add User

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

- 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.

Establish Your CAQH Account

To set up your CAQH account, please enter a username, password, and answer the security questions below.

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

Graphic 21: Create Username and Password

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:

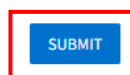
* Security Answer 1

* Security Question 2:

* Security Answer 2

* Security Question 3:

* Security Answer 3



Graphic 22: Create Security Questions and Answers

- 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 |

Navigation: [Home] [Previous] [1] [2] [Next] [End] 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).

Edit User

Basic Information

| | | |
|------------------------------|--|----------------------|
| First Name* | Middle Name | Last Name* |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Title | Department | |
| <input type="text"/> | <input type="text"/> | |
| Phone Number* | Phone Extension | |
| <input type="text"/> | <input type="text"/> | |
| Address 1 | Address 2 | |
| <input type="text"/> | <input type="text"/> | |
| City* | State* | Zip Code* |
| <input type="text"/> | (Please Select) <input type="button" value="v"/> | <input type="text"/> |
| Personal Work Email Address* | Personal Work Email Address (Confirmation)* | |
| <input type="text"/> | <input type="text"/> | |

User Account Information

USER TYPE*

PM Admin User Please select check box if this user needs Bulk Upload functionality

BULK UPLOAD STATUS

Status: Pending

USER STATUS*

Pending

Active

Suspended



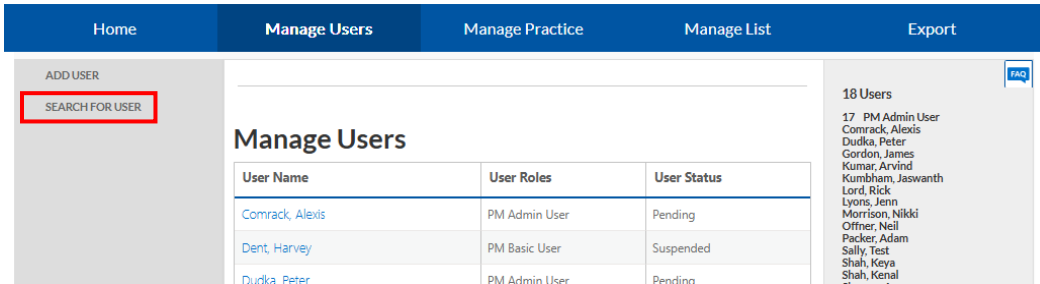
Graphic 24: Edit User Page

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

4.3 Search for a User

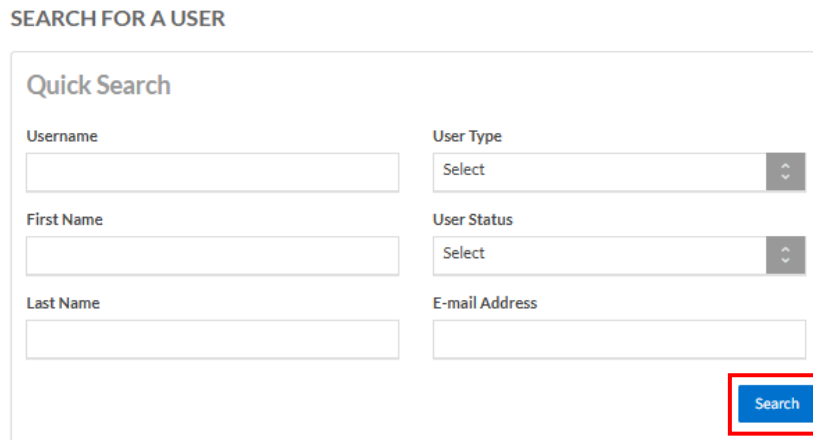
To perform a basic search to locate a specific user:

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.

SEARCH RESULTS

| User Name | User Roles | User Status |
|-------------------------------|---------------|-------------|
| Dent, Harvey | PM Basic User | Suspended |
| T, MR | PM Admin User | Suspended |
| Gordon, James | PM Admin User | Suspended |

1 of 1 pages (3 items)

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.

MY ACCOUNT - DOCTESTUSER

Basic Information

| | | |
|---|--|------------------------------------|
| First Name* | Middle Name | Last Name* |
| <input type="text" value="Test"/> | <input type="text"/> | <input type="text" value="User"/> |
| Title | Department | |
| <input type="text"/> | <input type="text"/> | |
| Phone Number* | Phone Extension | |
| <input type="text" value="123-456-7890"/> | <input type="text"/> | |
| Address 1 | Address 2 | |
| <input type="text"/> | <input type="text"/> | |
| City* | State* | Zip Code* |
| <input type="text" value="Fake City"/> | <input type="text" value="MN"/> <input type="button" value="v"/> | <input type="text" value="55372"/> |
| Personal Work Email Address* | Personal Work Email Address (Confirmation)* | |
| <input type="text"/> | <input type="text"/> | |



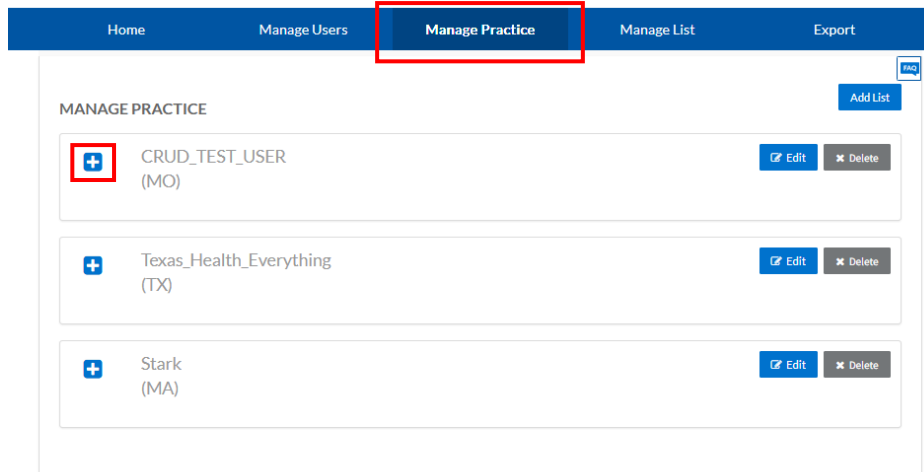
Graphic 28: Manage Account Page

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 Practitioners by creating lists of common provider 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 Providers' 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.

ADD LIST

List Name*

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

Save

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).

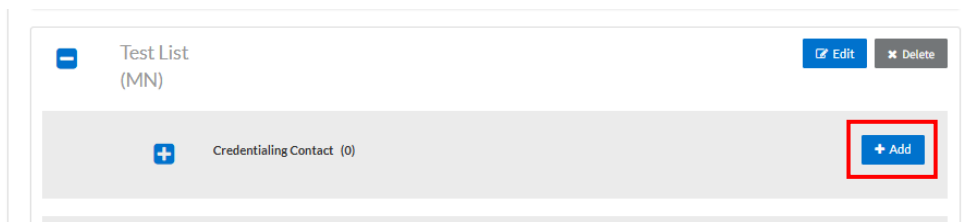


Graphic 31: List Details

5.1.1 Credentiaing Contact

To enter Credentiaing 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 **Credentiaing Contact** section.



Graphic 32: Add Credentiaing Contact Button

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

CREDENTIALING CONTACT INFORMATION

Credentialing Contact

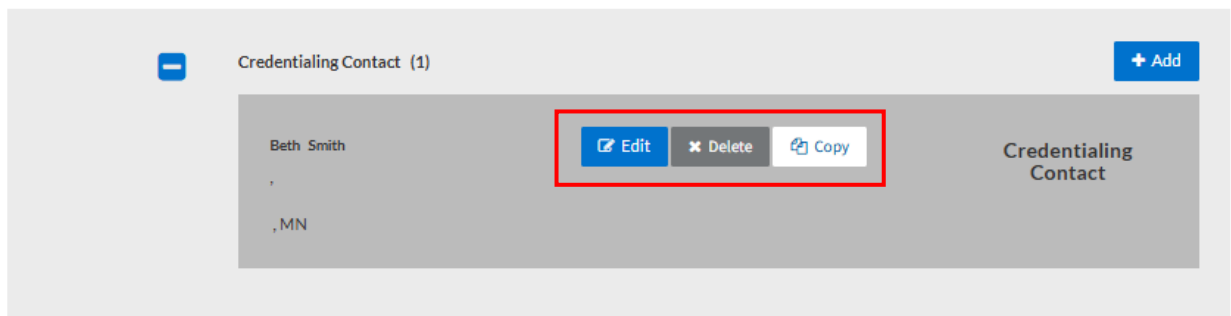
| | | |
|--|--|----------------------|
| First Name | Middle Name | Last Name |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| Street 1 | | |
| <input type="text"/> | | |
| Street 2 | | |
| <input type="text"/> | | |
| City | State | Zip Code |
| <input type="text"/> | (Please 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"/> |

Copy to a different list on save

(Select)

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

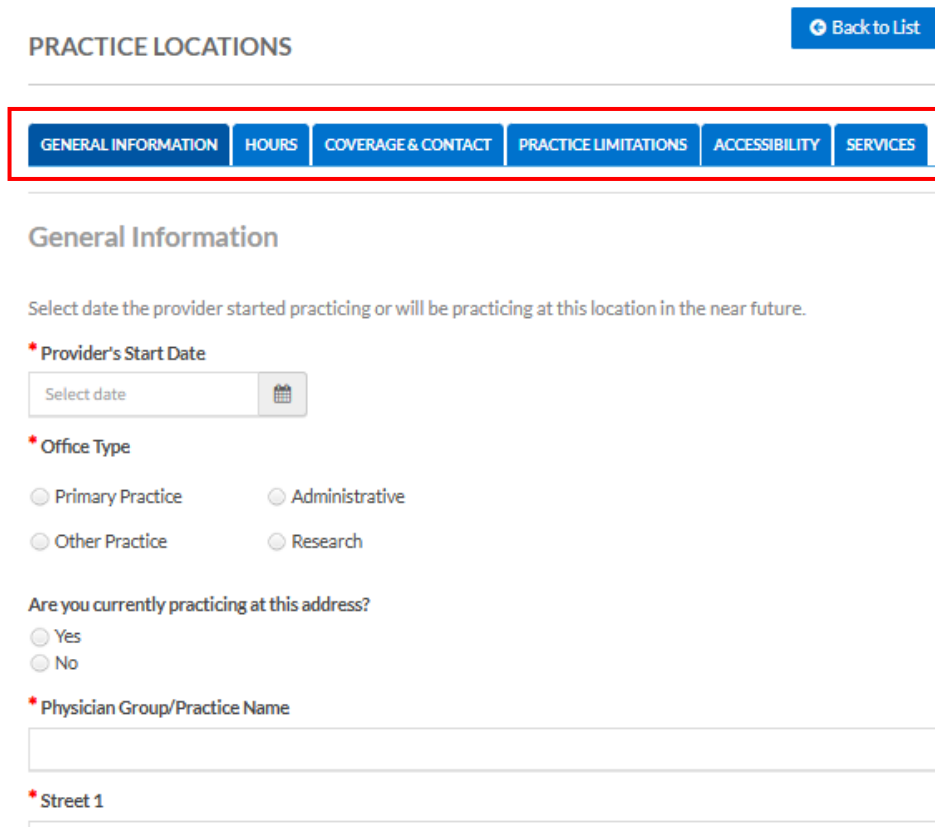
To enter Practice Location information for a list:

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

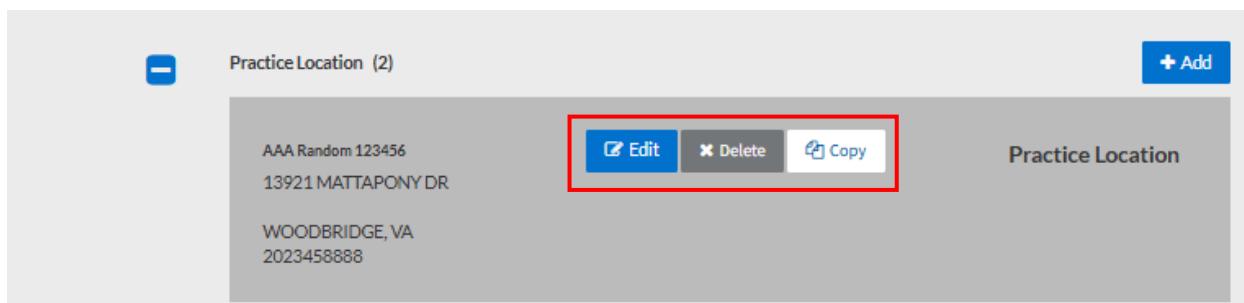
3. The Practice Locations page is displayed. Practice location information is entered using multiple tabs. Complete all required information for a tab. Use the **Save and Go Back**, **Save**, and **Save & Continue** buttons at the bottom of each page to save your information and proceed to the next tab.



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 Practitioner’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 - 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 Practitioner’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.

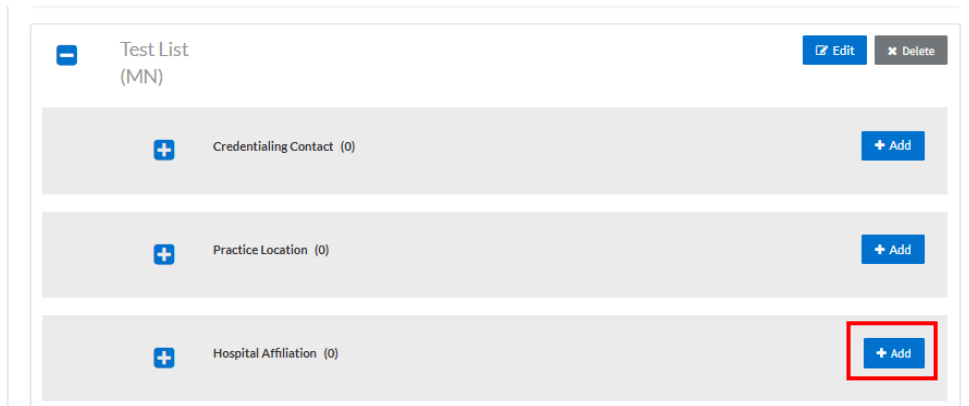


Graphic 37: Manage Practice Location

5.1.3 Hospital Affiliation

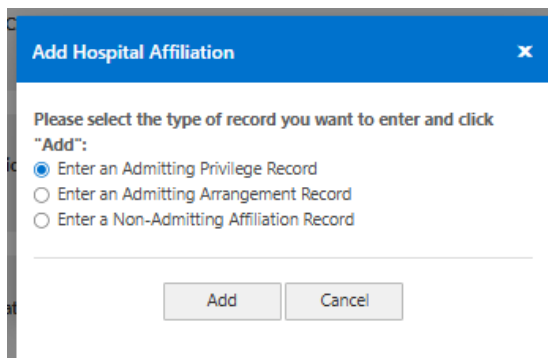
To enter Hospital Affiliation information for a list:

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.



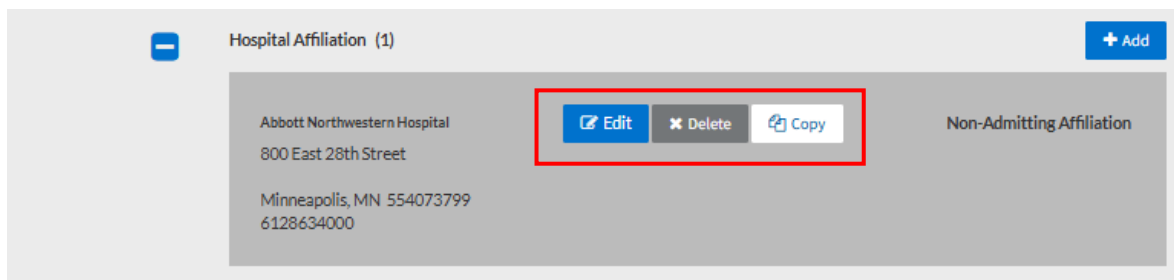
Graphic 38: Add Hospital Affiliation Button

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.

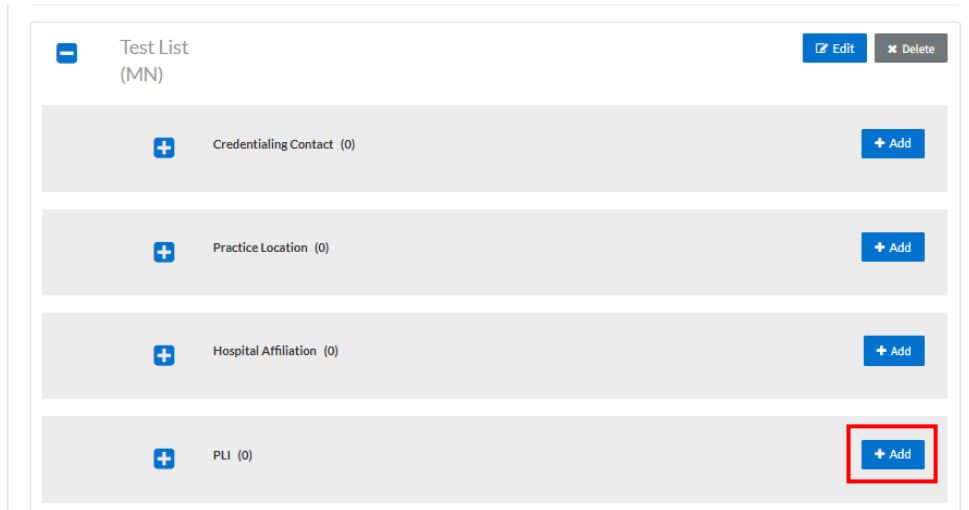


Graphic 40: Manage Hospital Affiliation

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.

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

Renewal Date

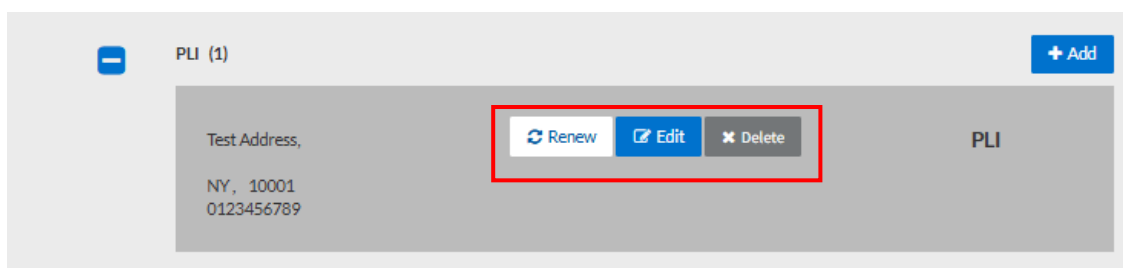
* Current Expiration Date

* Carrier/Self Insured Name Other (Not Listed)

Address

Graphic 42: Add PLI Information

- Self-insured: Self-insured Practitioners 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 Practitioners are not transferring financial risk for professional liability claims and expenses to defend those claims to an insurance carrier.
 - If your Practitioner does not carry professional liability insurance, select **Not Insured** in the **Carrier/Self Insured Name** field. The remaining fields do not need to be completed. In addition, the Practitioner will not be required to submit a professional liability insurance face sheet. However, the Practitioner 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 Practitioner’s primary malpractice carrier.
 - Individual coverage is any malpractice liability insurance coverage that is not shared by other Practitioners, 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.

EDIT LIST

List Name*

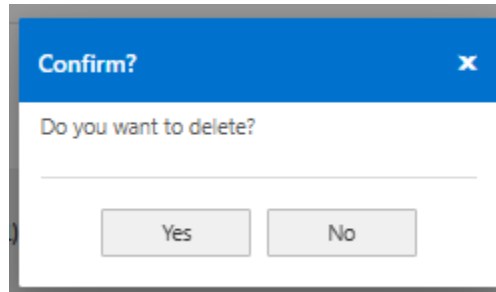
Graphic 44: Edit List

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.



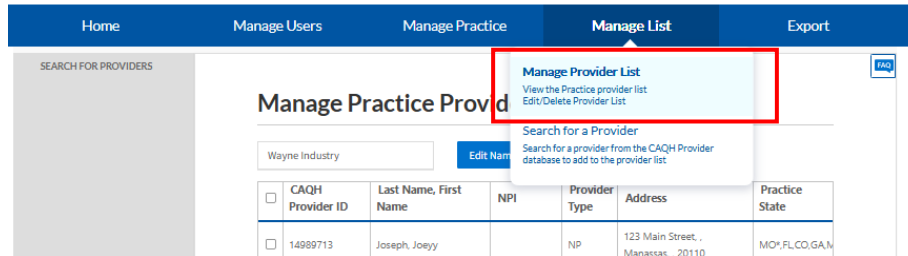
Graphic 45: Delete List Dialog

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

6 Manage List

You can view and manage the list of Practitioners 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 Practitioners 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 Practitioner 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](#)

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

1 of 1 pages (11 items)

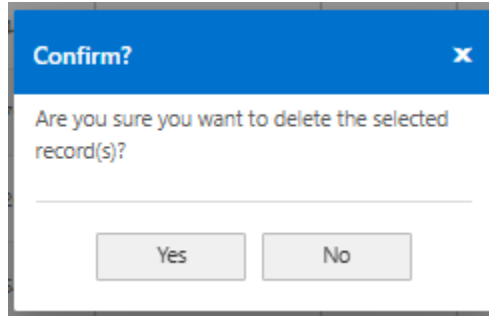
[Download to Excel](#) [Delete](#)

Graphic 47: Manage Practice Provider List Page

6.1 Delete a Practitioner

To delete a Practitioner from the list:

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



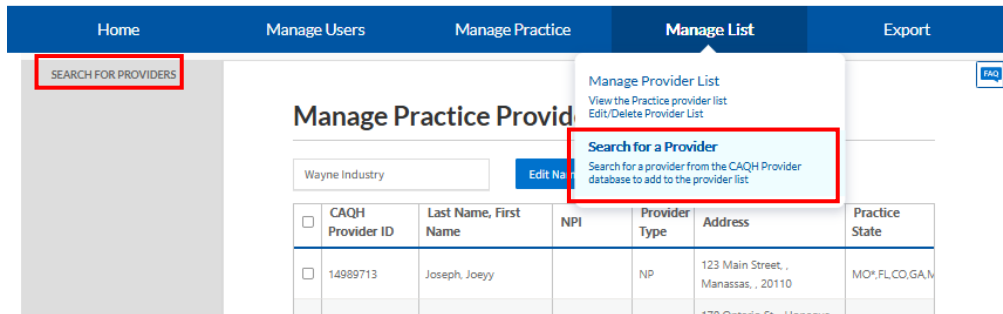
Graphic 48: Delete Practitioner Dialog

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

6.2 Search for a Provider

To locate a specific Practitioner 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.

Enter Search Criteria

Search for Providers to add to List

| | | |
|-----------------|---|------|
| Last Name | ↕ | test |
| (Please Select) | ↕ | |
| (Please Select) | ↕ | |
| (Please Select) | ↕ | |
| (Please Select) | ↕ | |
| (Please Select) | ↕ | |

Search

Graphic 50: Enter Search Criteria Page

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

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

| | | | | | |
|-------------------------------------|----------|---------------------|------------|------|--|
| | | | | | 123213232 |
| <input checked="" type="checkbox"/> | 16808738 | Test, Katie | 1215248265 | MD | |
| <input type="checkbox"/> | 16074763 | TEST, Link | 3466346464 | ABA | abc123, , eerberberb, , 565556556 |
| <input type="checkbox"/> | 15115100 | Test, Margaret | 1174599609 | CRNA | 200 Northpoint Pkwy, . West Palm Beach, , 33407 |
| <input type="checkbox"/> | 14210961 | test, matchinglogic | | PA | Street 1, Street 1, denver, , 874545454 |
| <input type="checkbox"/> | 14210998 | test, matchinglogic | | HOS | street1, , Fairbanks, , 87823 |

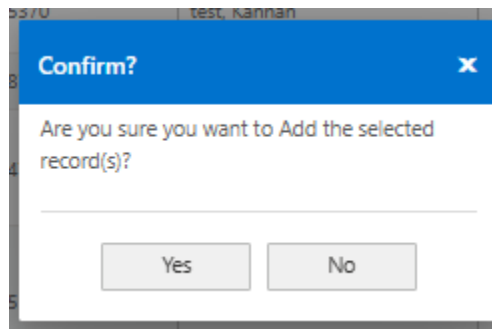
⏪
⏩
1
2
3
4
5
6
7
8
⏭

1 of 8 pages (775 items)

Add Provider(s)

Graphic 51: Search Results

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



Graphic 52: Add Practitioner Dialog

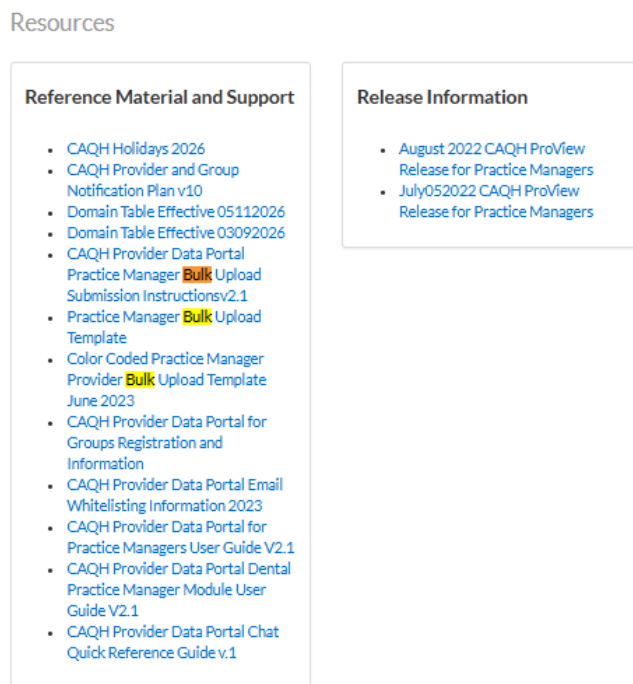
6. The page is refreshed, and the Practitioner is now displayed in your list on the Manage Practice Provider List page.

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 Practitioners 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”.

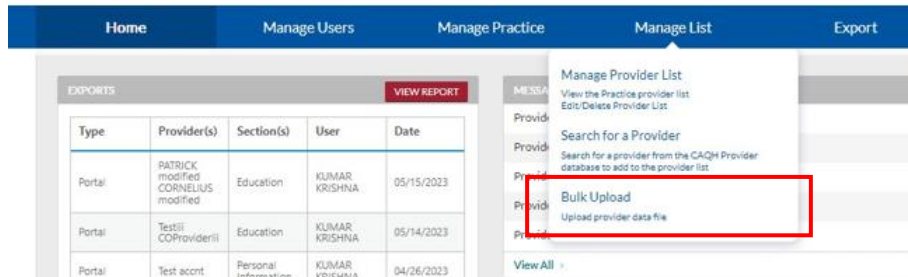
The Bulk Upload file must be named as shown below:

| 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:

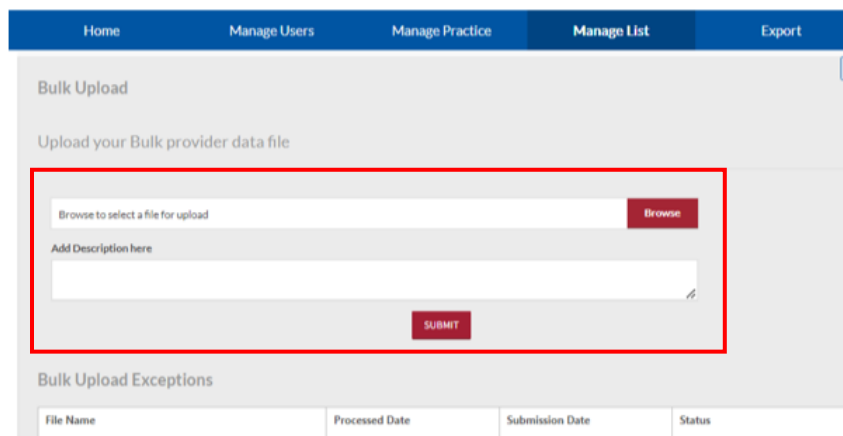
1. Hover over the **Manage List** option in the top navigation menu and select the **Bulk Upload** option.



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 Practitioner 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.



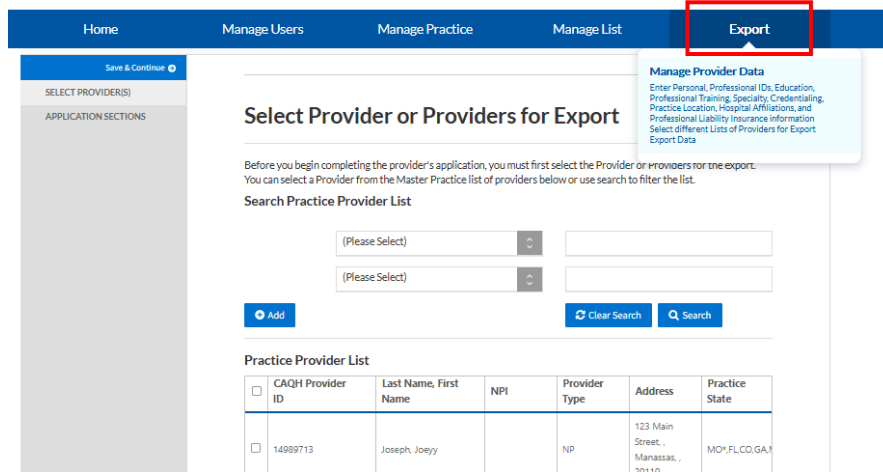
Graphic 55: Upload Bulk File

4. Once the file is processed, data will automatically be exported to the individual Practitioner data profiles. The Practitioner can review the data and choose to import the data if desired. The Practitioner 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 Practitioner accounts.

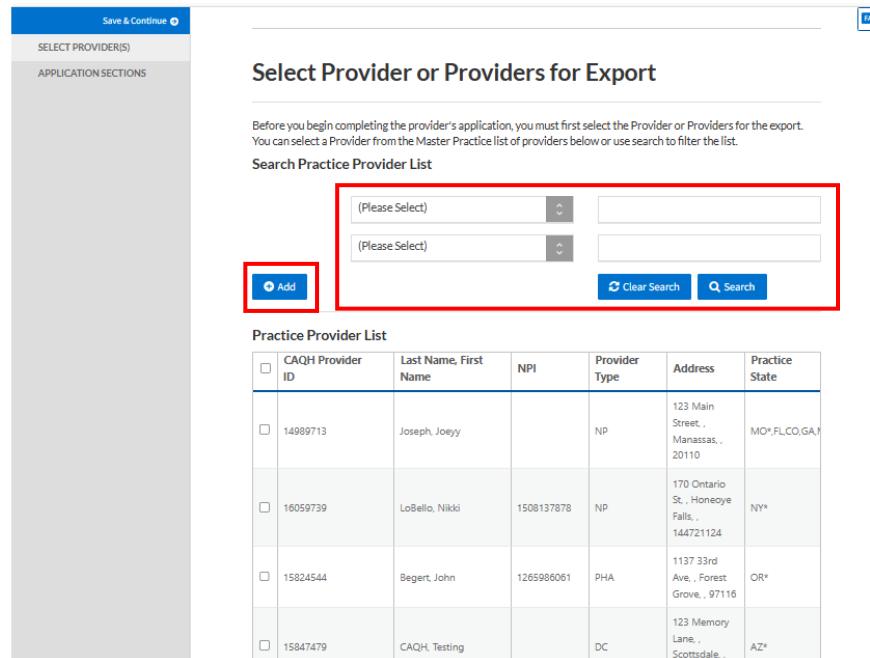
NOTE: If you need assistance, click the **FAQ** icon that is displayed on the right-hand side of the screen.



Graphic 56: Export Menus Option

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

- Clicking a column heading sorts information by that column.
- Use the search options to refine the list or locate a specific Practitioner.
- 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 Practitioners:

1. Select one or more Practitioners from your list by clicking the checkmark in their corresponding row. You can select a single Practitioner 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.

Select Provider or Providers for Export

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

First Name

(Please Select)

Practice Provider List

| <input type="checkbox"/> | CAQH Provider ID | Last Name, First Name | NPI | Provider Type | Address | Practice State |
|-------------------------------------|------------------|-----------------------|------------|---------------|--|----------------|
| <input type="checkbox"/> | 15847479 | CAQH, Testing | | DC | 123 Memory Lane, , Scottsdale, , 12345 | AZ* |
| <input checked="" type="checkbox"/> | 15894926 | Lanahan, Tester | 555555555 | ACU | 2020 K Street NW, Suite 900, Washington, , 20006 | DC* |
| <input type="checkbox"/> | 12366854 | GAProvidervi, Testvi | 1122334455 | MD | 1221 Hawk Lane, , Atlanta, , 30301 | MD* |
| <input checked="" type="checkbox"/> | 14489301 | Dentists, Test | 2930592013 | DDS | 54 Green Street, , Charlestown, , 02129 | MA* |

1 of 1 pages (4 items)

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

Yes
 No

Please select the new practice state?

(Please Select)

Graphic 58: Select Practitioners 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 Practitioner, all options are selectable.
 - If you are exporting multiple Practitioners, 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.

Select Provider Application Sections for Export

Which Provider Application sections would you like to export?

- Personal Information
- Professional IDs
- Education
- Professional Training
- Speciality
- Credentialing Contact
- Practice Location
- Hospital Affiliation
- PLI

Please note, providers are unable to overwrite Address, Tax ID, and Type 2 NPI fields when they overwrite with your Practice Location record.

Use Saved Sections from Practice?

Would you like to use any saved sections from your Practice? (i.e.: Credentialing Contact, Practice Location, Hospital Affiliations, or Professional Liability Insurance sections)

- Yes
- No

Which List contains the provider profile information you will be exporting?

(Please Select)

Continue

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.

SELECT INFORMATION FOR EXPORT **CANCEL**

To: Export Data File
Drop entries below to add or overwrite

From: List - Texas_Health_Everything (TX)
« Drag entries to the left to add to Export file

🔄 Select undo to return import content to the right

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 Practitioner may make. You can see a record of the export in the [Activity Log](#) and the Export History Log available from the Home page.

Export Summary Page

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

Provider(s) Selected for Export

Katie Test

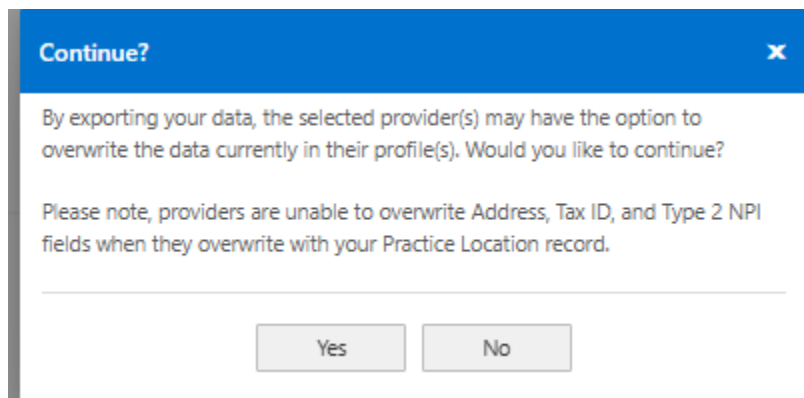
Click Export to make the information you have just entered available to providers on your list. Providers will not have visibility to this information until this step is completed. Once exported, the providers you selected can enter CAQH Provider Data Portal at <https://proview.caqh.org/pr/> and may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

Export

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 Practitioner(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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> 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 | <ul style="list-style-type: none"> When the system sends a Welcome Email, OR When DataSpring Operations sends a Welcome Letter through USPS. <p>NOTE: Effective 06/08/2020, DataSpring no longer sends registration kits via the United States Postal Service (USPS).</p> |
| 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 | <p>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.</p> <p>NOTE: Effective 06/08/2020, DataSpring no longer sends registration kits via the United States Postal Service (USPS).</p> |
| Undeliverable | <p>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.</p> <p>NOTE: Effective 06/08/2020, DataSpring no longer sends registration kits via the United States Postal Service (USPS).</p> |

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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