CAQH ProView®

Practice Manager Module User Guide

Version 1.3
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Chapter 1: Introduction

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

CAQH ProView Overview

CAQH ProView is the healthcare industry's premier resource for providers to self-report professional and practice information to payers, hospitals, large provider groups and health systems. CAQH ProView eliminates duplicative paperwork for these organizations that may require provider profile information for claims administration, credentialing, directory services, and more.

If you are an office manager or clinic administrator who assists with gathering information for credentialing or other administrative purposes for multiple providers, the CAQH ProView Practice Manager Module may facilitate your data entry process.

The CAQH ProView Practice Manager Module can be accessed at https://proview.caqh.org/pm.

The following steps provide you with a high-level overview of the process flow when using the CAQH ProView Practice Manager Module.

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

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

System Security

The confidentiality and security of provider information and the privacy of system users are critical priorities for CAQH. CAQH has implemented information security policies, standards, guidelines, processes, procedures, and best practices to strengthen its security program and to protect its information assets. CAQH ProView is designed to be compliant with laws and regulations relating to the privacy of individually identifiable information.

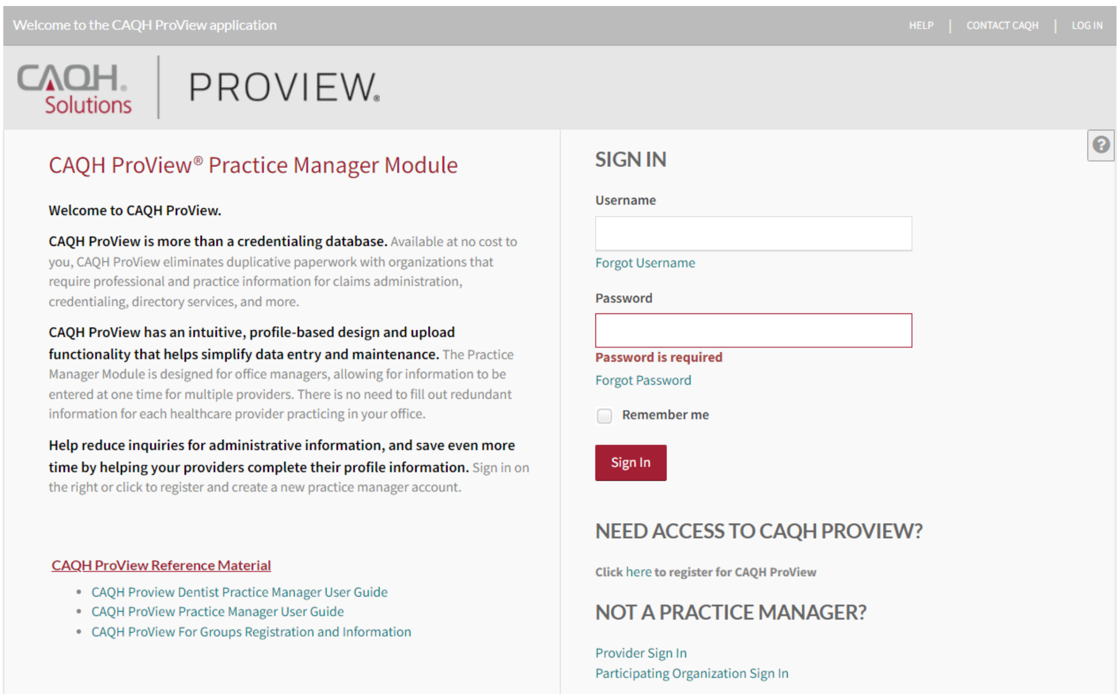
The CAQH ProView solution is housed in secure datacenters where multiple physical and electronic safeguards are implemented. Secure Internet access to application screens, use of passwords and certificates are used to help ensure only authorized use of the system. Powerful Transport Layer Security (TLS) encrypts the data in transition; the database content is also encrypted at rest and in backup to prevent unauthorized access to CAQH ProView. Only authenticated users have access to their restricted data. Virus detection mechanisms are used to help ensure that the database and the websites are free of viruses. Routine encrypted backups protect volatile system data and are secured in an off-site storage facility.

Chapter 2: Registration

Registration is required for all Practice Managers to obtain access to the CAQH ProView Practice Manager Module.

New Users – Administrators

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



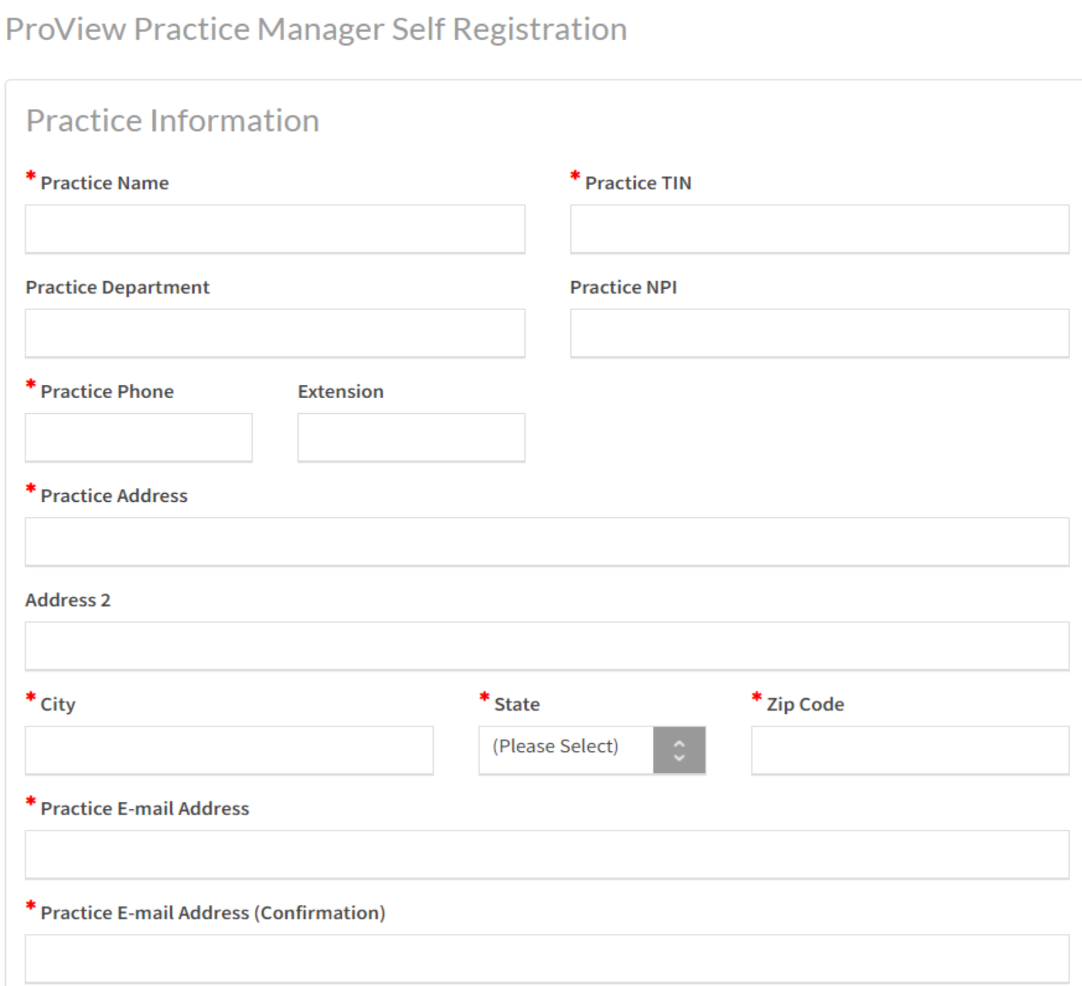
New Users – Child Accounts

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

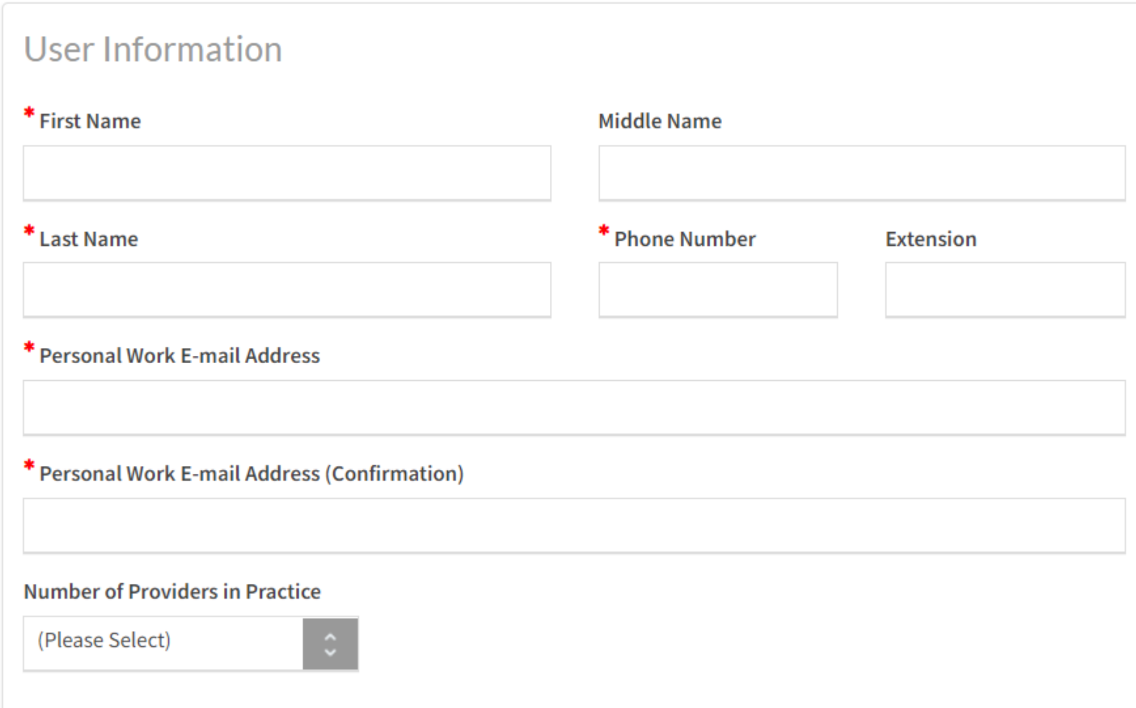
When a new user is created in the portal by the Administrator, CAQH ProView will send an email to the email address of the newly created user. New users will complete their registration with the CAQH ProView Practice Manager module by selecting the link contained in the e-mail. You will be prompted to update your username and password at this time. Refer to "Creating a CAQH ProView Username and Password" on page 6 of this guide for the next steps in the process.

Self-Registration

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

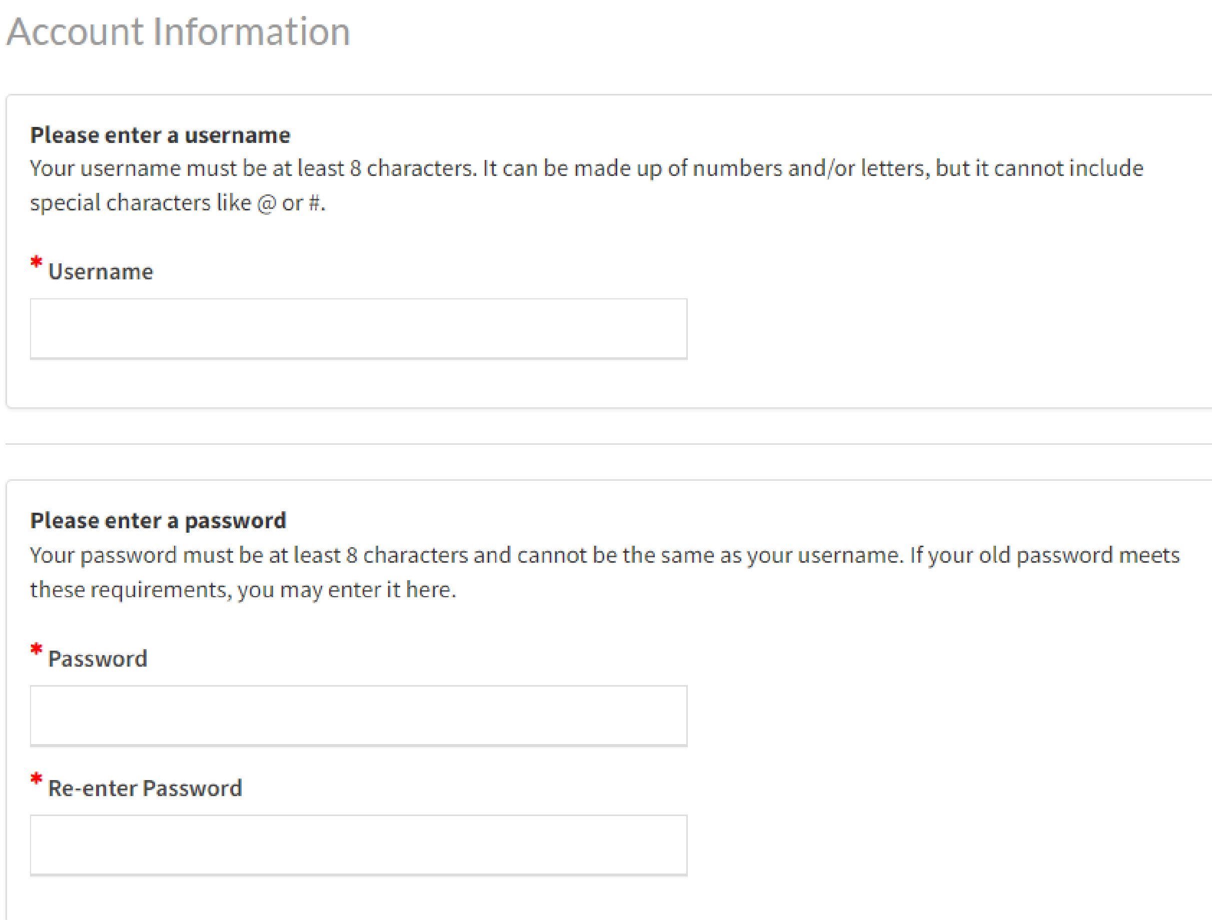


You will also need to provide your user account information.



Creating a CAQH ProView Username and Password

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



Account Information

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

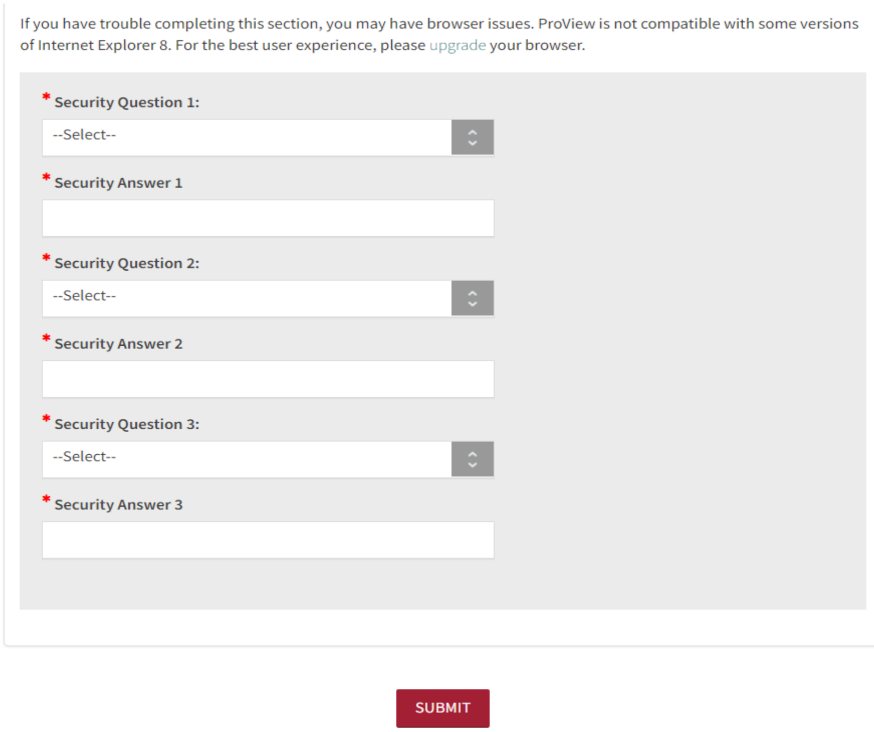
* Username

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

* Password

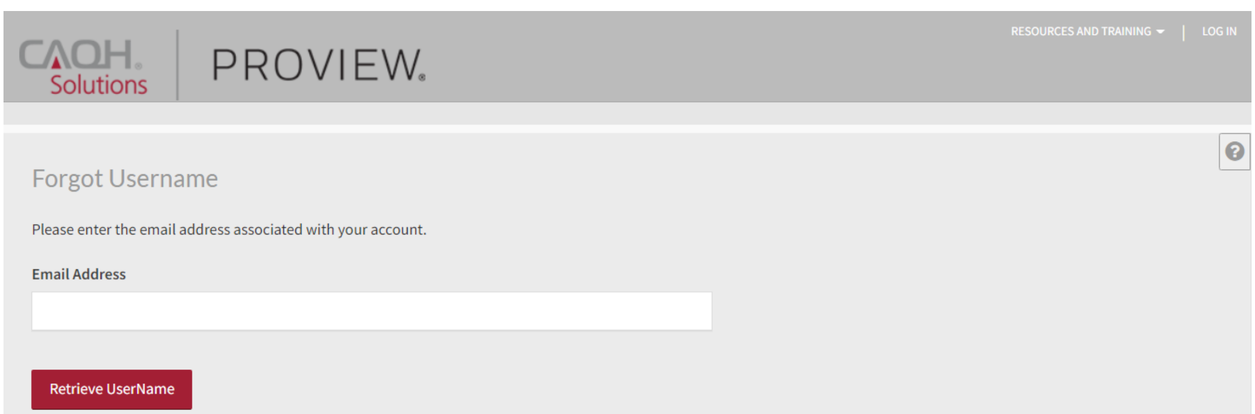
* Re-enter Password

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

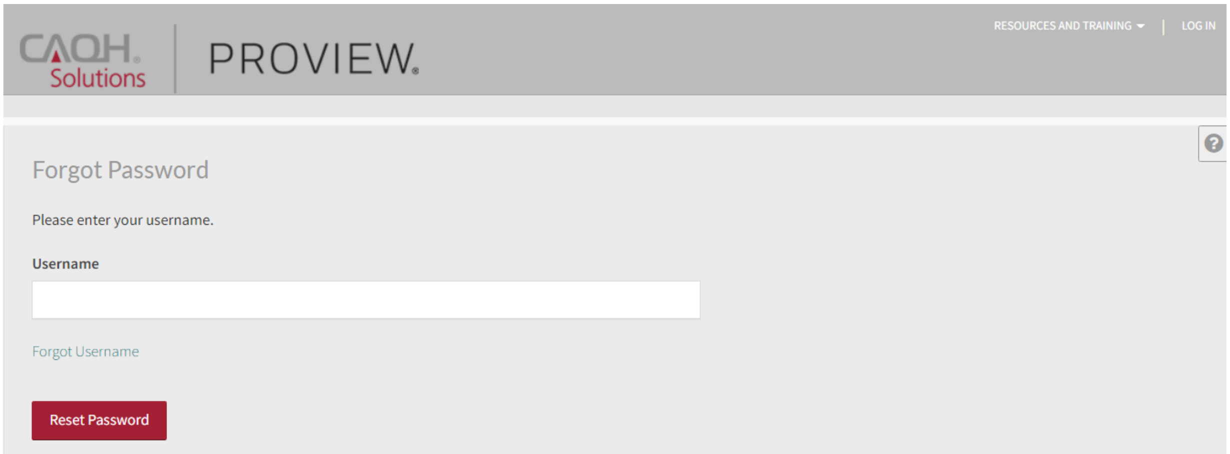


<u>Forgotten Username and/or Password</u>

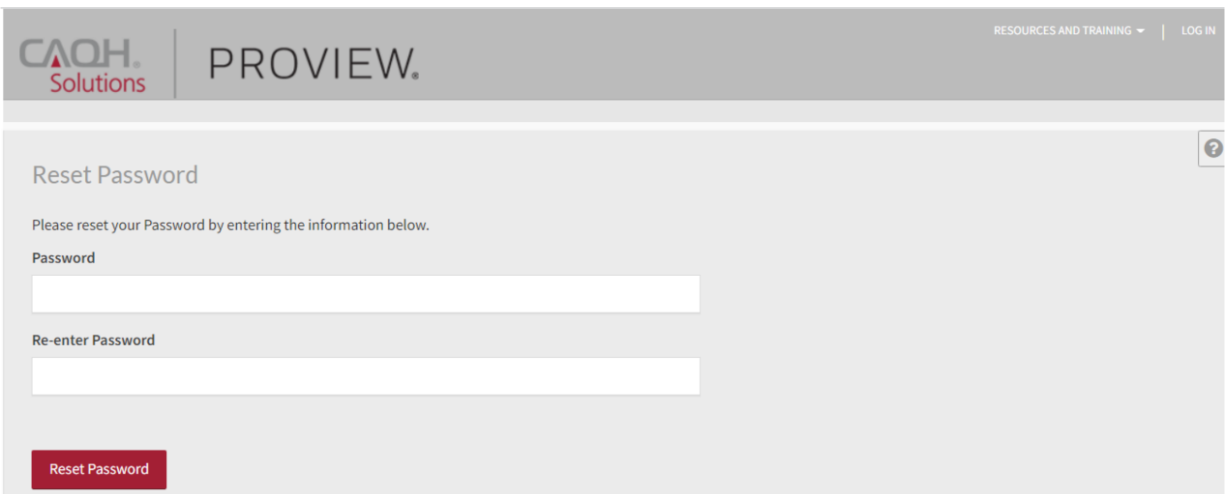
If you forgot your Username, you may select the "Forgot Username" link on the CAQH ProView sign-in page. Enter your email address to receive your username in an email.



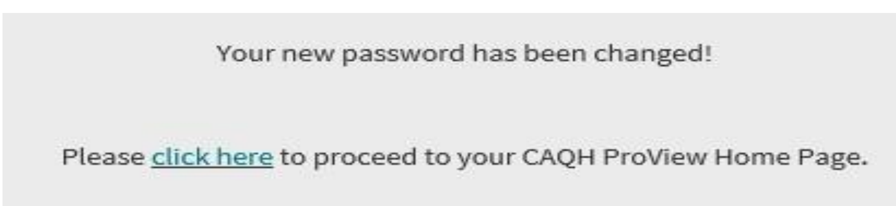
If you forgot your Password, you may select the "Forgot Password" link on the CAQH ProView sign-in page. Enter your username and agree to the terms of condition and click continue. An email with a link will be sent to you to reset your password.



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



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

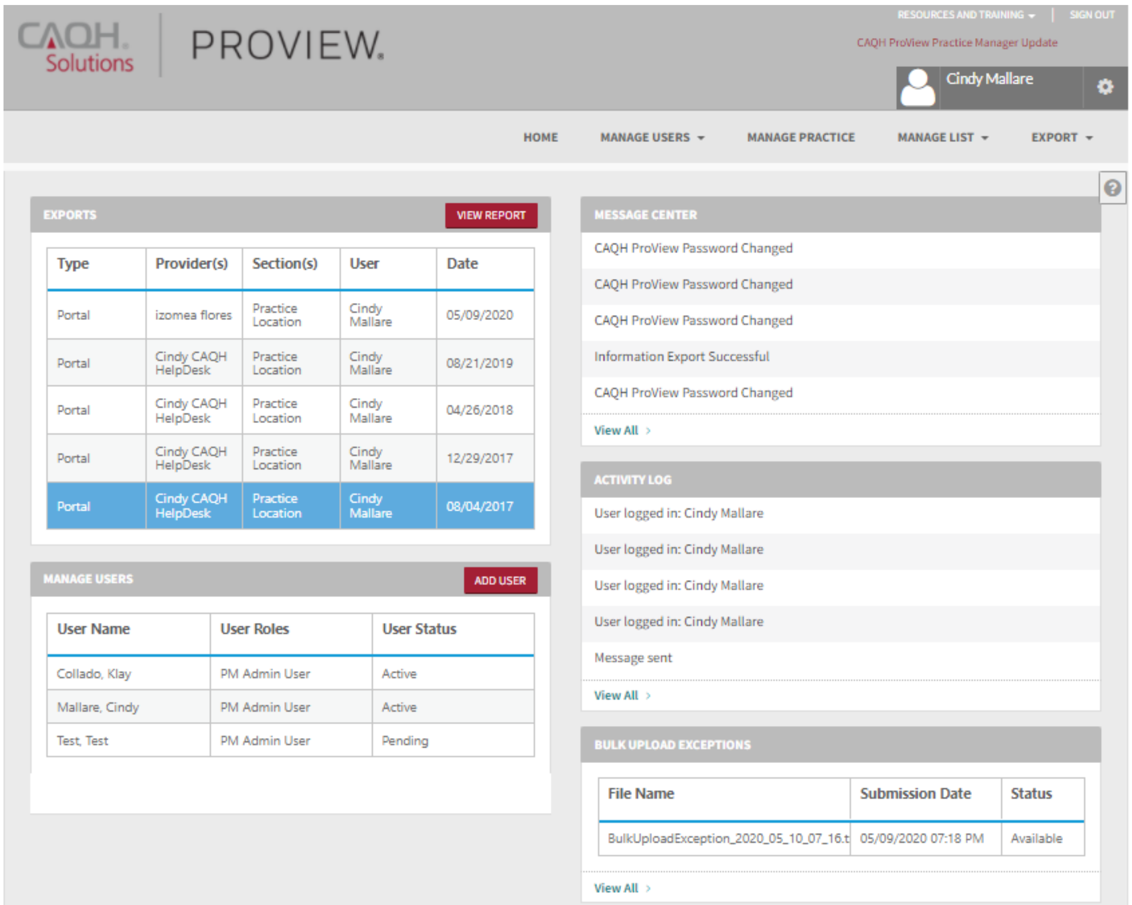


Chapter 3: Home Page

You will see the CAQH ProView Practice Manager Module “Home” page after a successful login.

Tip:

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



The Home page displays five components:

1. **Exports**
   - The Exports section displays a summary of recent exports, the related user who performed the export, and the date exported.

2. **Manage Users**
   - This section displays a list of most recent users, their roles and statuses. Only Administrators can view the Manage Users section.

3. Message Center

• The Message Center section displays messages related to your account.

4. Activity Log

• The Activity Log section displays recent users who have logged into the account and recent activity within the account.

5. Bulk Upload Exceptions

- This section displays a list of Exception Reports from a Bulk Upload processed file. Only users with Bulk Upload access can view the Bulk Upload Exceptions section.

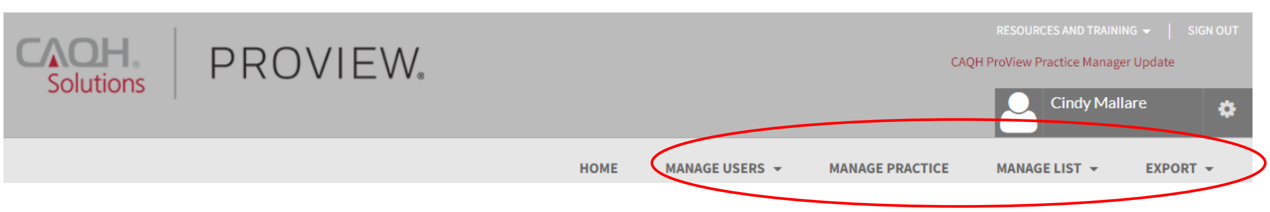
In addition, to these components, across the top of the Home page is a navigation menu, which allows you to navigate to the four sections of the Practice Manager Module:

- **Manage Users** – Administrator Users can click here to add or edit account users (see Chapter 4).

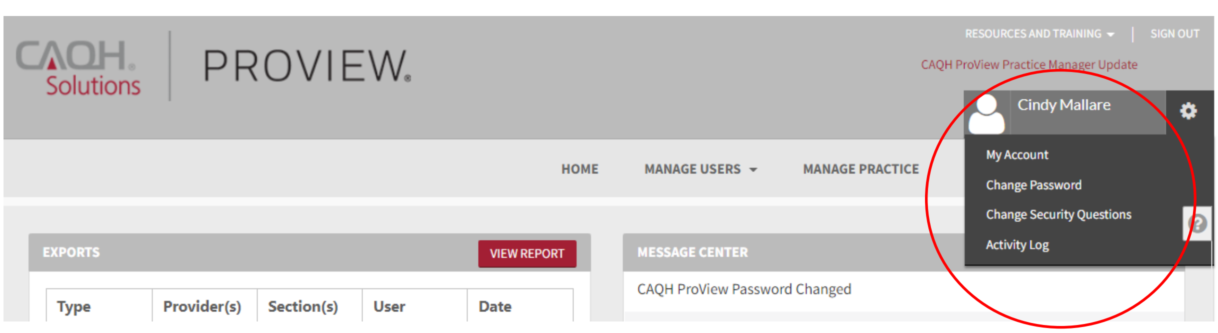
- **Manage Practice** – Click here to enter information common across multiple providers (see Chapter 5).

- **Manage List –** Click here to add, edit, and delete providers on your provider list (see Chapter 6).

- **Export –** Click here to begin the export data process to multiple or individual provider accounts (see Chapter 8).

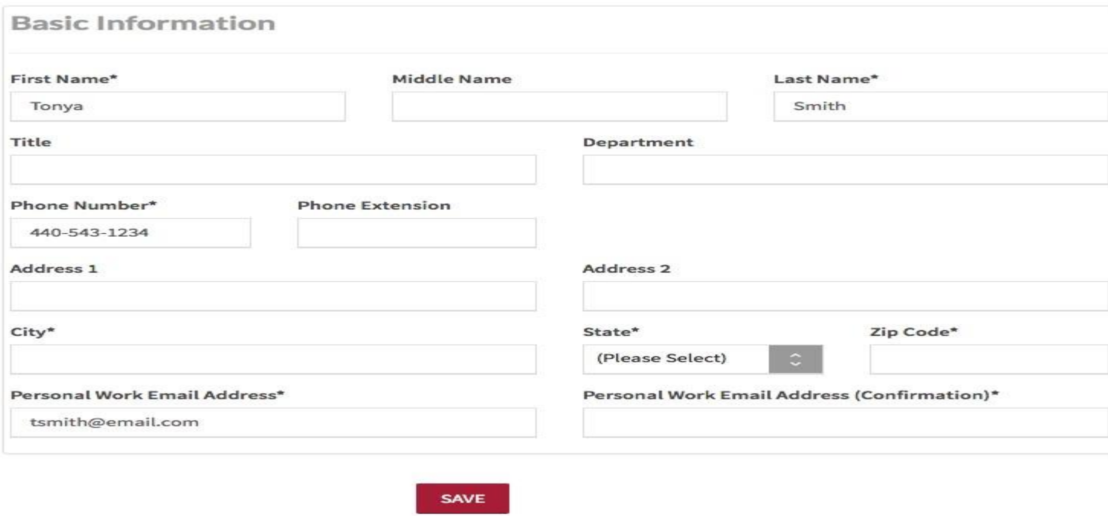


A drop-down menu also is available next to the user's name in the upper right-hand corner.



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

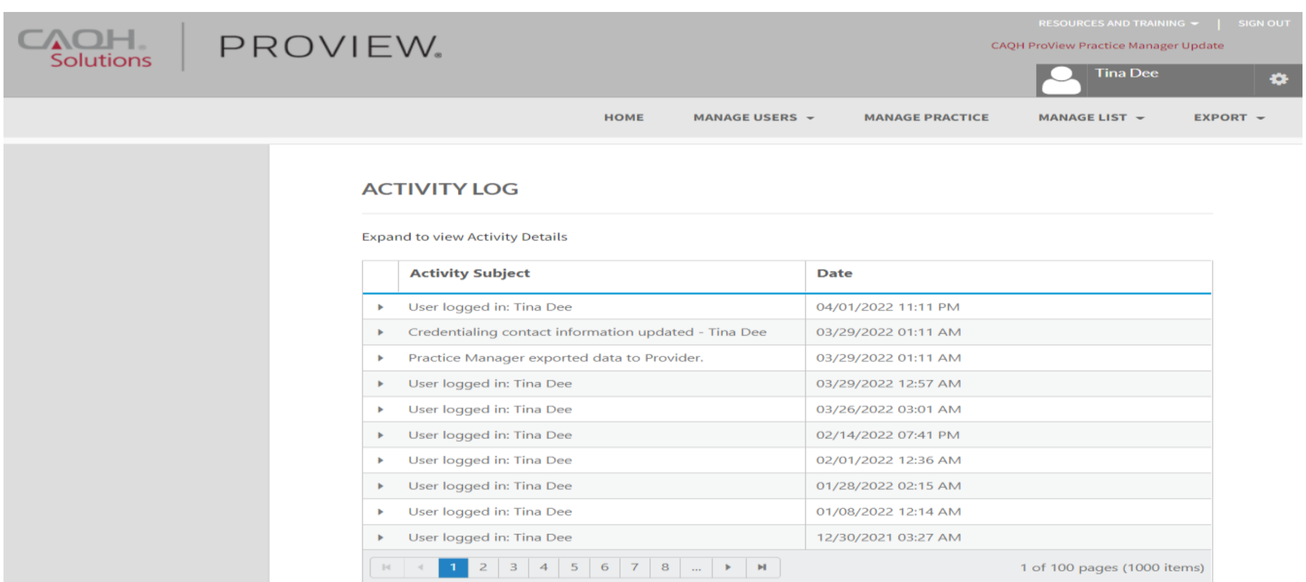
1. **My Account** – Click here to edit or update personal account information. Note: the fields marked with an asterisk (*) are required. Select “Save” when you are finished updating your information.



2. **Change Password** – Click here to update your password.

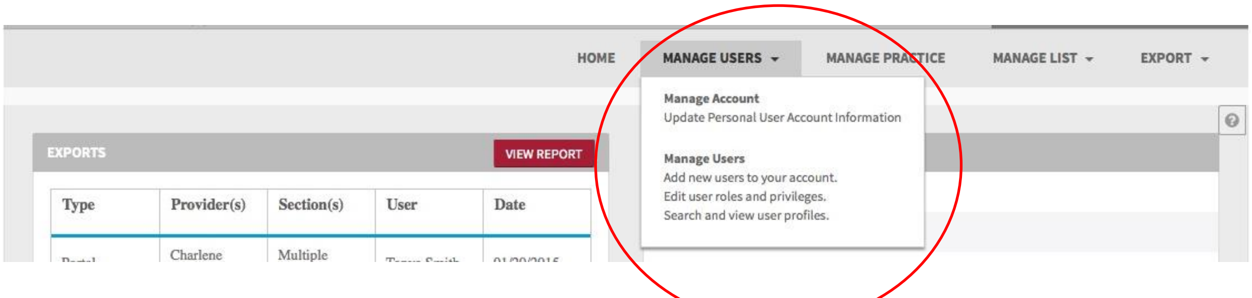
3. **Change Security Questions** – Click here to update your security questions.

4. **Activity Log** – Click here to view your activity log, which shows you the types of activities you have completed recently, along with the date and time of those activities. You are able to select the arrow next to the “Activity Subject” to expand the activity details.



Chapter 4: Manage User

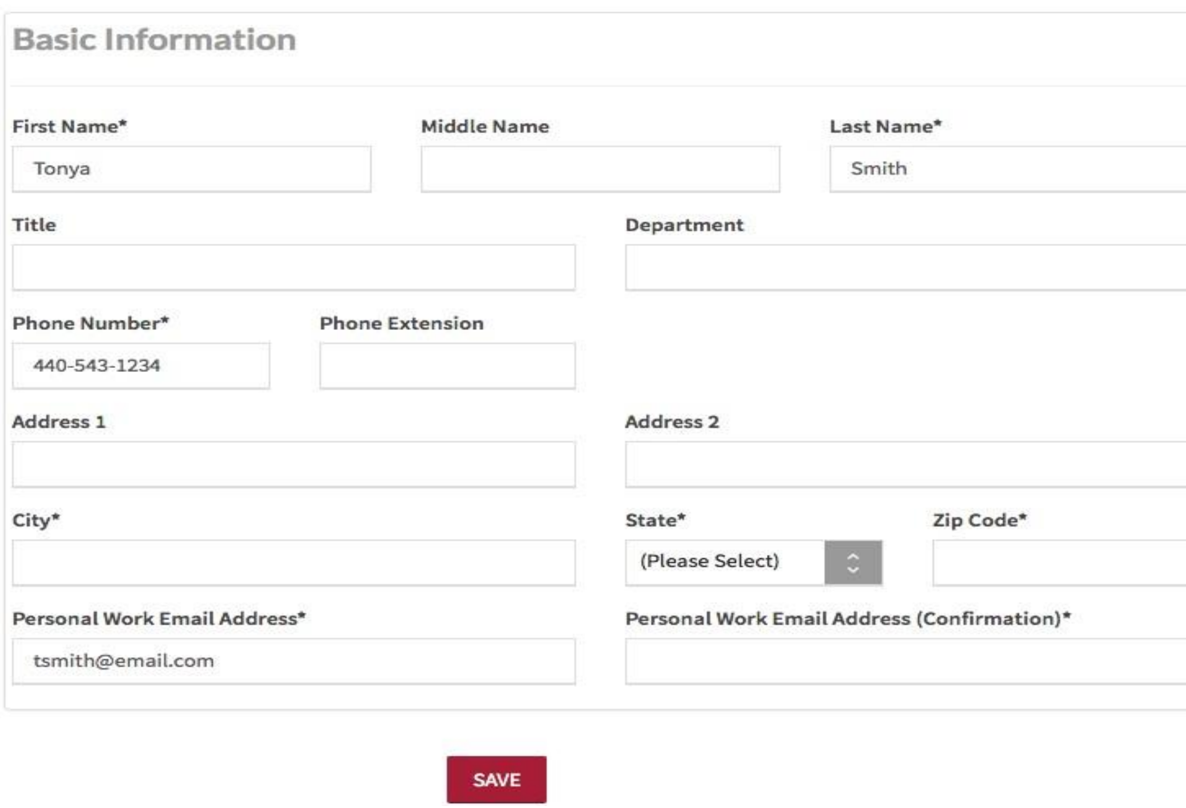
If you are an Administrator, you will have access to the “Manage User” section, where you have the ability to add, edit or delete user accounts. From the Home Page, click on “Manage Users” on the top navigation bar to begin the process.



From the “Manage Users” drop-down menu bar, you can perform the following:

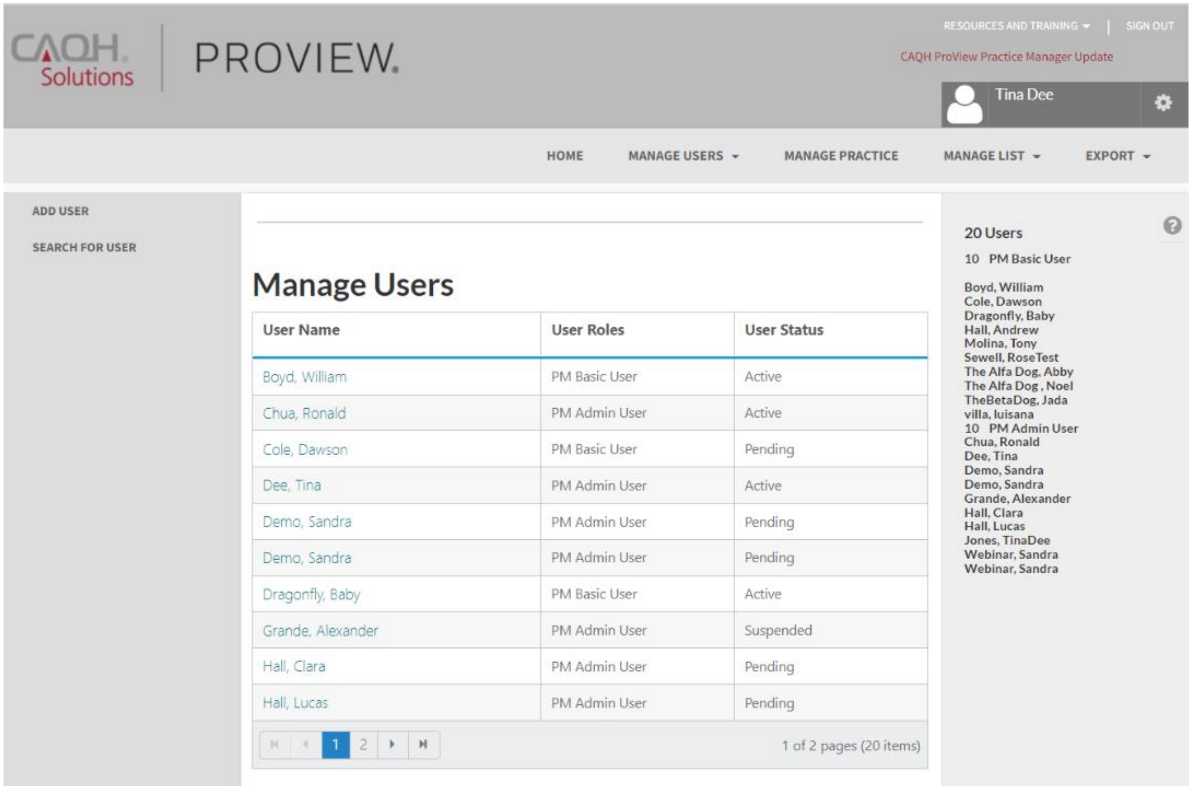
Manage Account

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



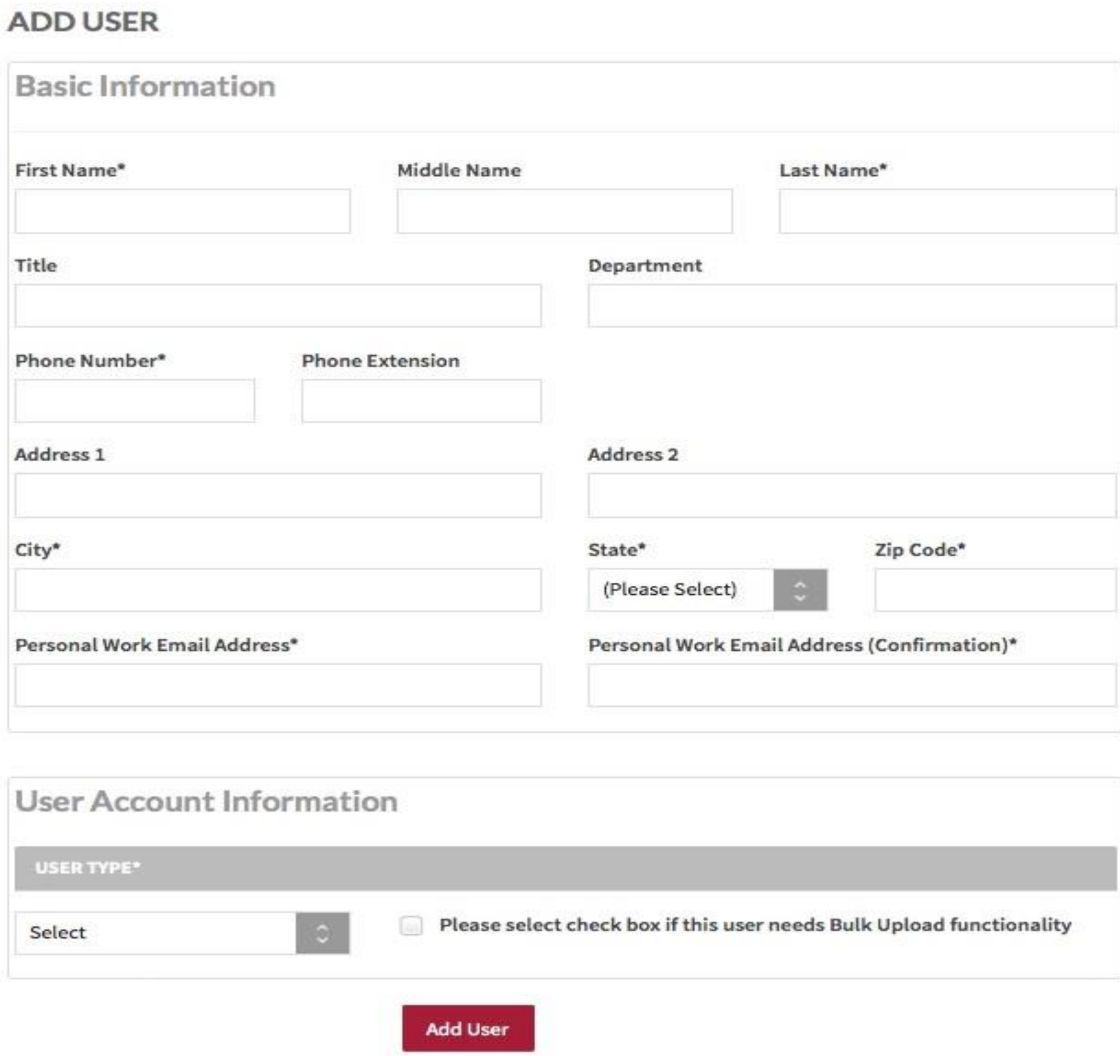
Manage Users

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



Add User

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

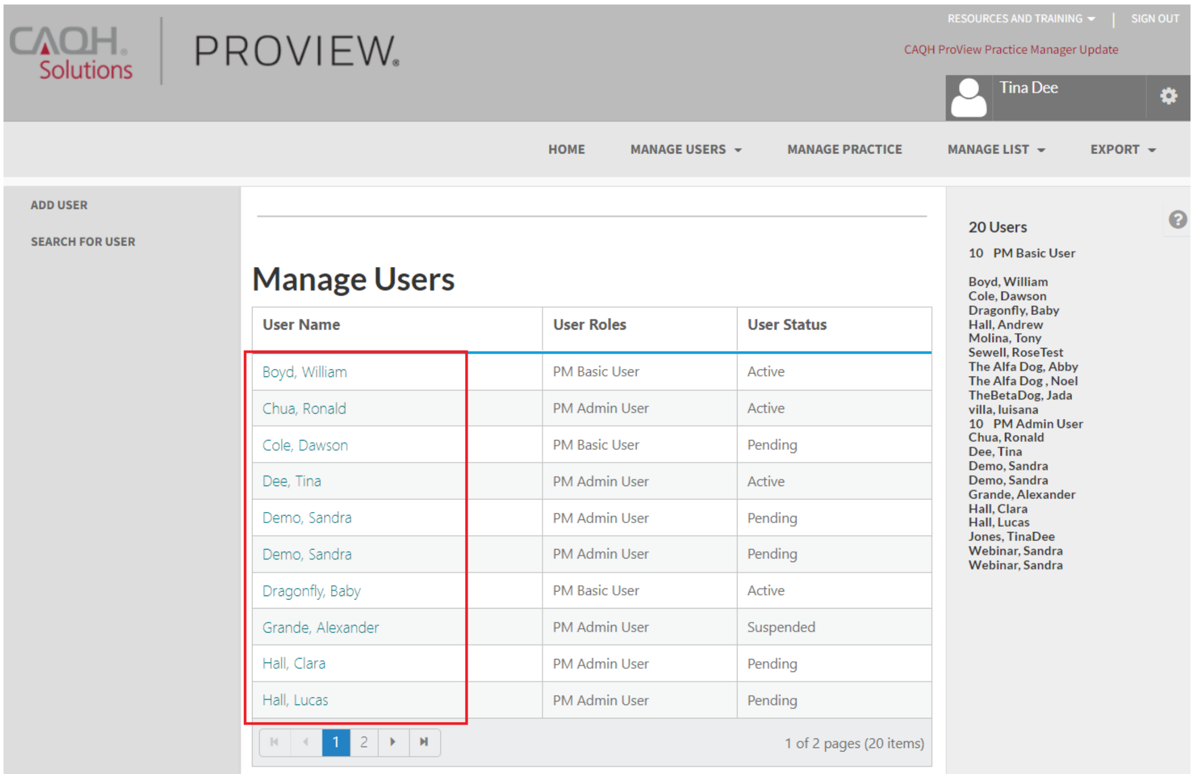


To add a user, complete the fields and click on “Add User”.

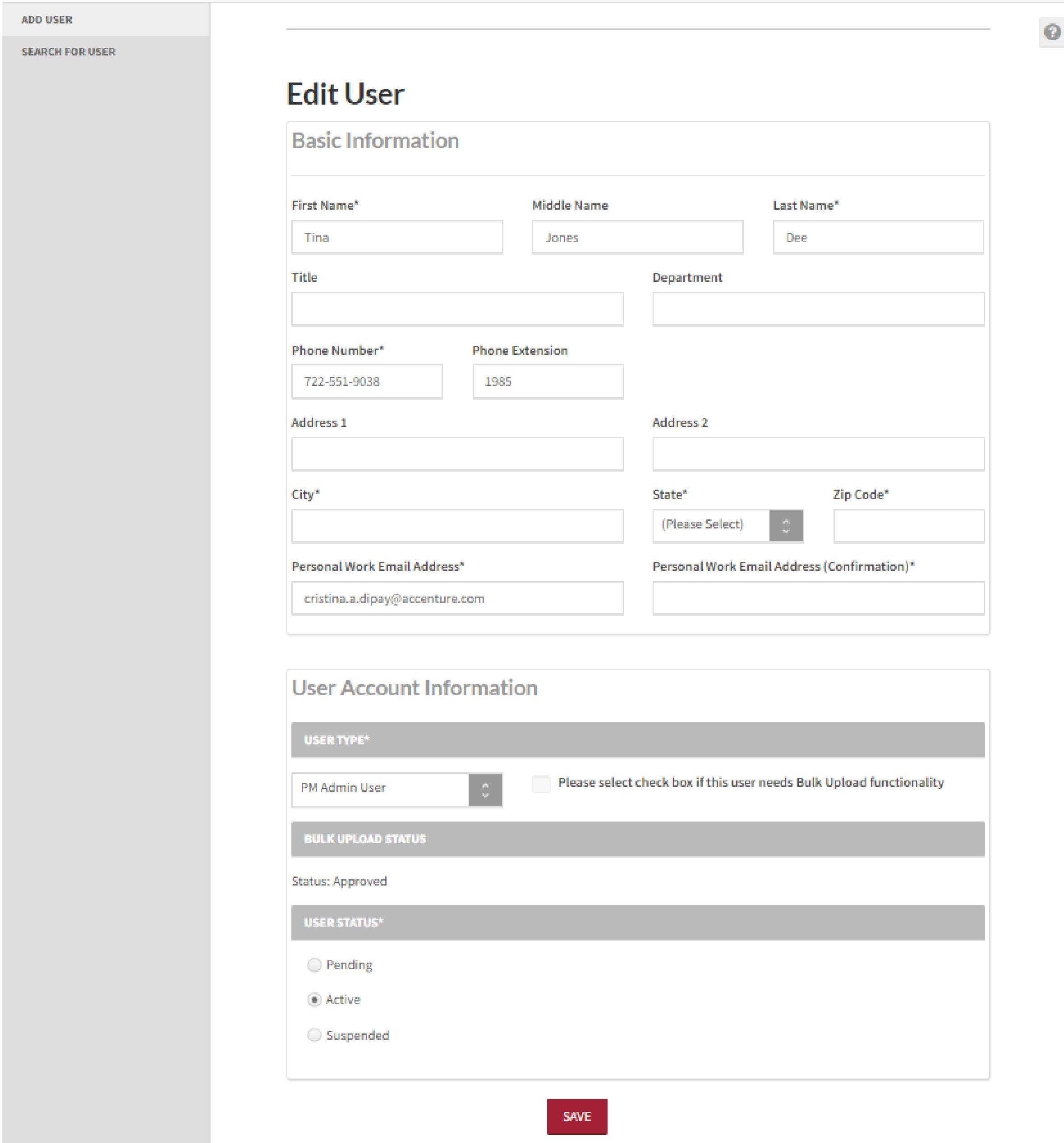
- Fields marked with an asterisk (*) are required.
- At the bottom of the screen, you may define the user role as another Administrator or as a Basic User. The only difference between these roles is that Administrators are able to view the “Manage Users” section.
- You can also select the check box if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

Edit User

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



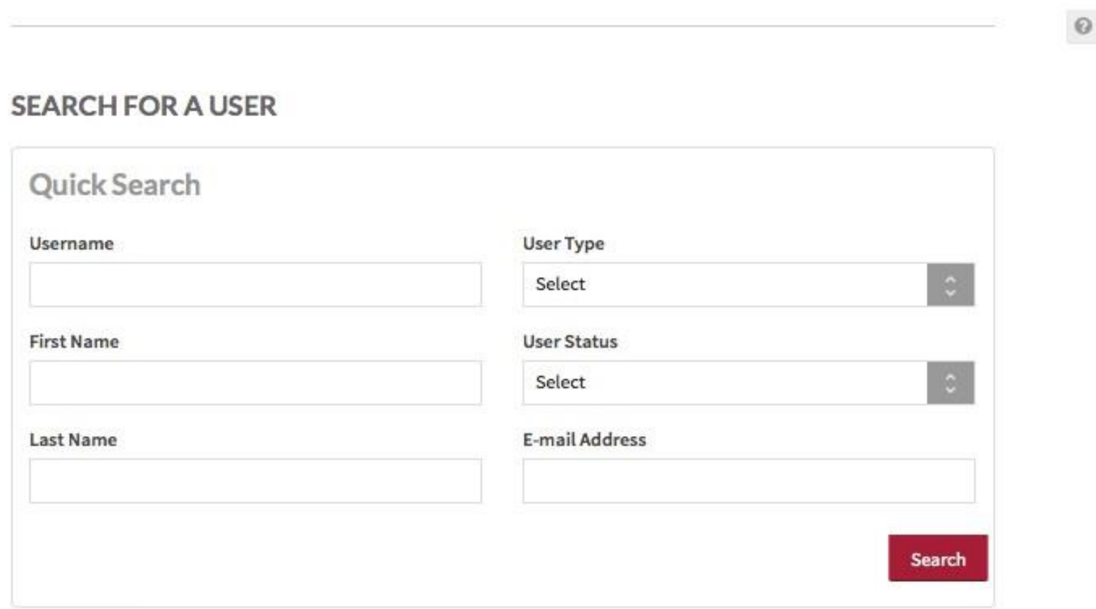
The “Edit User” screen will display. Here you can edit the user’s account information, their user role (Administrator or Basic), and their user status (Pending, Active, or Suspended).



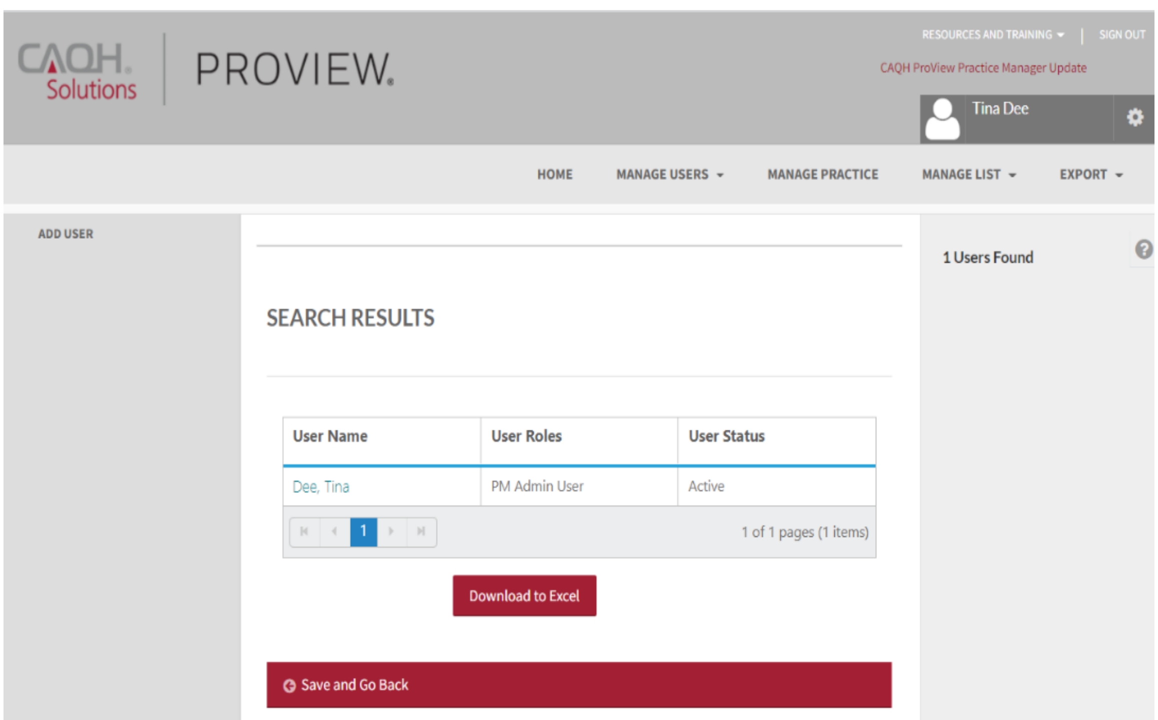
Search for User

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

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



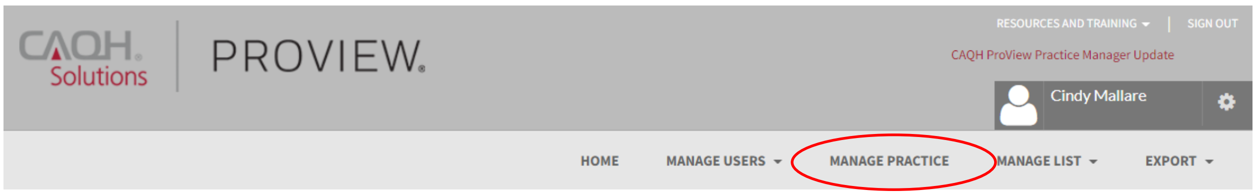
A “Search Results” screen will display a list of users that meet your search criteria. You are able to select a user’s name to view more details on that user.



Chapter 5: Manage Practice

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

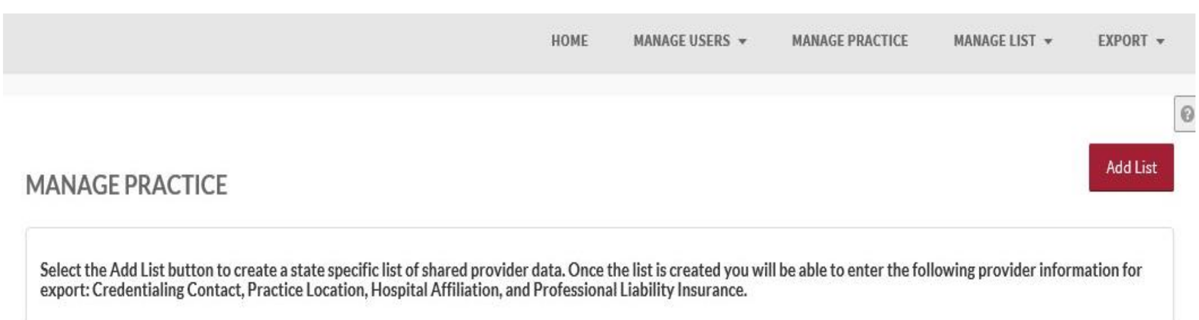
- Credentialing Contact
- Practice Location
- Hospital Affiliation
- Professional Liability Insurance.



Tips:

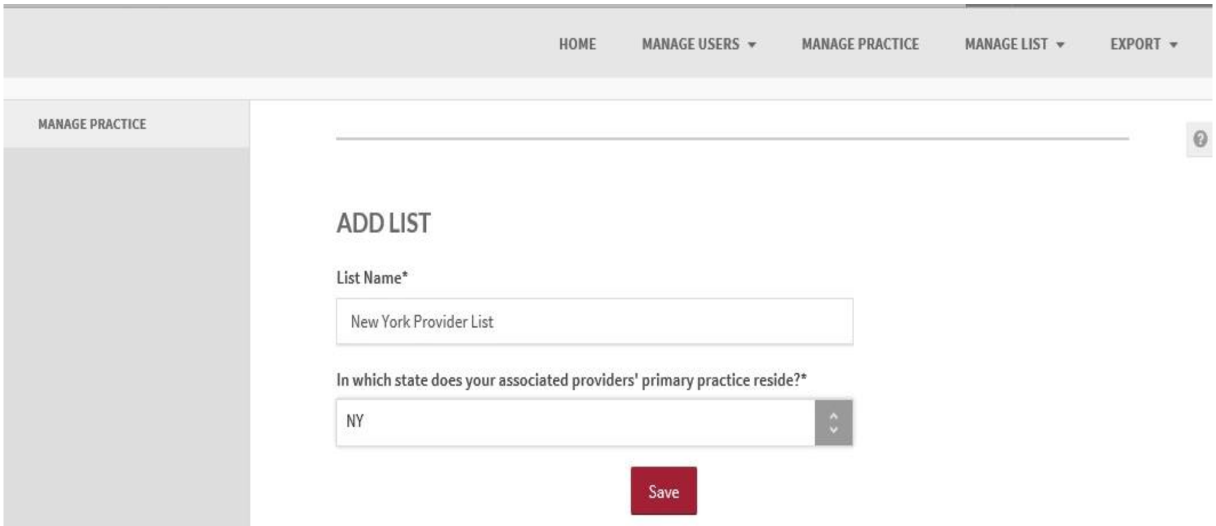
1. Throughout the system, fields that a provider will be required to enter prior to attestation are indicated with a red asterisk (*).
2. If you need assistance, you can access the “?” link that is displayed on the right-hand side of the screen.
3. Use “Go to previous section” or “Save & Continue” to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

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



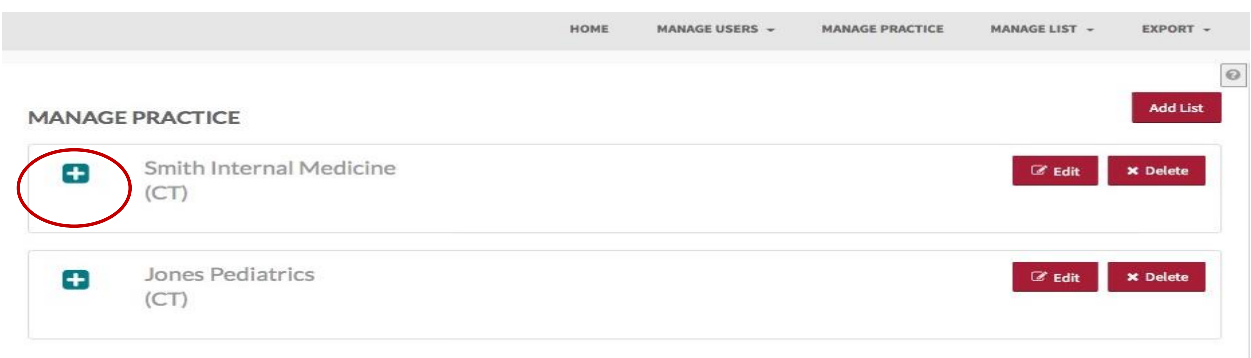
Add List

From the screen above, select “Add List” to create a practice group name and its associated practice state. In the CAQH ProView Practice Manager Module, you will need to maintain state specific lists to drive any state mandated or voluntary form questions. Once you have added that information, select “Save”.



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

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

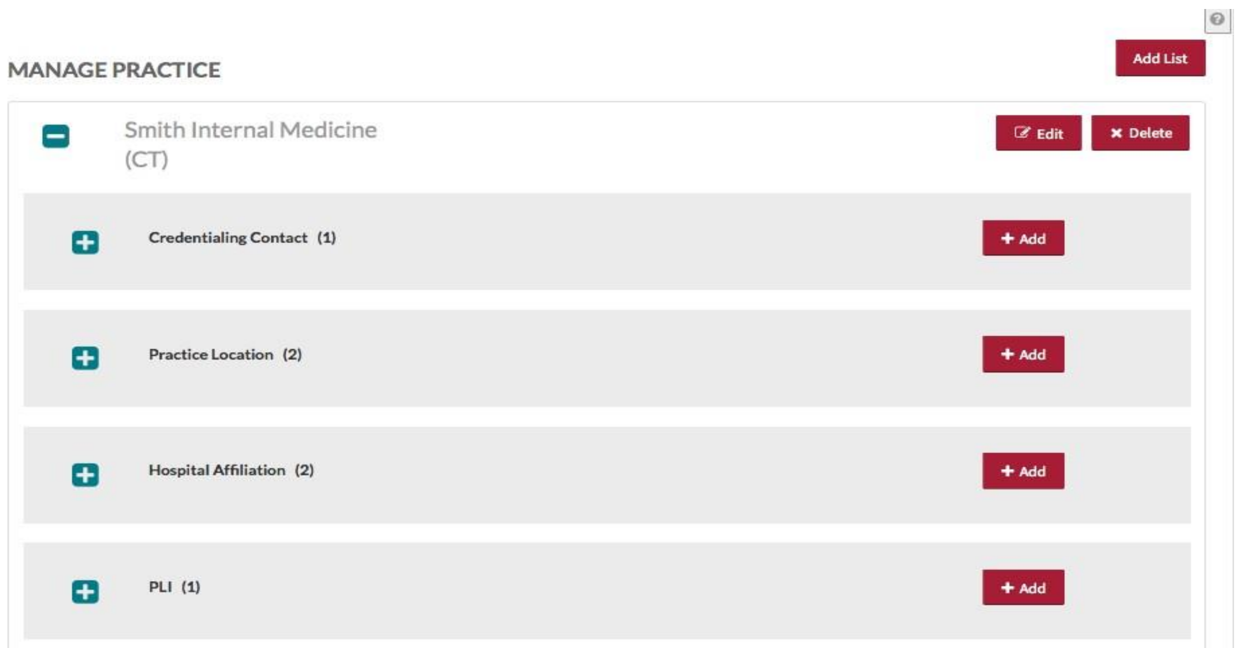


Within each practice group, there are four common sections where you may enter data for multiple providers.

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

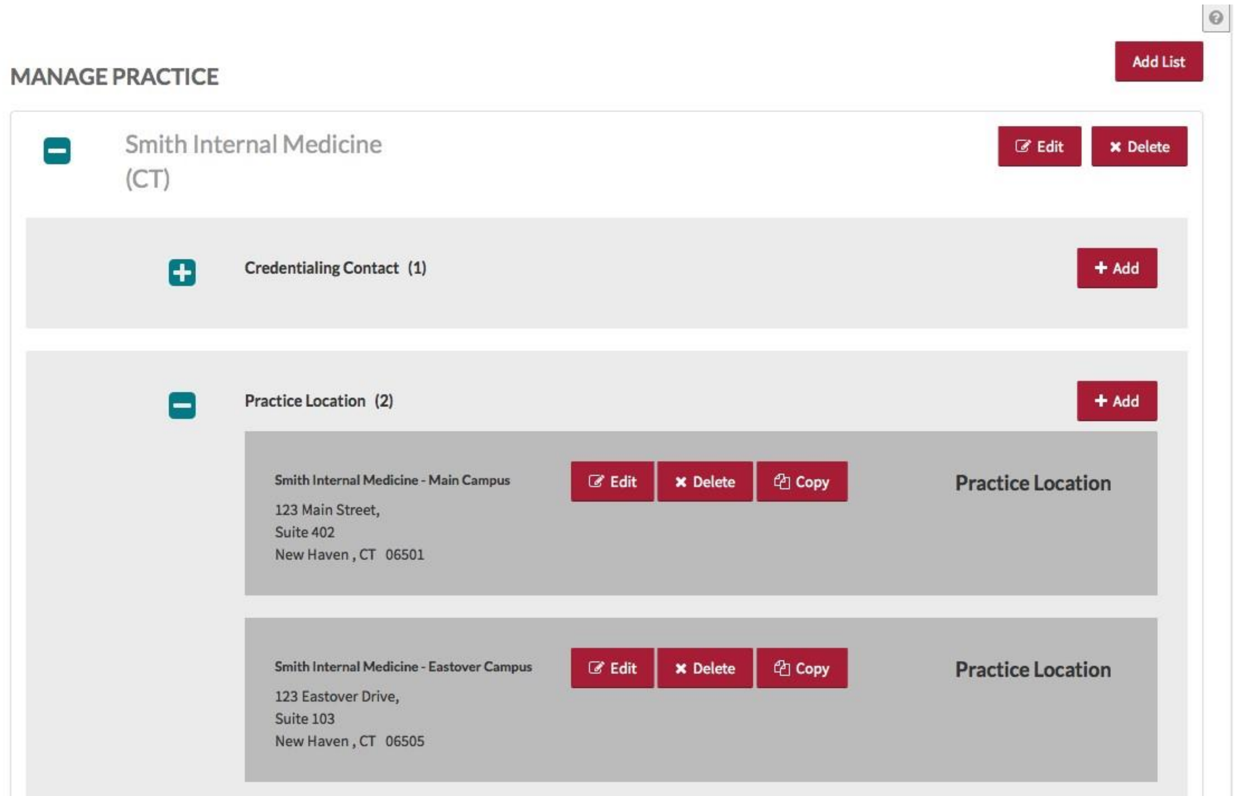
The information entered and saved in each of these sections can be exported to a single provider or multiple providers.

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



When you click on the show more (+) button, the applicable section will expand. Within each section you can perform the following:

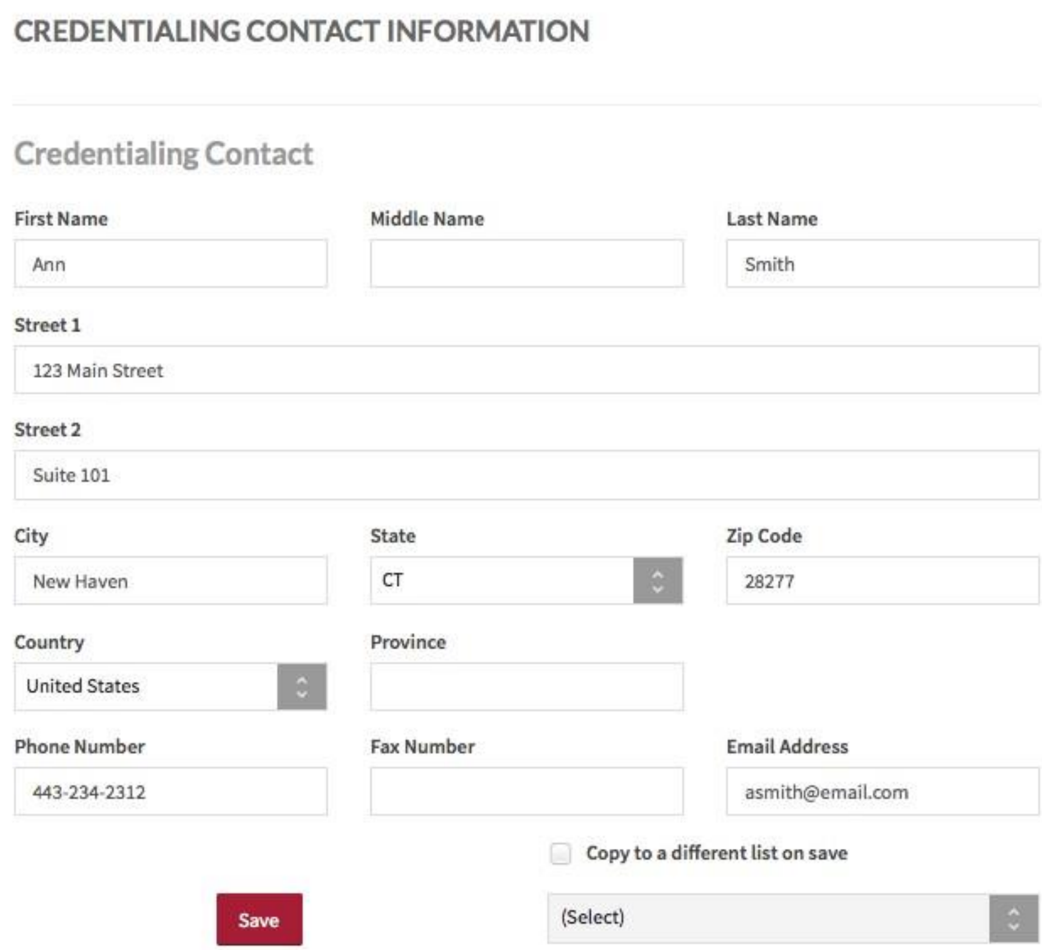
- Select “Edit” to edit the information within a practice location.
- Select “Copy” to create a duplicate of a practice location and its related information.
- Select “Delete” to remove a practice location. Please note that by selecting “Delete”, all information entered for that practice location will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



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

<u>Credentialing Contact</u>

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

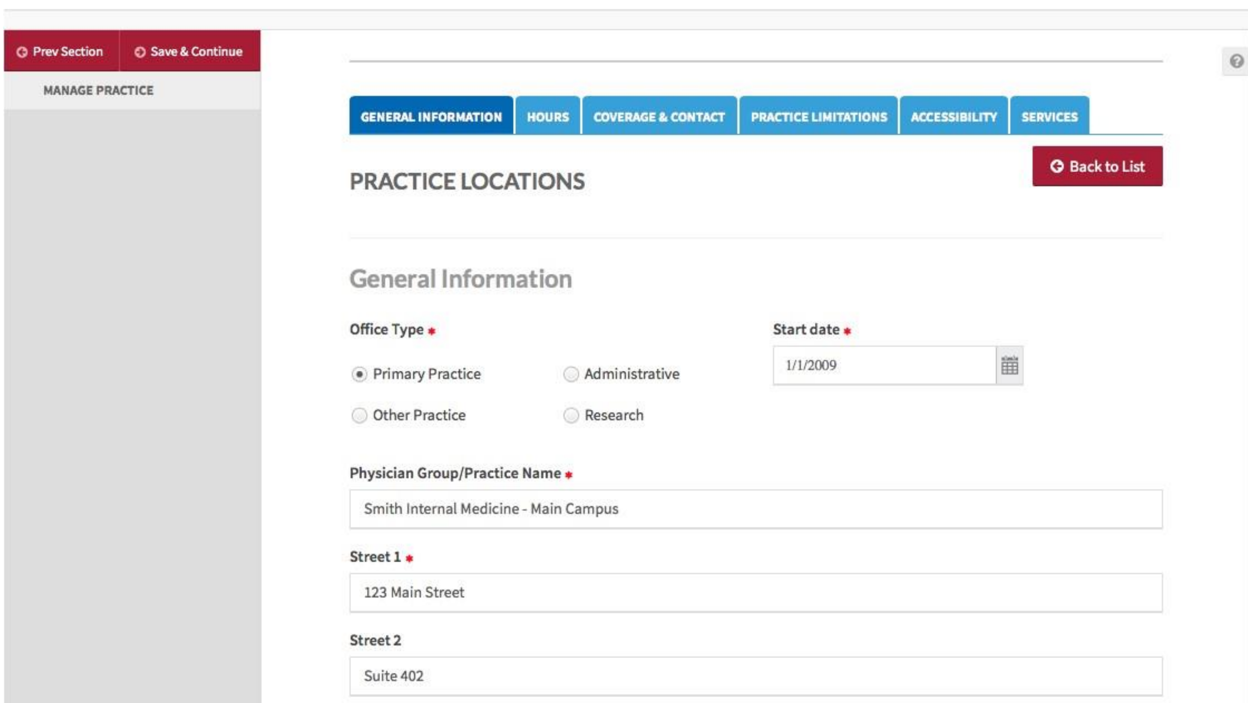

CREDENTIALING CONTACT INFORMATION
Credentialing Contact
First Name
Ann
Middle Name
Last Name
Smith
Street 1
123 Main Street
Street 2
Suite 101
City
New Haven
State
CT
Zip Code
28277
Country
United States
Province
Phone Number
443-234-2312
Fax Number
Email Address
asmith@email.com
Copy to a different list on save
Save
(Select)

Practice Location

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

Tips:

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



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

- General Information
    - Physician Group/Practice Name

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

    - Address

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

    - Group Medicaid Number
    - Group Medicare Number
    - NPI Type 2 - Enter your provider's group National Provider Identification Number

    - Phone Numbers
    - Phone Coverage
    - Tax Identification Number
    - Hours
    - Office Hours
    - Patients **-** Indicate the types of patients accepted into the practice

    - Coverage & Contact
    - Colleagues
    - Covering Colleagues
    - Mid-Level Practitioners

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

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

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

- Gender Limitations
- Age Limitations
- Other Limitation

- Accessibility o ADA Accessibility

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

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

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

  - Interpretation Services

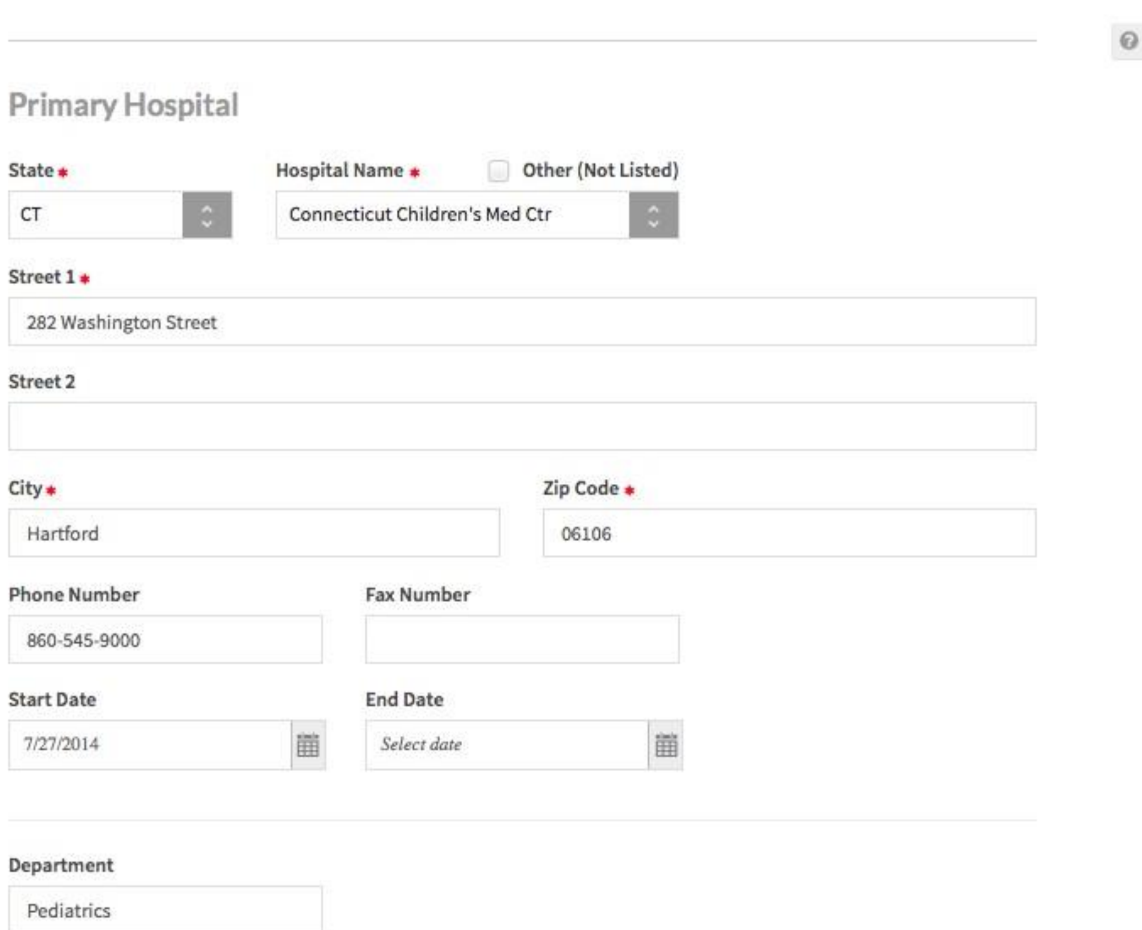
Hospital Affiliation

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

Tips:

1. Throughout the screens, required fields that providers must complete prior to their attestation are indicated with a red asterisk (*). To export data, all required fields do not need to be completed by a practice manager, but they will be required before the provider can attest.

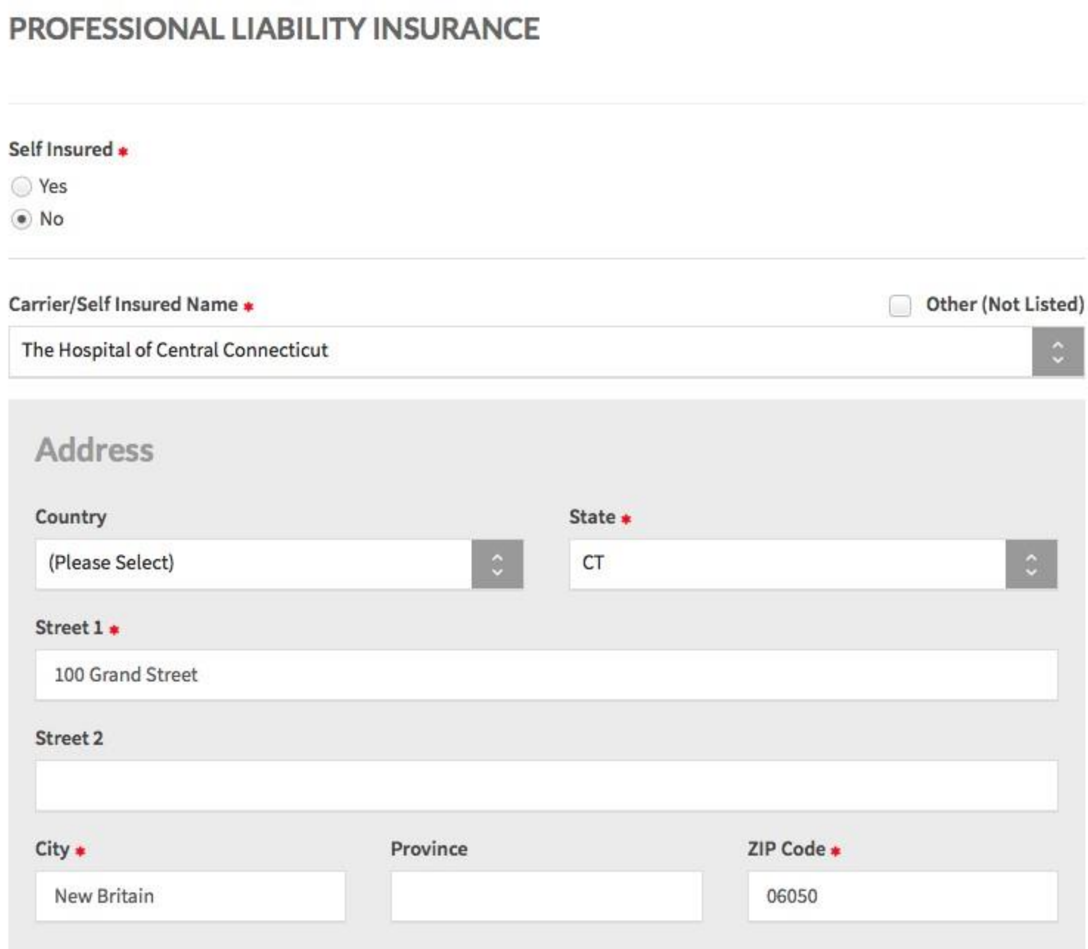
2. Use “Go to previous section” or “Save & Continue” to page forward or backward within sections.
3. It is important to click on the “Save” or “Save & Continue” button to save your information. If you close the browser without clicking “Save” or “Save & Continue”, you will lose your information.
4. Questions presented to you may vary based on the provider’s primary practice state.



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

Tips:

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



The questions asked in this section include the following:

- Self-insured o Self-insured providers are protected from professional liability claims by a program of self-insurance where expense payments and those to satisfy professional liability claims are made from a self-insurance trust fund. In other words, self-insured providers are not transferring financial risk for professional liability claims, and expenses to defend those claims, to an insurance carrier.
    - Insurance name
      If your provider does not carry professional liability insurance, select 'Not Insured' in the 'Carrier/Self Insured Name'. The remaining fields do not need to be completed. In addition, the provider will not be required to submit a professional liability insurance face sheet. However, the provider may need to submit a letter of credit to the health plan in lieu of the required professional liability insurance face sheet. If you have questions regarding your state's regulations, please refer to your affiliated health plan for clarification.

If your provider also has coverage under a Patient Compensation Fund, you still must complete all the questions in the 'Current Professional Liability Carrier' section as they relate to the provider's primary malpractice carrier.

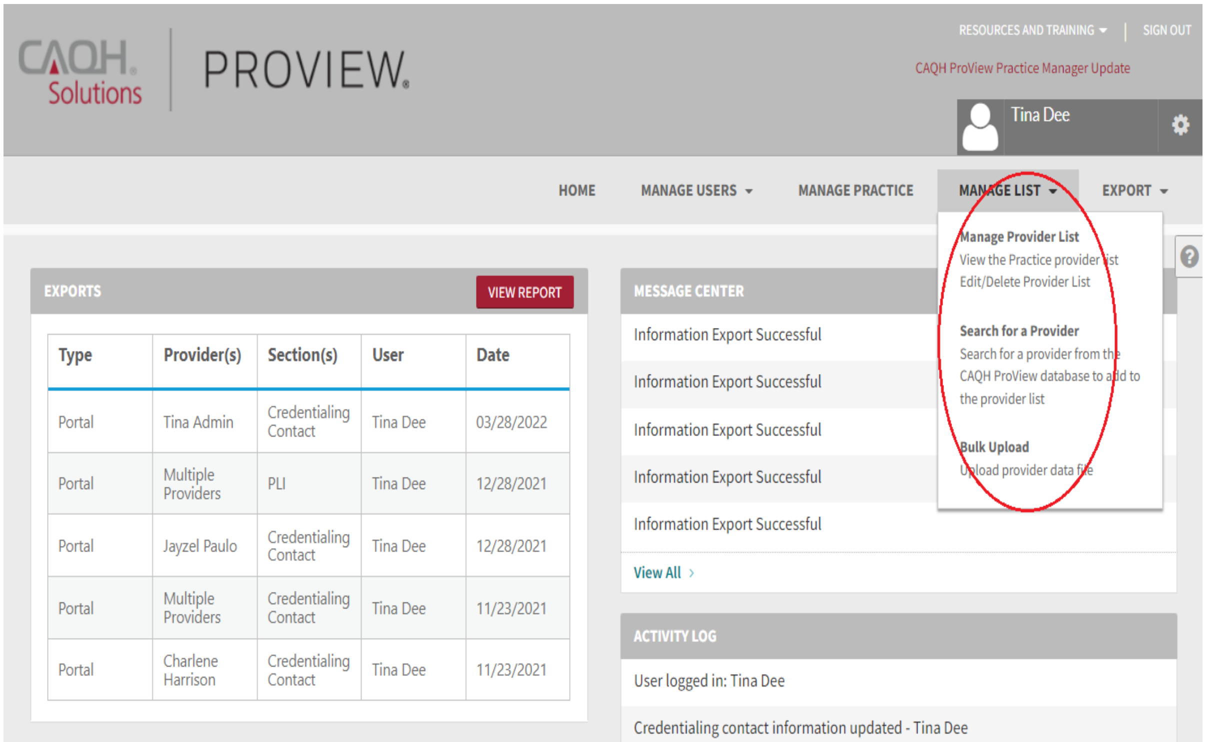
- Address
- Phone number
- Original effective date
- Current effective date
- Current expiration date
- Policy number
- Type of coverage

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

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

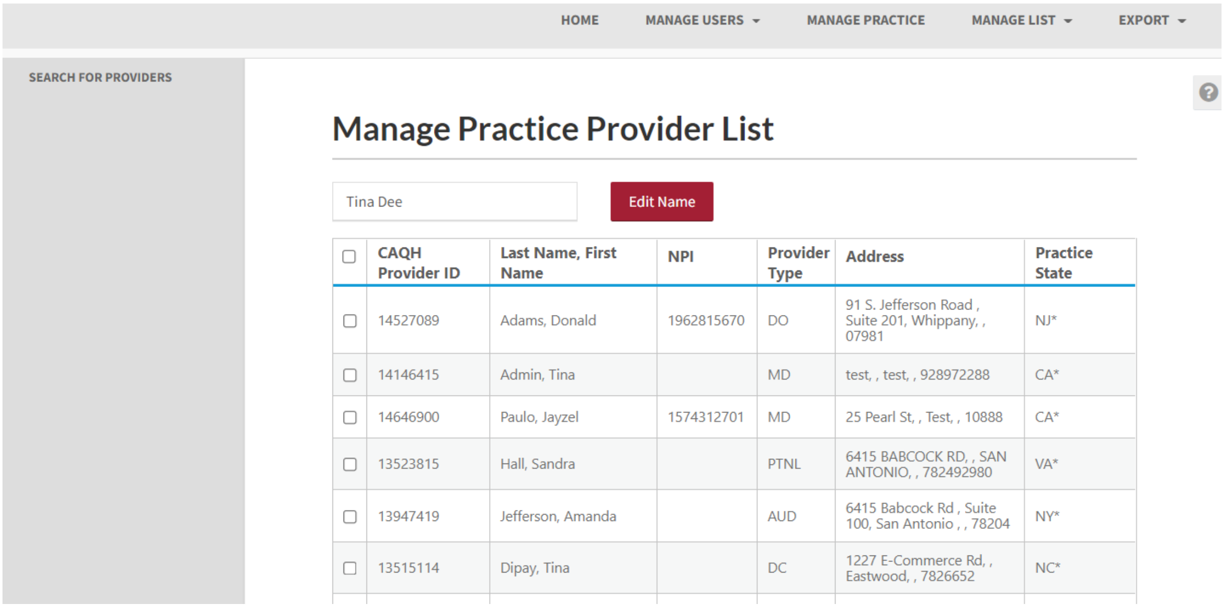
Chapter 6: Manage Provider List

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

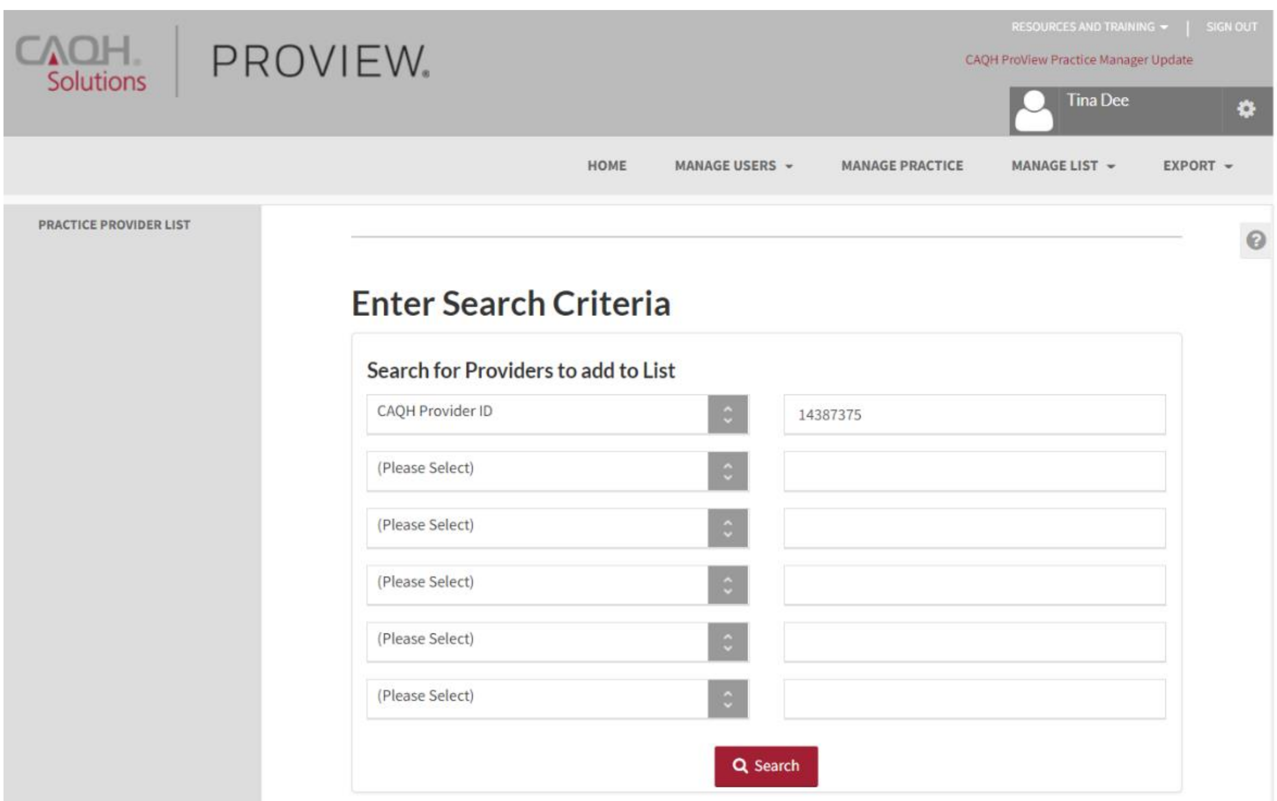


Click on “Manage Provider List” to view the list of providers associated with your account.

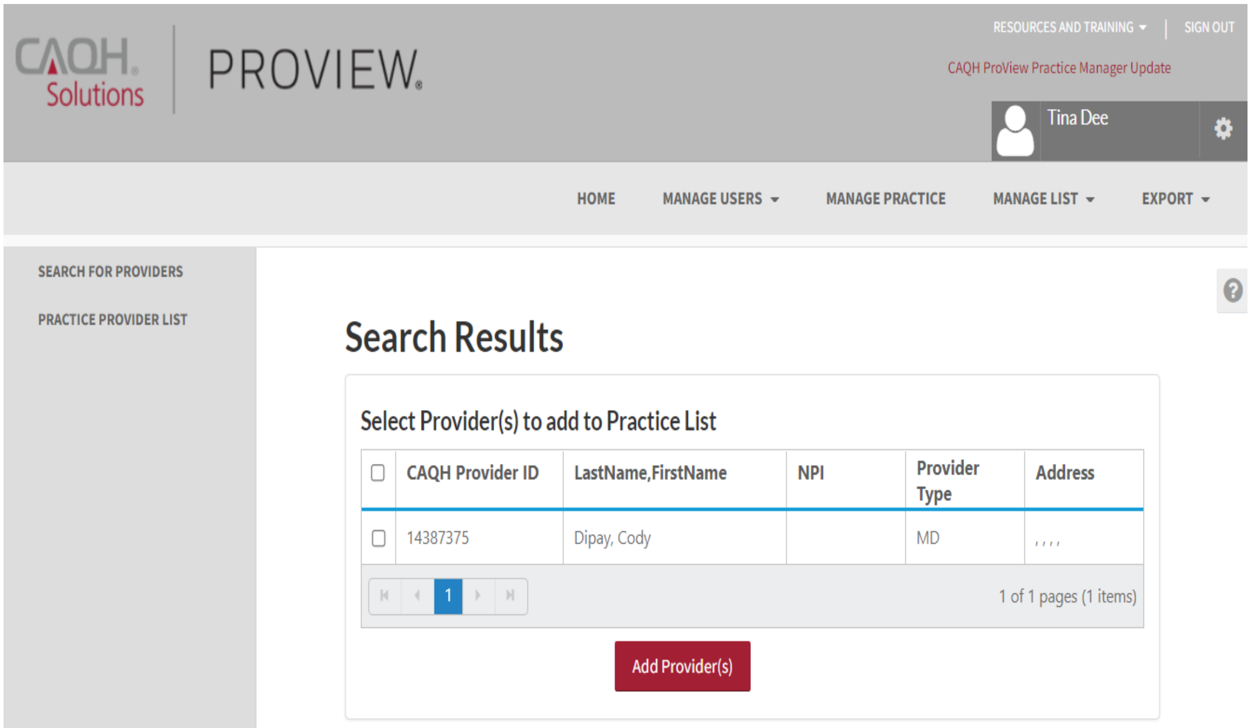
- For new users, upon initial login, the “Manage Provider List” will not contain any providers. Once a list is established, the “Manage Provider List” will be populated.
- You can delete providers from your list by clicking on the selection box next to a provider and then selecting “Delete”.
- You can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



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



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



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

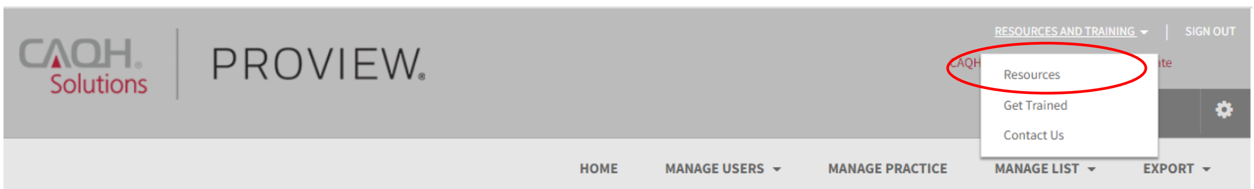
Chapter 7: Bulk Upload

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

Creating a Bulk Upload File

The "Bulk Upload Submission Instructions" are located on the "Resources" page, accessible from the resource and training menu on the top right of the screen. This document provides the file template and file specification requirements for the Bulk Upload file.

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

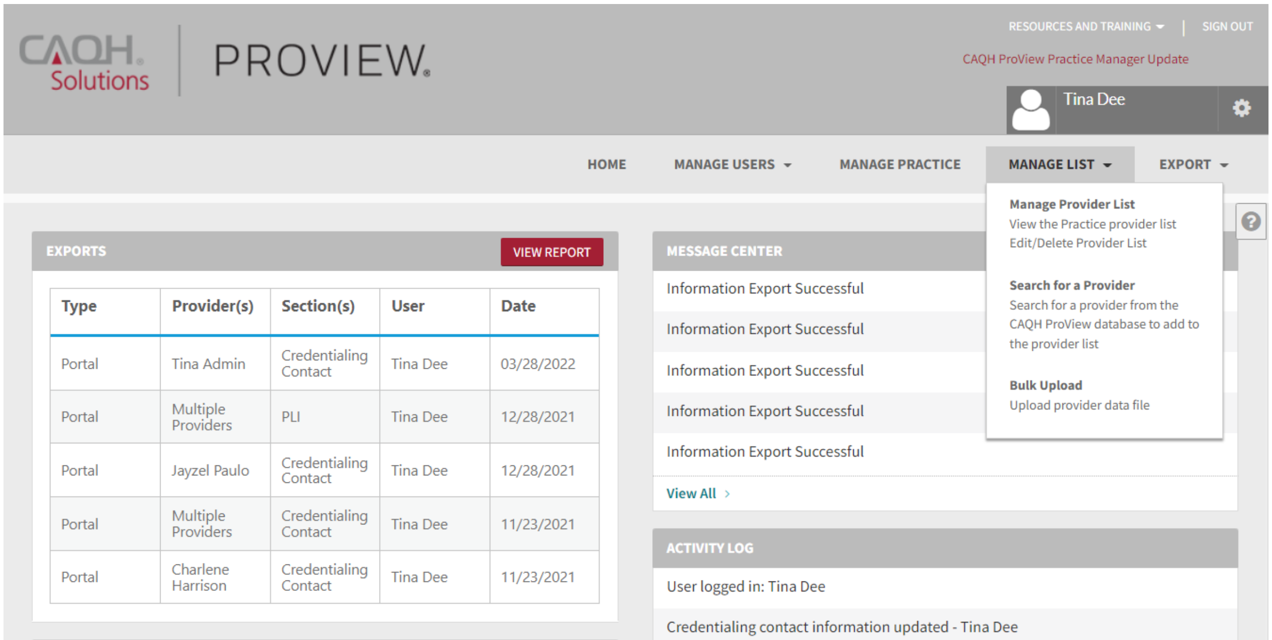


The Bulk Upload file must be named as listed in the table below.

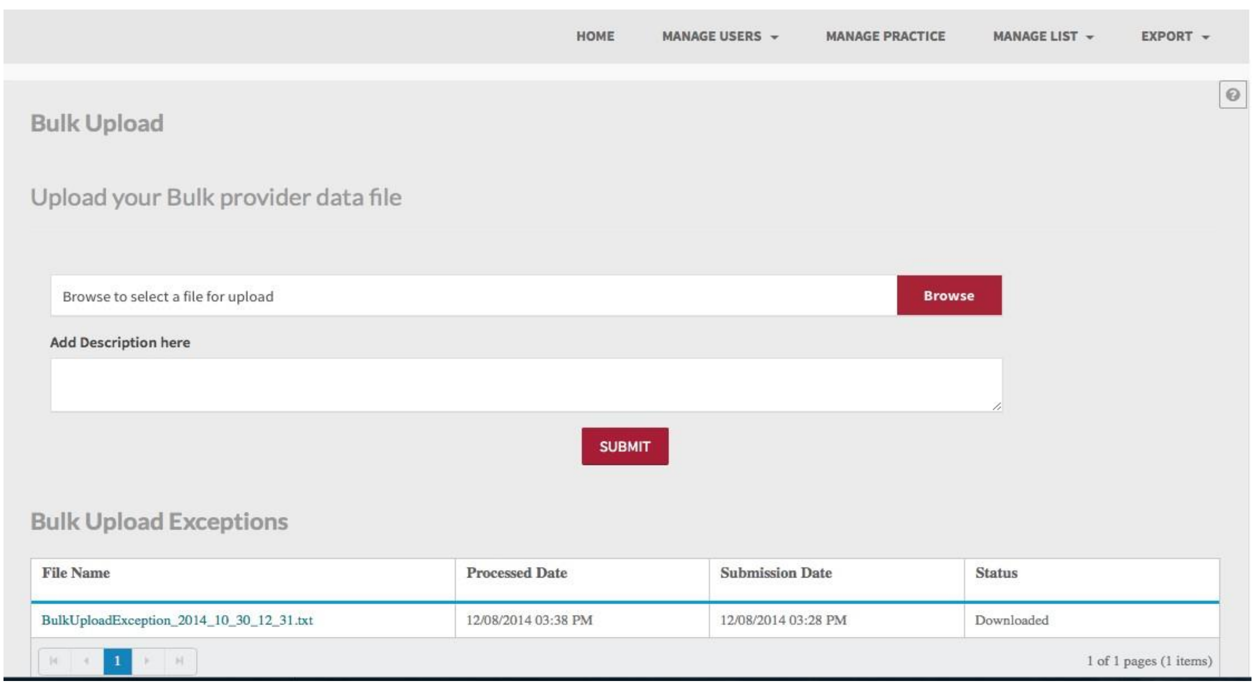
File Name	Description	Frequency	Delimiter
ProviderBulkUpload_YYYY_MM_DD_HH_MM.txt	The file name will be required when submitted by PM user.	Ad hoc	Pipe delimited

Uploading a Bulk Upload File

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



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

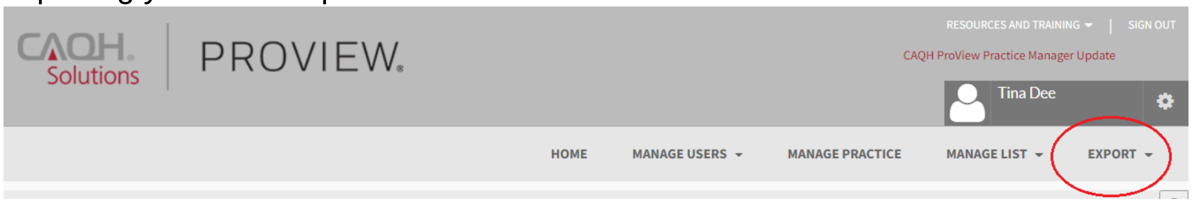


You can submit multiple Bulk Upload files; however, the files will be processed in the order in which they were received.

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

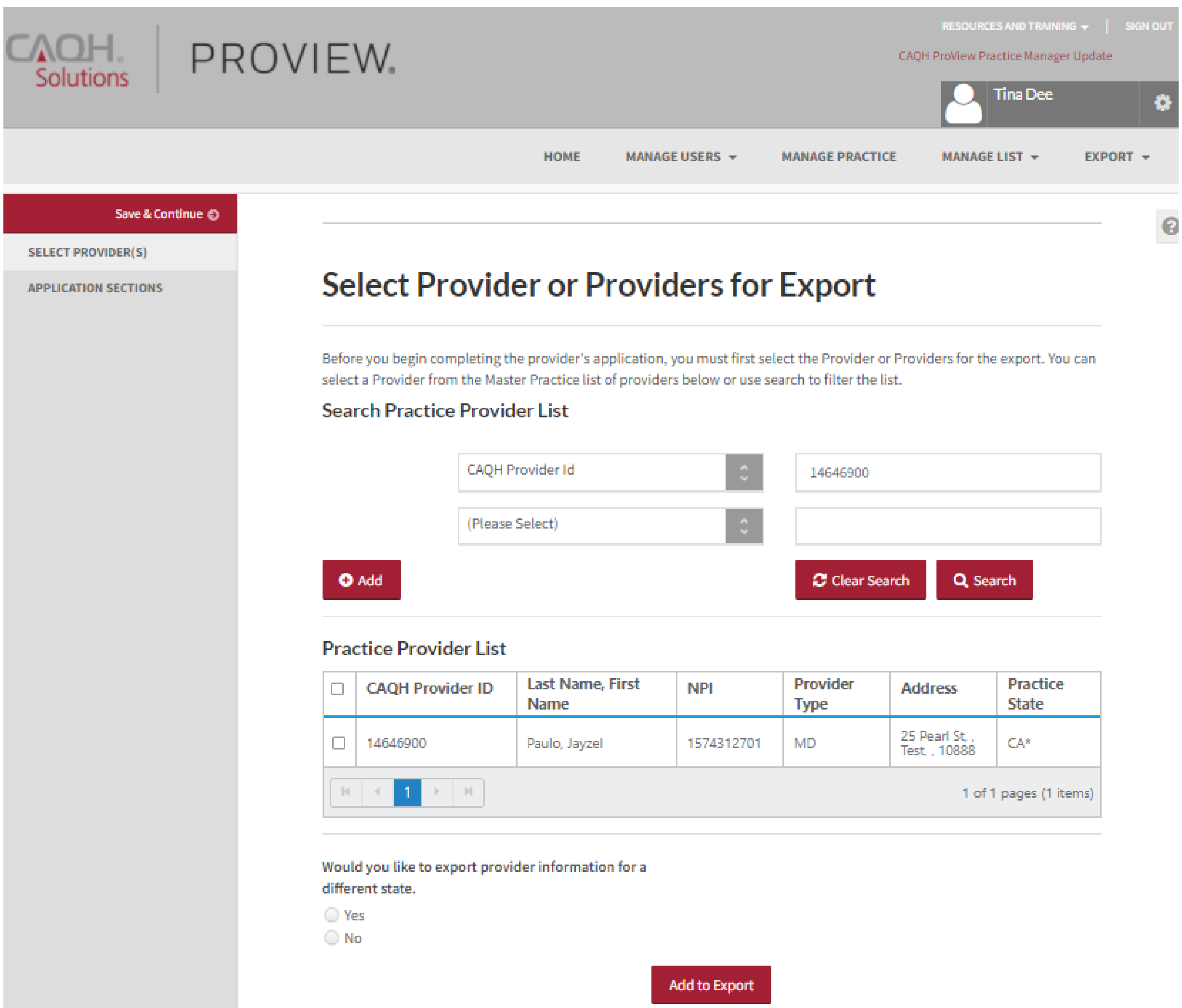
Chapter 8: Export

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



Select Provider(s) to Export

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

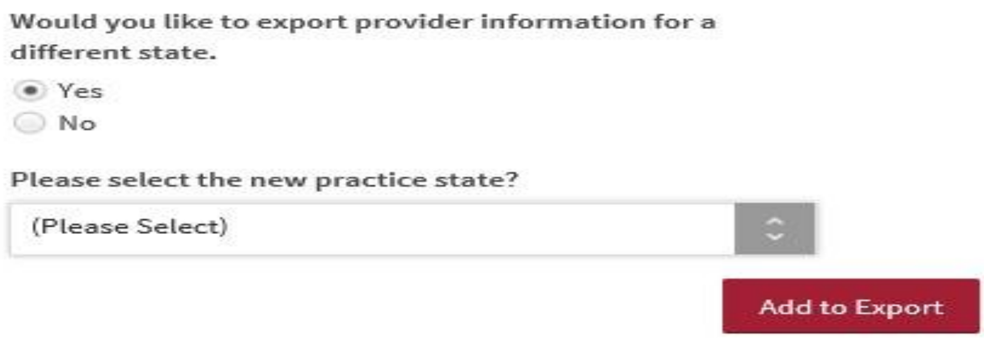


You can search for a provider by the following:

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

Select from the drop-down list and enter additional search criteria in the text box then select **"**Search"**.** You can also **"**Add" or "Clear Search" criteria using the relevant buttons.

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



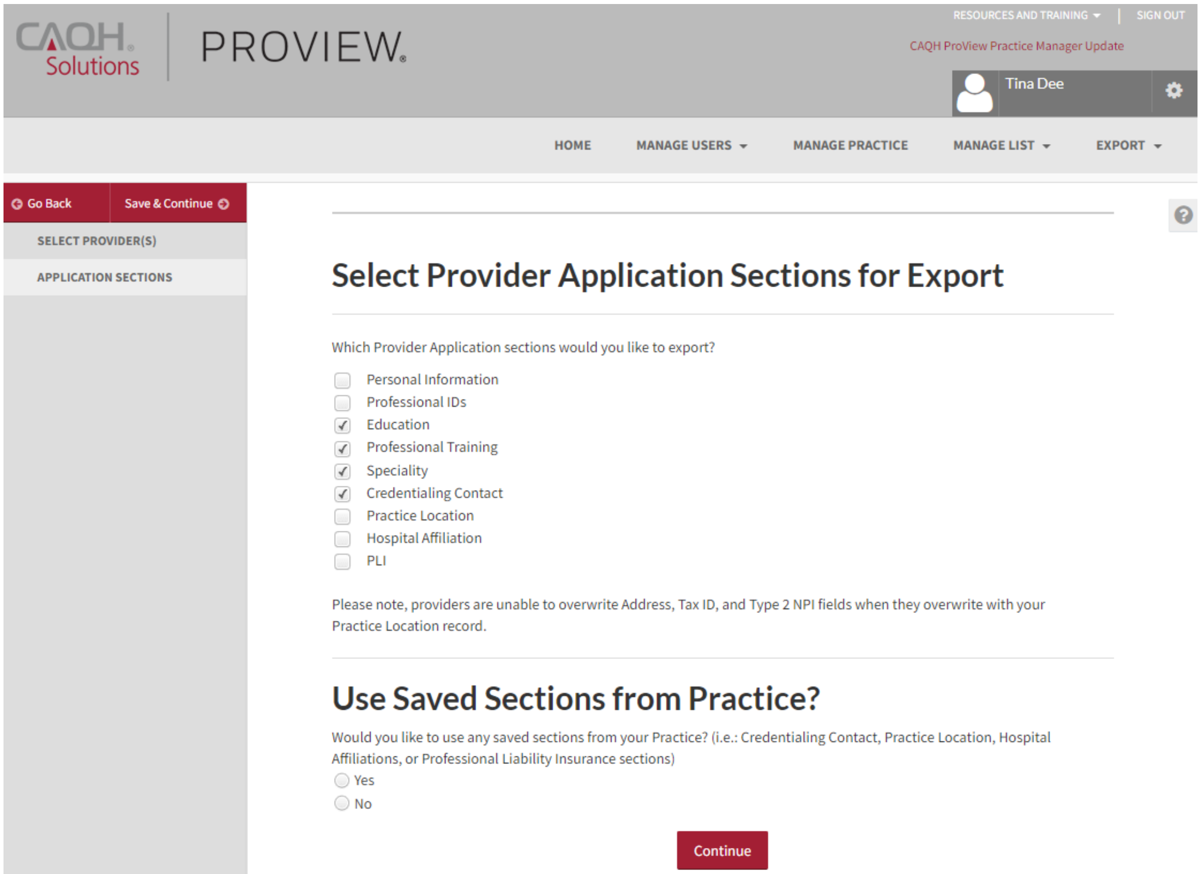
Once you have selected the provider(s) to export data to, select "Add to Export".

Select Sections for Export

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

Single Provider Export

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


RESOURCES AND TRAINING
SIGN OUT
CAQH Solutions
PROVIEW
CAQH ProView Practice Manager Update
Tina Dee
HOME
MANAGE USERS
MANAGE PRACTICE
MANAGE LIST
EXPORT
Go Back
Save & Continue
SELECT PROVIDER(S)
APPLICATION SECTIONS
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
Continue

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

1. Personal Information
2. Professional IDs
3. Education
4. Professional Training
5. Specialties
6. Credentialing Contact
7. Practice Location
8. Hospital Affiliations
9. Professional Liability Insurance (PLI)

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

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

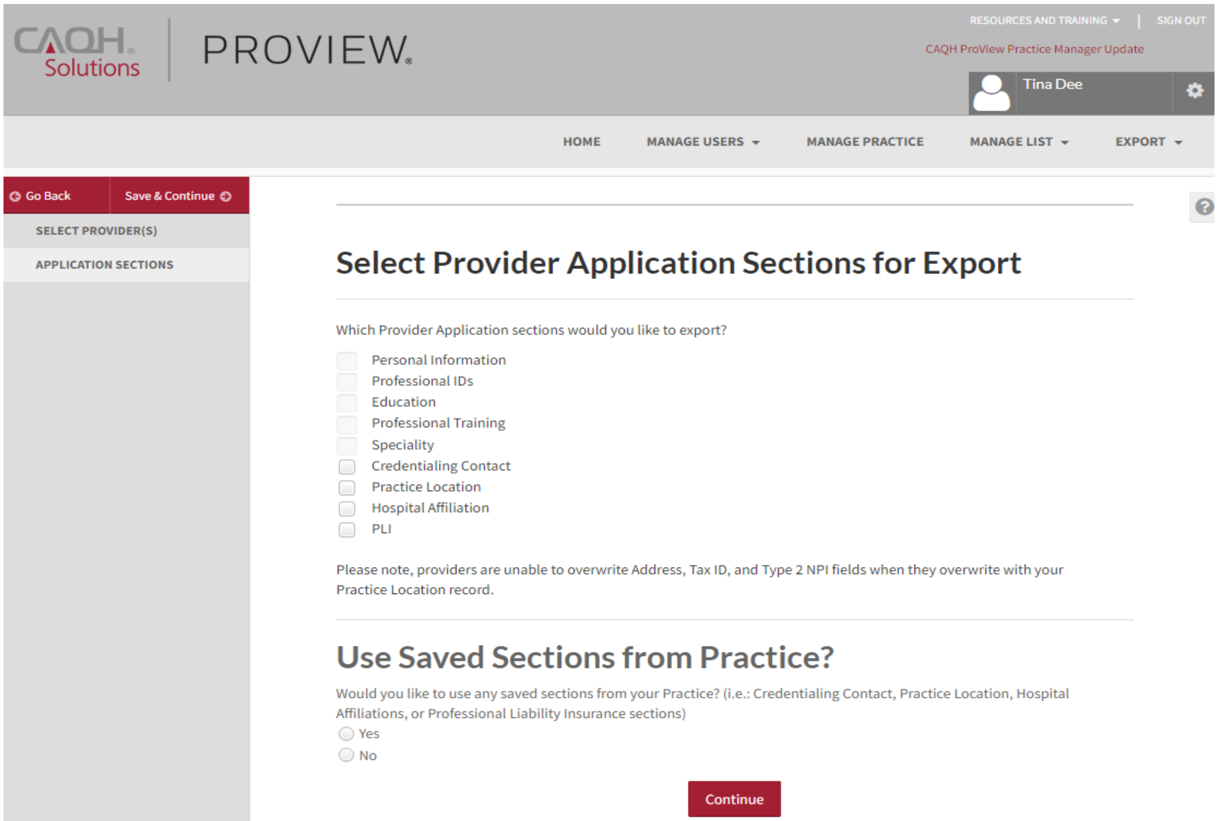
If you select "No", the above four sections (if you selected all four) will be presented to you for data entry once you select "Continue".

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

Select "Continue".

Multiple Providers Export

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



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

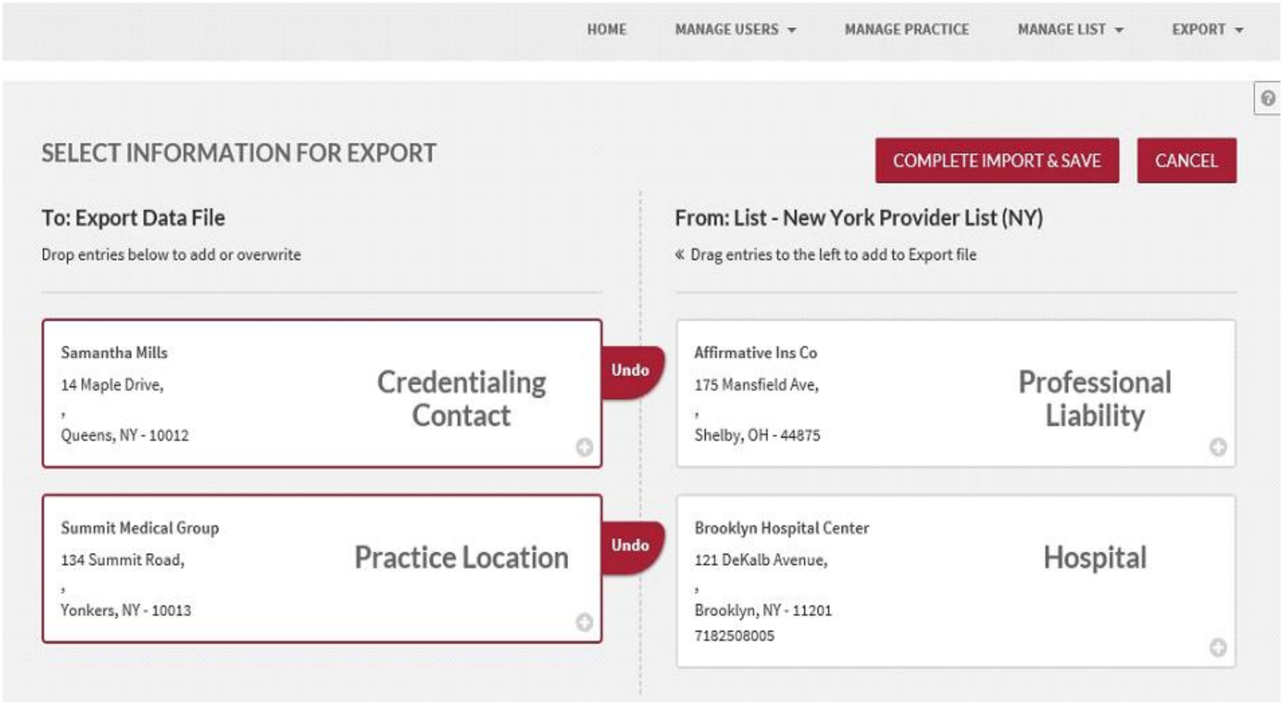
If you select "No", the above four sections (if you selected all four) will be presented to you for data entry once you select "Continue".

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

Select "Continue".

Using Saved Sections

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



Review Export Information

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

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

Tips:

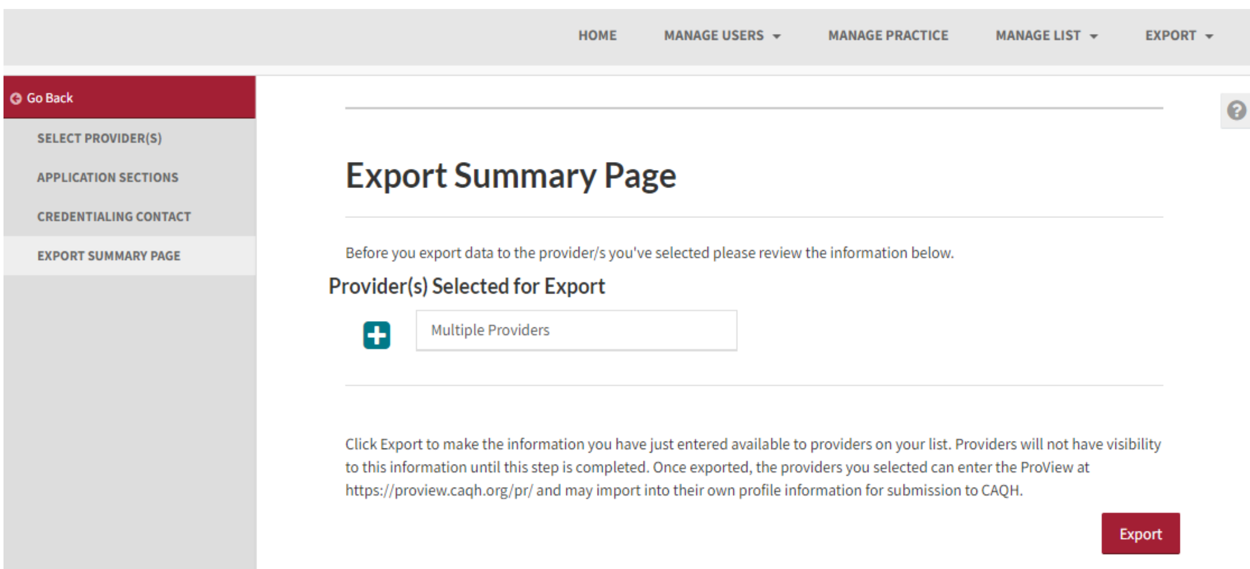
1. Throughout the screens, required fields that providers must complete prior to their attestation are indicated with a red asterisk (*). To export data, all required fields do not need to be completed by a practice manager, but they will be required before the provider can attest.
2. Use “Go to previous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

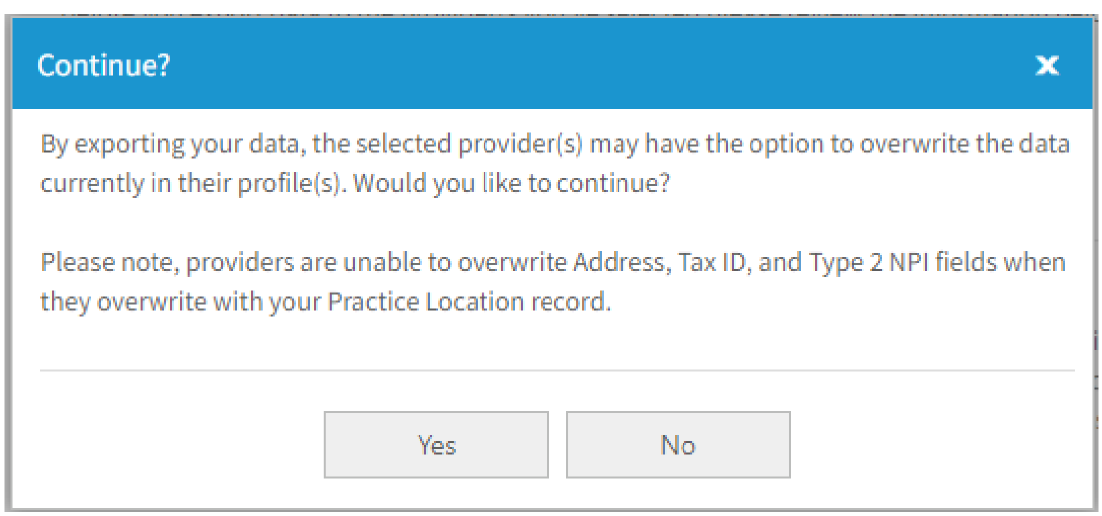
Export Summary Page

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

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

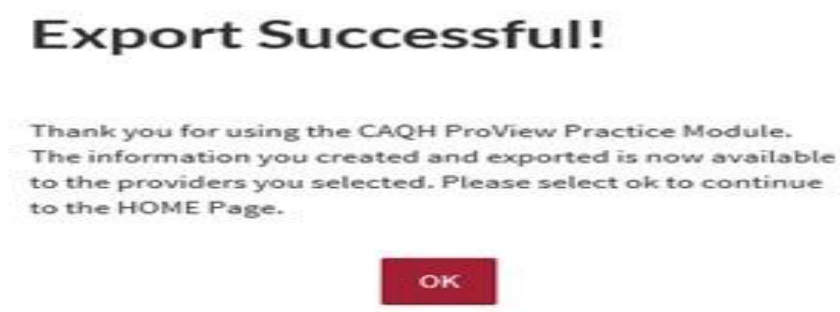
  NOTE: During future exports, the only provider profile information that is saved in the Practice Manager Module is information that is stored in the four common sections (Credentialing Contact, Practice Location, Hospital Affiliation, and Professional Liability Insurance).





Export Confirmation

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



APPENDIX

Provider Status

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

Status	Definition
New Provider	Provider has been entered into system but has not been sent a registration kit.
Initial Outreach	Provider has been sent outreach but has not yet registered.
Return Mail	Registration kit mailing is returned from USPS due to poor mailing address, provider no longer at the address, etc. *Note that effective 06/08/2020, CAQH is no longer sending registration kits via USPS.
Undeliverable	Unable to outreach to provider due to lack of valid information. For example, invalid email address.
Alternate Outreach	Provider has been messaged at a secondary location after attempts are made to primary office location.
First Provider Contact	Provider has logged into CAQH ProView.
Profile Data Submitted	Provider has progressed through CAQH ProView and "attested". Still waiting for supporting documents. Also may be referenced as "Profile Data Submitted".
Initial Profile Complete	Information has been attested to and supporting documents received. Also may be referenced as "Initial Profile Submitted".
Re-Attestation	After the provider has reached initial application complete, and the provider is keeping information current and "attesting".
Expired Attestation	After attestation is greater than 120 days old.
Opt out	Provider has asked to be removed from the CAQH database.
Provider Retired	Support Center is contacted that provider has retired from practice.
Provider Deceased	Support Center is notified that provider is deceased.

CAQH Practice Manager Support Center Desk Information

CAQH ProView Support Center:

Contact CAQH
CAQH Provider Help Desk:
Chat: https://proview.caqh.org/PR/
Chat Hours:
Monday – Friday: 8:30 AM to 6:30 PM (EST)

Phone: 1-888-599-1771
Phone Hours:
Monday – Friday 8 AM – 8 PM EST

Revision Log

Version	**Updates**
Version 1	Original
Version 1.1	• Updated *System Security* section. • Updated Chapter 7 – Bulk Upload to clarify the action steps still required by the provider after a bulk upload file is processed. • Updated *Appendix – Provider Status* table to reflect accurate names for provider status, specifically “Application Problem”, “Application Data Submitted”, and “Initial Application Complete”.
Version 1.2	• Updated Contact Information to include chat option
Version 1.3	• Updated screenshots and Help Desk Operation Hours