

Practice Manager Quick Reference Guide



PROVIEW™
A CAQH Solution®



CAQH ProView is the premier industry solution for practice managers to easily self-report provider data required by health plans, hospitals and other organizations. This information is used for credentialing, claims processing, quality assurance, member services, emergency response and more.

Easy to use, CAQH ProView eliminates the need for practice managers to complete multiple, lengthy paper forms. Spend less time filling out forms, by electronically entering and securely submitting information only one time. Available in all 50 states and the District of Columbia, CAQH ProView is free to providers.

CAQH ProView — The new industry standard for provider data collection.

- Fully electronic solution saves time and eliminates the need for redundant, time-consuming paper forms and faxes.
- Simplifies provider data collection by only prompting to enter the data required for the state(s) where a provider practices.
- The CAQH ProView data set meets the data collection requirements of URAC, the National Committee for Quality Assurance (NCQA) and Joint Commission standards.
- CAQH ProView is supported by:
 - America's Health Insurance Plans
 - American Academy of Family Physicians
 - American College of Physicians
 - American Health Information Management Association
 - American Medical Association
 - Medical Group Management Association

Benefits to Practice Managers

- Free service to providers in your practice.
- Easy to use.
- Import profile sections at one time for multiple providers with bulk upload feature.
- Maintain multiple practice locations and provider lists.
- Export provider-specific data.
- Enhanced security features help you maintain total control of your information.
- Updated provider and practice information is immediately available to authorized organizations.

Using the CAQH ProView Practice Manager Module

The CAQH ProView Practice Manager Module enables office information to be entered one time for multiple providers. There is no need to fill out redundant information for each healthcare provider practicing in your office.

Practice Manager Administrator (Admin) Users will be able to self-register for an account by logging into the Practice Manager CAQH ProView website. Once the account is established, additional Admin Users and Basic Users may be added. Basic Users can only be added by an Admin User and do not have privileges to manage other types of users. To complete your registration follow the steps outlined below. **Step One lists separate information for new users and existing UPD users. Select the one that applies to you. After completing Step One, all users follow Steps Two through Four.**

STEP ONE: Registration — New Users	STEP ONE: Registration — Existing UPD Users	STEP TWO: Set up Practice Lists — All Users
<p>A. Practice Manager Administrator (Admin) Account Registration</p> <ol style="list-style-type: none"> Go online to https://proview.caqh.org/pm Select "Click here to register for CAQH ProView" to start the process. <ul style="list-style-type: none"> Enter your registration information. Required fields are marked with a red asterisk (*). Create your CAQH ProView Practice Manager Module username and password. Choose and answer three security questions. You will be redirected to the login page to sign in. Enter your newly created or updated username and password to login. Select Manage Users to add new users, edit roles and privileges of existing users, or to search and view users' profiles. <p>B. Practice Manager Basic User Registration</p> <p>When a Practice Manager Admin adds Basic Users to their account, CAQH ProView will send a notice to the email address provided for the new user.</p> <ol style="list-style-type: none"> New users initiate their registration by selecting the link included in the email. The Practice Manager Basic User Complete Registration screen appears. Enter your registration information. The fields marked with a red asterisk (*) are required. Create your CAQH ProView Practice Manager Module username and password. Choose and answer 3 security questions. You will be redirected to the login page to sign in. Enter your newly created username and password to login. 	<ol style="list-style-type: none"> Go online to https://proview.caqh.org/pm If you have an existing username and password from the Universal Provider Datasource (UPD) Practice Administrator Module, enter it on this screen. CAQH ProView will prompt you to create a new username and password the first time you log in. Create your CAQH ProView Practice Manager Module username and password. Choose and answer three security questions. You will be redirected to the login page to sign in. Enter your newly created or updated username and password to login. Select Manage Users to add new users, edit roles and privileges of existing users, or to search and view users' profiles. 	<ol style="list-style-type: none"> From the Home page select "Manage Practice," located on the top navigation bar. <ul style="list-style-type: none"> The Manage Practice section allows the Practice Manager to create a unique list which can be used during the export process. Users are able to create and save the four common provider profile information sections: <ol style="list-style-type: none"> Credentialing Contact Practice Location Hospital Affiliation Professional Liability Insurance (PLI) Click "Add List" to add a practice (i.e., group name and state) that includes common provider profile information across a group of providers. Once you have created a practice, click the "+" sign to the left of a practice to select one of the four common provider profile information sections. Click "Add" to begin entering information within any of the four common provider profile information sections. <ul style="list-style-type: none"> Enter the requested information within each section. Use "Go to previous section" or "Save & Continue" to move forward or backward within your application. It is important to click the "Save & Continue" button to save your information. If you close the browser without clicking "Save & Continue," you will lose your information.

STEP THREE: Set Up Provider Lists — All Users	STEP FOUR: Export Data — All Users	STEP FOUR: Export Data — All Users (continued)
<ol style="list-style-type: none"> 1. From the Home page select “Manage List,” located on the top navigation bar. 2. Upon initial setup, the Manage Provider List does not contain any providers. For Practice Managers who previously utilized the UPD Practice Administrator Module, the provider list will be populated with your providers linked to your historical UPD account. 3. To start creating the Practice Provider List or to add to your Provider List, select “Search for a Provider.” 4. Enter search criteria. To narrow your search, select and enter information about your provider. 5. Select provider(s) to add to your Practice Provider List. 	<ol style="list-style-type: none"> 1. From the Home page select “Export,” located on the top navigation bar. 2. You must first select the provider(s) for the export. Select provider(s) from the “Practice Provider List” or use search to filter the list. 3. Select if you would like to export provider information for a different state. If a provider has multiple practice states, you must export the data individually by each state. Select the desired state from the drop down menu. 4. Click “Add to Export.” 5. Select the sections you would like to export. <ul style="list-style-type: none"> — Here you can select additional export sections that include: <ol style="list-style-type: none"> A. Personal Information B. Professional IDs C. Education D. Professional Training E. Specialty — You can also select the saved sections from your Practice List that you established in Step Two. These sections include: <ol style="list-style-type: none"> A. Credentialing Contact B. Professional Liability Insurance C. Practice Location D. Hospital Affiliations 	<ol style="list-style-type: none"> 6. If you selected to export the sections that have no saved data, these sections will now appear for you to complete. <ul style="list-style-type: none"> — Enter the requested information within each section. — Use “Go to previous section” or “Save & Continue” to move forward or backward within your application. — 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. 7. If you selected to export the sections from the saved Practice List area, the system will display the “Select Common Sections for Export” screen. You will then be asked to drag and drop the common sections you wish to use. 8. Click “Export” to make the information you have just entered available to providers on your list. Providers will be able to review the information you entered and may choose to import it into their profiles. 9. Once you select the “Export” button, you will receive a notification that your export was successful. After the data is exported, you will not be able to see any changes to the data that the provider may make.



CAQH, a non-profit alliance, is the leader in creating shared initiatives to streamline the business of healthcare. Through collaboration and innovation, CAQH accelerates the transformation of business processes, delivering value to providers, patients and health plans.