



PROVIEW™

CAQH ProView®

**Participating Organization
User Guide**

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CHAPTER 1: Introduction

The purpose of this document is to guide Participating Organizations through the process of managing their providers and data in CAQH ProView™. This guide will provide Participating Organizations with an understanding of how to use the system, giving an overview of each section within the system along with tips for efficient use.

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 organizations that may require provider profile information. CAQH ProView's comprehensive repository of provider data can serve a variety of business needs for your organization, including claims administration, credentialing, and directory services.

For Participating Organizations, CAQH ProView can be accessed at <https://proview.caqh.org/po>.

Listed below is a high-level overview of the process to obtain a completed provider data profile within CAQH ProView.

1. A Participating Organization submits a provider on a roster file by uploading the roster file into CAQH ProView or via the SFTP server.
2. Using key identifying information, CAQH ProView determines if the provider is new to the system or if the provider already has a CAQH ProView account.
3. New providers will receive a welcome kit via email with registration instructions.
4. The Participating Organization will receive a Return Roster file with the provider's account information and current provider status in the system.
5. Once registered with the system, the provider completes all required data profile questions.
6. The provider authorizes access to the completed data profile for the Participating Organization.
7. Provider attests to the accuracy of the completed data profile and submits any required supporting documents.
8. CAQH receives and reviews the supporting documents for accuracy and 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 either via the portal, the CAQH ProView SFTP server, or through Application Programming Interface (API).

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

Becoming a CAQH ProView Participating Organization

A health plan, hospital or other healthcare organization interested in becoming a new CAQH Participating Organization may contact CAQH at (202)-517-0384 or send us an email at sales@caqh.org. A CAQH representative will work with you to establish your organization's CAQH ProView account.

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: CAQH ProView Sign-In

Existing UPD Users

For users from contracted Participating Organizations who previously had access to the Universal Provider Datasource (UPD), go to <https://proview.caqh.org/po> (see Figure 01). You can initially sign-in with CAQH ProView by entering your UPD username and password and clicking “Sign in”. You will be prompted to update your username and password at this time.

FIGURE 01

Welcome to the CAQH ProView application HELP | CONTACT CAQH | LOG IN

CAQH Solutions | **PROVIEW™**

CAQH ProView™

Welcome to CAQH ProView™, formerly the Universal Provider Datasource®.

CAQH ProView is more than a credentialing database. Your organization can use CAQH ProView to streamline all processes requiring provider demographic data, including claims administration, directory services, credentialing, and more.

The real-time provider information in CAQH ProView includes validated key data elements such as TIN, NPI, DEA and addresses. Additionally, CAQH ProView makes it easy for healthcare providers to update their profile, helping ensure accurate, timely data submission to organizations that require this information.

Sign in on the right to access up-to-date profiles for healthcare providers.

If you would like to learn more about participating with CAQH ProView, email Ask.ProView@caqh.org.

SIGN IN

Username

[Forgot Username](#)

Password

[Forgot Password](#)

Remember me?

Sign In

NOT A PARTICIPATING ORGANIZATION USER?

[Practice Manager Sign In](#)
[Provider Sign In](#)

New Users

If you have been added as a new user for your Participating Organization, you will receive a link in an email message that will route to the following page (see Figure 02 below) to create a unique username and password for access to the system.

New Participating Organizations

If you are a new Participating Organization, a CAQH representative will assist you with creating a Participating Organization administrator account. Once the administrator account has been established, the Participating Organization administrator will receive a link in an email message that will route to the following registration page (see Figure 02 below) to create a unique username and password for access to the system.

Creating a CAQH ProView Username and Password

CAQH ProView users may be asked to create a new username and password to meet CAQH ProView new login requirements (see Figure 02).

FIGURE 02

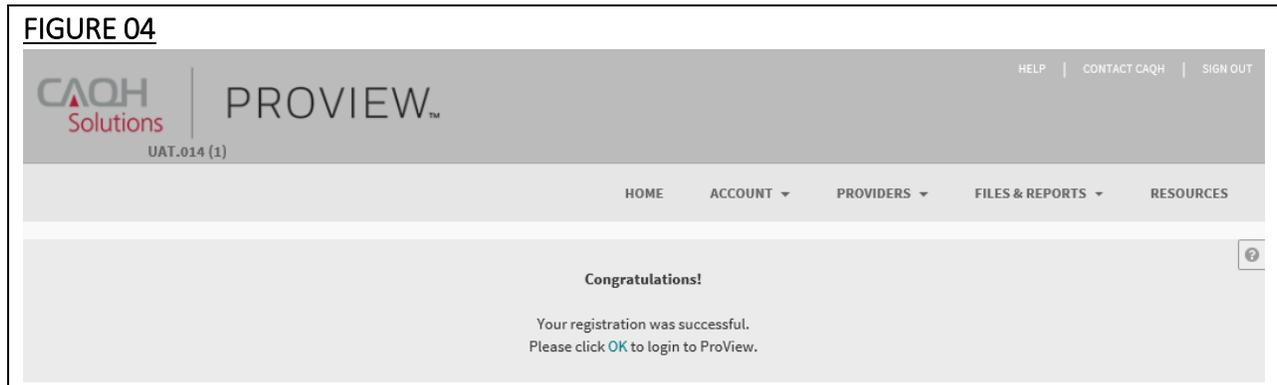
The screenshot shows a registration form titled "Create a ProView Account". Below the title is the instruction "Please fill in the fields below to continue registration." The form is divided into two main sections. The first section is titled "Please create a unique Username" and includes a note: "Please note that your username must be at least 8 characters (combination of numbers and letters) and cannot contain special characters or spaces." Below this note is a text input field labeled "Create Username". The second section is titled "Please reset your Password by entering the information below." and includes a note: "Please note that new Password must be at least 8 characters and cannot be same as your Username." Below this note are two text input fields: "New Password" and "Re-enter New 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 (see Figure 03).

FIGURE 03

The screenshot shows a form for selecting security questions. It contains three identical rows. Each row starts with a dropdown menu labeled "Security Question 1: (required) *", "Security Question 2: (required) *", and "Security Question 3: (required) *" respectively. Each dropdown menu currently displays "--Select--". Below each dropdown menu is a text input field labeled "Security Answer 1 *", "Security Answer 2 *", and "Security Answer 3 *" respectively. At the bottom center of the form is a red button labeled "SUBMIT".

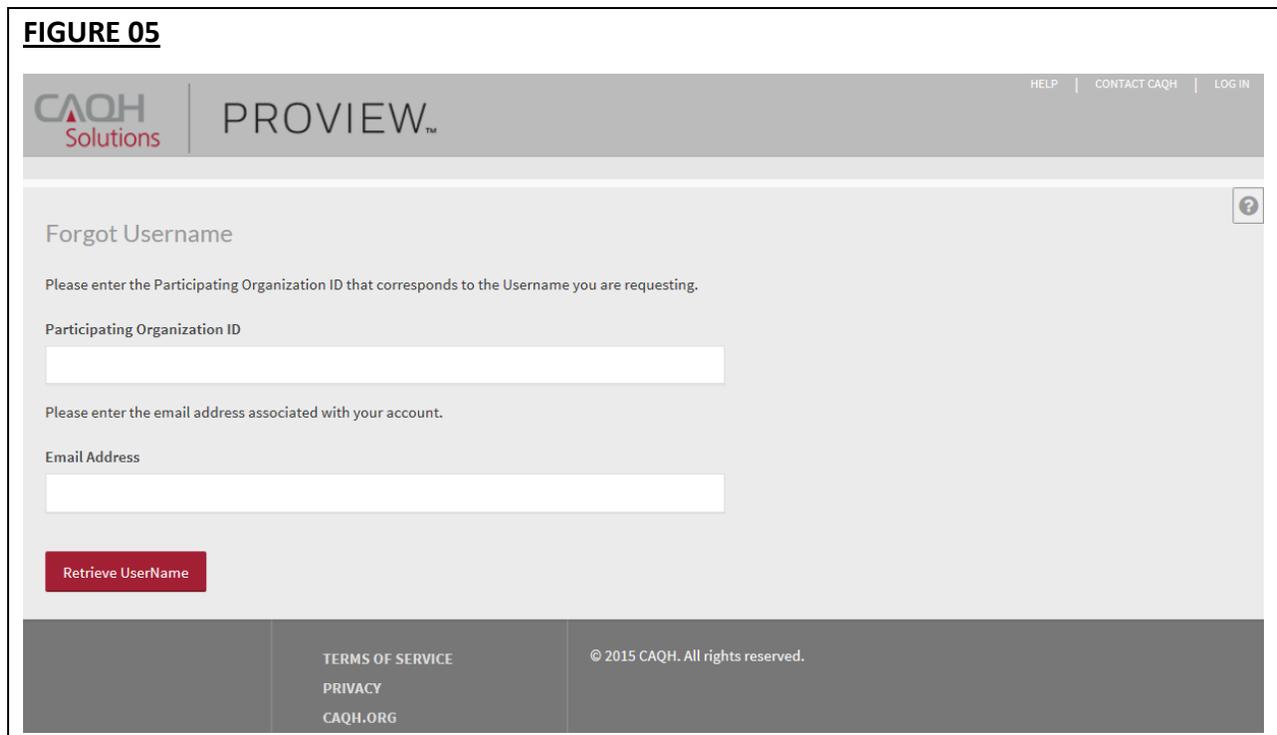
Click “Create Account” and you will receive confirmation that your CAQH ProView registration was successful (see Figure 04).



Once you have established a CAQH ProView username and password, you will be directed to the CAQH ProView sign-in page. Enter your username and password to proceed.

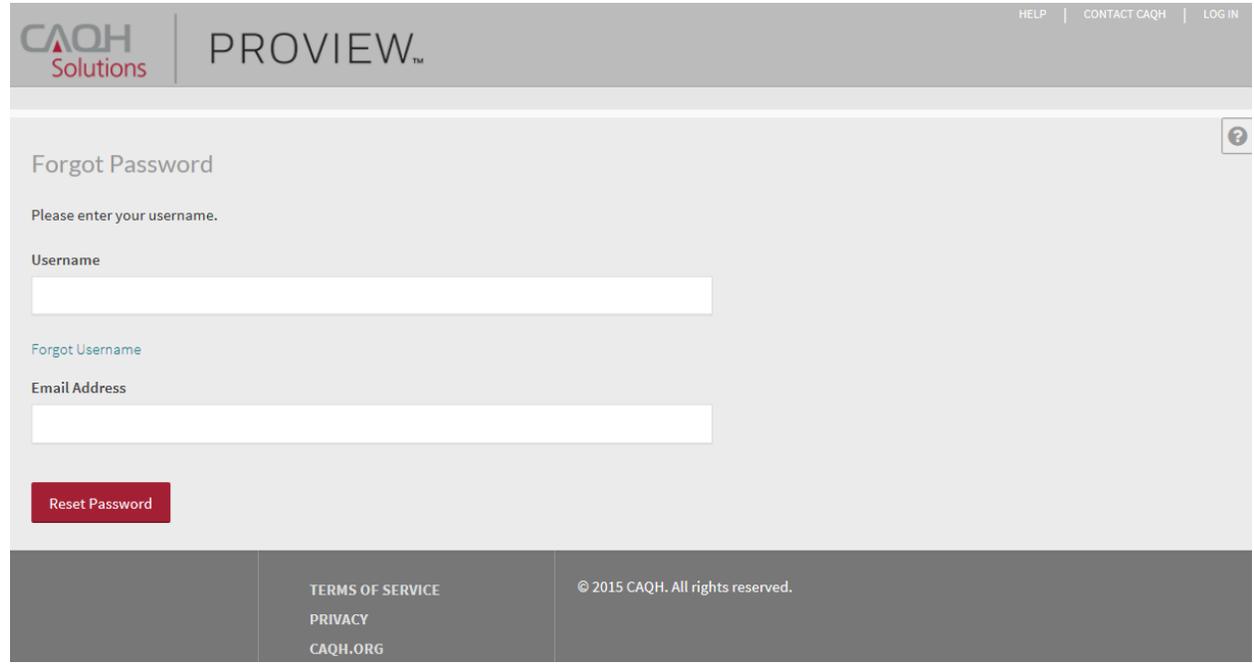
Forgotten Username and/or Password

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 (see Figure 05).



If you forgot your Password, you may select the “Forgot Password” link on the CAQH ProView sign-in page. Enter your username and email address to reset password (see Figure 06). An email with a link will be sent to you to reset your password.

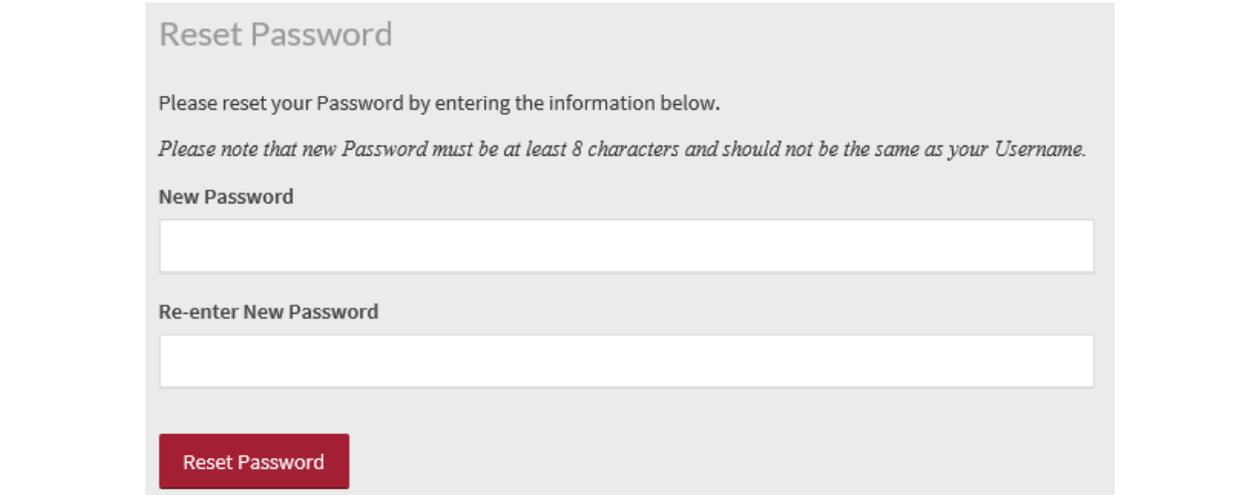
FIGURE 06



The screenshot shows the CAQH ProView 'Forgot Password' page. At the top left is the CAQH Solutions logo, and at the top right are links for HELP, CONTACT CAQH, and LOG IN. The main heading is 'Forgot Password' with a help icon. Below the heading is the instruction 'Please enter your username.' followed by a 'Username' label and an input field. A link for 'Forgot Username' is provided below the input field. Below that is an 'Email Address' label and another input field. A red 'Reset Password' button is located at the bottom of the form area. The footer contains links for 'TERMS OF SERVICE', 'PRIVACY', and 'CAQH.ORG', along with the copyright notice '© 2015 CAQH. All rights reserved.'

Once you select the link in the email sent to you, enter and re-enter your new password, then select “Reset Password” (see Figure 07).

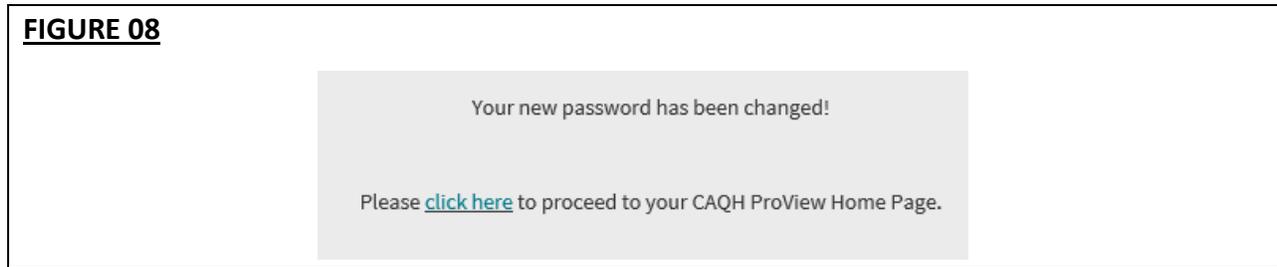
FIGURE 07



The screenshot shows the CAQH ProView 'Reset Password' page. The heading is 'Reset Password'. Below the heading is the instruction 'Please reset your Password by entering the information below.' followed by a note: 'Please note that new Password must be at least 8 characters and should not be the same as your Username.' Below the note are two input fields: 'New Password' and 'Re-enter New Password'. A red 'Reset Password' button is located at the bottom of the form area.

The Password Change confirmation (see Figure 08) will appear when your password has been successfully reset. You can then log into CAQH ProView using your new password.

FIGURE 08



CHAPTER 3: Home Page

You will see the CAQH ProView Home page after a successful login (see Figure 09). Based on your CAQH ProView user role, as established by your Participating Organization’s administrator, the home page view and the areas accessible to you will vary. See *Chapter 5: Managing Users* for more information on the variety of roles that can be assigned to users within a Participating Organization’s account.

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.

FIGURE 09

The screenshot displays the CAQH ProView interface for a user named Charlene Harrison. The page includes a navigation bar with links for HELP, CONTACT CAQH, and SIGN OUT. Below the navigation bar, there are tabs for HOME, ACCOUNT, PROVIDERS, FILES & REPORTS, and RESOURCES. The main content area is divided into several sections:

- QUICK SEARCH:** A search form with fields for First Name, Last Name, Primary Practice State, CAQH Provider ID, and Provider Type. A red "Search" button is located below the fields.
- PROVIDER STATUS REPORT:** A section with "View by State" and "Display" dropdown menus, and a "Get Report" button. Below this is a donut chart titled "Provider Status Report" with a legend and a "Detailed Report" button.
- MESSAGE CENTER (22):** A list of messages, all titled "Roster Submission Failed". A "View All" link is at the bottom.
- MANAGE USERS:** A table with an "ADD USER" button. The table lists users with their names, roles, and statuses.

User Name	User Roles	User Status
Harrison, Charlene	PO Administrator (ProView and Sanctions)	Active
Everline, Scott	PO Back-Up Administrator (ProView and Sanctions)	Active
Montanez, Chris	PO Back-Up Administrator (ProView and Sanctions)	Active
Urwongse, Ron	PO Standard User (ProView and Sanctions)	Active
Only, View	PO View-Only User (ProView and Sanctions)	Active
Lis, Jennifer	PO Back-Up Administrator (ProView and Sanctions)	Active
Kalathil, Mano	PO Back-Up Administrator (ProView and Sanctions)	Pending
Morteo, Alessandra	PO Back-Up Administrator (ProView and Sanctions)	Active
Lanahan, Brittany	PO Back-Up Administrator (ProView and Sanctions)	Active
Comrack, Alexis	PO Back-Up Administrator (ProView and Sanctions)	Pending

The Home page for Participating Organization administrators displays six components:

1. **Quick Search**: This section allows you to conduct a quick search for a provider with the CAQH ProView system using the following criteria:

- First Name
- Last Name
- Primary Practice State
- CAQH Provider ID
- Provider Type

If more options are needed to search by, you can conduct an advanced search, which is explained in further detail later in this guide.

2. **Message Center**: This section displays information relevant to your account, e.g. if a roster submission failed.

3. **Provider Status Report**: This section allows you to view a snapshot of the provider population in the system and the related provider status distribution. Via the drop-down menus in this section, you may filter by state and choose to view a snapshot for the entire CAQH ProView provider population or for only your Participating Organization's roster population. Once a drop-down box is selected, select "Get Report" to view the data. If a more detailed report is needed, select "Detailed Report", which will provide the following detailed information:

- Provider name
- Birth Date
- City, State
- Roster Status
- Provider Status

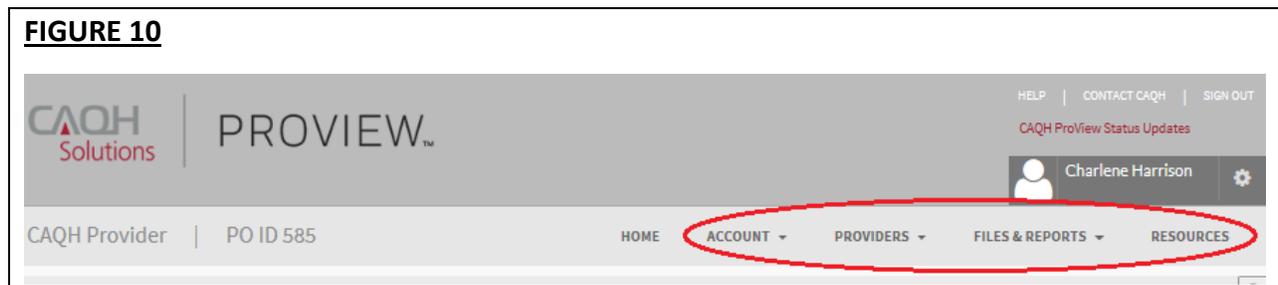
4. **Manage Users**: This section allows you to view a list of the current users and their assigned user roles, e.g. an administrator vs. standard user, and the user status, e.g. active, pending, or suspended. From this section, you may select the "Add User" button to quickly add a user to your profile. By selecting the "Show More" option, you will be taken to the Manage Users page, which allows you to add a user, conduct a search, or delete a user record. Refer to *Chapter 5: Managing Users* for more information on the Manage User function.

5. **Upload Rosters**: This section provides a list of rosters that have been uploaded along with the submission date and status. If you select "Show More", you will be taken to the "Upload Roster" page where you can upload a roster file and view a historical list of all roster uploads. Refer to *Chapter 7: Files & Reports* for more information on uploading roster files.

6. **Download Files:** This section provides a list of recently available files for download. If you select “Show More”, you will be taken to the “Download Files” page to see a complete list of files available for download. These files include return rosters, roster exceptions, standard extracts, custom extracts, sanctions standard extracts, and sanctions custom extracts. Refer to *Chapter 7: Files & Reports* for more information on uploading roster files.

In addition, to these components on the Home page, across the top of the Home page is a navigation menu, which allows you, based on your user assigned role, to navigate to these sections (see Figure 10):

- **Account** – Click here to create and/or edit your Participating Organization’s profile information (See Chapter 4). You can also click here to manage the users of your organization’s account (See Chapter 5). This section is only accessible to users with administrator access.
- **Providers** – Click to view a summary of your roster population, to search for a provider that is on your roster, or to add a provider to your roster (See Chapter 6).
- **Files & Reports** – Click here to access files and reports related to your provider roster and your organization’s account (See Chapter 7).
- **Resources** – Click here to access a variety of resource documents related to CAQH ProView (See Chapter 8).



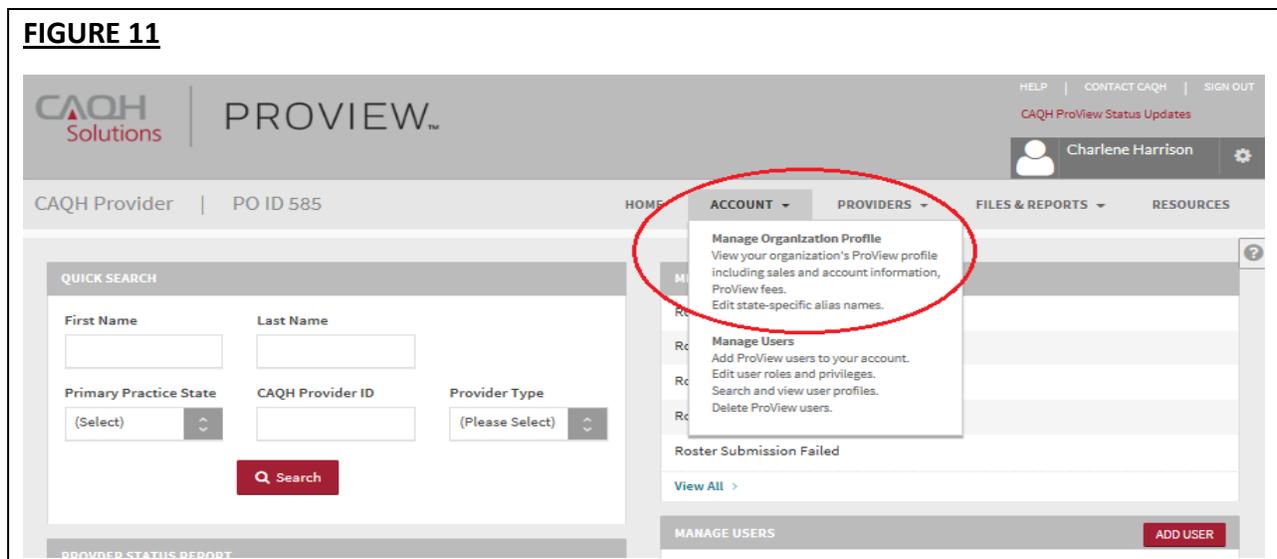
CHAPTER 4: Managing Your Organization’s Account

From the Home page, click on “Account” and then “Manage Organization Profile” to create/manage your organization’s profile (see Figure 11). For organizations new to CAQH ProView, after you initially login to the system, access this section to create a profile for your organization.

Tips:

- If you need assistance, you can access the “?” link that is displayed on the right-hand side of the screen.
- Required fields are marked with asterisks (*) across the entire profile application.

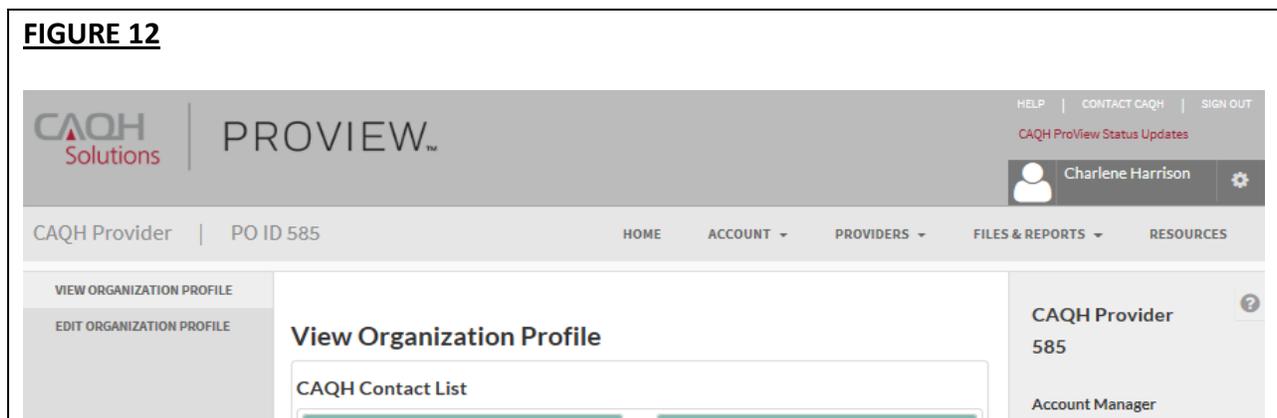
FIGURE 11



View Organization Profile

To view a summary of your organization’s account profile and contacts on file for CAQH’s reference, click on “Manage Organization Profile” from the “Account” drop-down. The “View Organization Profile” page will appear (see Figure 12).

FIGURE 12



The “View Organization Profile” screen will include contact information for the following:

- Contracting Manager
- Account Management Supervisor
- Account Manager
- Correspondence Address
- Billing Address

Edit Organization Profile

Click on “Edit Organization Profile” from “View Organization Profile” screen (see Figure 13) to create or edit your organization’s profile information.

Tips:

- If you need assistance, you can access the “?” link that is displayed on the right-hand side of the screen.
- Required fields for your organization’s profile are marked with asterisks (*).

FIGURE 13

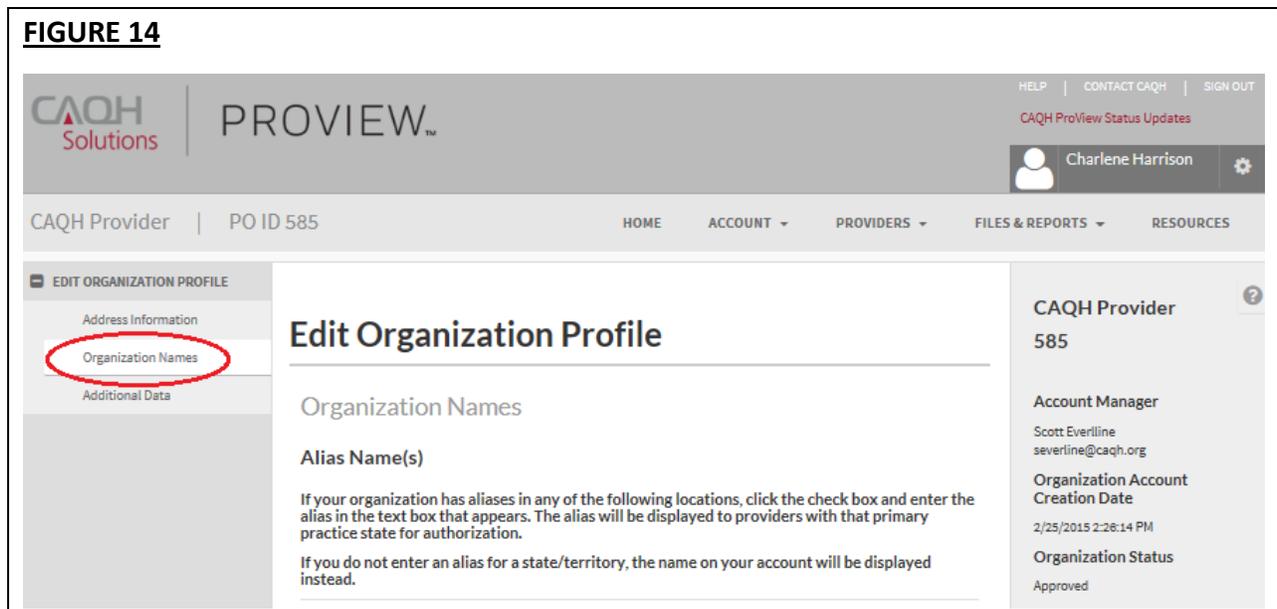
The screenshot shows the 'Edit PO Profile' page in the CAQH ProView system. The left sidebar has a menu with 'EDIT ORGANIZATION PROFILE' and sub-items: 'Address Information' (circled in red), 'Organization Names', and 'Additional Data'. The main content area is titled 'Edit PO Profile' and contains two sections: 'Address Information' and 'Billing Address'. The 'Address Information' section includes fields for 'Name of Participating Organization*' (CAQH Provider), 'Correspondence Address 1*' (1900 K St NW), 'Correspondence Address 2', 'City*' (Washington), 'State*' (DC), and 'Zip Code*' (20006). The 'Billing Address' section includes fields for 'Address(Ship To/Tax To)*' (1900 K St NW), 'Address2', 'City*' (Washington), 'State*' (DC), and 'Zip Code*' (20006). A right sidebar shows 'CAQH Provider 585' with a help icon, 'Account Manager Scott Everline', and 'Organization Account Creation Date 2/25/2015 2:28:14 PM'. The top navigation bar includes 'CAQH Solutions', 'PROVIEW™', 'HELP', 'CONTACT CAQH', 'SIGN OUT', 'CAQH ProView Status Updates', and a user profile for 'Charlene Harrison'.

You may enter or update the following information on the “Edit PO Profile” screen:

- Organization’s Address
- Billing Address
 - This section allows you to provide a billing address for billing correspondence.
 - In the “Attention Billing” field you may provide a name for billing correspondence.
 - You can also provide a billing correspondence email address if you wish to use a separate contact for email correspondence related to billing.

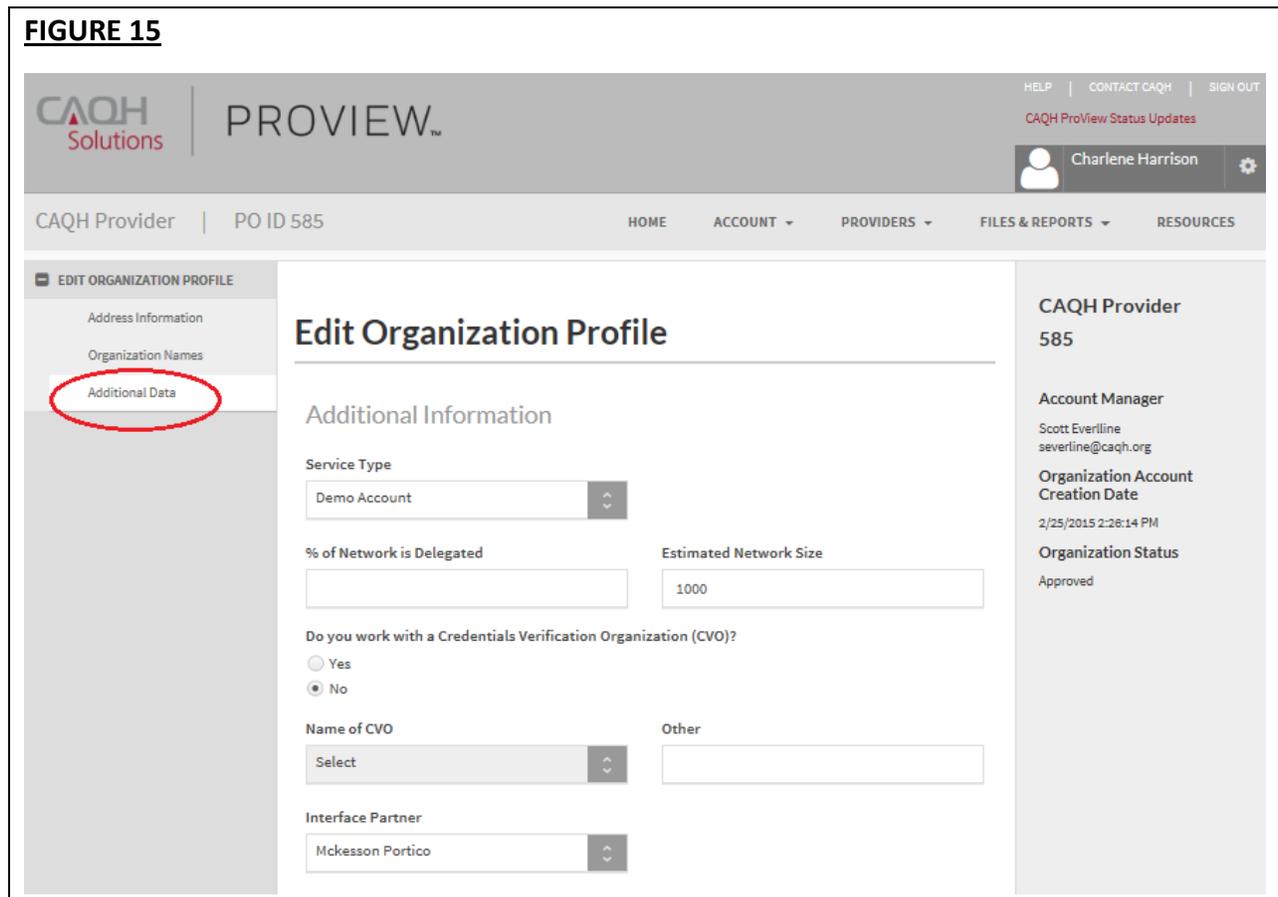
Enter the required information and click on “Next” to advance to the next screen. The “Organization Names” screen allows you to enter or update your organization’s alias names (see Figure 14).

FIGURE 14



- This section allows you to enter your organization alias state names by selecting the appropriate state, the authorization name and the alias name.
- An alias is a name under which the organization does business. Since providers will be asked to give your organization authorization for release of data, the alias should be a name that is known to providers within a given state.

Click on “Next” to advance to the “Additional Data” screen where you can enter additional information for your organization’s profile (see Figure 15).



- In this section, you will have the ability to enter and update the following:
 - Your organization’s “Service Type”
 - The percentage of which your network is delegated
 - Your organization’s estimated network size
 - Any CVO or interface partner
 - The email addresses where notifications are sent when standard extracts are prepared.

Changing an Organization’s Name

If your organization’s parent name, which is tied to your CAQH ProView participating organization identification number, needs to be changed, contact your Account Manager to assist you with this. You do not have the ability to change the parent organization’s name via the portal.

- Once your Account Manager has changed your organization’s name, it will be viewable to your rostered providers on the provider Authorization screen. A name change does not require the provider to re-authorize the organization. Any previous authorization selections will remain the same.

- Once your Account Manager has changed your organization's name, the organization's name will also be updated on the Authorized Plans form that is included in the provider replica applications.

Plan Administrator Emails

CAQH ProView uses the plan administrator email address and any designated back-up plan administrator emails as the main points of contact for the participating organization. Please confirm on a regular basis that the emails you have on file for your organization's Plan Administrator and Back-Up Plan Administrator are accurate.

If necessary, CAQH may use this information to contact you regarding CAQH ProView system updates. It is very important to keep this information accurate and up-to-date.

To view your information that is currently on file, please [use](#) following these steps:

1. Sign-in your organization's CAQH ProView account.
2. Click on Account from the top navigation menu.
3. Click on Manage Users.
4. Ensure that the correct email addresses are listed for any users with user roles defined as "Administrator" and "Backup Administrator".

If you need to make updates to the email addresses on file, please contact your Account Manager to assist you with this process.

CAQH ProView automatically distributes emails to the Plan Administrator when several events occur that are tied to that Plan Administrator's participating organization. Due to volume of activity, Plan Administrators may receive a high volume of emails. If desired for email management, the Plan Administrator can create an email rule to route emails from CAQH ProView to a separate folder within the email inbox.

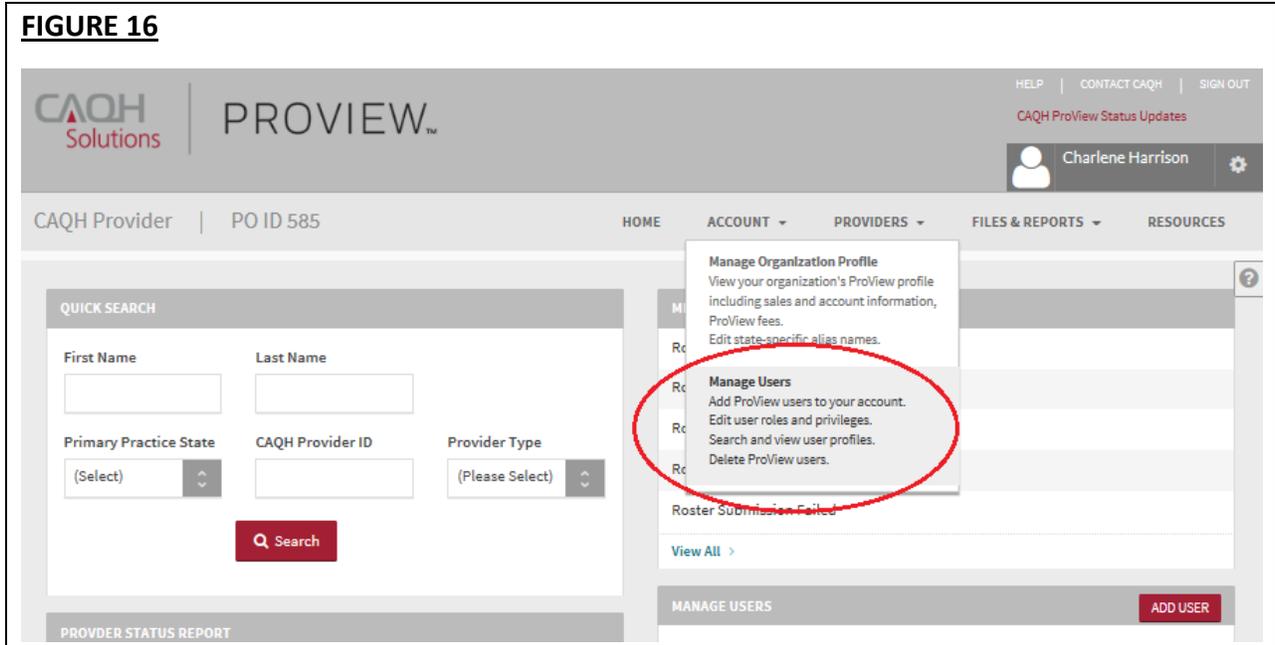
CHAPTER 5: Managing Users

From the Home page, click on “Account” and then “Manage Users” to search, add, delete and edit user privileges within your organization’s account (see Figure 16).

Tips:

- If you need assistance, you can access the “?” link that is displayed on the right-hand side of the screen.

FIGURE 16



Manage Users

Within the “Manage Users” screen, you can view a list of all users with current access to your organization’s CAQH ProView account (see Figure 17).

FIGURE 17

Manage Users

Click name to view User Details

<input type="checkbox"/>	User Name	User Roles	User Status
<input type="checkbox"/>	Harrison, Charlene	PO Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Everline, Scott	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Montanez, Chris	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Urwongse, Ron	PO Standard User (ProView and Sanctions)	Active
<input type="checkbox"/>	Only, View	PO View-Only User (ProView and Sanctions)	Active
<input type="checkbox"/>	Lis, Jennifer	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Kalathil, Mano	PO Back-Up Administrator (ProView and Sanctions)	Pending
<input type="checkbox"/>	Morteo, Alessandra	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Lanahan, Brittany	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Comrack, Alexis	PO Back-Up Administrator (ProView and Sanctions)	Pending

1 of 2 pages (13 items)

13 Users

- 1 PO Administrator (ProView and Sanctions)
- 9 PO Back-Up Administrator (ProView and Sanctions)
- 2 PO Standard User (ProView and Sanctions)
- 1 PO View-Only User (ProView and Sanctions)

By clicking on the “User Name”, “User Roles”, or “User Status”, a sort icon will appear and will allow you to sort the list of users accordingly (see Figure 18).

FIGURE 18

The screenshot displays the 'Manage Users' interface in the CAQH ProView system. The page header includes the CAQH Solutions logo, the 'PROVIEW' title, and navigation links for HELP, CONTACT CAQH, and SIGN OUT. Below the header, the user's name 'Charlene Harrison' is visible. The main content area features a 'Manage Users' section with a table of users. The 'User Name' column header is circled in red, indicating it is a clickable sort option. The table lists 13 users with their respective roles and statuses. A sidebar on the right provides a summary of the 13 users, categorized by role: 1 PO Administrator, 9 PO Back-Up Administrators, 2 PO Standard Users, and 1 PO View-Only User.

<input type="checkbox"/>	User Name ^	User Roles	User Status
<input type="checkbox"/>	Brisk, Ann	PO Standard User (ProView and Sanctions)	Pending
<input type="checkbox"/>	Comrack, Alexis	PO Back-Up Administrator (ProView and Sanctions)	Pending
<input type="checkbox"/>	Coster, Becca	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Everline, Scott	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Gibson, Erin	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Harrison, Charlene	PO Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Kalathil, Mano	PO Back-Up Administrator (ProView and Sanctions)	Pending
<input type="checkbox"/>	Lanahan, Brittany	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Lis, Jennifer	PO Back-Up Administrator (ProView and Sanctions)	Active
<input type="checkbox"/>	Montanez, Chris	PO Back-Up Administrator (ProView and Sanctions)	Active

13 Users

- 1 PO Administrator (ProView and Sanctions)
- 9 PO Back-Up Administrator (ProView and Sanctions)
- 2 PO Standard User (ProView and Sanctions)
- 1 PO View-Only User (ProView and Sanctions)

From this screen, you can also delete users, by selecting the selection box from the left of the user name, and clicking “Delete” at the bottom of the screen.

User Roles

As assigned by your organization's Administrator, there are different types of users with varying privileges:

1. **PO Administrator:** The PO Administrator has access to all sections available to a Participating Organization in CAQH ProView. He/she has access to the organization's account profile and can add, edit, and delete users. This user is also capable of searching and adding a provider to the PO roster. He/she can upload rosters, schedule & download files, and view provider and billing reports and the reference materials posted on the Resources page.
2. **PO Back-up Administrator:** The PO Back-up Administrator has the same access as a "PO Administrator". He/she has access to all sections available to a Participating Organizations in CAQH ProView. The PO Back-up Administrator has access to the organization's account profile and can add, edit, and delete users. This user is also capable of searching and adding a provider to the PO roster. He/she can upload rosters, schedule & download files, and view provider and billing reports and the reference materials posted on the Resources page.
3. **PO Temporary Administrator:** The PO Temporary Administrator has the same access as a "PO Administrator". He/she has access to all sections available to a Participating Organizations in CAQH ProView. The PO Temporary Administrator has access to the organization's account profile and can add, edit, and delete users. This user is also capable of searching and adding a provider to the PO roster. He/she can upload rosters, schedule & download files, and view provider and billing reports and the reference materials posted on the Resources page.
4. **PO Billing Administrator:** The PO Billing Administrator has access to the organization's account profile and can add, edit, and delete users. This user also can search for and add a provider to the PO roster. He/she has access to provider and billing reports and the reference materials posted on the Resources page. The PO Billing Administrator, however, does not have the ability to upload roster files, schedule extracts, download roster, and extract files.
5. **PO File Scheduler:** The PO File Scheduler can upload roster files, schedule extracts, and download roster, and extract files. He/she, however, does not have access to the organization's account profile or to the ability to add, edit, and delete users. The PO File Scheduler does not have the ability to search for a provider or add a provider to the PO roster and does not have access to the provider and billing reports. He/she has access to the reference materials posted on the Resources page.
6. **PO Standard User:** The PO Standard User can search for and add a provider, view a provider's data profile and supporting documents, upload and edit roster files, schedule and download custom extracts standard extracts, and sanctions custom extracts, and download files. He/she can access the reference materials posted on the Resources page. The PO Standard User does not have access to the Participating Organization's

billing reports, to the organization's account profile and does not have the ability to add, edit, and delete users.

7. **PO View Only:** The PO View Only User can search for a provider and view a provider's data profile and supporting documents but does not have the ability to add a provider to the PO roster. This user can view Provider Directory Maintenance Reports and the reference materials posted on the Resources page but does not have access to billing reports. The PO View Only user does not have the ability to upload or edit roster files, or to schedule or download extracts. He/she does not have access to the organization's account profile and does not have the ability to add, edit, and delete users.

No.	Privileges	Participating Organization Administrator	Backup Participating Organization Administrator	Temporary Participating Organization Administrator	Billing Administrator	Standard Participating Organization User	PO File Scheduler	PO View Only
1	Supporting Documents	X	X	X		X		X
2	Manage Provider	X	X	X	X	X		
3	Search for Provider	X	X	X	X	X		X
4	Provider Details	X	X	X	X	X		
5	Sanctions	X	X	X	X	X		
6	Participating Organization Profile	X	X	X	X			
7	Manage Users	X	X	X	X			
8	Upload Files	X	X	X		X	X	
9	Download Files	X	X	X	X	X		
10	Manage Extracts	X	X	X		X		
11	Manage Sanctions Extracts	X	X	X		X		
12	Provider Reports	X	X	X	X	X		
13	Organization Views	X	X	X	X			
14	Billing Reports	X	X	X	X			

User Status

As assigned by your organization's Administrator, a user can have one of the following types of statuses at any given time:

1. **Pending** – This status is displayed when a new user has not completed the registration form.
2. **Active** – Only users with an Active status can successfully login to the web portal.

3. **Suspended** – This status is displayed when a user is no longer an active user and the account has been suspended. The user will not be able to log in to the organization’s CAQH ProView account.

Add User

From the “Manage User” screen, click on “Add User” to add a new user. The organization’s ID and name will auto-populate onto this screen (see Figure 19).

FIGURE 19

The screenshot shows the 'Add User' form in the CAQH ProView interface. The form is titled 'Add User' and 'Basic Information'. It contains several input fields: Organization ID (585), Organization Name (CAQH Provider), First Name*, Middle Name, Last Name*, Suffix (dropdown menu), Title, Department, Phone Number*, Extension, and Work Address1*. A sidebar on the left has 'ADD USER' circled in red and 'SEARCH FOR USER' below it. The top navigation bar includes 'CAQH Solutions', 'PROVIEW™', 'HELP', 'CONTACT CAQH', 'SIGN OUT', 'CAQH ProView Status Updates', and a user profile for 'Charlene Harrison'.

Enter the following information for the new user:

- Name
- Title
- Department
- Phone number
- Work address
- Email address

At the bottom of the “Add User” screen, you will have the ability to assign the “User Type” and “User Status” for each user (see Figure 20). The option to select whether this user will be a backup administrator or billing administrator is also available.

FIGURE 20

The screenshot shows the 'User Account Information' form. At the top, there is a section for 'User Type*' with a dropdown menu currently set to 'Select'. Below this are two sets of radio buttons: 'Also Backup Administrator?' with 'Yes' and 'No' options (where 'No' is selected), and 'Also Billing Administrator?' with 'Yes' and 'No' options. The 'User Status*' section has three radio buttons: 'Pending' (selected), 'Active', and 'Suspended'. At the bottom center of the form is a red 'Add User' button.

Search for a User

From the “Manage User” screen, click on “Search for User” to search for a user (see Figure 21).

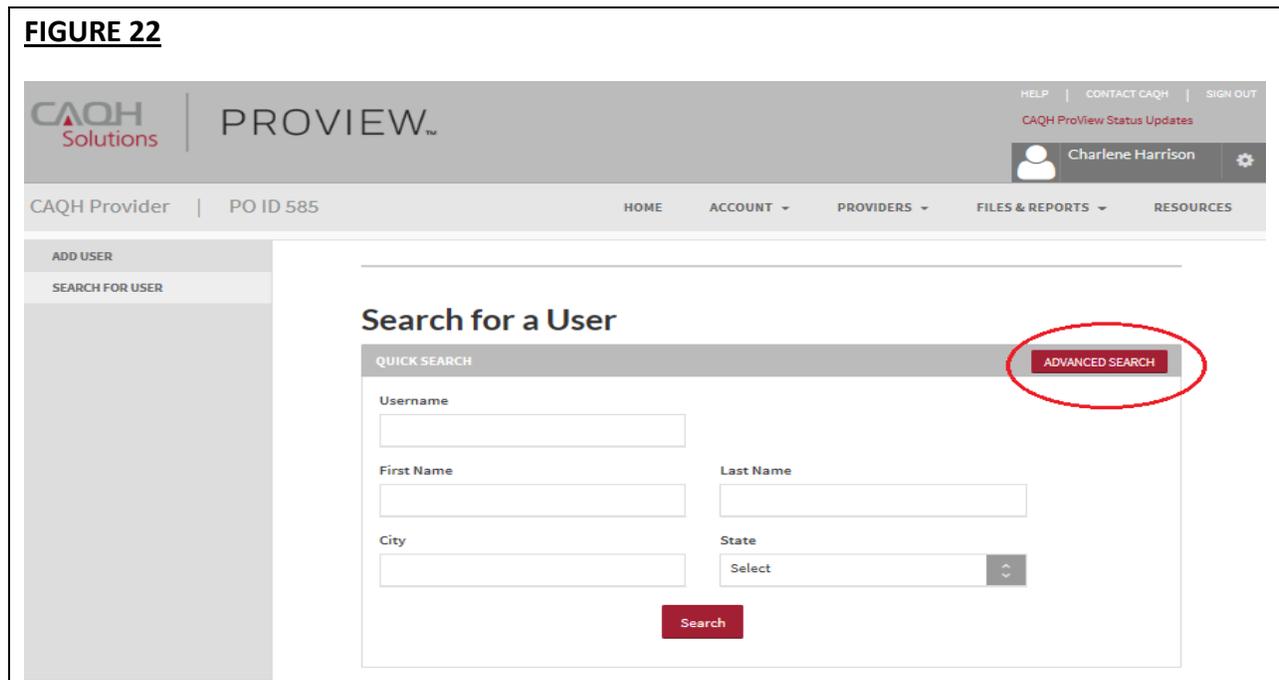
FIGURE 21

The screenshot shows the 'Search for a User' page. The top navigation bar includes the CAQH Solutions logo, 'PROVIEW™', and links for 'HELP', 'CONTACT CAQH', and 'SIGN OUT'. Below this is a user profile for 'Charlene Harrison' with a settings gear icon. A secondary navigation bar shows 'CAQH Provider | PO ID 585' and menu items: 'HOME', 'ACCOUNT', 'PROVIDERS', 'FILES & REPORTS', and 'RESOURCES'. On the left sidebar, 'ADD USER' and 'SEARCH FOR USER' are listed, with 'SEARCH FOR USER' circled in red. The main content area is titled 'Search for a User' and features a 'QUICK SEARCH' section with an 'ADVANCED SEARCH' button. The search form includes fields for 'Username', 'First Name', 'Last Name', 'City', and 'State' (a dropdown menu set to 'Select'). A red 'Search' button is located at the bottom of the form.

This option enables you to search for a user using a variety of search criteria such as:

- Username
- First Name
- Last Name
- City
- State

You can also select “Advanced Search” to perform a more refined search for a user using criteria as shown below (see Figure 22):

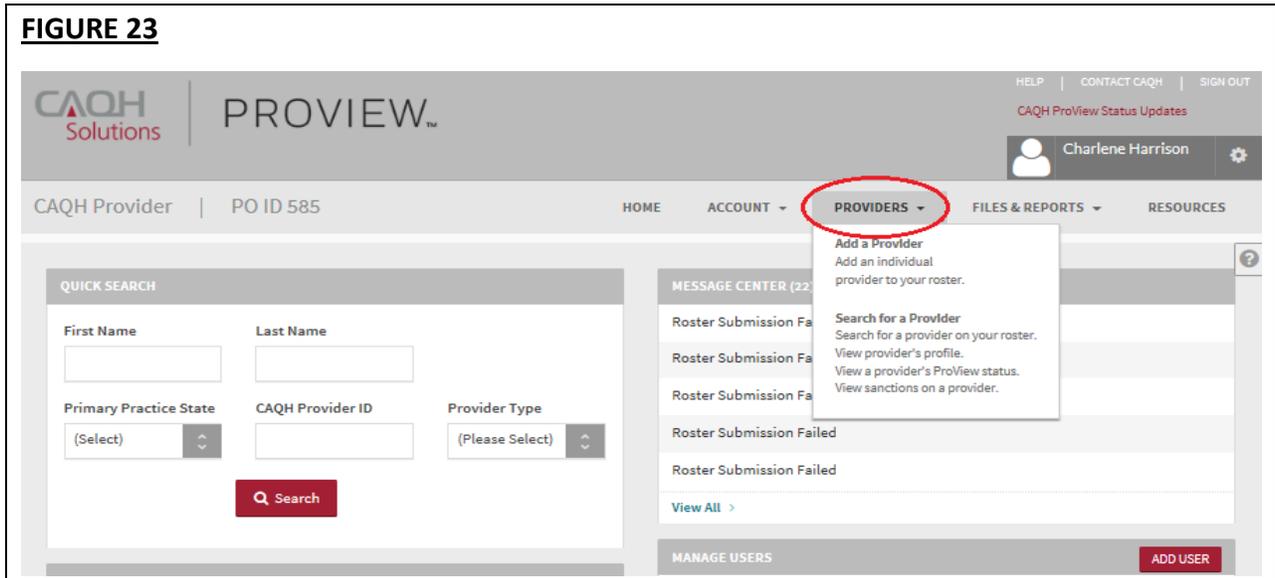


- Title
- Department
- Work Address
- Email Address
- Phone Number
- User Type and Status

CHAPTER 6: Managing Providers

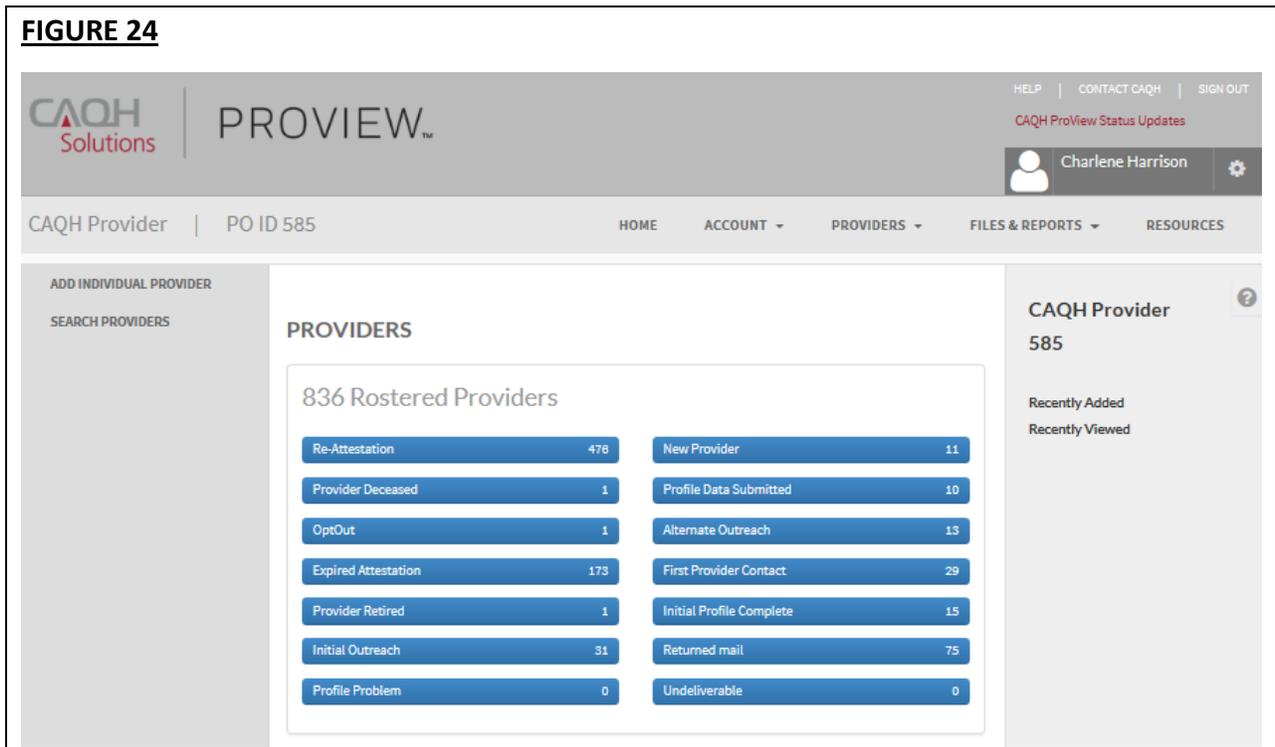
From the Home page, click on “Providers” to add a provider to your roster, to search for a provider that is on your roster or within the CAQH ProView system, or to view your providers’ data profiles (see Figure 23).

FIGURE 23



When you initially click on “Providers”, a summary of your provider roster population will present (see Figure 24). See the *Appendix* for definitions of the provider statuses.

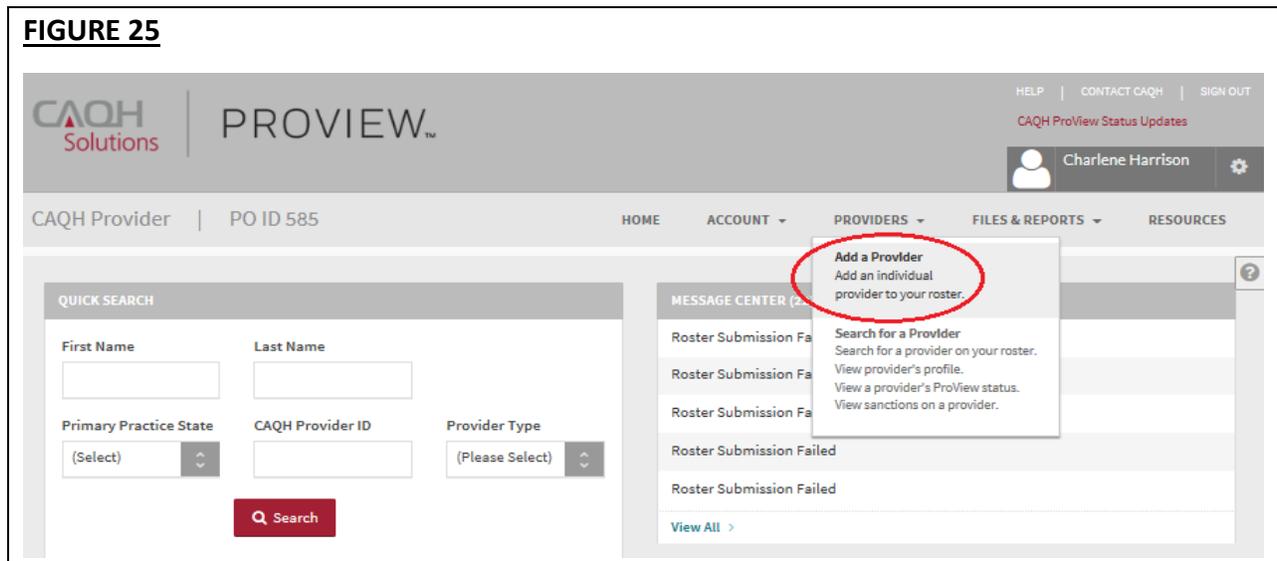
FIGURE 24



Add a Provider to Roster

If you would like to add an individual provider to your roster file, click on “Add a Provider” from the “Providers” drop-down menu (See Figure 25).

FIGURE 25



The “Add Provider to Your Roster” screen will display (see Figure 26 below). If you have multiple providers to add to your roster, you may find it easier to upload a roster file – refer to *Chapter 7: Files and Reports* for more information.

Tips:

- If you need assistance, you can access the “?” link that is displayed on the right-hand side of the screen.
- Required fields are marked with asterisks (*).

FIGURE 26

ADD PROVIDER TO YOUR ROSTER

Provider Details

First Name* Middle Name Last Name* Suffix (Select)

Provider Correspondence Address1*

Provider Correspondence Address2

City* State* Zip Code* (Select)

Phone Fax E-mail Address

Gender (Select) Birth Date* (Select date) Last Recredentialing Date (Select date) Next Recredentialing Date (Select date)

Provider Practice State* (Please Select) Provider Type* (Please Select) Application Type(if Licensed in IL,required) (Please Select)

Professional IDs

At least one of the following Professional IDs is required to add a provider

SSN DEA UPIN NPI

Provider Tax ID Provider License State (Please Select) Provider License Number

Organization Relationship

Plan Provider ID Par/Non-par (Please Select) Delegated (Please Select)

ADD

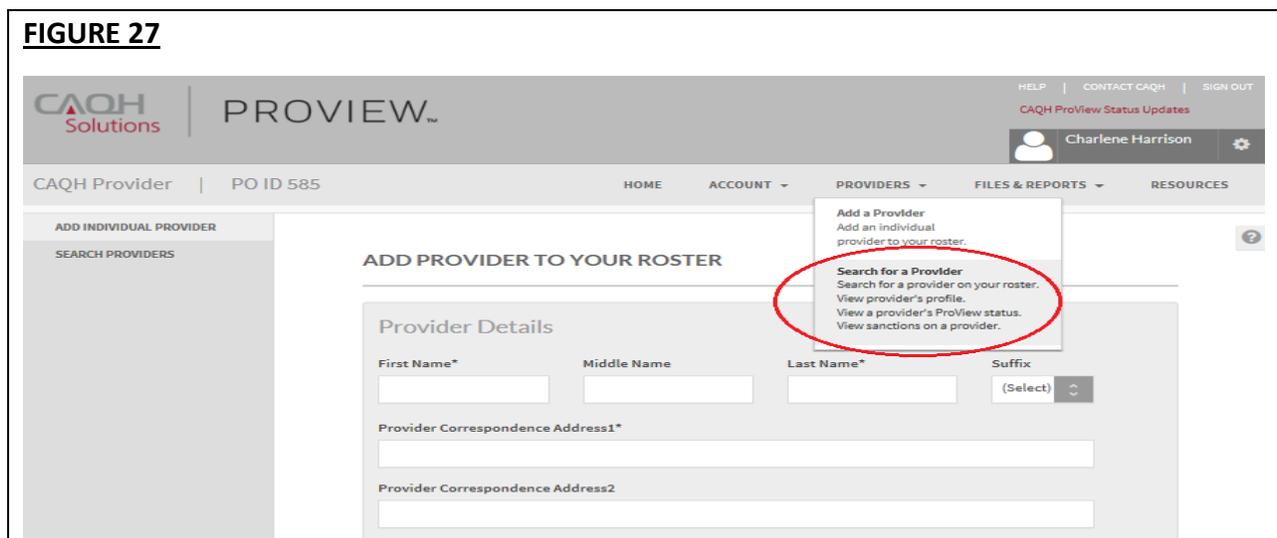
To add a provider to your roster, enter the general demographic information for the provider, along with any available information listed below:

- Last Re-credentialing Date
- Next Re-credentialing Date
- Provider Practice State
- Provider email address
 - If the provider is new to CAQH ProView, please provide an email address so that CAQH ProView’s automated welcome email and additional system messages can be distributed to the provider.

- Email is the preferred method of communication for provider outreach. To avoid any potential delays from returned postal mail, we encourage participating organizations to submit an email address for each provider on their roster.
- Provider Type (MD, DO, DDS, etc.)
- Application Type (If licensed in Illinois, this field is required)
- Professional IDs (at least one is required)
 - SSN (Social Security Number)
 - DEA (Drug Enforcement Agency)
 - UPIN (Unique Physician Identification Number)
 - NPI (National Provider Identifier)
 - Provider License State
 - Provider License Number
- Organization Relationship
 - Organization Provider ID
 - Indicate if provider is participating or non-participating
 - Indicate if provider is delegated or not delegated
 - The delegate flag identifies if a provider is delegated or not for credentialing purposes. Delegated providers are not required to complete the same standard required data set as non-delegated providers. Delegated providers complete a smaller subset of data prior to attestation. Therefore, if a provider is marked as delegated, the provider’s full data set, replica or supporting documentation may **not** be available in the data extract.

Search for a Provider

If you would like to search for an individual provider on your roster file or within the CAQH ProView system, click on “Search for a Provider” from the “Providers” drop-down menu (see Figure 27 below).



The “Search for a Provider” screen will display (see Figure 28). In the “Type of Search” box, you can choose to either search the entire CAQH ProView system or only your rostered provider population.

FIGURE 28

The screenshot shows the CAQH ProView interface for a user named Charlene Harrison. The main heading is "SEARCH FOR A PROVIDER". Under "TYPE OF SEARCH", there is a dropdown menu currently set to "All ProView Providers". Below this is the "QUICK SEARCH" section, which includes a red "Advanced Search" button and several input fields: "First Name", "Last Name", "Primary Practice State" (a dropdown menu), "CAQH Provider ID", and "Provider Type" (a dropdown menu). A red "Search" button is located at the bottom of the search form. The left sidebar contains "ADD INDIVIDUAL PROVIDER" and "SEARCH PROVIDERS". The right sidebar shows "CAQH Provider 585" and "Recently Viewed". The top navigation bar includes "HELP", "CONTACT CAQH", "SIGN OUT", and "CAQH ProView Status Updates".

The “Quick Search” sections allows the user to search on the following options:

- First Name
- Last Name
- Primary Practice State
- CAQH Provider ID
- Provider Type (MD, DO, DDS, etc.)

By clicking on “Advanced Search”, you can perform a more refined search (see Figure 29). Upon selecting “Advanced Search”, you will be given more options to search by. It is not required that all fields contain data to run the search.

FIGURE 29

ADVANCED SEARCH - PROVIDER

If you know any of the Professional IDs below, we recommended that you enter to further refine your search.

Click to Select

All ProView Providers 

Provider Details

First Name	Middle Name	Last Name	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Zip Code	Birth Date	Provider Type	Provider Practice States
<input type="text"/>	<input type="text" value="Select date"/> 	<input type="text" value="(Please Select)"/> 	<input type="text"/>
Last Recredential Date	Next Recredential Date	Provider Status	
<input type="text" value="Select date"/> 	<input type="text" value="Select date"/> 	<input type="text" value="(Please Select)"/> 	

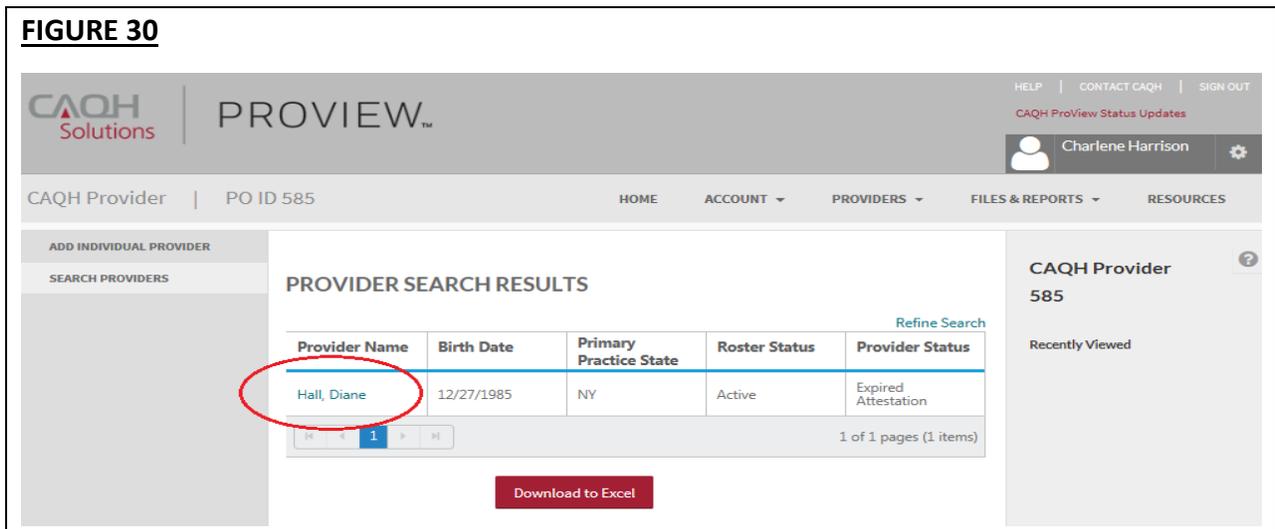
Professional IDs

SSN	DEA	NPI	Provider License State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Please Select"/> 
Provider License Number	CAQH Provider ID	Plan Provider ID	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

View Provider Detail

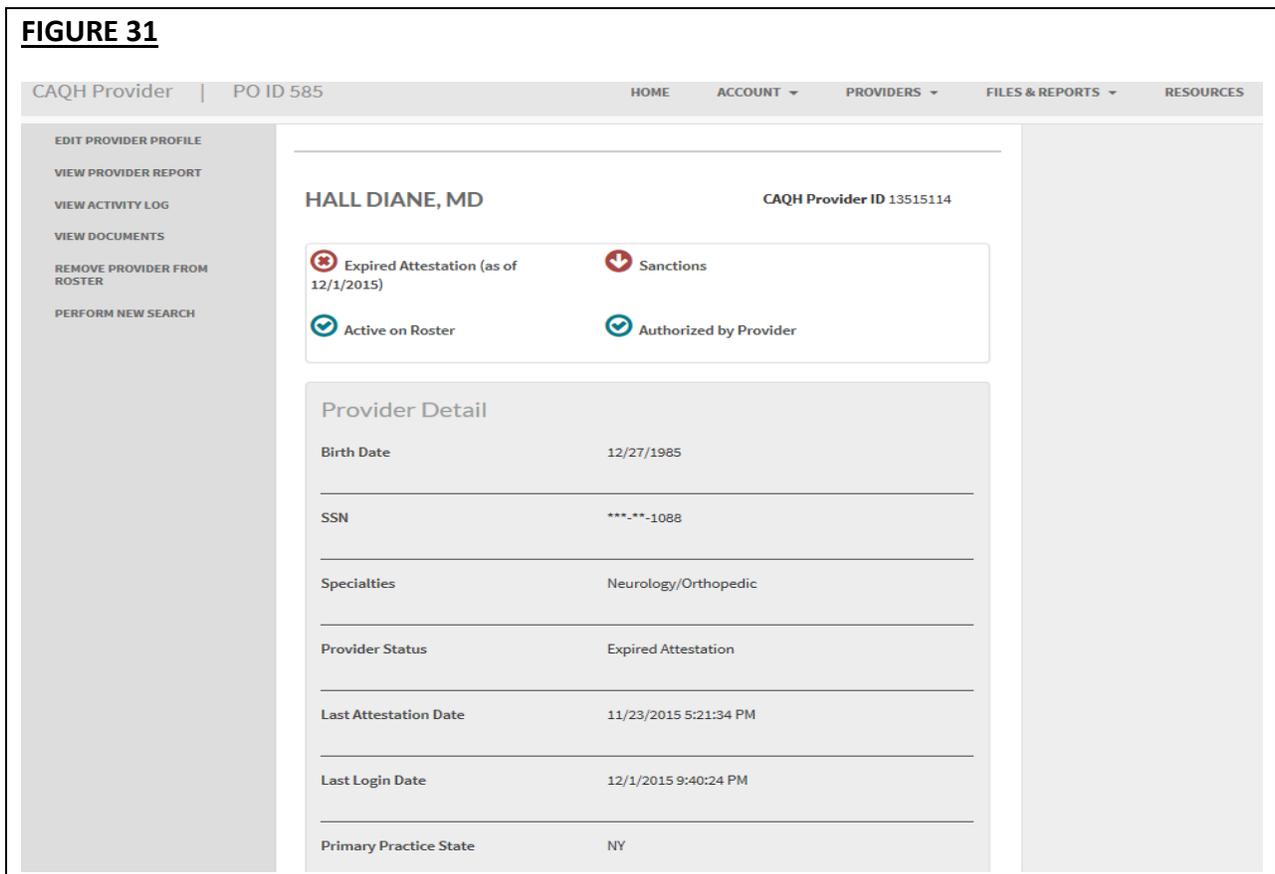
From the “Provider Search Results” screen (see Figure 30), click on the provider name to view the provider’s data profile.

FIGURE 30



A “Provider Detail” page will display (see Figure 31) that provides a summary of the provider’s data profile. This will include the provider’s birthdate, SSN, specialties, provider status, last attestation date, and last login date.

FIGURE 31



From this “Provider Detail” page you can perform the following via the left navigation menu:

1. **Edit Provider Profile:** Click here to edit organization specific profile information for a provider. If a provider has already registered with the system, you will only be able to edit the following (see Figure 32):
 - Plan Provider ID
 - Last Recredential Date
 - Next Recredential Date
 - Par/Non-par
 - Delegated

FIGURE 32

The screenshot displays the CAQH ProView interface. At the top, the CAQH Solutions logo and 'PROVIEW™' are visible. The user 'Charlene Harrison' is logged in. The navigation menu includes 'HOME', 'ACCOUNT', 'PROVIDERS', 'FILES & REPORTS', and 'RESOURCES'. The left sidebar contains options: 'EDIT PROVIDER PROFILE', 'VIEW PROVIDER REPORT', 'VIEW ACTIVITY LOG', 'VIEW DOCUMENTS', 'REMOVE PROVIDER FROM ROSTER', and 'PERFORM NEW SEARCH'. The main content area shows the provider details for 'HALL DIANE, MD' with CAQH Provider ID 13515114. Below this is the 'EDIT PROVIDER ON YOUR ROSTER' section, which contains a 'Roster Details' form. The form includes the following fields:

- Plan Provider ID: 585
- Last Recredential Date: Select date
- Next Recredential Date: Select date
- Par/Non-par: UnAffiliated
- Delegated: (Please Select)

At the bottom of the form are two buttons: 'Edit Provider' and 'Cancel'.

2. **View Provider Report:** Click here to view a data summary of a provider's data profile. You can also access a replica of the CAQH standard form or a state specific form if applicable. You can choose to include the provider's supporting documentation by clicking on the applicable check box (see Figure 33).

FIGURE 33

The screenshot displays the CAQH ProView interface for a participating organization. At the top, the CAQH Solutions logo and 'PROVIEW™' are visible. The user is logged in as Charlene Harrison. The page title is 'CAQH Provider | PO ID 585'. The main navigation menu includes HOME, ACCOUNT, PROVIDERS, FILES & REPORTS, and RESOURCES. On the left sidebar, options include EDIT PROVIDER PROFILE, VIEW PROVIDER REPORT, VIEW ACTIVITY LOG, VIEW DOCUMENTS, REMOVE PROVIDER FROM ROSTER, and PERFORM NEW SEARCH. The main content area is titled 'Provider Report' and contains a form to generate a report by entering a state (NY) and a date (12/2/2015). Below the form are two document preview thumbnails: 'Data Summary' and 'Replica Credentialing Application'. The 'Replica Credentialing Application' section includes a checkbox for 'Include Support Documents' and a note: 'The Report will open in Adobe Acrobat PDF format. If you do not have Adobe Acrobat 4.0 or higher installed, please click here to install it.'

3. **View Activity Log:** Click here to view a log of the provider’s activity on CAQH ProView, including any recent attestation history (see Figure 34).

FIGURE 34

The screenshot displays the CAQH ProView interface for a provider. The header includes the CAQH Solutions logo and the text 'PROVIEW™'. Navigation links for 'HELP', 'CONTACT CAQH', and 'SIGN OUT' are present. The user 'Charlene Harrison' is logged in. The provider's name 'HALL DIANE, MD' and 'CAQH Provider ID 13515114' are shown. The 'ACTIVITY LOG' section is active, displaying a table of events. A sidebar on the left contains various management options.

Activity Subject	Date
▶ User logged in: Diane Hall	12/02/2015 05:40 AM
▶ ProView System changed the Provider Status from Re-Attestation to Expired Attestation	12/02/2015 01:20 AM
▶ Change to Authorization	11/25/2015 12:27 AM
▶ Change to Authorization	11/25/2015 12:27 AM
▶ User logged in: Diane Hall	11/25/2015 12:26 AM
▶ Change to Authorization	11/25/2015 12:23 AM
▶ User logged in: Diane Hall	11/25/2015 12:22 AM
▶ Contact Delegate status changed to Yes	11/25/2015 12:22 AM
▶ Change to Authorization	11/25/2015 12:18 AM
▶ Change to Authorization	11/25/2015 12:16 AM

1 of 60 pages (593 items)

4. **View Documents:** Click here to view the supporting documents currently on file for the provider (see Figure 35).

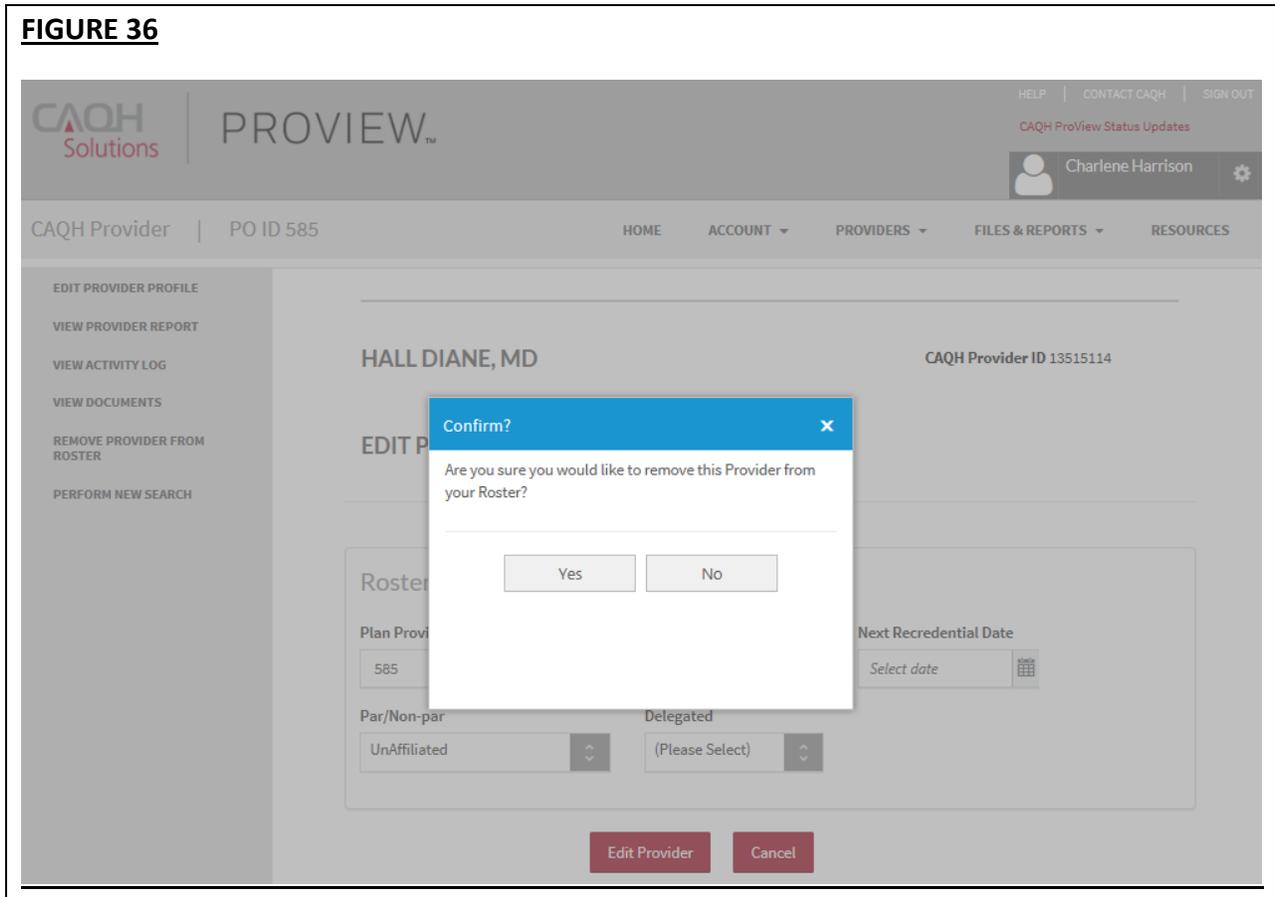
FIGURE 35

The screenshot displays the CAQH ProView interface for a provider named HARRISON, CHARLENE, with CAQH Provider ID 12267586. On the left, a sidebar contains several navigation options: EDIT PROVIDER PROFILE, VIEW PROVIDER REPORT, VIEW ACTIVITY LOG, VIEW DOCUMENTS (which is highlighted), REMOVE PROVIDER FROM ROSTER, and PERFORM NEW SEARCH. The main content area shows the provider's name and ID at the top. Below this, there is a section titled 'Supporting Documents' which contains a table with three columns: Name of Document, Expiration Date, and Status. The table lists eight documents, with the first three having 'Approved' status and the fourth having 'Missing' status. The remaining four documents also have 'Approved' status.

Name of Document	Expiration Date	Status
11311819_Insurance_030520102		Approved
11311819_Release_0305201023		Approved
11311819_StateRelease_030520		Approved
Missing		Missing
11311819_StateAuth_030520102		Approved
11311819_StateAuth_030520102		Approved
11311819_StateAuth_030520102		Approved
11311819_StateLicense_030520		Approved

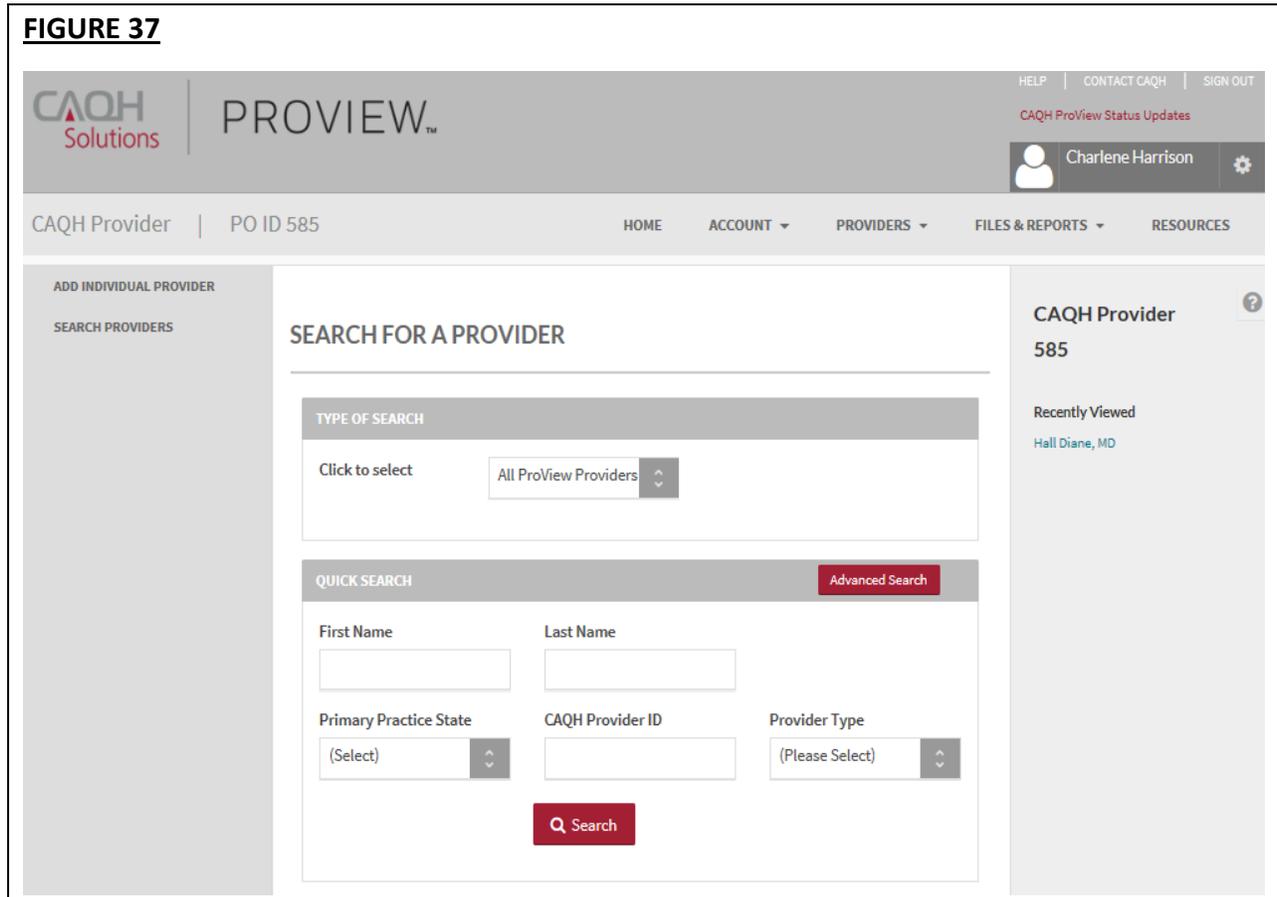
5. **Remove Provider from Roster:** Click here to remove the provider from your roster. A pop-up screen will appear to confirm that you would like to remove the provider from your roster (see Figure 36).

FIGURE 36



6. **Perform New Search:** Click here to return to the “Search for a Provider” screen to search for a different provider (see Figure 37).

FIGURE 37



Best Practices for Roster Submissions

There are a few ways participating organizations can improve the roster submission processes:

1. To avoid the creation of duplicate provider accounts, submit providers to your roster with a CAQH provider ID if available. If the CAQH provider ID is not available, submit providers to your roster using one of these combinations of identification numbers:
 - SSN + Birthdate
 - NPI + Birthdate
 - UPIN + Birthdate
2. Email is the preferred method of communication for provider outreach. To avoid any potential delays from returned postal mail, we encourage participating organizations to submit an email address for each provider on their roster.
3. If the provider does not have an email address, then a physical address should be provided that reflects the location where the provider receives mail. This is often the same as the primary practice location address.

4. CAQH ProView uses the physical address submitted on the roster files for provider outreach if an email is not provided. Providers who cannot be reached are placed in "Return Mail" status and do not receive further follow-up until updated contact information is available.

Duplicate provider accounts

If a duplicate provider account is identified, please forward the CAQH Provider IDs to the CAQH ProView Support Center at accounthelp@proview.cagh.org. The Support Center will merge the accounts, contacting the provider if necessary to determine which account should be maintained. The Support Center will also notify any participating organizations who have any of the affected CAQH ProView provider IDs on their roster.

Recent Changes on the CAQH ProView Provider Application

NPI Validation:

NPI Type 1 and Type 2 are critical pieces of identifying information that plans use to update provider information in their systems. Invalid Type 1 and Type 2 NPIs are saved in ProView. Sometimes the value entered in the Type 1 NPI field is a Type 2 NPI and sometimes it is an invalid NPI, or an NPI belonging to another provider. The information entered in the Type 2 NPI field is often not a valid NPI and is often a Type 1 NPI.

When the provider attests, the value entered in the Type 1 and Type 2 NPI will be checked to see if it is a valid Type 1 and Type 2 NPI and if the provider name associated with the NPI matches the provide name saved in ProView. If an error is identified, the provider will be required to edit the Type 1 and/or Type 2 NPI fields or indicate that he wishes to ignore the validation warning.

A certain number of Providers in the system have an invalid Type 1 and Type 2 NPI. These providers will see a required fix on the Review Screen and Correct Errors page that they will be required to address before attesting.

Practice Location Address Validation:

Practice location address, used with Type 2 NPI, is used by plans to identify where Providers are contracted to see patients, where to process claims for Providers, and which locations to list for them in provider directories. Plans are not able to match the practice location information in ProView with the practice location information that is saved in their systems because small differences like “St.” instead of “Street” or a zip code entered incorrectly will prevent a match.

Practice location addresses are standardized by USPS. Providers are asked to confirm the standardized address, though they have the option to confirm the originally entered address. The standardized address will appear in ALL CAPS.

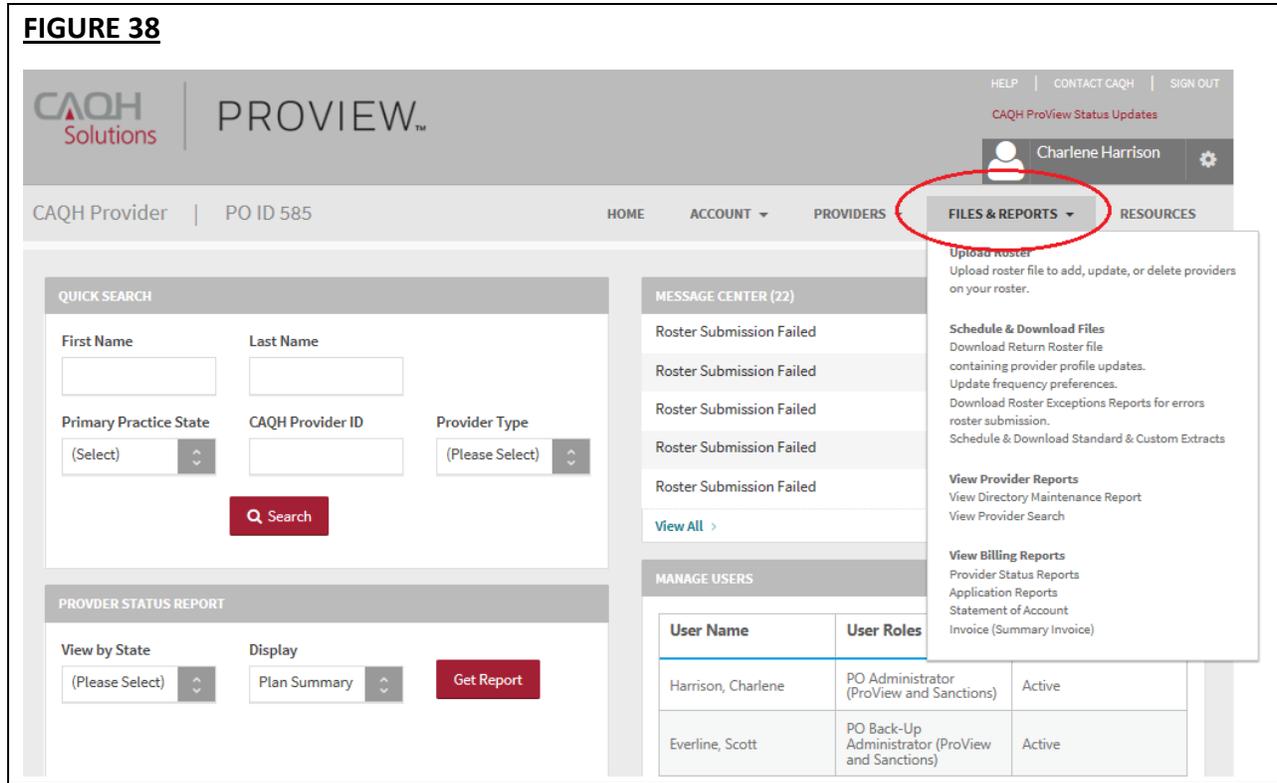
Providers will be required to review the standardized address for all practice location addresses entered on their profiles at the next attestation.

CHAPTER 7: Files & Reports

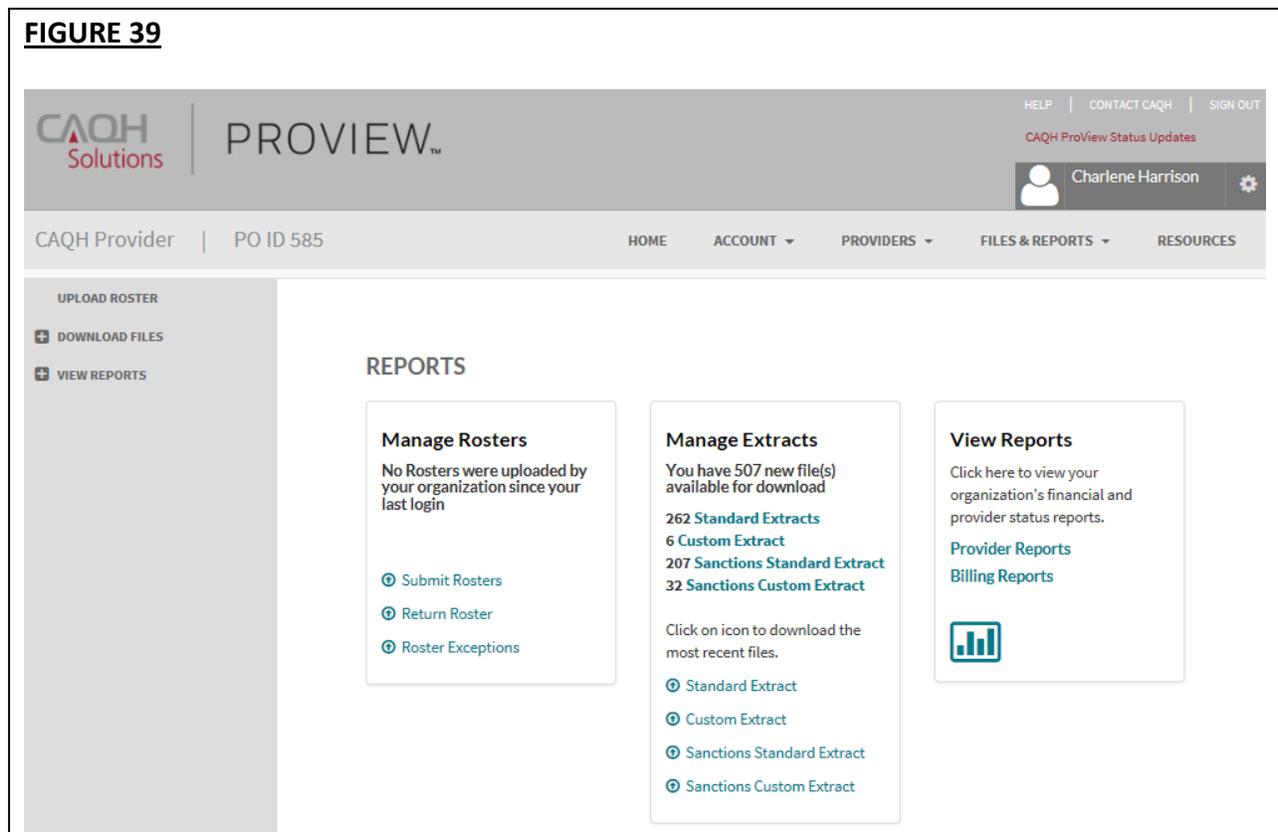
From the Home page, click on “Files & Reports” to upload rosters, download files, and to view provider and billing reports (see Figure 38).

- All files and reports will be accessible on the portal page for 30 days after the file was generated.
- The areas accessible to you are based on your user privileges.

FIGURE 38



When you initially click on “Files & Reports”, the following screen appears (see Figure 39).



You can choose to navigate to the available sections via this “Reports” screen or from the “Files & Reports” navigation drop-down menu.

- **Manage Rosters/Upload Roster** – Click here to submit your organization’s rosters files to the CAQH ProView database. A roster file includes all the providers with whom you would like to receive their CAQH ProView data profiles.
- **Manage Extracts/Schedule & Download Files** – Click here to schedule standard and custom extracts and to download standard and custom extract files. Extracts are files that are generated by CAQH ProView and contain provider data related to the listing of providers submitted on the roster file.
- **View Provider Reports** – Click here to view the Directory Maintenance Report, which is a condensed form of the standard extract file. This file only contains a small number of fields from CAQH ProView that health plans can use of data management.
- **View Billing Reports** – Click here to view your organization’s financial and provider status reports. Viewers must have Adobe Acrobat installed to view these reports.

Upload Roster

After selecting “Manage Rosters” from the “Reports” screen or “Upload Rosters” from the navigation drop-down, you will be directed to the “Upload Roster” screen. From this screen, you can upload a roster file and view recently uploaded roster files and the file details, such as the amount of records within the uploaded roster file, the submission date, and the status of the file (see Figure 40 below).

FIGURE 40

The screenshot displays the 'Upload Roster' interface. At the top, there's a navigation bar with 'CAQH Solutions' and 'PROVIEW™' logos, and links for 'HELP', 'CONTACT CAQH', and 'SIGN OUT'. Below the navigation bar, the user's name 'Charlene Harrison' and a settings icon are visible. The main content area is titled 'UPLOAD ROSTER' and includes a sidebar with 'DOWNLOAD FILES' and 'VIEW REPORTS' options. The central section features a file upload form with a 'Browse' button and an 'Upload' button. Below the form is a 'Recent Uploads' table.

File Name	Records	Submission Date	Status
1035_ProviderRoster_2015_11_12_02_20.txt	2335	11/20/2015 01:01 AM	Failed
1059_ProviderRoster_2015_11_12_02_45.txt	320	11/13/2015 04:40 AM	Failed
585_ProviderRoster_2015_10_26_00_00.txt	0	10/27/2015 01:03 AM	Failed
585_ProviderRoster_2015_10_19_02_41.txt	1	10/20/2015 02:41 AM	Complete
585_ProviderRoster_2015_10_19_02_36.txt	1	10/20/2015 02:37 AM	Complete

The right sidebar shows the user's profile as 'Charlene Harrison' and the organization as 'CAQH Provider 585'. It also displays statistics: '0 Roster Submissions uploaded from your organization since last login' and 'Last Roster Submission 11/19/2015'. There is also a 'Users' section.

Creating and Uploading Roster Files

- To create a roster file, Participating Organizations should reference the “CAQH ProView Roster Data Exchange Guidelines”, which is available on the “Resources” page in the system, see *Chapter 8 – Resources* for more information. The “CAQH ProView Roster Data Exchange Guidelines” provides the required file specifications required for a roster file.
 - You can include on your roster files affiliated or participating providers, providers who are in the contracting process, or non-participating providers.
- Once you have created your roster file, click on the “Browse” button to select the file you would like to upload and then click “Upload” (see Figure 41 below).
 - In addition to uploading your roster file via the portal, you can also use the CAQH ProView SFTP server to upload roster files. Please refer to the **CAQH ProView SFTP Connection Steps** section of this same chapter for more information on connecting to the SFTP server.

FIGURE 41

The screenshot displays the 'UPLOAD ROSTER' interface. At the top, there is a navigation bar with the CAQH Solutions and PROVIEW™ logos, user information for Charlene Harrison, and a main menu with options: HOME, ACCOUNT, PROVIDERS, FILES & REPORTS, and RESOURCES. The 'UPLOAD ROSTER' section is active, showing a file upload area with a 'Browse' button and an 'Upload' button, both circled in red. Below this is a 'Recent Uploads' table with columns for File Name, Records, Submission Date, and Status. The table lists five uploads, with the most recent two marked as 'Complete' and the others as 'Failed'. A sidebar on the right shows 'CAQH Provider 585' with statistics on roster submissions and last submission date.

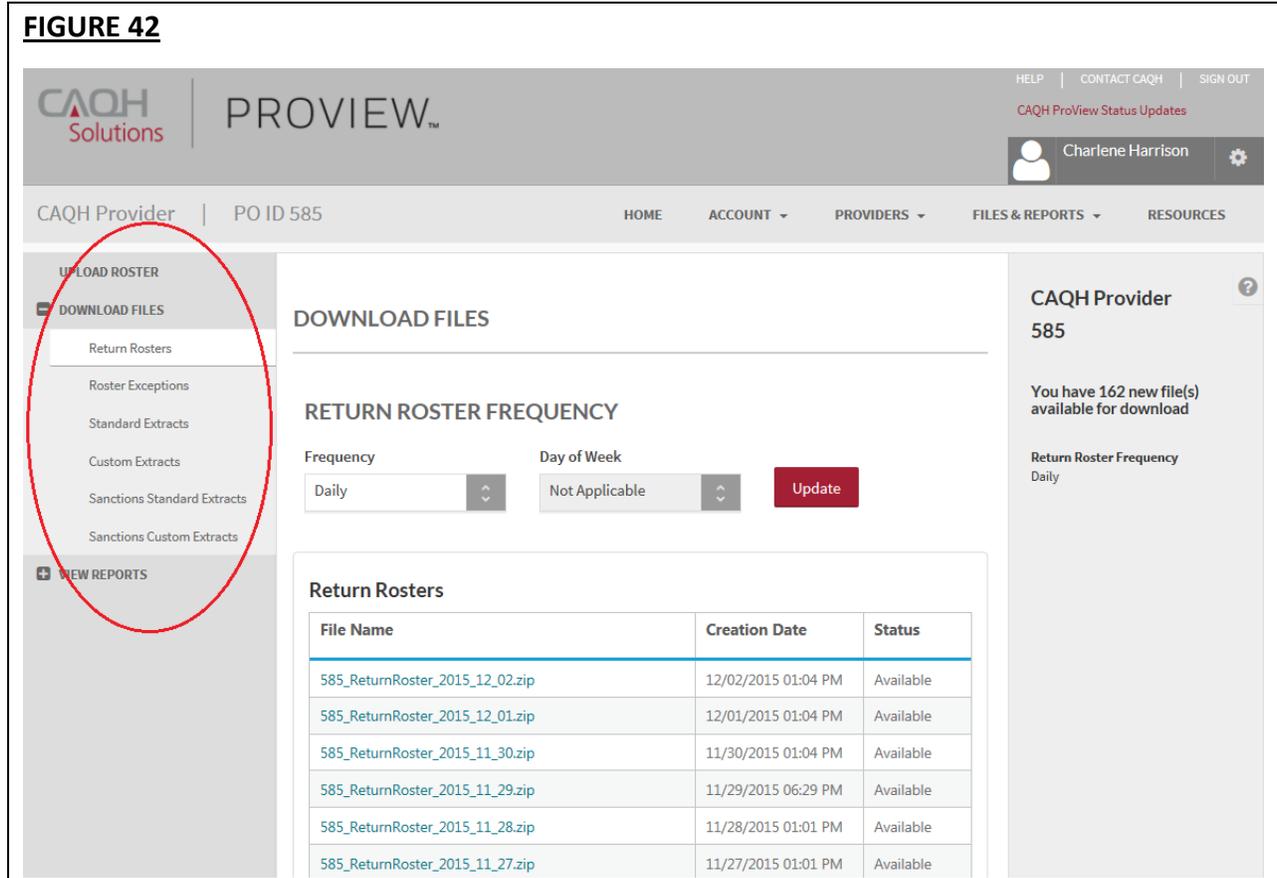
File Name	Records	Submission Date	Status
1035_ProviderRoster_2015_11_12_02_20.txt	2335	11/20/2015 01:01 AM	Failed
1059_ProviderRoster_2015_11_12_02_45.txt	320	11/13/2015 04:40 AM	Failed
585_ProviderRoster_2015_10_26_00_00.txt	0	10/27/2015 01:03 AM	Failed
585_ProviderRoster_2015_10_19_02_41.txt	1	10/20/2015 02:41 AM	Complete
585_ProviderRoster_2015_10_19_02_36.txt	1	10/20/2015 02:37 AM	Complete

- The Upload Status section will display the live submission status. You will see the progress of the file as it completes the following stages:
 - ✓ File Uploaded
 - ✓ Passed Basic Validation Check
 - ✓ Passed Data Quality Validation Check
 - ✓ Roster Updated
- If any exceptions are found within the file, a red X is displayed, with the explanation that the file contains exceptions. A roster exception report will be generated and available to you from the "Download Files" section.
- An email will be sent to you to inform you if the roster was submitted successfully and if exceptions existed.
 - If you include a provider in your roster submission who is not currently in CAQH ProView, CAQH will initiate an outreach to the provider via email to invite the provider to join CAQH ProView.
 - Once roster files are submitted, they are processed by a Roster Processing Engine.

Schedule & Download Files

Click on “Manage Extracts” from the “Reports” screen or “Download Files” from the navigation drop-down to access the “Download Files” screen (see Figure 42).

The “Download Files” page displays which provides access to all downloaded and/or downloadable return rosters, roster exception reports, standard extracts, and custom extracts.



Return Rosters

A return roster file is a list of providers associated with a Participating Organization at any given time. The list includes both active and inactive providers associated with the organization. This file can be used by a Participating Organization to keep their internal systems in sync with CAQH ProView data. Reference the “CAQH ProView Roster Data Exchange Guidelines”, which is available on the “Resources” page in the system, for more information on the file specifications of the Return Roster file.

The “Return Roster” page will display the list of last run return rosters along with the creation date and the download status. On this page, you can also update the frequency of the return roster by daily or weekly selection (see Figure 43).

FIGURE 43

The screenshot shows the CAQH ProView interface for a user named Charlene Harrison. The page is titled "RETURN ROSTER FREQUENCY" and is part of the "DOWNLOAD FILES" section. The user is identified as "CAQH Provider 585" and has 162 new files available for download. The "Return Roster Frequency" is currently set to "Daily".

Return Rosters

File Name	Creation Date	Status
585_ReturnRoster_2015_12_02.zip	12/02/2015 01:04 PM	Available
585_ReturnRoster_2015_12_01.zip	12/01/2015 01:04 PM	Available
585_ReturnRoster_2015_11_30.zip	11/30/2015 01:04 PM	Available
585_ReturnRoster_2015_11_29.zip	11/29/2015 06:29 PM	Available
585_ReturnRoster_2015_11_28.zip	11/28/2015 01:01 PM	Available
585_ReturnRoster_2015_11_27.zip	11/27/2015 01:01 PM	Available

Roster Exceptions

The Roster Exception Report contains errors associated with processing a Participating Organization's roster. Click on the "Roster Exceptions" link to download your roster exception reports (see Figure 44). Reference the "CAQH ProView Roster Data Exchange Guidelines", which is available on the "Resources" page in the system, for more information on the file specifications of the roster exception report.

FIGURE 44

The screenshot shows the CAQH ProView interface for a participating organization. The top navigation bar includes 'HELP', 'CONTACT CAQH', and 'SIGN OUT'. The user is identified as 'Charlene Harrison'. The main navigation menu includes 'HOME', 'ACCOUNT', 'PROVIDERS', 'FILES & REPORTS', and 'RESOURCES'. The left sidebar has 'UPLOAD ROSTER' and 'VIEW REPORTS' sections. Under 'DOWNLOADED FILES', the 'Roster Exceptions' link is circled in red. The main content area is titled 'DOWNLOAD FILES' and 'ROSTER EXCEPTIONS'. It contains a table with the following data:

File Name	Creation Date	Status
585_RosterException_2015_10_19_02_36.txt	10/20/2015 02:37 AM	Downloaded
585_RosterException_2015_07_24_11_58.txt	07/27/2015 10:48 PM	Downloaded
585_RosterException_2015_05_21_14_55.txt	05/22/2015 04:00 AM	Downloaded
585_RosterException_2015_05_21_07_50.txt	05/21/2015 09:01 PM	Downloaded
585_RosterException_2015_05_21_07_36.txt	05/21/2015 08:51 PM	Downloaded
585_RosterException_2015_05_20_07_45.txt	05/20/2015 08:36 PM	Available
585_RosterException_2015_05_19_18_45.txt	05/20/2015 07:55 AM	Downloaded
585_RosterException_2015_04_14_09_15.txt	04/15/2015 01:21 AM	Downloaded
585_RosterException_2015_03_11_12_00.txt	03/11/2015 10:38 PM	Downloaded
585_RosterException_2015_03_10_04_46.txt	03/11/2015 06:09 AM	Downloaded

The right sidebar shows 'CAQH Provider 585' and a notification: 'You have 1 new file(s) available for download'. Below this is the 'E-mail Notification Recipients' section with the email 'charrison@caqh.org' and an 'Edit' link.

Extracts

Extracts are files that are generated by CAQH ProView and contain provider data related to your listing of providers submitted on the roster file. Extract files can be downloaded from the CAQH ProView system or through SFTP folders. There are four types of extracts:

1. **Standard Extracts:** A scheduled electronic file of all complete (Initial Application Complete or Re-attestation) providers, active on your roster, who have authorized your organization to view their data profiles.
 - You can establish a standard extract schedule through the web portal.
 - The standard extracts are executed in batch according to their schedule.
 - Standard extracts will include all changes to a provider record over a given period.
2. **Custom Extracts:** A custom extract is an ad hoc or scheduled electronic file of all complete (Initial Application Complete or Re-attestation) providers, active on your roster, who have authorized the organization and meet the custom extract criteria selected by the organization.
 - Custom extracts can be scheduled or submitted for execution immediately.

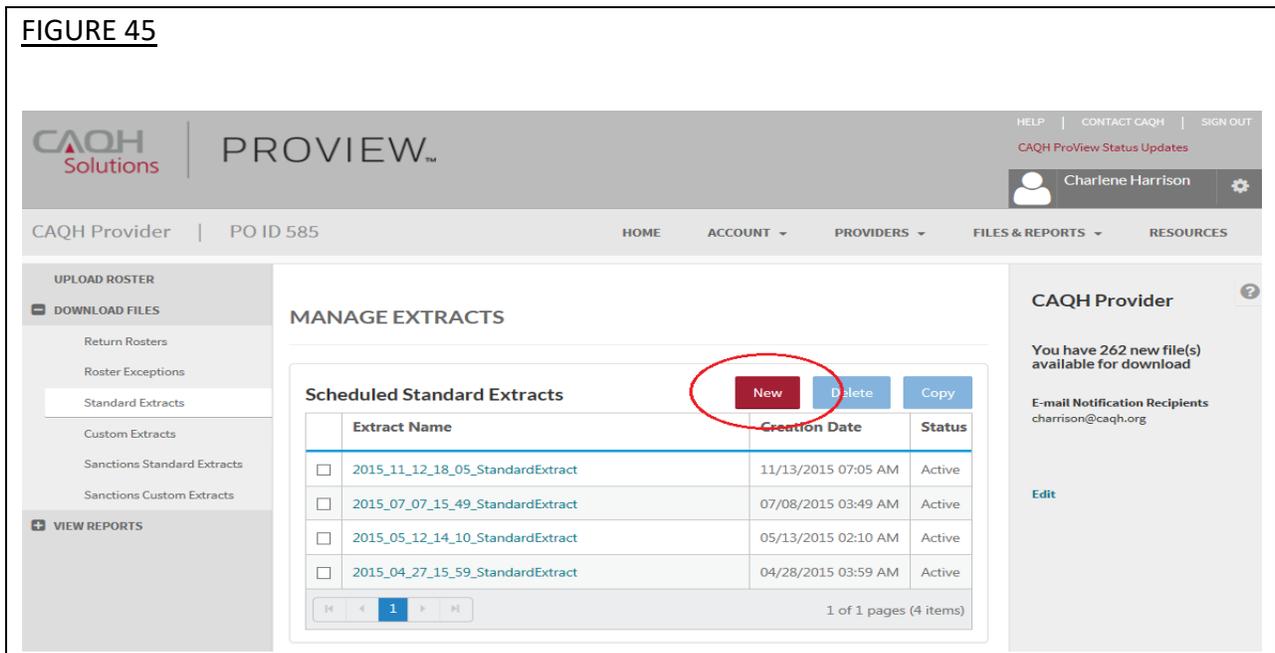
- Custom extracts can be limited to specific plan provider IDs or CAQH provider IDs.
 - A major difference in the purpose between standard and custom extracts is that standard extracts are intended to retrieve all changes to provider data over a given period, whereas custom extracts are intended to deliver a full view of a given provider's most current attestation and data profile.
3. **Sanctions Standard Extracts:** If your organization is a subscriber to CAQH SanctionsTrack, sanctions standard extracts will be available to you. The sanctions standard extract is an extract that includes provider-related sanctions information for your active rostered provider population.
- CAQH SanctionsTrack is a centralized data collection process of querying national and state boards for sanctions data and loading this data to CAQH ProView. Sanctions are matched to unique providers within CAQH ProView.
 - Sanctions standard extract can be scheduled to run on a recurring basis by Participating Organizations. The standard extract will contain additions and updates to sanctions since the last standard extract. When new sanctions are added or updates are made to existing sanctions for a provider, they will be reported on the next scheduled standard extract run for a Participating Organization (if the Participating Organization has purchased the sanctions module of CAQH ProView)
 - The sanctions extract will be delivered in a pipe-delimited text file.
4. **Sanctions Custom Extracts:** If your organization is a subscriber to CAQH SanctionsTrack, sanctions custom extracts will be available to you. The sanctions custom extracts are ad hoc reports based on the most current sanction data CAQH ProView has for a provider.
- The sanctions custom extract will be generated based on the criteria provided by a Participating Organization (if the Participating Organization has purchased the sanctions module of CAQH ProView).
 - The sanctions custom extract can be scheduled for submitted for execution immediately.
 - Sanctions custom extracts can be limited to specific plan provider IDs or CAQH provider IDs.
 - A major difference in the purpose between the sanctions standard and sanctions custom extracts is that the sanctions standard extracts are intended to retrieve all changes to provider data over a given period, whereas the sanction custom extracts are intended to deliver a full view of a given provider's most current attestation and data profile.

Email info@cagh.org if you would like more information about CAQH SanctionsTrack.

Scheduling Standard and Custom Extracts

To schedule an extract file, click on the “New” button on the applicable extract screen (see Figure 45).

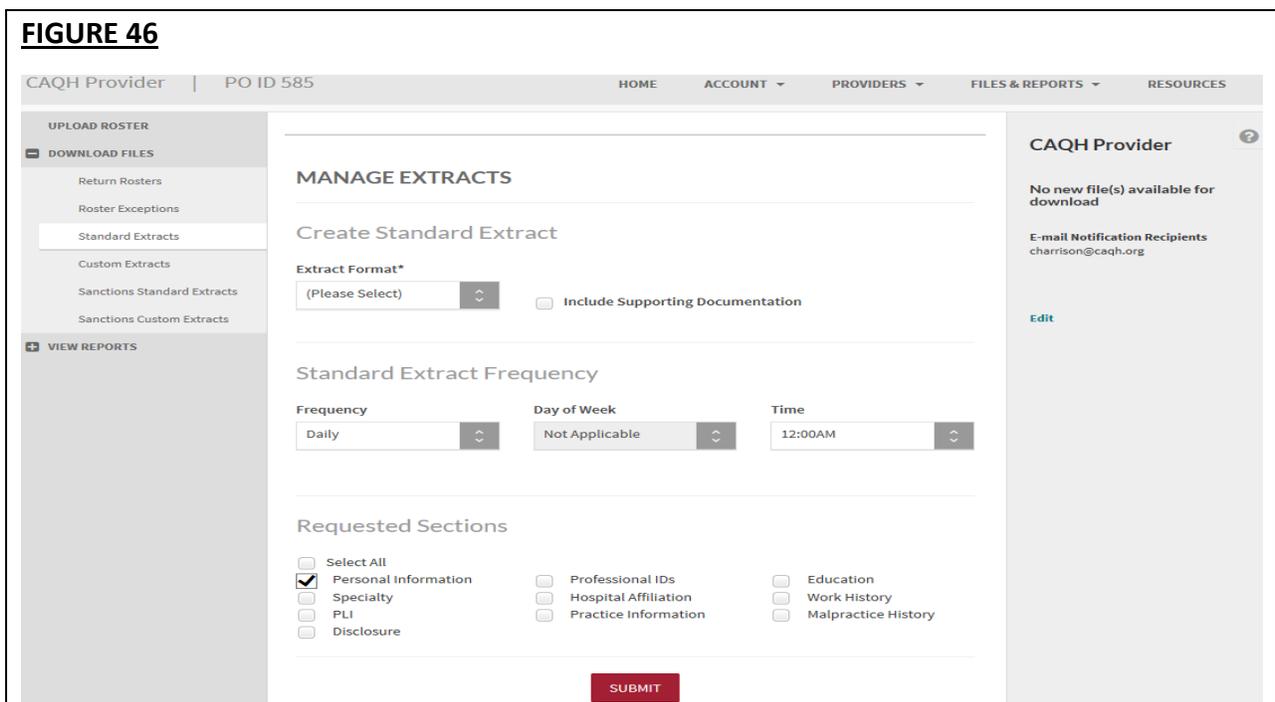
FIGURE 45



Based on the type of extract (standard, custom, sanctions standard, or sanctions custom), a different set of variables will be shown to allow you to schedule an extract.

If you want to schedule a standard or custom extract, you will be able to select the format, frequency and sections to add (see Figure 46).

FIGURE 46

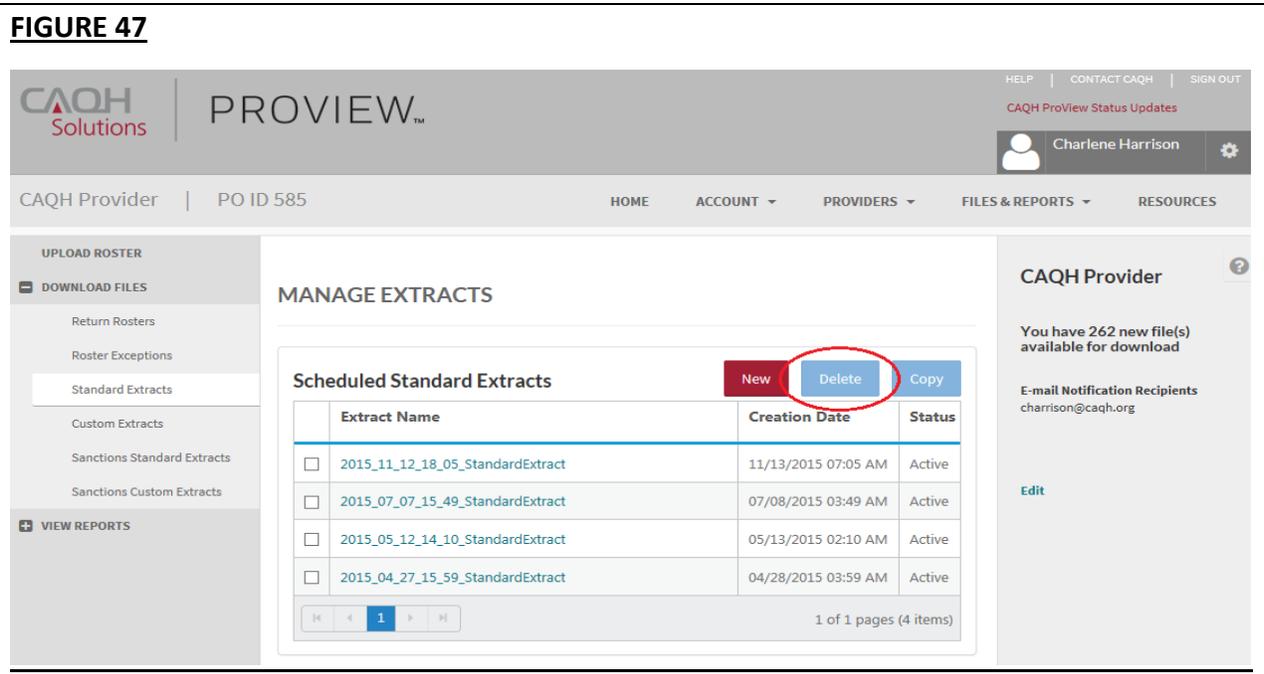


- **Extract Format:** The standard and custom extract files can be received in XML, ASCII, or Replica formats.
 - The Replica format will include a PDF version of the provider data file in either the CAQH standard form or the state specific form if applicable.
 - You can also choose to include supporting documents in your extract by selecting the corresponding check box.
 - All of a particular provider’s supporting documents will be provided in one zipped file.
 - Sanctions standard and custom extracts will be delivered in a pipe-delimited text file. In addition, a PDF attachment will be available for each sanction if supplied by the sanction vendor. The PDF file can be linked to the provider in the pipe-delimited text file using the naming convention detailed below. In addition, the provider record in the ASCII file will contain the name of the PDF file that corresponds to the provider’s sanction image.
 - Refer to the *CAQH ProView Extract Guidelines* on the “Resources” tab for additional information regarding the file specifications for the extract formats.

- **Extract Frequency:** You can schedule the extract files to be generated daily or weekly and at a specific time (for standard only).
- **Requested Sections:** You can indicate which sections you would like to receive in your extract file.

Deleting Extracts

If you would like to delete an extract, select the checkbox next to the desired extract you want to delete, then select the “Delete” button (See Figure 47).



Copy Extracts

If you would like to copy an extract with the same format, frequency, and sections, click on “Copy” to create a replica of an extract (See Figure 48).

FIGURE 48

The screenshot shows the 'MANAGE EXTRACTS' interface. At the top, there are navigation links for HELP, CONTACT CAQH, and SIGN OUT, along with a status update for CAQH ProView. The user is identified as Charlene Harrison. Below the navigation, the page title is 'CAQH Provider | PO ID 585'. The main content area is titled 'MANAGE EXTRACTS' and contains a table of 'Scheduled Standard Extracts'. The table has columns for 'Extract Name', 'Creation Date', and 'Status'. There are four rows of data. Above the table are buttons for 'New', 'Delete', and 'Copy'. The 'Copy' button is circled in red. To the right of the table, there is a sidebar for 'CAQH Provider' with a notification that 262 new file(s) are available for download and an email notification recipient listed as charrison@caqh.org. The bottom of the table shows pagination: '1 of 1 pages (4 items)'.

Edit Extracts

Click on the file name of the extract file to view a summary of the specified extract criteria (See Figure 49).

FIGURE 49

This screenshot is identical to Figure 48, showing the 'MANAGE EXTRACTS' page. In this version, the first row of the 'Scheduled Standard Extracts' table is circled in red. The table contains the following data:

	Extract Name	Creation Date	Status
<input type="checkbox"/>	2015_11_12_18_05_StandardExtract	11/13/2015 07:05 AM	Active
<input type="checkbox"/>	2015_07_07_15_49_StandardExtract	07/08/2015 03:49 AM	Active
<input type="checkbox"/>	2015_05_12_14_10_StandardExtract	05/13/2015 02:10 AM	Active
<input type="checkbox"/>	2015_04_27_15_59_StandardExtract	04/28/2015 03:59 AM	Active

Once the “Extract Name” link is selected, the page below appears (see Figure 50). From here, select the “Edit” button to make necessary changes.

FIGURE 50

The screenshot displays the CAQH ProView interface. At the top, there is a header with the CAQH Solutions logo and the text 'PROVIEW™'. Navigation links include 'HELP', 'CONTACT CAQH', and 'SIGN OUT'. A user profile for 'Charlene Harrison' is visible. Below the header, a breadcrumb trail shows 'CAQH Provider | PO ID 585'. The main navigation menu includes 'HOME', 'ACCOUNT', 'PROVIDERS', 'FILES & REPORTS', and 'RESOURCES'. The left sidebar contains sections for 'UPLOAD ROSTER', 'DOWNLOAD FILES' (with sub-items like 'Return Rosters', 'Roster Exceptions', 'Standard Extracts', 'Custom Extracts', 'Sanctions Standard Extracts', 'Sanctions Custom Extracts'), and 'VIEW REPORTS'. The main content area is titled 'MANAGE EXTRACTS' and features a 'Standard Extract' card with 'Edit' and 'Create a Copy' buttons. Below this is a table with columns for 'Extract Name', 'Creation Date', and 'Status'. A single row shows an extract named '2015_11_12_18_05_StandardExtract' created on '11/12/2015 6:05:15 PM' with a status of 'Active'. Further down, there is a table for 'Requested Sections' with columns for 'Extract Format', 'Include Supporting Documentation', 'Frequency', and 'Time'. The 'Requested Sections' are listed in three columns: Personal Information, Specialty, PLI, Disclosure; Professional IDs, Hospital Affiliation, Practice Information; and Education, Work History, Malpractice History. The right sidebar, titled 'CAQH Provider', contains a message: 'No new file(s) available for download' and 'E-mail Notification Recipients: charrison@caqh.org' with an 'Edit' link.

CAQH ProView SFTP Connection Steps

In addition to downloading files directly from the portal, Participating Organizations can choose to upload and download files from CAQH ProView’s SFTP server.

Listed below are instructions on how to upload and download files from CAQH ProView’s SFTP server. Please note the following:

- There will be 2 folders available on the CAQH ProView server – Incoming and Outgoing.
- The credentials necessary to access the SFTP server will be at the user level, i.e. the individual user’s CAQH ProView username and password.
- Files placed in the Incoming folder are processed when they are received.
- CAQH has begun removing extract and return roster files that were posted to the portal in March and April 2015. Although these files will no longer be available from the portal, these files are still available if needed. Please contact the CAQH ProView Support Center if you need a specific file from that time period.
- On December 7, 2015, CAQH has started removing all extract and return roster files that are older than 90 days from the portal. Files older than 90 days will no longer be accessible.

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

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

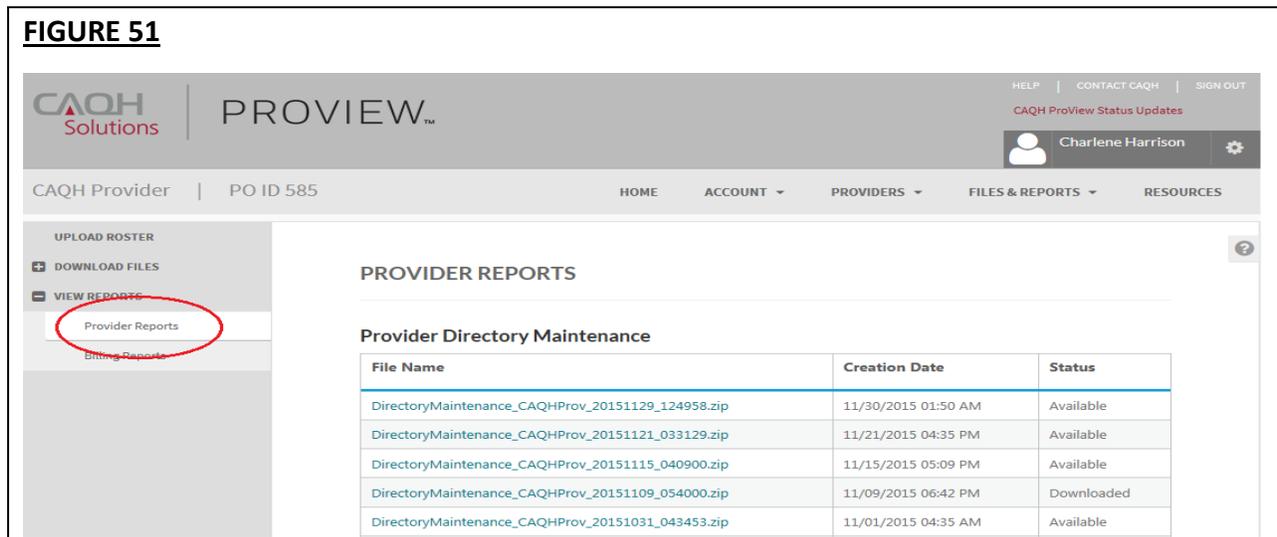
AUTOMATED UPLOAD/DOWNLOAD: If your organization connects to CAQH’s FTP server through automated scripts, follow the steps below to access CAQH ProView’s SFTP server:

1. Before accessing the SFTP server, login to the CAQH ProView application to update your username/password based on the enhanced security requirements.
2. Ensure that software can support a SSH/SFTP connection.
3. Update the old FTP URL (ftpupd.caqh.org) with the new SFTP URL (sftp.proview.caqh.org). Port number will remain as 22.
4. Ensure that updated scripts to connect to the new SFTP server with the new user credentials are deployed.

View Provider Reports

Click on the “Provider Reports” page to view the Provider Directory Maintenance Report (DMR) (see Figure 51). The DMR report is a condensed form of the standard extract file. This file contains a small number of fields from CAQH ProView that health plans can use for data management.

FIGURE 51



View Billing Reports

Click on “Billing Reports” to view your Participating Organization’s billing reports and invoices (See Figure 52). You must have the appropriate permissions to access this option.

FIGURE 52

UPLOAD ROSTER
DOWNLOAD FILES
VIEW REPORTS
 Provider Reports
Billing Reports

BILLING REPORTS

Application Reports

File Name	Download	Report Date	Status
Application_585_102015	.pdf .txt	October, 2015	Downloaded
Application_585_092015	.pdf .txt	September, 2015	Downloaded
Application_585_082015	.pdf .txt	August, 2015	Downloaded
Application_585_072015	.pdf .txt	July, 2015	Downloaded
Application_585_062015	.pdf	June, 2015	Downloaded
Application_585_052015	.pdf	May, 2015	Downloaded
Application_585_042015	.pdf	April, 2015	Downloaded
Application_585_032015	.pdf	March, 2015	Downloaded
Application_585_022015	.pdf .txt .csv	February, 2015	Downloaded
Application_585_012015	.pdf .txt .csv	January, 2015	Downloaded

1 of 6 pages (57 items)

Statement of Account Reports

File Name	Download	As Of	Status
No records to display			

0 of 0 pages (0 items)

Invoices

File Name	Download	Report Date	Status
Invoice_585_042015.pdf	.pdf	April, 2015	Downloaded

1 of 1 pages (1 items)

The following reports will be available on this page:

1. **Application Report:** A monthly report specific to your organization that details your rostered providers who have met the definition of “complete” during the displayed reporting period, the Plan Provider ID (if supplied by organization), the date the provider qualified as “complete”, and the amount billed to your organization. The report displays the total number of providers and the total amount billed for the reporting period. You can use this report to reconcile providers to the monthly invoice.

2. **Statement of Account Report:** A monthly report specific to your organization that lists all reconciled and outstanding invoices, and credit memos as of the date displayed in the header of the report. The date and amount of each invoice is also provided. You can use this report to identify payments/credits and balances open to date.
3. **Invoice:** Billing statement that reflects all qualified providers for the current billing. CAQH bills a month in arrears, which means that in the current month, you will receive an invoice for last month services for all providers with a qualifying anniversary date. You are billed for your roster providers on a per annum basis based on each provider's anniversary date.

CAQH ProView Anniversary Date Process

The CAQH ProView Anniversary Date is the date when a Participating Organization becomes eligible to be billed for one year of access to a provider's data. CAQH bills Participating Organizations monthly for all Anniversary Dates that fall in a given month. The following process flows outline how CAQH ProView™ sets and removes Anniversary Dates.

Set Anniversary Date Process Flow

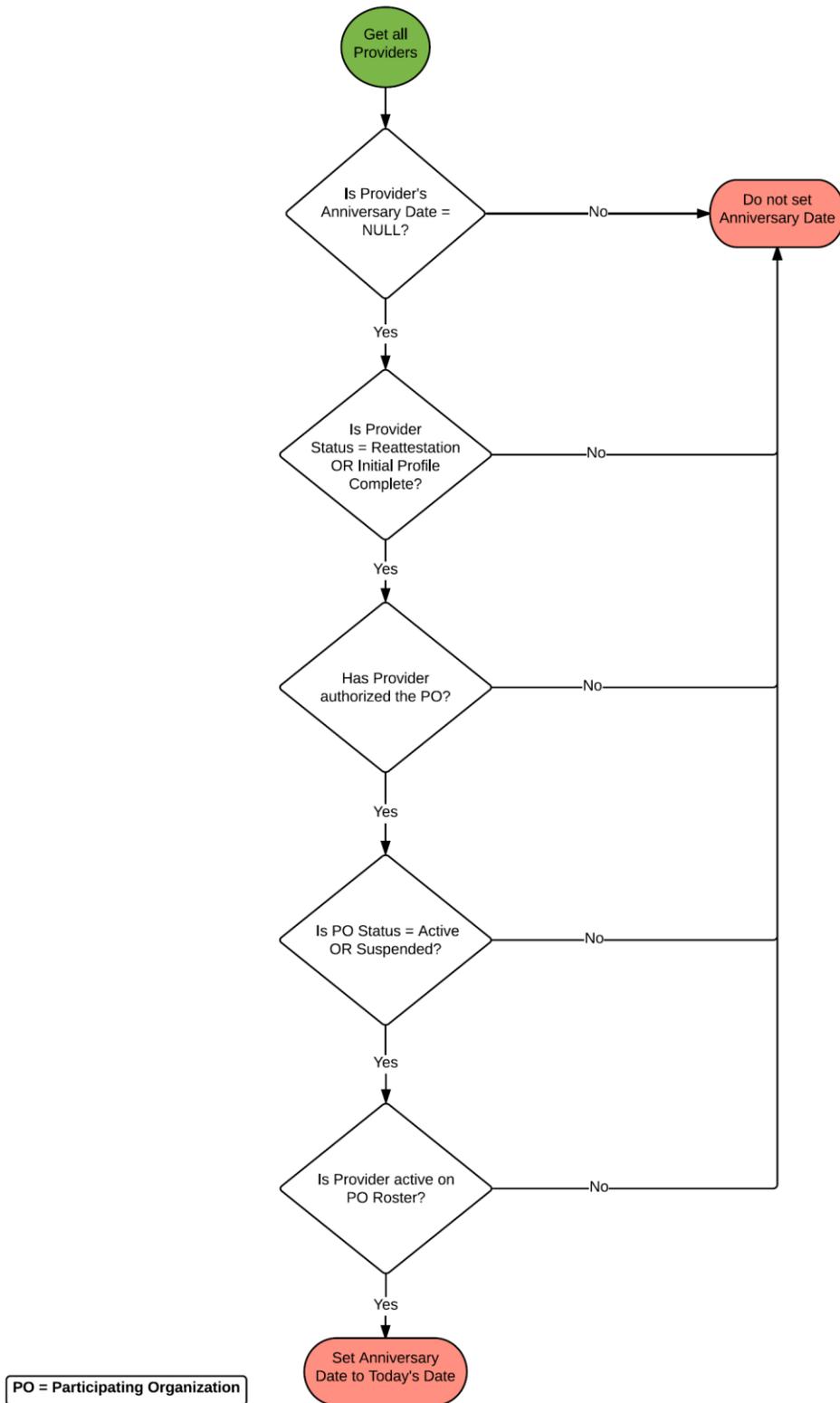
The *Set Anniversary Date Process* flow demonstrates how CAQH ProView nightly assigns an Anniversary Date to eligible providers. Once assigned, the next review of the Anniversary Date occurs on the same date in the following year.

Remove Anniversary Date Process Flows

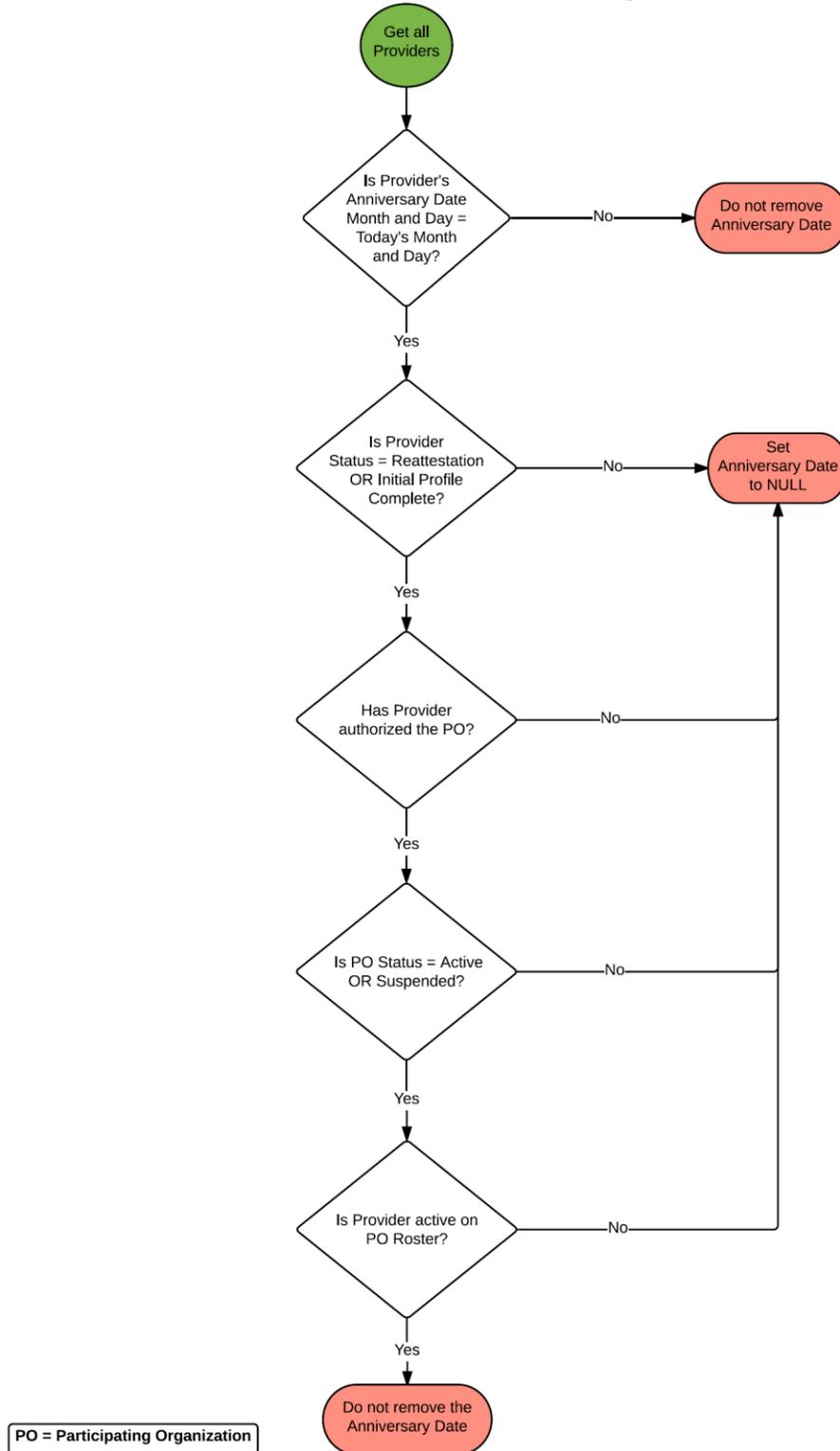
The *Remove Anniversary Date Process* flows demonstrate how CAQH ProView nightly removes or retains the prior year's Anniversary Date for eligible providers. There are two separate process flows: a) if the current month and day is February 28 (to determine if a leap year adjustment is necessary) and b) if the current month is **not** February 28.

These processes remove the Anniversary Date if the Participating Organization should no longer be billed for an eligible provider for another year, or they retain the Anniversary Date if billing should continue for another year.

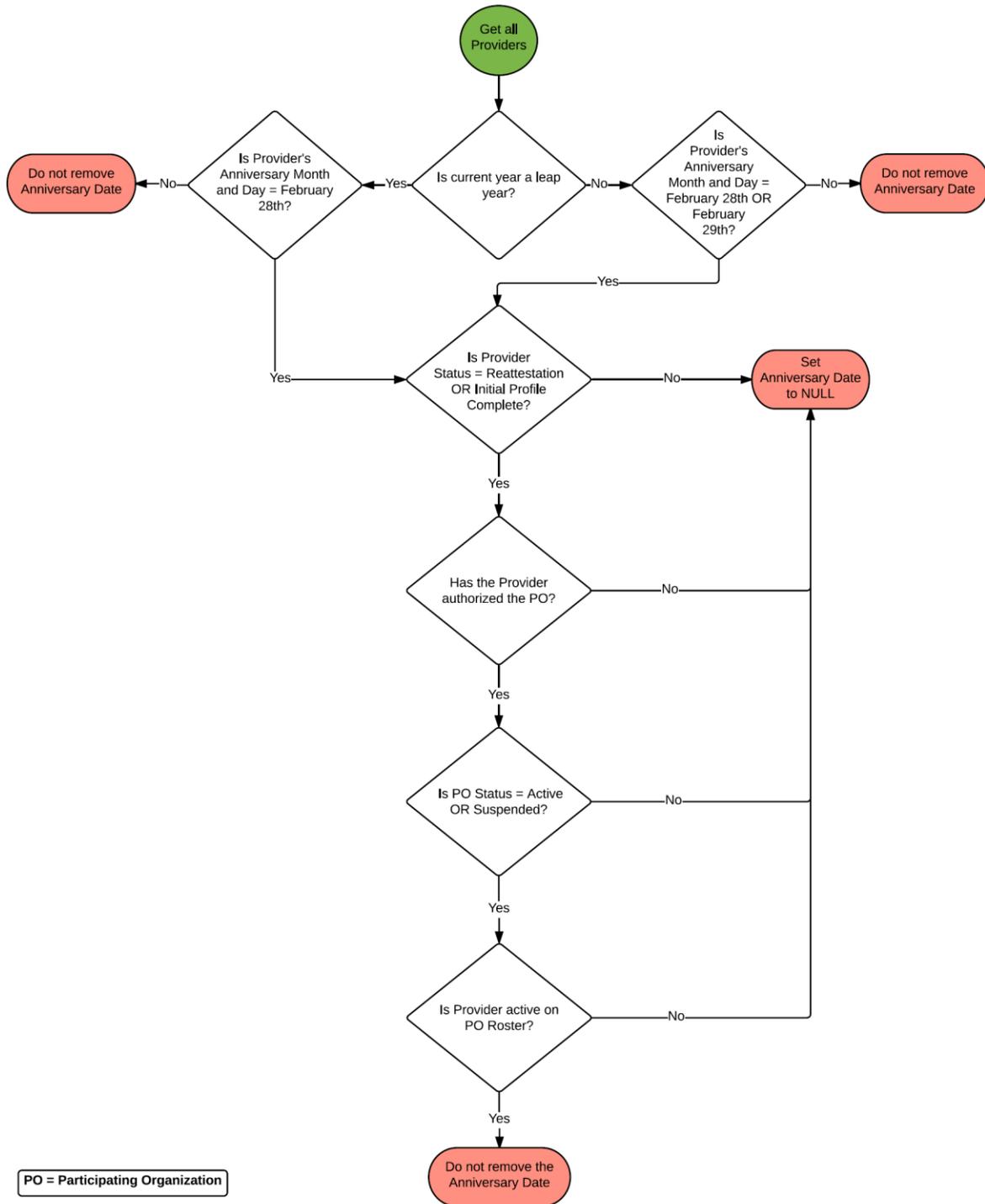
Set Anniversary Date Process



If current date is not 2/28/XX: Remove Anniversary Date Process



If current date is 2/28/XX: Remove Anniversary Date Process



CAQH DirectAssure® Anniversary Date Process Flows

The CAQH DirectAssure® Anniversary Date is the date when a Participating Organization becomes eligible to be billed for one year of access to provider directory data. CAQH bills Participating Organizations monthly for all DirectAssure Anniversary Dates that fall in a given month. The following process flows outline how CAQH DirectAssure sets and removes Anniversary Dates.

Set Anniversary Date Process Flow

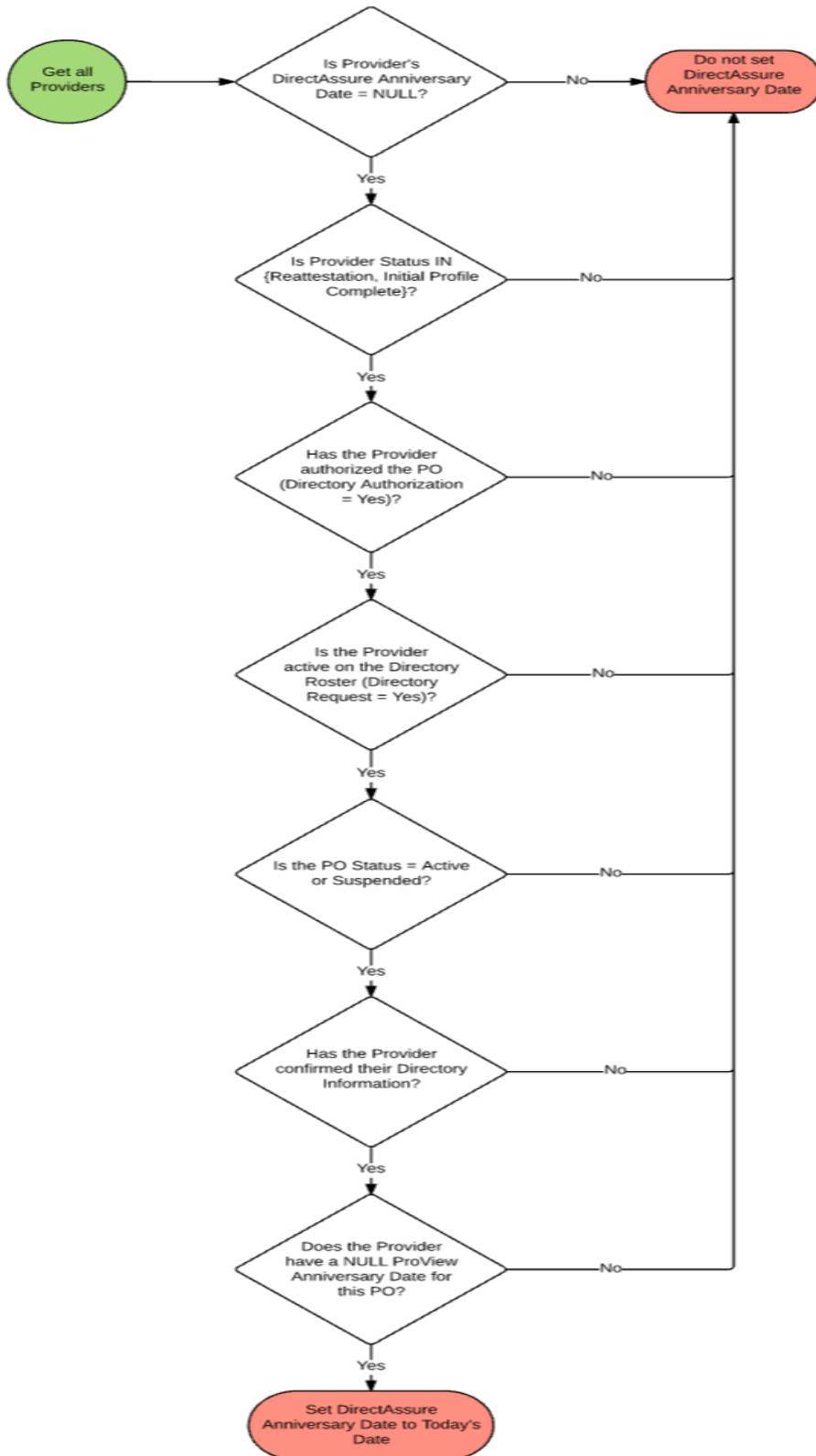
The Set Anniversary Date Process flow demonstrates how CAQH DirectAssure nightly assigns an Anniversary Date to eligible providers. Once assigned, the next review of the Anniversary Date occurs on the same date in the following year.

Remove Anniversary Date Process Flows

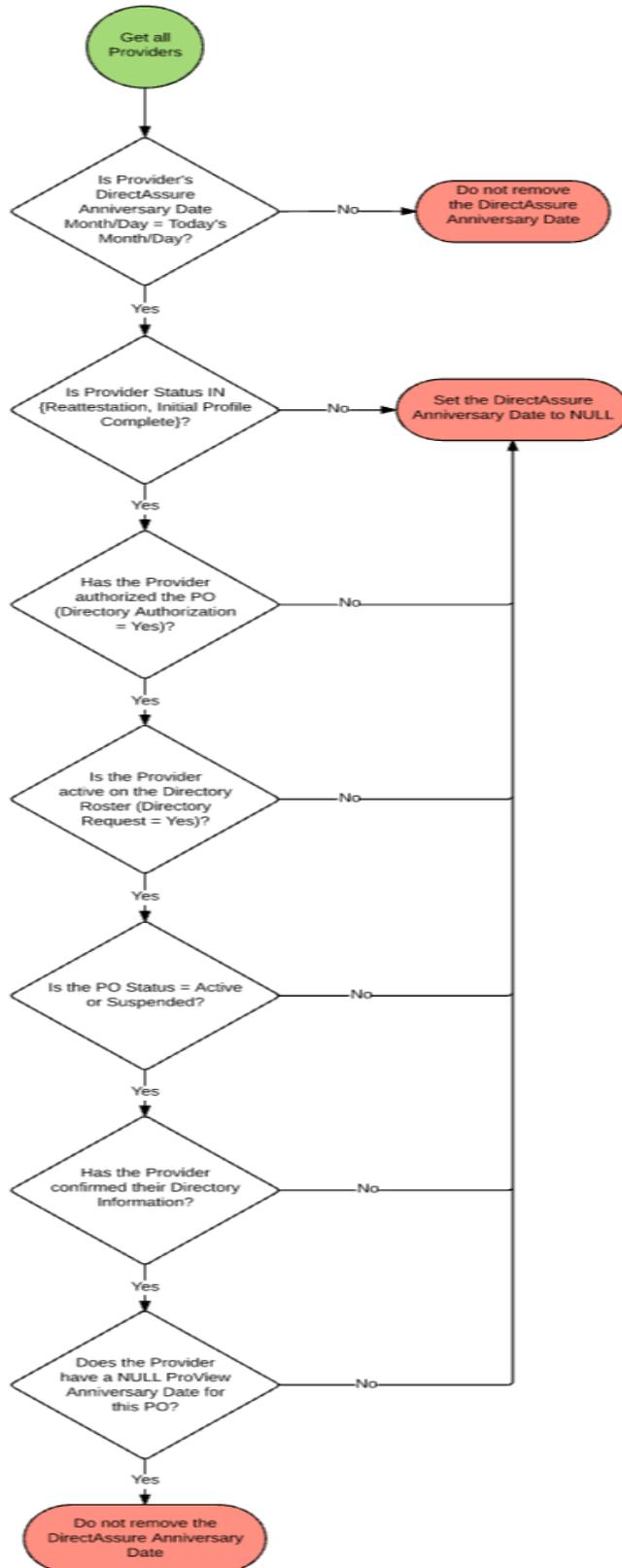
The Remove Anniversary Date Process flows demonstrate how CAQH DirectAssure nightly removes or retains the prior year's Anniversary Date for eligible providers. There are two separate process flows: a) if the current month and day is February 28 (to determine if a leap year adjustment is necessary) and b) if the current month and day is not February 28.

These processes remove the Anniversary Date if the Participating Organization should no longer be billed for the provider for another year, or retains the Anniversary Date if billing should continue for another year.

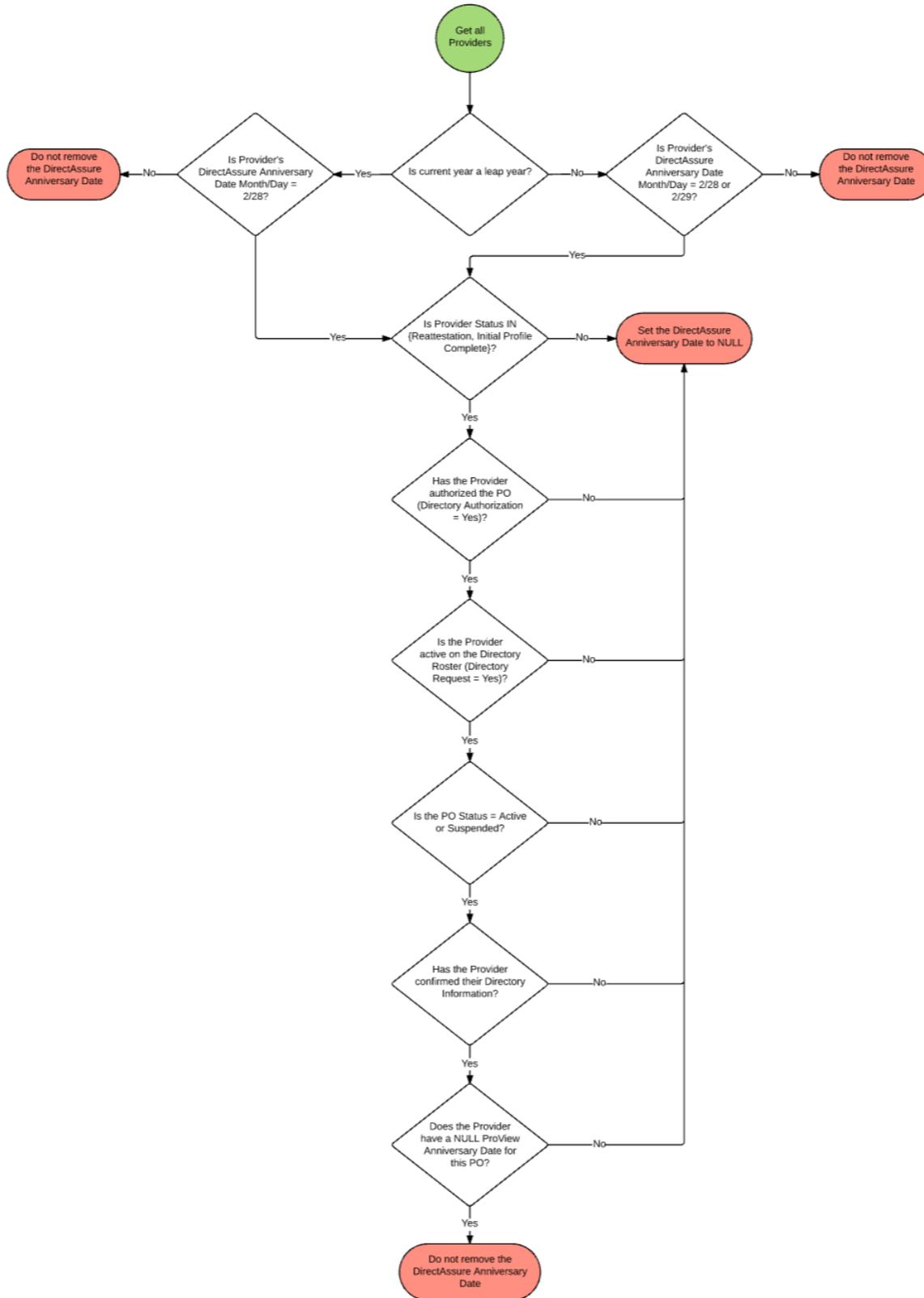
Set Anniversary Date Process



***If current date is not 2/28/XX:
Remove Anniversary Date Process***



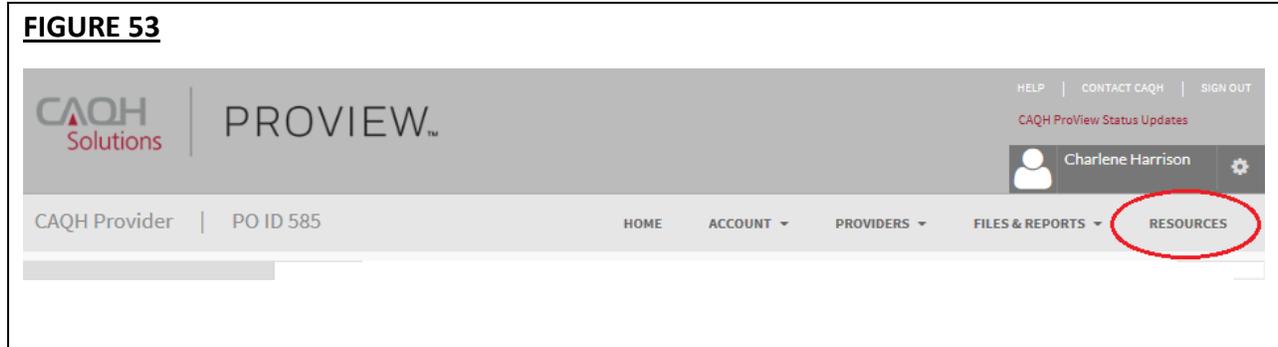
***If current date is 2/28/XX:
Remove Anniversary Date Process***



CHAPTER 8: Resources

Click on “Resources” from the top navigation bar to access useful information related to CAQH ProView (see Figure 53).

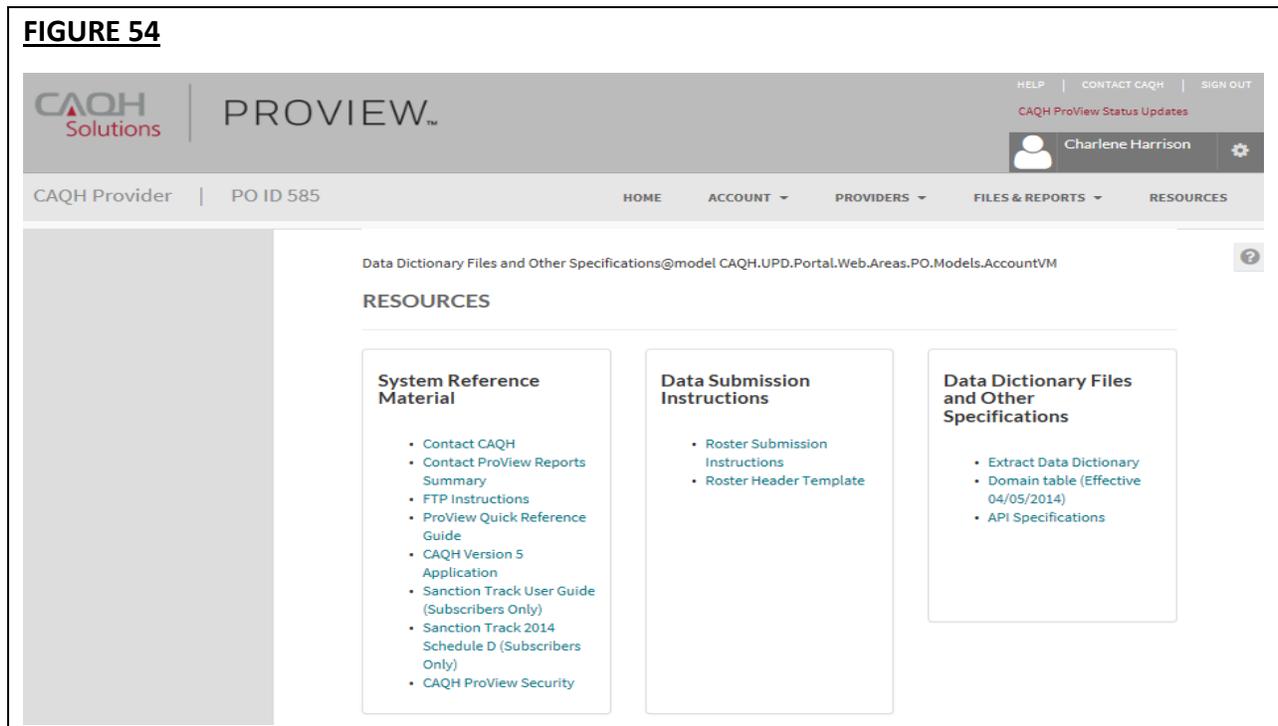
FIGURE 53



The “Resources” page provides links to information related to using CAQH ProView including the following (see Figure 54):

- System Reference Material
- Data Submission Instructions
- Data Dictionary Files and Other Specifications

FIGURE 54



APPENDIX

Provider Status Logic

Provider statuses are defined below and may be automatically changed, or manually changed by the CAQH ProView Support Center (see Activity Type):

CAQH ProView™ assigns the provider statuses based on the triggering events below.

Status	Triggering Event	Activity Type
New Provider	When a new provider record is created	Automatic
Initial Outreach	<ol style="list-style-type: none"> 1. When the system sends a Welcome Email 2. When CAQH Operations sends a Welcome Letter through USPS 	<ol style="list-style-type: none"> 1. Automatic 2. Manual
Undeliverable	When a Welcome Letter is returned from USPS as “Undeliverable” due to bad mailing address, and no alternate Email or Mailing Addresses are available	Manual
Returned mail	When a Welcome Letter is returned from USPS as “Return to Sender” due to bad mailing address, and no alternate Email or Mailing Addresses are available	Manual
Alternate Outreach	<ol style="list-style-type: none"> 1. When the current Provider Status is Initial Outreach and provider changes Primary Email Address at registration 2. When the current Provider Status is Initial Outreach, and the Welcome Email bounced back; the Welcome Letter is resent via a new Email or Mailing Address 3. When the current Provider Status is New Provider, and the Welcome Letter is returned from USPS; the Welcome Letter is resent via a new Mailing Address 	<ol style="list-style-type: none"> 1. Automatic 2. Manual 3. Manual
First Provider Contact	<ol style="list-style-type: none"> 1. When a new provider registers and logs into the portal with a username and password 2. When a new provider contacts the Provider Help Desk 	<ol style="list-style-type: none"> 1. Automatic 2. Manual
Profile Problem	When CAQH Operations identifies a critical issue with a provider’s profile (Example: A paper application submitted in UPD was incomplete). May also be referred to as “Application Problem”.	Manual

Status	Triggering Event	Activity Type
Profile Data Submitted	When a provider attests for the first time and all required documents are not yet approved. May also be referred to as "Application Data Submitted".	Automatic
Initial Profile Complete	When a provider has attested for the first time and all required documents are approved. May also be referred to as "Initial Application Complete".	Automatic
Re-Attestation	When a provider attests, after the first attestation	Automatic
Expired Attestation	<ol style="list-style-type: none"> 1. When Provider does not have Primary Practice State = IL, and the provider has not attested within the last 120 days 2. When Provider has Primary Practice State = IL, and the provider has not attested within the last 180 days 	Automatic
Provider Retired	When CAQH Operations is notified that a provider is retired	Manual
Provider Deceased	When CAQH Operations is notified that a provider is deceased	Manual
OptOut	When CAQH Operations has verified that a provider no longer wishes to participate in CAQH ProView	Manual

Re-attestation Reminder Email Schedule

Re-attestation is required by providers every 120 days (180 days for Illinois providers) in CAQH ProView to ensure provider data is maintained and accurate for health plan use. CAQH ProView will email providers to remind them when they are due for re-attestation. System automated generated emails will be sent to the provider's primary method of contact email, and if on file the PMOC CC1 and PMOC CC2, at the following intervals (message frequency and timing differs for Illinois providers):

1. 15 days prior to expiration
2. 10 days prior to expiration
3. 5 days prior to expiration

If no re-attestation has occurred, a provider will be put in "Expired" status on the day after the re-attestation was due. Providers in expired status will receive the following notices:

1. Day after provider is placed in expired status
2. 14 days after expired
3. 28 days after expired
4. 42 days after expired – final notice.

State Voluntary and Mandated Applications

CAQH ProView supports the following voluntary or mandated state specific credentialing applications:

1. Colorado
2. Georgia
3. Illinois
4. Massachusetts
5. Minnesota
6. Mississippi
7. North Carolina
8. Nevada
9. Oklahoma
10. Oregon
11. Texas
12. Washington
13. West Virginia

CAQH ProView Provider Types

CAQH ProView supports the following provider types:

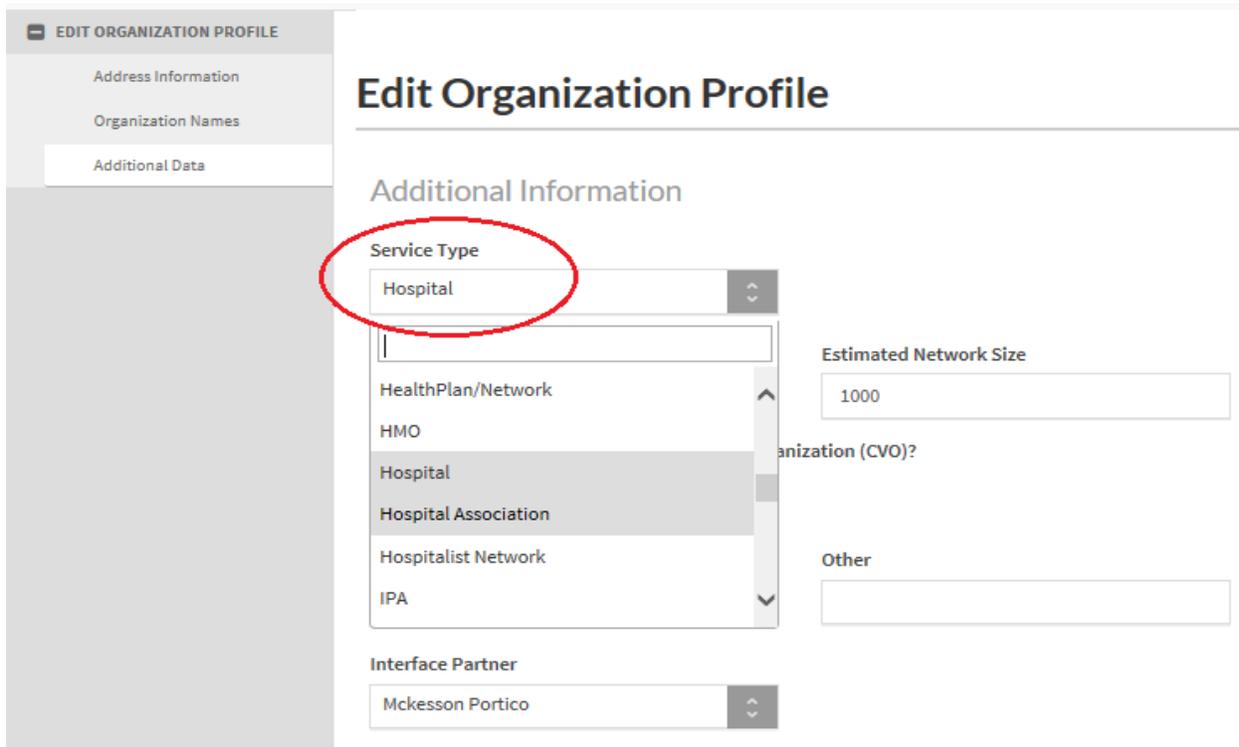
ProviderTypeAbbreviation	ProviderTypeDescription
MD	Medical Doctor (MD)
DDS	Doctor of Dental Surgery (DDS)
DMD	Doctor of Dental Medicine (DMD)
DPM	Doctor of Podiatric Medicine (DPM)
DC	Doctor of Chiropractic (DC)
DO	Osteopathic Doctor (DO)
ACU	Acupuncturist
ADC	Alcohol/Drug Counselor
AUD	Audiologist
BT	Biofeedback Technician
CRNA	Certified Registered Nurse Anesthetist
CSP	Christian Science Practitioner
CNS	Clinical Nurse Specialist
CP	Clinical Psychologist
CSW	Clinical Social Worker
DT	Dietician
LPN	Licensed Practical Nurse
MFT	Marriage/Family Therapist
MT	Massage Therapist
ND	Naturopath
NEU	Neuropsychologist
MW	Midwife
NMW	Nurse Midwife
NP	Nurse Practitioner
LN	Nutritionist
OT	Occupational Therapist
OPT	Optician
OD	Optometrist
PHA	Pharmacist
PT	Physical Therapist
PA	Physician Assistant
PC	Professional Counselor
RN	Registered Nurse
RNFA	Registered Nurse First Assistant
RT	Respiratory Therapist
SLP	Speech Pathologist
HOS	Hospitalist

ProviderTypeAbbreviation	ProviderTypeDescription
APN	Advanced Practice Nurse
AA	Anesthesia Assistant
ABA	Applied Behavioral Analyst
AT	Athletic Trainers
GC	Genetic Counselor
SA	Surgical Assistant

Request for Domain Table Changes

Here’s the process for sending requests for domain table changes:

1. Any requests to change or to add a drop-down entry (see figure below) on any of the sections of your profile should be sent to domainchanges@caqh.org



2. Upon receipt, these requests are placed into a review and approval process.
3. If the request is approved, an email notification is sent to the requester advising when they can expect the change to be implemented.
4. If the request is not approved, the requester is notified with the details as to why the request was not approved.
5. The typical turnaround time for processing these requests is 2 weeks.

CAQH ProView Participating Organization Support Center Information

CAQH ProView Participating Organization Support Center:

Phone: 888-600-9802

Email: accounthelp@proview.caqh.org

Help Desk Hours:

Monday – Friday: 8 AM – 6 PM (EST)

Revision Log

<u>Version</u>	<u>Updates</u>
Version 1	Original
Version 1.1	<ul style="list-style-type: none"> • Updated <i>System Security</i> section. • Updated <i>Appendix – Provider Status</i> table to reflect accurate names for provider status, specifically “Application Problem”, “Application Data Submitted”, and “Initial Application Complete”.
Version 2	<ul style="list-style-type: none"> • Added information and process flows outlining how anniversary dates are set and removed for providers. • Added additional detail in Appendix on the following: provider status logic, the re-attestation reminder email schedule, the voluntary and mandated state specific credentialing applications supported in CAQH ProView, and a listing of provider types supported in CAQH ProView. • Clarified that delegated providers are not required to complete the same full data set as non-delegated providers. • Added additional detail regarding best practices for roster submissions and duplicate account processing. • Added information regarding Plan Administrator Emails.
Version 3	<ul style="list-style-type: none"> • Updated screenshots to show the changes made on the portal • Added the steps in sending requests for domain table changes • Updated some details on file removal from portal
Version 4	<ul style="list-style-type: none"> • Added details of the recent changes on the CAQH ProView Provider Application • Updated CAQH ProView Anniversary Date Process Flow • Added details for CAQH DirectAssure Anniversary Date Process Flow
Version 5	<ul style="list-style-type: none"> • Updated the details on the PO User Roles