



PROVIEW™

**CAQH ProView®**

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**Provider User Guide**

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## CHAPTER 1: Introduction

The purpose of this document is to guide you as a provider through the process of entering your profile information free of charge into CAQH ProView™ to meet a variety of data needs of health plans, hospitals and other healthcare organizations. It also defines the steps to authorize, attest and maintain your data profile through the re-attestation process.

### **CAQH ProView Overview**

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

Through an intuitive, profile-based design, you can easily enter and maintain your information for submission to your selected organizations. CAQH ProView can be accessed at <https://proview.caqh.org/pr>.

The following steps provide you with a high-level overview of the process to complete your data profile.

1. Register with the system.
2. Complete all application questions.
3. Review your data profile for accuracy.
4. Authorize participating organizations access to your data profile.
5. Attest to your data profile.
6. Upload your supporting documentation.

This document will provide additional information and helpful tips for each of these steps.

### **Getting Started**

Completing the initial CAQH ProView profile may take up to two hours; however, preparing yourself for the information requested will reduce the time required to complete your profile. Additional time may be required depending upon several factors, including the number of practice locations, amount of postgraduate training and work history, and overall familiarity with online tools and systems.

While CAQH ProView was designed to be compatible with most Internet browsers, we recommend upgrading to the most current version of Internet Explorer, Chrome or Safari, and using one of these browsers for the best performance.

If your practice has an office manager or clinic administrator who assists with gathering information for credentialing or other administrative purposes for multiple providers, the [CAQH ProView Practice Manager Module](#) may facilitate your data entry process. Data that is the same

for multiple providers (e.g., clinic name, address and phone number) can be entered once by a practice manager, rather than having to be entered repeatedly for each individual provider. Please refer to *Chapter 7: Importing Data from the Practice Manager Module* for more information regarding this functionality.

### **System Security**

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

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

## CHAPTER 2: Registration

Registration is required for all providers to obtain access to CAQH ProView.

### **New Users**

If you received an introductory email from CAQH ProView, select the link contained in the email to begin the registration process using the CAQH ID provided. Refer to “Creating a CAQH ProView Account” on page 6 of this guide for the next steps in the process.

### **Existing UPD Providers**

For providers who were previously registered with the CAQH Universal Provider Datasource (UPD), go to CAQH ProView at <https://proview.cagh.org/pr> (see Figure 01). You can initially sign-in with CAQH ProView by entering your existing UPD username and password and clicking “Sign in”. You may be prompted to update your username and password at this time. Refer to “Creating a CAQH ProView Username and Password” on page 7 of this guide for the next steps in the process.

**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. Available at no cost to you, CAQH ProView eliminates duplicative paperwork with organizations that require your professional and practice information for claims administration, credentialing, directory services, and more.

Through an intuitive, profile-based design, you can easily enter and maintain your information for submission to your selected organizations. Help reduce inquiries for your administrative information and save even more time by keeping your CAQH ProView profile complete and up-to-date. Ensure that the healthcare organizations you authorize have instant access to accurate, timely information.

Sign in on the right to update your existing profile information or, if you are a new provider to CAQH ProView, register to create a profile.

**CAQH ProView Reference Material**

- [Provider User Guide](#)
- [Provider Quick Reference Guide](#)
- [Video: Providers – Get Started with CAQH ProView](#)
- [Video: How to Log In for the First Time](#)
- [Video: I Forgot My Username/Password](#)
- [Video: How to Attest and Re-Attest](#)

**SIGN IN** ?

Username

[Forgot Username](#)

Password

[Forgot Password](#)

Remember me?

[Sign In](#)

**FIRST TIME HERE?**

1. Existing CAQH UPD users: Sign in with your old UPD username and password.
2. If you received a welcome email, use the link in your email to begin the sign in process.
3. If you were not registered with CAQH UPD and are new to CAQH ProView: [Register Now](#)

[Practice Manager Sign In](#)  
[Participating Organization Sign In](#)

## Self-Registration

If you have not received a Welcome Letter or were not previously registered with the UPD, you may begin the self-registration process by accessing CAQH ProView at <https://proview.caqh.org/pr> (see Figure 01 above) and clicking on “Register”. The “Getting Started” page (see Figure 02) will display and will provide you with additional tips on how to get started. Click on “Go to Next Section” to continue with the registration process.

**FIGURE 02**

**CAQH Solutions** | **PROVIEW**

### GETTING STARTED

CAQH ProView is the healthcare industry's premier resource for self-reporting professional and practice information to health plans and other healthcare organizations. Through an intuitive, profile-based design, you can easily enter and maintain your information for submission to your selected organizations. The system eliminates duplicative processes to collect provider demographic information required to support, credentialing, directory services, claims administration and more.

CAQH ProView is a timesaver over traditional paper application submissions and includes the following helpful features to expedite data collection and maintenance to support credentialing and other key industry functions:

- Drop-down selections for select fields and sections (ex. medical schools, hospitals)
- Required and suggested fixes to ensure a complete profile prior to attestation
- Auto-save feature as you move from screen to screen
- Field formatting and data validation to avoid errors
- 24x7 access to the website, and customer support representatives for assistance
- Extensive help and FAQ content to provide guidance on how to complete the profile sections

Completing the initial CAQH ProView profile may take up to two hours, however once a profile is complete ongoing maintenance is easily performed through a streamlined reattestation process. Follow the suggestions below to prepare for the information that will be requested and to reduce the time required to complete the profile. Additional time may be required depending upon several factors, including the number of practice locations, amount of postgraduate training and work history, and overall familiarity with online tools/systems.

### BEFORE YOU BEGIN

The following suggestions may allow for easier and faster completion of the CAQH ProView profile:

- Familiarize yourself with the type of information that the profile will require.
- Familiarize yourself with the required steps to complete the CAQH ProView profile.
- Have the proper materials available for reference when you start.
- If your practice has an office manager or clinic administrator who assists with gathering information for credentialing or other administrative purposes for multiple providers, the CAQH ProView Practice Administrator Module will make data entry easier. Data that is the same for multiple providers (e.g., clinic name, address and phone number) can be entered once, rather than having to be entered repeatedly for each individual provider.

If you already have a CAQH Provider ID, please [click here](#). Otherwise, please click the Next button below to register.

Thank you for your participation.

**Go to next section** **Cancel**

To establish a CAQH ProView account, you will be required to enter a name, provider type, primary practice state, birthdate, email address, and at least one personal identification number (see Figure 03). You will then receive an email with your CAQH Provider ID and a link to complete your provider registration.

**FIGURE 03**

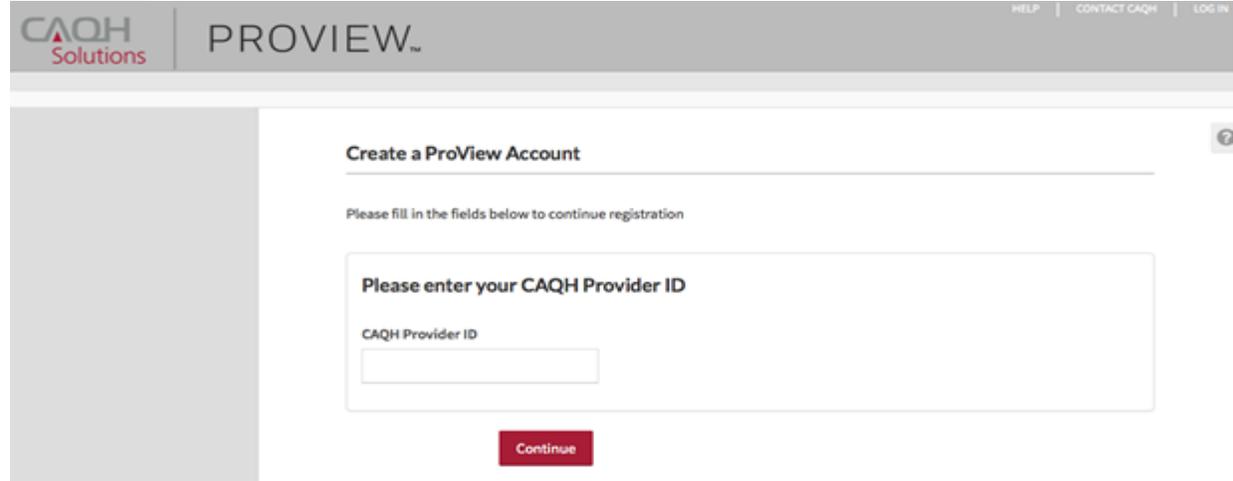
The screenshot shows a web form titled "Create a ProView Account". Below the title is a link: "If you have a CAQH provider ID, [click here.](#)". A horizontal line separates this from the main form area. The text "Please fill in the fields below to continue registration" is centered. A box contains the instruction "Please complete all of the following fields:". Below this are five input fields: "First Name" (with a red asterisk), "Middle Name", "Last Name" (with a red asterisk), "Suffix" (a dropdown menu showing "--"), and "Address Type" (a dropdown menu showing "(Please Select)"). Below these is a "Street 1" field (with a red asterisk) which is a wide text input box.

### **Creating a CAQH ProView Account**

New CAQH ProView users who either self-register with the system or who are added to the system by an organization, will receive an email from CAQH ProView containing a CAQH Provider ID and a link to create a CAQH ProView account.

Upon selecting the link from the email you received, you will be directed to the page shown below (see Figure 04). Enter your CAQH Provider ID and select “Continue”.

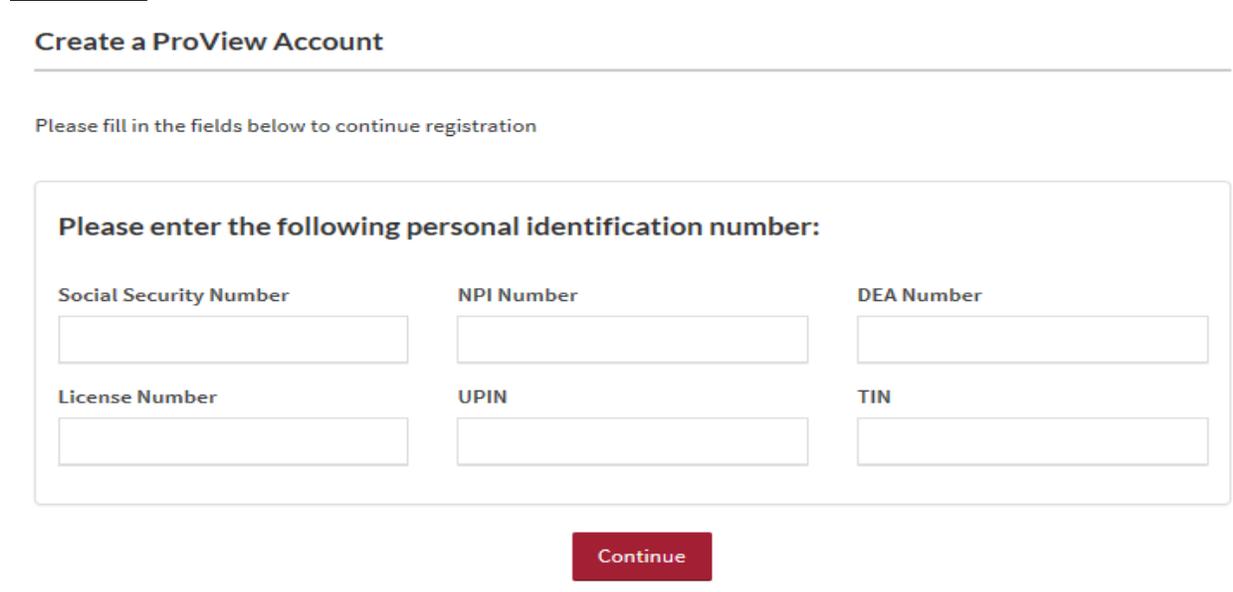
**FIGURE 04**



The screenshot shows the CAQH ProView website header with the logo and navigation links (HELP, CONTACT CAQH, LOG IN). The main heading is "Create a ProView Account". Below it, a message says "Please fill in the fields below to continue registration". A large text box contains the instruction "Please enter your CAQH Provider ID" and a label "CAQH Provider ID" above a single input field. A red "Continue" button is positioned below the input field.

At the next screen (see Figure 05), enter your personal identification number(s) to proceed with creating your ProView account. Select “Continue” to proceed.

**FIGURE 05**



The screenshot shows the CAQH ProView website header and the heading "Create a ProView Account". Below it, a message says "Please fill in the fields below to continue registration". A large text box contains the instruction "Please enter the following personal identification number:". Below this instruction are six input fields arranged in two rows and three columns. The first row contains "Social Security Number", "NPI Number", and "DEA Number". The second row contains "License Number", "UPIN", and "TIN". A red "Continue" button is positioned below the input fields.

### **Creating a CAQH ProView Username and Password**

CAQH ProView users may be asked to create a new username and password to meet CAQH ProView requirements (see Figure 06). Usernames in CAQH ProView must consist of 8 characters and can be any combination of numbers and/or letters. Special characters like # or @ are not allowed.

**FIGURE 06**

#### **Establish Your CAQH ProView Account**

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

**Please enter a username**

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

Username \*

**Please enter a password**

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

Password \*

Re-enter Password \*

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 07). By checking “I Agree” at the bottom of the page, you adhere to the terms and conditions, which can be accessed by selecting the “See Terms and Conditions” hyperlink. Then select “Create Account”.

**FIGURE 07**

Security Question 1: (required) \*

--Select--

Security Answer 1 \*

Security Question 2: (required) \*

--Select--

Security Answer 2 \*

Security Question 3: (required) \*

--Select--

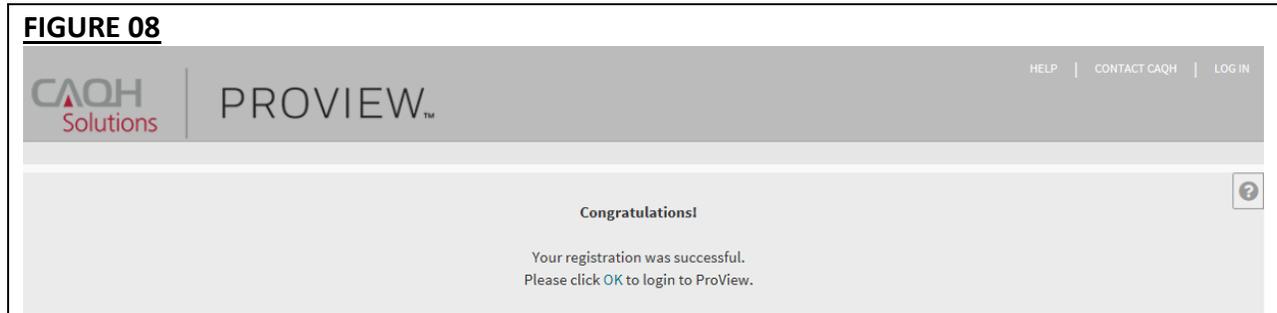
Security Answer 3 \*

[See Terms and Conditions](#)

I Agree

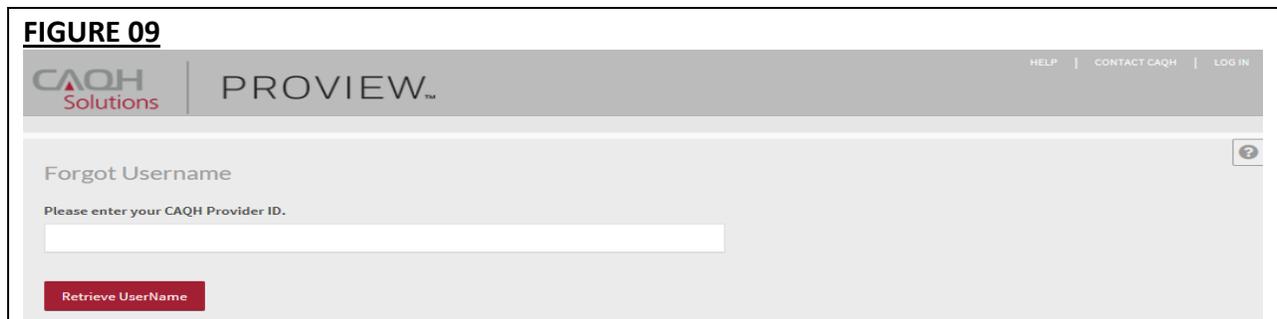
Create Account

Click “Create Account” and you will receive confirmation that your CAQH ProView registration was successful (see Figure 08).

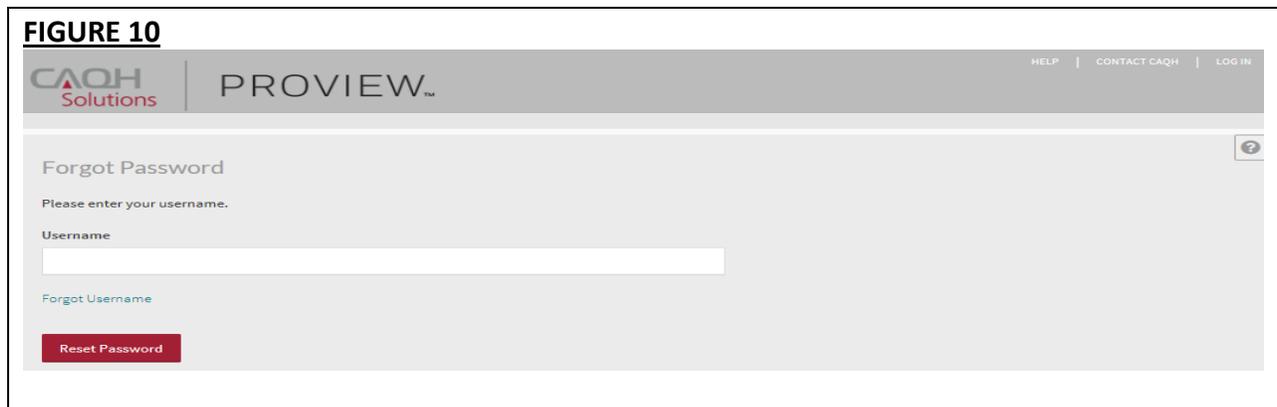


**Forgotten Username and/or Password**

If you forgot your Username, you may select the “Forgot Username” link on the CAQH ProView sign-in page (see Figure 01). Enter your CAQH Provider ID to receive your username in an email (see Figure 09). The email will be sent to the email address listed as the primary method of contact.

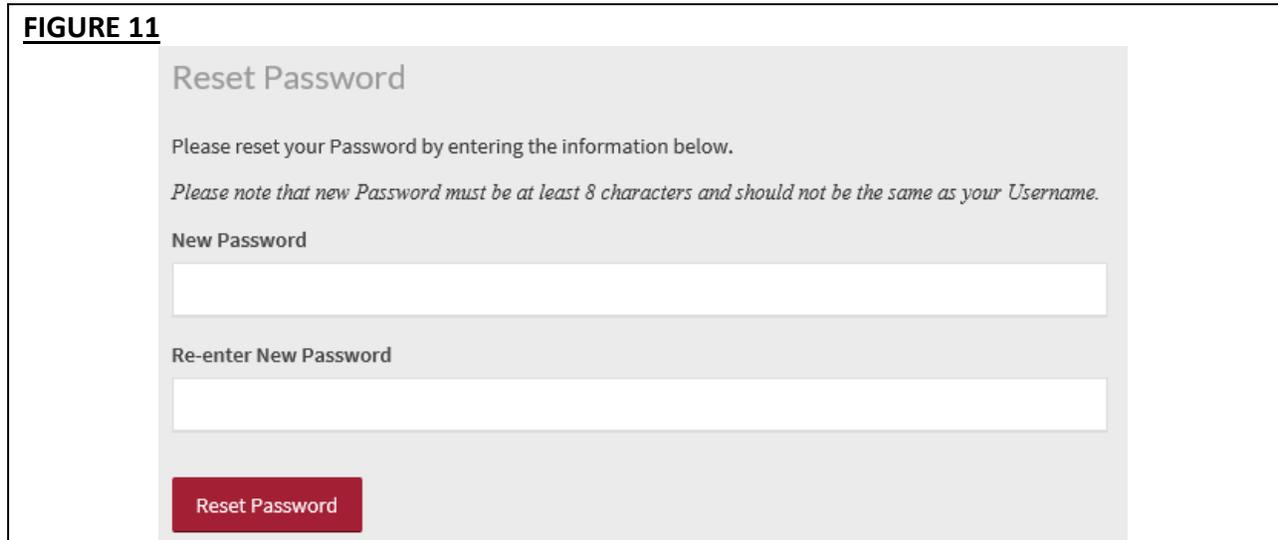


If you forgot your Password, you may select the “Forgot Password” link on the CAQH ProView sign-in page (see Figure 01). Enter your username to reset your password (see Figure 10). An email with a link will be sent to you to reset your password. The email will be sent to the email address listed as the primary method of contact.



Once you select the link in the email sent to you, enter and verify your new password, then select “Reset Password” (see Figure 11).

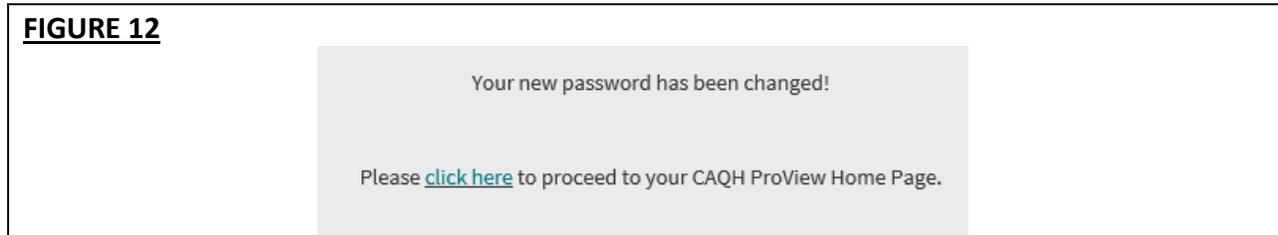
**FIGURE 11**



The screenshot shows a web form titled "Reset Password". Below the title, there is a message: "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." The form contains two input fields: "New Password" and "Re-enter New Password". At the bottom of the form is a red button labeled "Reset Password".

The Password Change confirmation (see Figure 12) will appear when your password has been successfully reset. You can then log into CAQH ProView using your new password.

**FIGURE 12**



The screenshot shows a confirmation message in a light gray box. The text reads: "Your new password has been changed!" followed by "Please [click here](#) to proceed to your CAQH ProView Home Page."

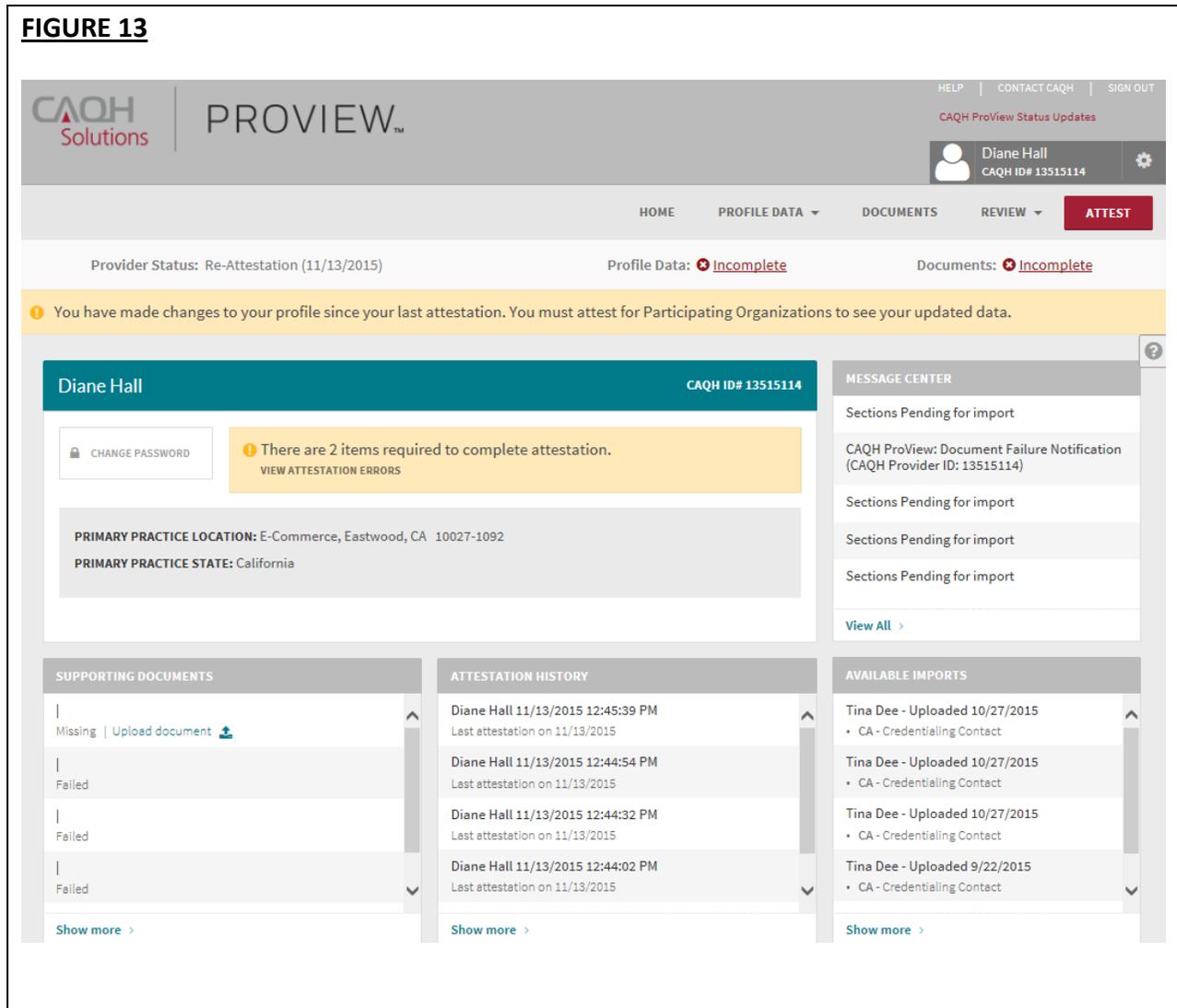
## CHAPTER 3: Home Page

You will see the CAQH ProView Home page (see Figure 13) after a successful login.

**Tip:**

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

**FIGURE 13**



The Home page displays five components:

**1. Profile Summary**

- Provides a summary of your key profile information, such as your CAQH Provider ID, any outstanding required fixes that need to be made to your data profile, and your primary practice state. You can also easily access a “Change Password” button here to change your password if necessary.

## 2. Message Center

- Displays information relevant to your account, information from CAQH and actions required. This also displays any notifications from CAQH regarding missing or expired documents.

## 3. Supporting Documents

- Provides links to any supporting documents that have been uploaded to your profile.
- Displays the approval status of your supporting documents.
- If you have questions on uploading your documentation, refer to *Chapter 6: Uploading Supporting Documentation*.

## 4. Attestation History

- Provides a record of your attestation history.
- Attestation is the term used to show you certify that you have carefully reviewed all information contained within your CAQH data profile and that all information provided by you is true, correct and complete to the best of your knowledge. You also acknowledge that your CAQH data profile will not be considered complete until supporting documentation and signed Authorization, Attestation and Release Form are submitted.

## 5. Available Imports.

- Displays any sections containing data available for import into your data profile. With CAQH ProView, practice managers have the capability to enter information on your behalf and then export that information for your access and to ease your data entry requirements. You will have the option to import any available data as a new set or replace an existing set of data within the section. You also have the ability to compare your existing data to the data entered by a practice manager before you choose to import the data.

In addition, to these components, across the top of the home page is a navigation menu, which allows you to navigate to four sections to complete your profile information (see Figure 14):

- **Profile Data** – Click here to enter your profile information (See Chapter 4)
- **Documents** – Click here to review your supporting documents (See Chapter 6)
- **Review** – Click here to review the information you have entered and correct any required errors (See Chapter 5)
- **Attest** – Click here to attest to the accuracy of your information (See Chapter 8)

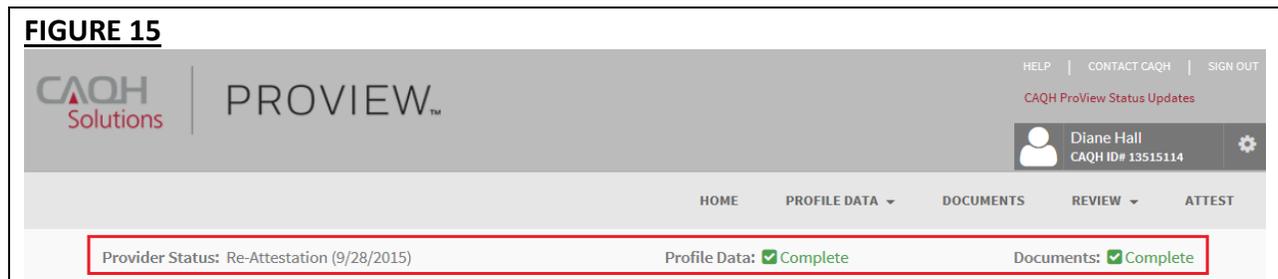


## Status Bar

A status bar is also available at the top of the screen (see Figure 15). The status bar will help you know what actions need to be taken on your profile in order for your authorized organizations to receive your up-to-date information.

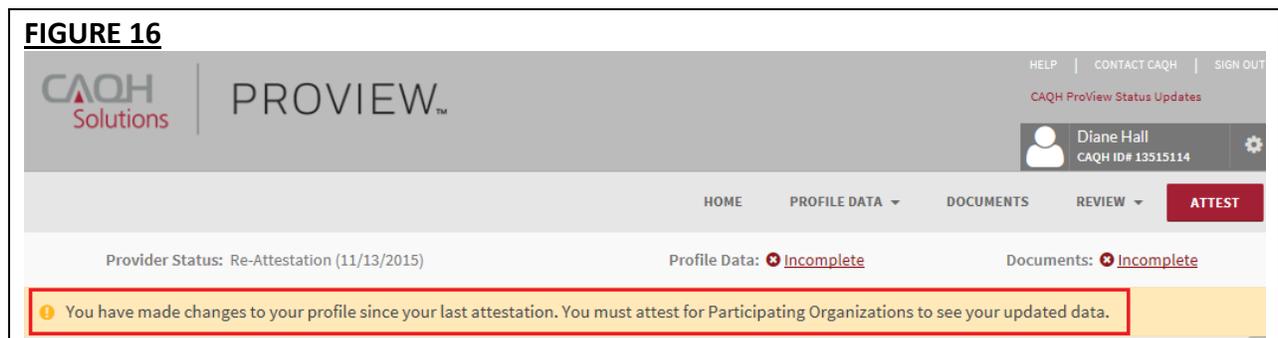
The Status Bar shows three elements (see Figure 15):

- Provider Status with 'as of' date
- Profile Data: Complete/Incomplete
  - The status 'Complete' is displayed if you have successfully completed all required fields in the sections listed on the left hand side navigation.
- Documents: Complete/Incomplete
  - The status 'Complete' is displayed if ALL the required supporting documents have been provided and are current according to requirement rules.



## Attest Reminder Bar

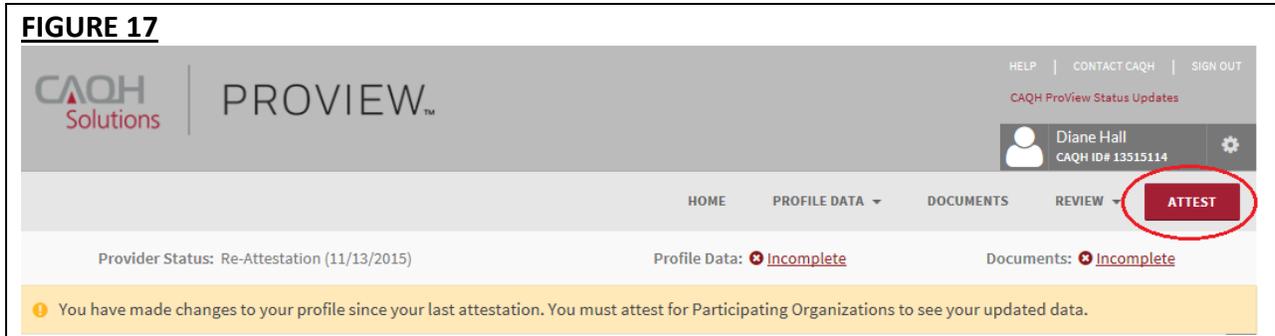
- After you update any information in your profile, you must complete attestation so that your authorized organizations can view your updated profile.
- A reminder message will appear across the top of the page on every page only after you have changed one or more piece of data and have not attested to that change (see Figure 16)
- This message will disappear only after you have attested but would re-appear if you changed more data and did not re-attest.
- This message will also appear if CAQH has updated a relevant domain table value.



### Attest Button in Navigation Bar

- The 'Attest' navigational element is now moved to the far right position (see Figure 17).
- If you have never attested or have previously attested and have unattested data, the 'Attest' navigational element will show as a red button.
- The 'Attest' navigational element will also show as a red button when you are NOT in the following status:
  - Initial Profile Complete
  - Re-attestation

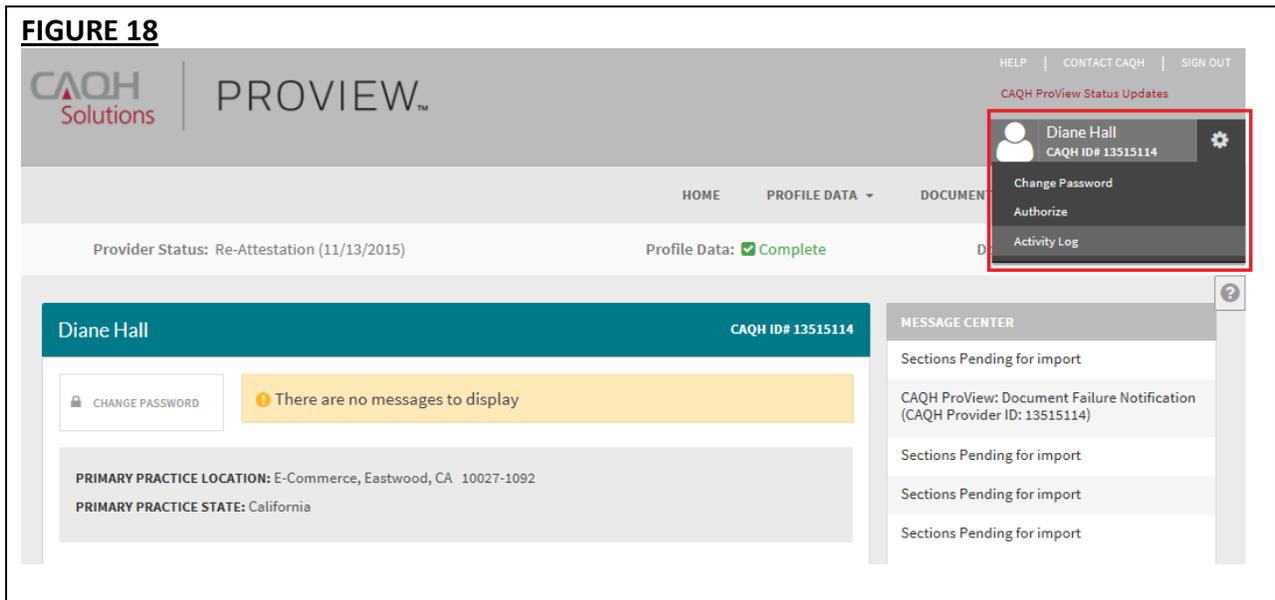
**FIGURE 17**



### Activity Log

From the Home Page you can access the “Activity Log” from the top right navigation drop-down menu (see Figure 18).

**FIGURE 18**



The Activity Log lists all recent activity that has occurred in your account, including recent log-ins, re-attestations, and data updates (See Figure 19).

**FIGURE 19**

HOME PROFILE DATA DOCUMENTS REVIEW ATTEST

Provider Status: Re-Attestation (11/13/2015) Profile Data: ✔ Complete Documents: ✘ Incomplete

### ACTIVITY LOG

Expand to view Activity Details View Activity Log History

Activity Subject	Date
▶ Attestation/ Reattestation Event	11/14/2015 03:37 AM
▶ ProView System changed the Provider Status from Re-Attestation to Re-Attestation	11/14/2015 03:36 AM
▶ User logged in: Diane Hall	11/14/2015 03:30 AM
▶ User logged in: Diane Hall	11/14/2015 01:50 AM
▶ Attestation/ Reattestation Event	11/14/2015 01:46 AM
▶ ProView System changed the Provider Status from Re-Attestation to Re-Attestation	11/14/2015 01:45 AM
▶ Attestation/ Reattestation Event	11/14/2015 01:45 AM
▶ Attestation/ Reattestation Event	11/14/2015 01:45 AM
▶ ProView System changed the Provider Status from Re-Attestation to Re-Attestation	11/14/2015 01:45 AM
▶ Change to Personal Information : Primary Practice State Provider Changed Personal Information Details: Section Header: Provider Info Field: Primary Practice State Old Value: CO New Value: CA	11/14/2015 01:45 AM

1 of 41 pages (401 items)

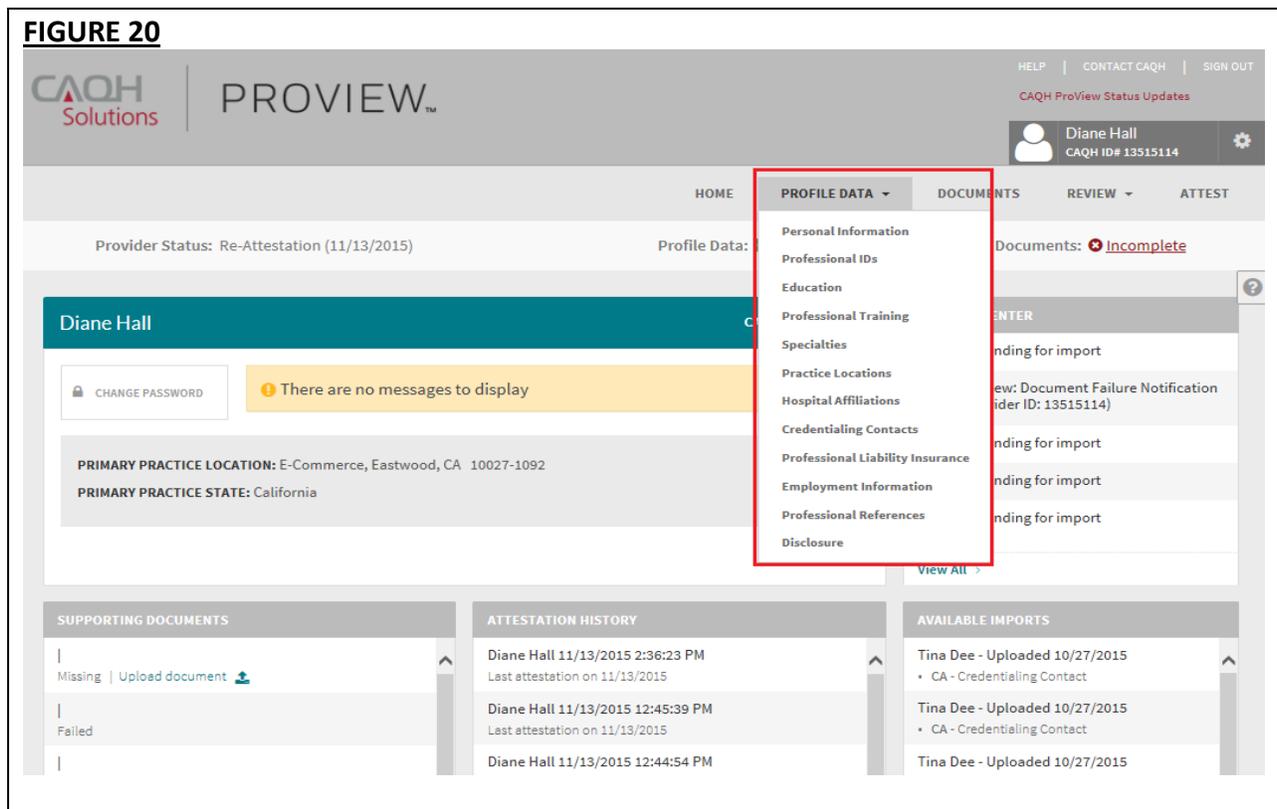
## CHAPTER 4: Completing Your Profile Information

CAQH ProView will guide you through the process of completing your information and managing your profile data and supporting documentation. From the Home Page, click on “Profile Data” on the top navigation bar to begin the process (see Figure 20).

**Tips:**

1. Throughout the system, required fields are indicated with a red asterisk (\*).
2. If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
3. Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
4. It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.

**FIGURE 20**



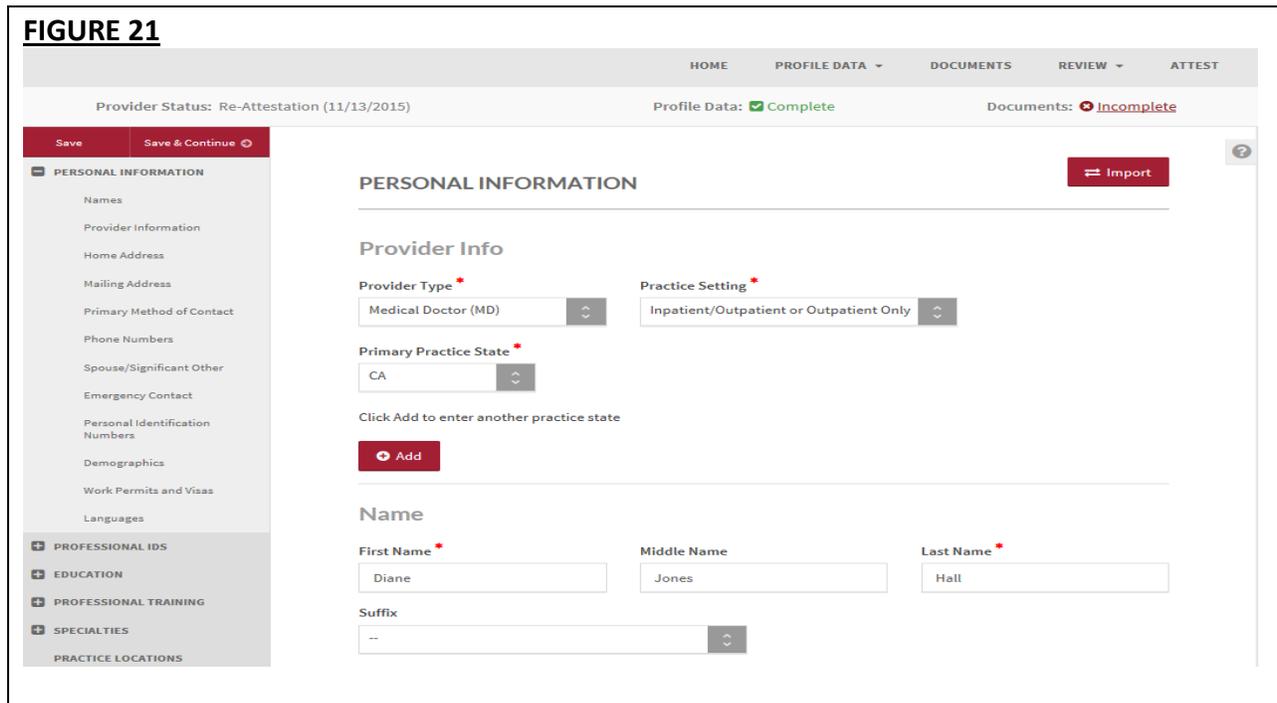
Clicking on “Profile Data” shows a drop down list of 12 Sections: Personal Information, Professional IDs, Education, Professional Training, Specialties, Practice Locations, Hospital Affiliations, Credential Contacts, Professional Liability Insurance, Employment Information, Professional References, and Disclosure. They are described in further detail below. Questions presented to you may vary based on your primary practice state.

**Personal Information**

The Personal Information section (see Figure 21) requests basic information such as name, phone numbers, and contact information. Some information on this screen may be pre-populated based on the information you entered during the self-registration process. Additional information or tips are provided below as applicable to assist you with completing these fields.

**Tips:**

1. If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
2. Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
3. It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.



- **Provider Type, Practice Setting and Practice State**
  - You will first be asked to identify your provider type, practice setting and practice states. The answers to these questions will drive the questions presented to you throughout CAQH ProView's profile sections. If you practice in multiple states and one of those states includes a state specific credentialing application, the state specific questions and the CAQH ProView standardized questions will be presented to you in one integrated flow throughout the system. You will be required to complete all required questions for both the CAQH ProView standardized profile questions as well as any state specific questions.
  
- **Home Address**
  - Not required to complete your application; however, hospitals have identified that this information adds value in confirming your accessibility to the hospital.
  
- **Mailing Address**
  - Enter the "Mailing Address" of the physical location of your practice. If you do not have a physical practice location, you may enter a P.O. Box; however, it is important to note that health plans intend to use this information for their directories. If you would like to enter a P.O. Box for the billing address, please enter this information in the Billing Contact section.
  
- **Primary Method of Contact**
  - An email is required as a primary method of contact for CAQH ProView. This email will be used for all system generated messages, such as reminders when it is time to re-attest to your data profile.
  - You also can enter two additional email addresses (PMOC CC1 and PMOC CC2) that will be copied on the system generated messages.
  
- **Personal Identification Numbers**
  - Your Social Security Number is required to complete the application.
  - NPI – National Provider Identification Number
    - This is a provider's Type 1 National Provider Identifier. It is a unique, 10-digit identification number issued to health care providers by the Centers for Medicare and Medicaid Services (CMS).

## Professional IDs

The Professional ID section (see Figure 22) requests that you enter all professional identification numbers and upload any applicable supporting documentation. If you have questions on uploading your documentation, refer to *Chapter 6: Uploading Supporting Documentation*.

### Tips:

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Select “Add” to enter additional medical licenses or other professional identification numbers.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.

**FIGURE 22**

The screenshot displays the 'PROFESSIONAL IDS' section of the CAQH ProView interface. At the top, there is a navigation bar with 'HOME', 'PROFILE DATA', 'DOCUMENTS', 'REVIEW', and 'ATTEST'. Below this, a status bar shows 'Provider Status: Re-Attestation (11/13/2015)', 'Profile Data: Complete', and 'Documents: Incomplete'. A 'Save' button is located at the top left of the main content area. The left sidebar contains a navigation menu with categories like PERSONAL INFORMATION, PROFESSIONAL TRAINING, and SPECIALTIES. The main content area is titled 'PROFESSIONAL IDS' and includes an 'Import' button. Below this is the 'Professional License' form, which contains the following fields:
 

- License State:** A dropdown menu with 'CA' selected.
- Do you currently practice in this state?:** Radio buttons for 'Yes' (selected) and 'No'.
- License Number:** A text input field containing '516219'.
- License Type:** A dropdown menu with '(Select)' chosen.
- License Status:** A dropdown menu with '(Select)' chosen.
- Issue Date:** A date picker field with 'Select date'.
- Expiration Date:** A date picker field with '12/1/2015'.

 A 'Remove' button is positioned to the right of the 'Do you currently practice in this state?' field. Below the form, there is a 'Click Add to enter another license' prompt and an 'Add' button. The section below the form is titled 'DEA Registration'.

The following professional identification numbers are requested.

- Medical License
  - You must enter all state medical licenses you currently hold or have held as issued by a U.S. or Canadian licensing authority.
- DEA Registration – Drug Enforcement Administration
- CDS Registration – Controlled Dangerous Substance
- Medicare
- Medicaid
- ECFMG
  - This is a certificate issued by the Education Commission for Foreign Medical Graduates, and applies to US Citizens who graduated from a Medical School outside the United States.
- USMLE – United States Medical Learning Examination
  - The United States Medical Learning Examination is a physician assessment required for physician licensing in the United States.

### **Education**

The Education section (see Figure 23) requests information regarding your education history, including your professional and undergraduate school information.

#### **Tips:**

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Click on “Add” to add additional education as necessary.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.

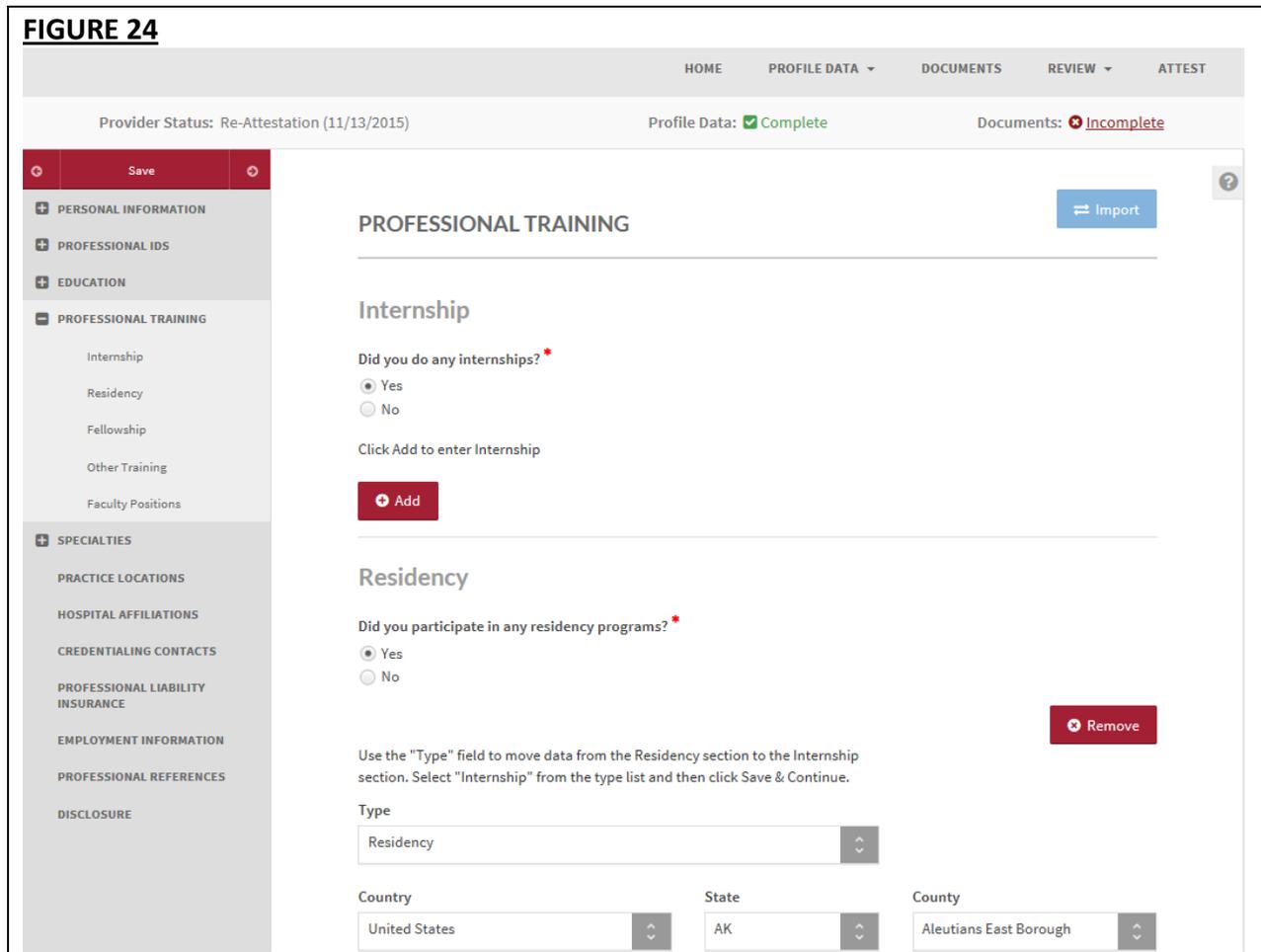
**FIGURE 23**

**Professional Training**

The Professional Training section (see Figure 24) requests information regarding your professional training, such as your internship and residency information.

**Tips:**

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Click on “Add” to add additional training as necessary.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.



The Professional Training subsections are listed below:

- Internship
  - Include any incomplete internship programs.
- Residency
  - Include any incomplete residency programs.
  - If your training program was Rotating or Transitional, please enter a separate entry for each rotation. For credentialing, the health plans need to know the specifics of each rotation including the specialty or department and the time associated with each.
- Fellowship
  - The period of medical training in the United States and Canada that a physician or dentist may undertake after completing a specialty training program (residency)
- Faculty Positions/Academic Appointments

## Specialties

The Specialties section (see Figure 25) requests information regarding your specialties and certification information.

### Tips:

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Click on “Add” to add additional specialties as necessary.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.

**FIGURE 25**

HOME PROFILE DATA ▾ DOCUMENTS REVIEW ▾ ATTEST

Provider Status: Re-Attestation (11/13/2015) Profile Data: ✔ Complete Documents: ✘ Incomplete

**SPECIALTIES** Import

**Primary Specialty**

Do you have any specialties? \*

Yes

No

---

**CERTIFICATIONS**

Do you have Certifications? \*

Yes

No

---

**Other Interests**

Provide additional areas of professional practice interest, activities, procedures, diagnoses or populations

Save and Go Back Save Save & Continue

The specialties that are included in the drop-down list are collected from the National Uniform Claim Committee ([www.nucc.org](http://www.nucc.org)). If you cannot locate your specialty in this list, select the specialty that is most appropriate for your practice. If your specialty is not listed, you may enter it in the “Areas of Other Interest”, which is towards the bottom of the “Specialty” page. You may also send an email to [providerhelp@proview.caqh.org](mailto:providerhelp@proview.caqh.org) to notify them about your missing specialty.

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

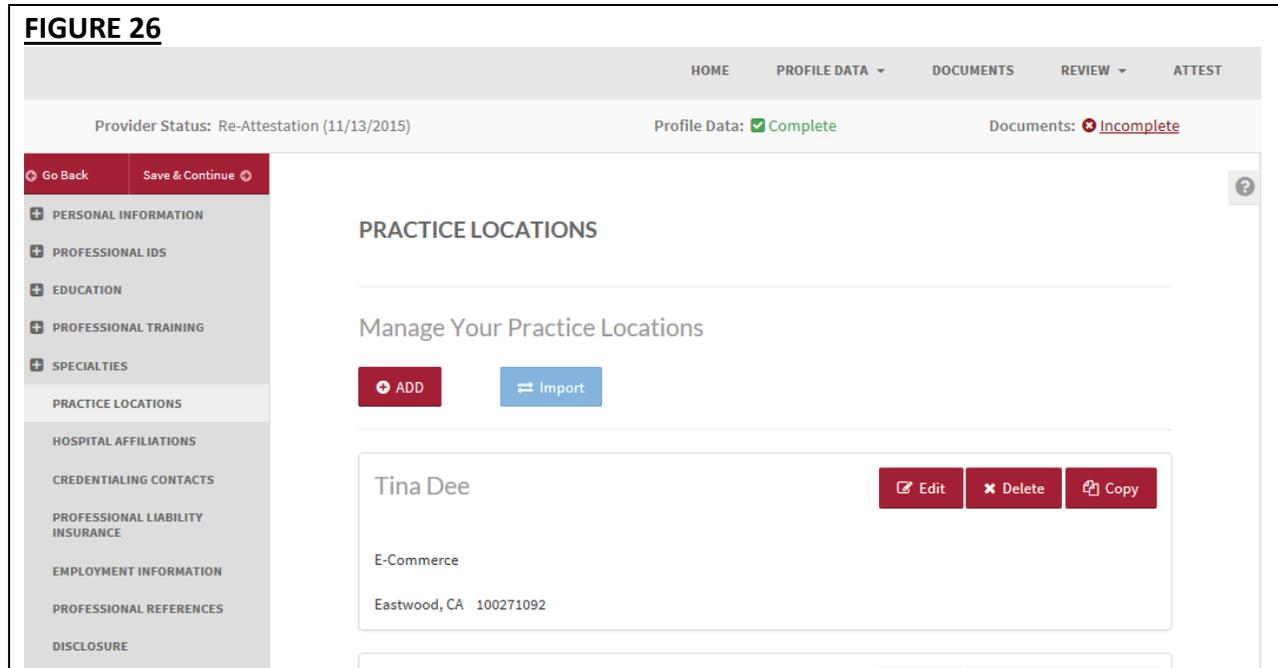
- Primary Specialty
- Secondary Specialty
- Additional Specialty
- Board Examination – dynamically displayed/hidden based on your entries
- Certifications – The system will ask if you have received any of the following certifications. Additional information regarding each certification is provided below for your reference.
  - **CPR - Cardio-Pulmonary Resuscitation certification:** Community level classes concentrate on performing CPR on adults and older children. Some also include AED training, which teaches how to use the electronic defibrillation unit on heart attack victims. Professional level classes are designed for health care professionals, ski patrol, police, firefighters and emergency medical technicians. These classes teach all of the skills previously mentioned, as well as removal of airway obstructions for victims of all ages. Other skills are also included in these classes, including inserting tubes to keep the airway open, using an oxygen tank, artificial breathing apparatuses and techniques for performing two-person CPR.
  - **BLS - Basic Life Support Certification:** Basic Life Support (BLS) certification is a relatively short training course required of many health professionals to help revive, resuscitate, or sustain a person who is experiencing cardiac arrest or respiratory failure of some sort. This could include a drowning victim, heart attack or stroke patient, or any scenario where breathing or heartbeats have been compromised.
  - **ACLS - Advanced Cardiovascular Life Support Certification:** ACLS is an acronym for Advanced Cardiovascular Life Support. This certification is required of many healthcare providers who will be interacting with patients. Like its name implies, ACLS is usually required of more advanced medical professionals, as it does include some invasive procedures, unlike Basic Life Support (BLS), which is required of almost all healthcare professionals.
  - **ALSO - Advanced Life Support in OB Certification:** Advanced Life Support in Obstetrics (ALSO<sup>®</sup>) is an evidence-based multidisciplinary training program that prepares maternity health care providers to better manage obstetric emergencies when and wherever they occur. ALSO's evidence-based learning path bridges

knowledge gaps and boosts skill sets using a team-based approach, hands-on training, and mnemonics to reduce errors and save lives.

- **Health Care Provider (CoreC)**
- **ATLS - Advanced Trauma Life Support Certification:** Advanced Trauma Life Support (ATLS) is a training program for medical providers (MD/DO/DPM/PA/NP/CO) in the management of acute trauma cases, developed by the American College of Surgeons. Similar programs exist for nurses (ATCN) and paramedics (PHTLS). The program has been adopted worldwide in over 60 countries, sometimes under the name of Early Management of Severe Trauma (EMST), especially outside North America. Its goal is to teach a simplified and standardized approach to trauma patients. Originally designed for emergency situations where only one doctor and one nurse are present, ATLS is now widely accepted as the standard of care for initial assessment and treatment in trauma centers. The premise of the ATLS program is to treat the greatest threat to life first. It also advocates that the lack of a definitive diagnosis and a detailed history should not slow the application of indicated treatment for life-threatening injury, with the most time-critical interventions performed early.
- **NRP – Neonatal Resuscitation Program certification:** NRP was developed and is maintained by the American Academy of Pediatrics. This program focuses on basic resuscitation skills for newly born infants.
- **NALS - Neonatal Advanced Life Support certification:** NALS training, administered by the American Academy of Physician Assistants, delivers the same syllabus as NRP, has similar flexibility in its format, and equips trainees with identical knowledge and skills.
- **PALS - Pediatric Advanced Life Support Certification:** The PALS Course is for healthcare providers who respond to emergencies in infants and children. These include personnel in emergency response, emergency medicine, intensive care and critical care units such as physicians, nurses, paramedics and others who need a PALS course completion card for job or other requirements.
- Anesthesia Permit
- Other Interests
- Professional Associations: A professional association or professional society is usually an organization seeking to further a particular profession and the interests of individuals engaged in that profession. This is the section where you specify which Medical Professional Associations and Societies you are affiliated to. You can add more than one association to the list.

## **Practice Location**

The Practice Location section (see Figure 26) asks for detailed information regarding your practice location(s).



### **Tips:**

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Select “Add” to enter information for a practice location.
- Select “Edit” to edit the information within a practice location.
- Select “Copy” to create a duplicate of a practice location and its related information.
- Select “Delete” to remove a practice location from your application. Please note that by selecting “Delete”, all information entered for that practice location will be deleted.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.

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

- General Information
  - Physician Group/Practice Name

- Please enter the Practice Name as it appears on your claim submission so it will match the name for the location that is known to participating organizations with whom you contract. In most cases, this will not be the practitioner's name. In some cases, this may be the name as it appears on the W9.
- Address
  - CAQH requests that you enter the appropriate address for the actual physical location of your practice. If you do not have a physical practice location, you may enter a P.O. Box; however, please note that health plans intend to use this information for their directories. If you would like to enter a P.O. Box for the billing address, please enter this information in the Billing Contact section at the bottom of this page.
- Group Medicaid Number
- Group Medicare Number
- NPI Type 2
  - Enter your group National Provider Identification Number
- Phone Numbers
- Phone Coverage
- Tax Identification Number
- Hours
  - Office Hours
  - Patients
    - Indicate the types of patients accepted into the practice
- Coverage & Contact
  - Colleagues
  - Covering Colleagues
  - Mid-Level Practitioners
    - Mid-level practitioners include: P.A. (physician's assistant), N.M.W (nurse midwife), N.P (nurse practitioner), or R.N.F.A (registered nurse first assistant).
  - Office Manager or Business Staff Contact
  - Billing Contact
  - Payment and Remittance
- Practice Limitations
  - Limitation
    - A limitation is any restriction you have set on the gender or age of your patient population.
  - Gender Limitations
  - Age Limitations
  - Other Limitation
- Accessibility
  - ADA Accessibility
    - The Americans with Disabilities Act (ADA) ensures access to the built environment for people with disabilities. The ADA Standards establish

design requirements for the construction and alteration of facilities subject to the law. These enforceable standards apply to places of public accommodation, commercial facilities, and state and local government facilities.

- Handicapped Accessibility
- Public Transportation Accessibility
- Other Accessibility Services
- Disabled Accessibility
- Services
  - Services
    - Please use this section to indicate what services are provided at your practice location.
    - Clinical Laboratory Improvement Amendments (CLIA) - Diagnostic testing helps health care providers screen for or monitor specific diseases or conditions. It also helps assess patient health to make clinical decisions for patient care. The Clinical Laboratory Improvement Amendments (CLIA) regulate laboratory testing and require clinical laboratories to be certificated by their state as well as the Center for Medicare and Medicaid Services (CMS) before they can accept human samples for diagnostic testing. Laboratories can obtain multiple types of CLIA certificates, based on the kinds of diagnostic tests they conduct.
  - Interpretation Services

## Hospital Affiliation

The Hospital Affiliation section (see Figure 27) asks if you have hospital privileges, and if applicable, information regarding your primary and any other hospital affiliation(s).

**FIGURE 27**

### Tips:

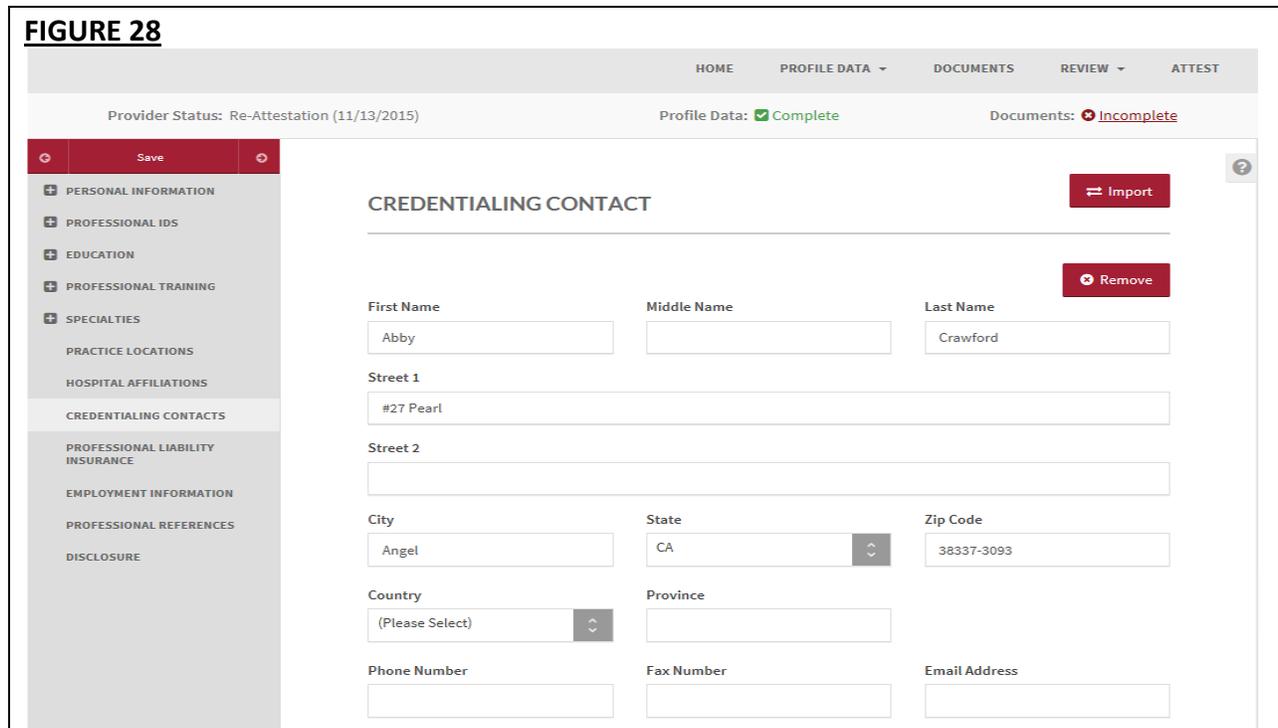
- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Select “Add” to enter information for a hospital affiliation.
- Select “Edit” to edit the information within a hospital affiliation.

- Select “Delete” to remove a hospital affiliation from your application. Please note that by selecting “Delete”, all information entered for that hospital affiliation will be deleted.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.

### **Credentialing Contact**

The Credentialing Contact section (see Figure 28) asks for specific contact information for your credentialing contacts.

- You may provide multiple credentialing contacts based on their location by first indicating the “Location Type”, e.g. practice location or hospital affiliation, and then by selecting from a drop-down list of your previously entered practices or hospitals.
- You may also indicate the same credentialing contact for multiple locations by selecting the appropriate locations from the drop-down menu in the “Location” field.



### **Tips:**

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.

- Select “Add” to enter information for a credentialing contact.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.

### **Professional Liability Insurance**

The Professional Liability Insurance section (see Figure 29) asks for information regarding your professional liability insurance.

**FIGURE 29**

### **Tips:**

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Select “Add” to enter information additional insurance policy information.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.

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

- Self-insured
  - If you are self-insured, you are protected from professional liability claims by a program of self-insurance where expense payments and those to satisfy professional liability claims are made from a self-insurance trust fund. In other words, you are not transferring financial risk for professional liability claims, and expenses to defend those claims, to an insurance carrier.
- Insurance name
  - If you do not carry professional liability insurance, select 'Not Insured' in the 'Carrier/Self Insured Name'. The remaining fields do not need to be completed. In addition, you are not required to submit a professional liability insurance face sheet. However, you may need to submit a letter of credit to your health plan in lieu of the required professional liability insurance face sheet. If you have questions regarding your state's regulations, please refer to your affiliated health plan for clarification.
  - If you also have coverage under a Patient Compensation Fund, you still must complete all the questions in the 'Current Professional Liability Carrier' section as they relate to your primary malpractice carrier.
- Address
- Phone number
- Original effective date
- Current effective date
- Current expiration date
- Policy number
- Type of coverage
- Amount of coverage
- Medical Malpractice Insurance Quotes
  - If you select "Yes" to "Would you like to receive comparative medical malpractice insurance quotes based on your CAQH profile" you will be directed to the Agree/I Do Not Agree to the "Opt-In" for medical malpractice insurance quotes.
  - Professional Liability Insurance (SAI Authorization): Medical Malpractice insurance markets change quickly and dramatically. This "opt-in" service provides you a simple way of procuring competitive proposals for your medical malpractice insurance at the press of a button. The aim is to provide you the best medical malpractice options through changing market conditions.
  - Answering "Yes" to this "opt-in" service will release a copy of your complete ProView profile for the purpose of requesting competitive medical malpractice insurance proposals. The proposals will be coordinated and presented to you by the Premium Group, Inc., a national broker specializing exclusively in medical malpractice insurance. They will be your only contact. Your provider data will be released for the purpose of requesting medical malpractice insurance proposals.

If you are interested in: lower insurance premiums; a stronger carrier; better policy features, or; a more vigorous defense in the event of a law suit, then press the “Yes” button. Answering “No, thank you, not this year” to this question will suspend the opt-in question for one year. You will be provided with the opportunity again next year to shop your malpractice insurance through this simple and effective process. If you are certain at present that your malpractice insurance carrier’s price; claims-paying ability; policy terms & conditions, and; defense philosophy, are among the best in the industry, then this would be the option for you.

- Answering “No, ask me again in 3 years” to this question will suspend the opt-in question for three years. You will have the opportunity in three years to shop your malpractice insurance at the press of a button via the ProView.

## Employment Information

The Employment Information section (see Figure 30) asks for information regarding your employment history, including your current and previous work information, any work history gaps, and any military employment information.

**FIGURE 30**

**Current Work Information**

[+ Remove](#)

**Current Employer?**

Yes  
 No

**Practice/Employer Name**

Cumberland Hospital

**Department**

**Street 1**

9407 Cumberland Rd.

**Street 2**

**City**                      **State**                      **Province**                      **Zip Code**

New Kent                      VA                                                                23124

**Country**

United States

**Phone Number**                      **Phone Extension**                      **Fax Number**

804-966-1693                                                                804-966-5639

**Tips:**

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Select “Add” to enter an employer and the related information.
- If the “Import” button is active, information already entered by a practice manager is available for you to view and import if you choose to do so.

- If you have not yet started work at a location, enter your expected start date in the Start Date field.
- In general, a gap is any break in continuous, full-time employment longer than 3 months. However, some state specific applications may have different requirements.
- Some organizations may require a full work history beginning with your professional degree and the reporting of all gaps in work history. Check with your credentialing organization.

### **Professional References**

The Professional References section (see Figure 31) asks for information regarding your references and their related contact information.

**FIGURE 31**

The screenshot shows the 'PROFESSIONAL REFERENCE' form in the CAQH ProView system. The form is titled 'PROFESSIONAL REFERENCE' and includes a 'Reference' section. The form fields are as follows:

- Provider Type:** Doctor of Dental Medicine (DMD) (with a 'Remove' button)
- First Name:** Ronald
- Last Name:** Clark
- Street 1:** Jade Cres
- Street 2:** (empty)
- City:** Fortridge
- State:** CA
- Province:** (empty)
- Zip Code:** 10003-1901
- Country:** United States
- Email Address:** (empty)
- Phone Number:** (empty)
- Fax Number:** (empty)

The left sidebar shows navigation options: PERSONAL INFORMATION, PROFESSIONAL IDS, EDUCATION, PROFESSIONAL TRAINING, SPECIALTIES, PRACTICE LOCATIONS, HOSPITAL AFFILIATIONS, CREDENTIALING CONTACTS, PROFESSIONAL LIABILITY INSURANCE, EMPLOYMENT INFORMATION, PROFESSIONAL REFERENCES, and DISCLOSURE. The top navigation bar includes: HOME, PROFILE DATA, DOCUMENTS, REVIEW, and ATTEST. The status bar shows: Provider Status: Re-Attestation (11/13/2015), Profile Data: Complete, and Documents: Incomplete.

### **Tips:**

- If you need assistance, you can access the “?” link that is displayed on the right hand side of the screens.
- Use “Save and Go Back” or “Save & Continue” to page backward or forward within sections.
- It is important to click on the “Save” button or the “Save & Continue” button to save your information. If you close the browser or move to another screen via the left hand navigation screen without clicking “Save” or “Save & Continue”, you will lose your information. Clicking on the back and forward arrows will not save your information either.
- Select “Add” to enter a professional reference and the related information.

## Disclosure

The Disclosure section (see Figure 32) includes all disclosure questions required for your practice states, including any state specific disclosure questions as well as a disclosure of ownership section. Please answer the questions accordingly.

Note: To include your disclosure of ownership answers in a PDF version of your data profile, you will need to download, print, sign and then upload the signed copy to CAQH ProView. This document will be available for download via the Documents screen.

**FIGURE 32**

HOME PROFILE DATA DOCUMENTS REVIEW ATTEST

Provider Status: Re-Attestation (11/13/2015) Profile Data: Complete Documents: Incomplete

Save

PERSONAL INFORMATION  
PROFESSIONAL IDS  
EDUCATION  
PROFESSIONAL TRAINING  
SPECIALTIES  
PRACTICE LOCATIONS  
HOSPITAL AFFILIATIONS  
CREDENTIALING CONTACTS  
PROFESSIONAL LIABILITY INSURANCE  
EMPLOYMENT INFORMATION  
PROFESSIONAL REFERENCES  
DISCLOSURE

CAQH DISCLOSURE OF OWNERSHIP

### DISCLOSURE

You are required to enter malpractice case history information if applicable. Click the "Add" button to enter a malpractice case history record.

#### Licensure

1. Has your license, registration or certification to practice in your profession ever been voluntarily or involuntarily relinquished, denied, suspended, revoked, restricted, or have you ever been subject to a fine, reprimand, consent order, probation or any conditions or limitations by any state or professional licensing, registration or certification board? \*  
 Yes  
 No
2. Has there been any challenge to your licensure, registration or certification? \*  
 Yes  
 No

## Authorize

The Authorize section (see Figure 33) allows you to indicate which healthcare organizations you would like to authorize release of your profile information.

**FIGURE 33**

**Affiliated Organizations Authorization**  
I hereby authorize the release of my full set of CAQH ProView self-reported information to:

- All healthcare organizations that indicate I am an affiliated provider or am in the process of becoming an affiliated provider
- Only the healthcare organizations that indicate I am an affiliated provider or am in the process of becoming an affiliated provider, and I specify below:

**Other Organizations Authorization**  
I hereby authorize the release of a more limited set of my CAQH ProView self-reported information to:

- All healthcare organizations that indicate I am not an affiliated provider
- Only the healthcare organizations that indicate I am not an affiliated provider, and I specify below:

Organization Name	Selection
No Organizations to display.	

Review the information provided on the screen, select the applicable authorization and agree to the authorization release accordingly.

- You have the ability to indicate a “global” authorization, which allows access to your data profile to all healthcare organizations that indicate to CAQH that you are an affiliated provider or am in the process of becoming an affiliated provider.
- You also have the ability to individually select organizations to allow access to your data profile by selecting “Only the healthcare organizations that indicate I am an affiliated provider or am in the process of becoming an affiliated provider, and I specify below”.
- In the “Other Organizations Authorization” section, you have the option to release a more limited set of your data profile to healthcare organizations that you are not affiliated with.
  - Organizations need data for providers who are not affiliated or participating in their network in order to pay out-of-network claims. For example, if a health plan would like to verify a non-participating provider’s address before they submit payment for the claim.
  - In the “Other Organization Authorization” section, you have the option to either grant global authorization to all health plans who indicate you are not affiliated or to select the individual plans who have indicated you are not affiliated. By selecting the latter option, you will be able to view which health plans have asked to view a limited set of your data and can grant access via line item authorization. **If preferred, you do not need to authorize any organizations that you are not affiliated with.**
- If you are interested in participating with additional health plans, you need to contact each health plan directly. Once you are added to the health plan’s CAQH provider roster, the health plan will be listed on this authorization screen.

## Update Authorization

You can change or update your authorization selection at any time. Simply log into CAQH ProView and select “Authorize” (see Figure 34) from the top right navigation drop-down menu to make your change. Click “Save” for your changes to be effective.

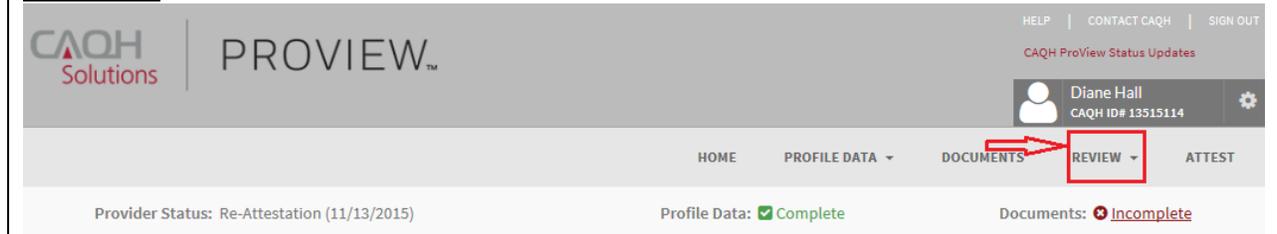
**FIGURE 34**

The screenshot displays the CAQH ProView user interface for a provider named Diane Hall (CAQH ID# 13515114). The top navigation bar includes links for HELP, CONTACT CAQH, and SIGN OUT. A user profile dropdown menu is open, showing options for Change Password, Authorize (highlighted), and Activity Log. The main content area shows the provider's status as 'Re-Attestation (11/13/2015)' and 'Profile Data: Complete'. A message center on the right indicates 'There are no messages to display'. Below this, there are three main sections: 'SUPPORTING DOCUMENTS' (with a 'Missing' status and an 'Upload document' button), 'ATTESTATION HISTORY' (listing three attestations for Diane Hall on 11/13/2015), and 'AVAILABLE IMPORTS' (listing three imports for Tina Dee on 10/27/2015). The primary practice location is listed as E-Commerce, Eastwood, CA 10027-1092, and the state is California.

## CHAPTER 5: Review Your Data

Once you have completed your data profile, select “Review” from the top navigation bar (see Figure 35).

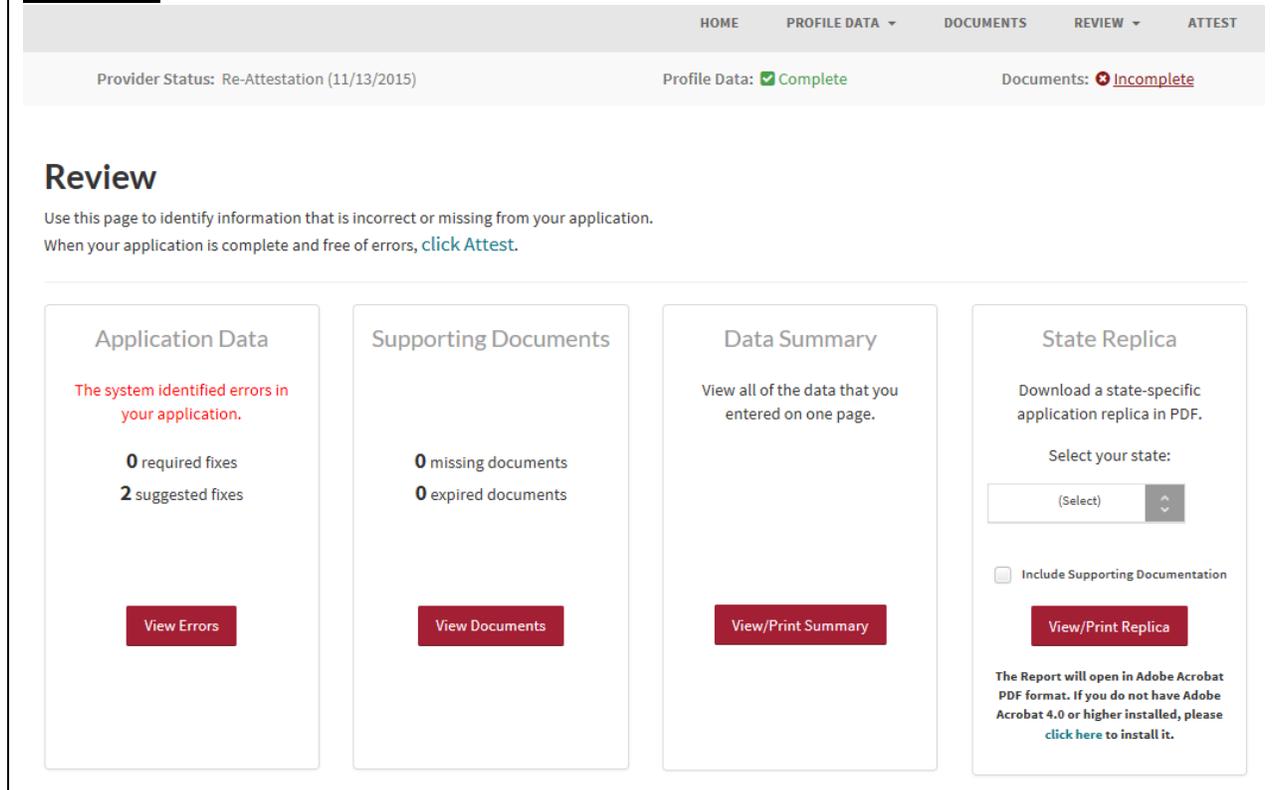
**FIGURE 35**



On the Review screen (see Figure 36), there are four areas you can access to review your data.

1. **View Errors** – Click here to address any errors you need to fix within your data profile.
2. **View Documents** – Click here to see all supporting documents uploaded into your data profile, and any missing documents needed to complete your profile.
3. **View/Print Summary** – Click here to view a PDF summary of your data profile.
4. **View/Print Replica** – Click here to generate a replica of any state specific application applicable to your practice state(s).

**FIGURE 36**

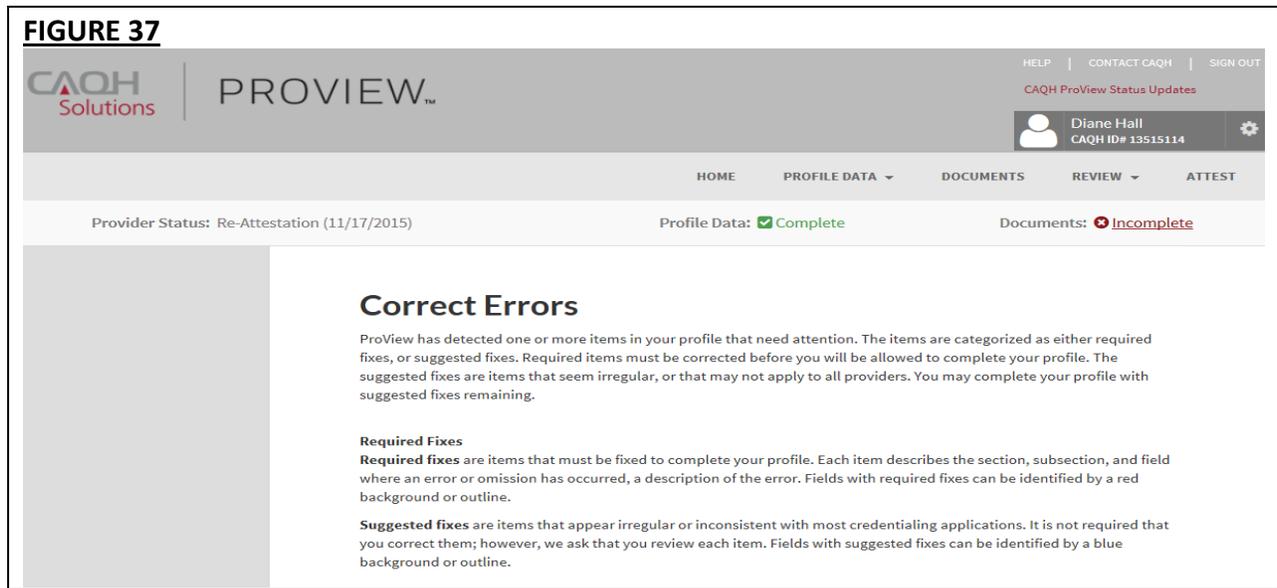


**Correct Errors**

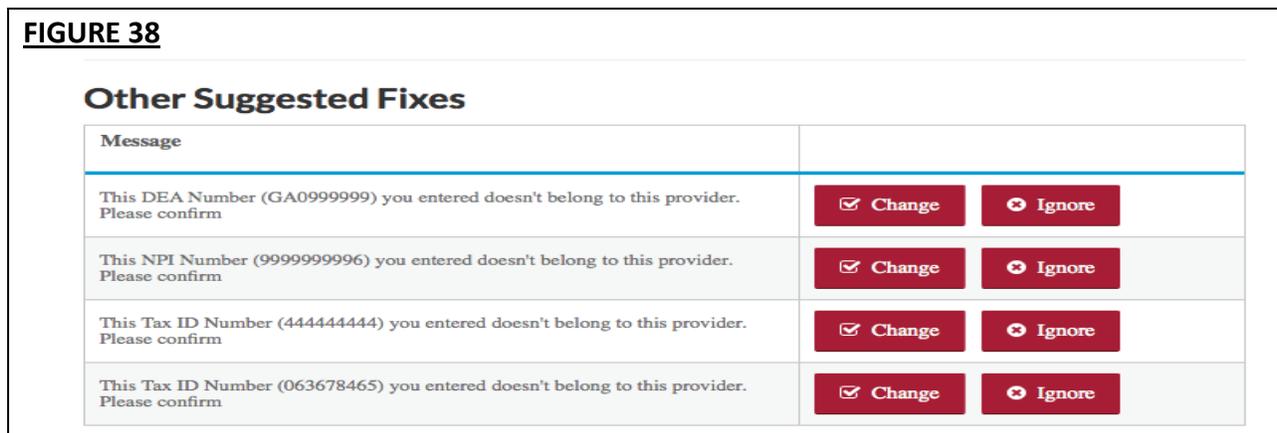
The “Correct Errors” screen (see Figure 37) will highlight any required or suggested fixes you may need to make to your data profile.

**Tips:**

- When you click on a required or suggested fix, the system will direct you back to the applicable section to make the required changes.
- It is recommend that you also correct any suggested fixes to ensure your data profile is as complete and as accurate as possible for health plans accessing your data.



CAQH ProView validates that the identification numbers you entered for DEA, NPI and TIN match the provider name associated with that identification number. If applicable, you will be notified in the Suggested Fix section that the number you entered does not belong to your provider name (See Figure 38). You can choose to click on “Change” to correct this error or “Ignore” to keep the data you entered the same. This step is optional, but CAQH strongly suggests you review any suggested fixes to ensure your data profile is accurate.



## View Documents

This section (see Figure 39) shows the information you uploaded in the portal and any missing documents needed to finalize your application. This screen can also be accessed by clicking on “Documents” from the top navigation bar. Refer to *Chapter 6 – Uploading Supporting Documentation* from more information.

**FIGURE 39**

Provider Status: Re-Attestation (10/14/2015)      Profile Data: ✔ Complete      Documents: ✔ Complete

### DOCUMENTS

The documents that support your CAQH ProView profile are listed below

- Required documents are indicated with a red \*.
- Highlighted rows require your attention.
- Please upload one document into each slot. Make sure that the document you upload corresponds to the document type listed in the Document Name column.

For more information click the [?](#)

\* Required

Document Name	State	Uploaded Date	Expiration Date	Status	Document Actions
* Application Release		06/10/2015		Approved	Delete
Certificates of Completion (Med School, Internship etc.)		09/13/2012		Approved	Delete   Replace
* DEA		11/03/2014		Approved	Delete   Replace
* Professional Liability Insurance		02/19/2015		Approved	Delete   Replace
State License		05/21/2015	03/31/2016	Approved	Delete   Replace
State Release		02/19/2015		Approved	Delete   Replace
W-9		05/19/2012		Approved	Delete   Replace

Select document type       Upload any document you want to add to your list. This is an optional section.      Upload

## View/Print Summary

Once you have reviewed your documents, click on “View/Print Summary” from the “Review” screen (see Figure 40) to view a PDF summary of your application and validate that the information entered is correct. Double-click the image to view your application and to enable the “Save” and “Print” features.

## View/Print Replica

You can click on “View/Print Replica” from the “Review Screen” (see Figure 40) to generate the CAQH standard form, or if applicable a state specific form, of your information. Select a state for which you want the report generated, select the “Include Supporting Documentation” checkbox if applicable, and double-click the image to view your state replica. You have the option to print your application if desired. **Note:** the report will open in a PDF format. If you do not have Adobe Acrobat 4.0 or higher installed, select the link at the bottom of the section to install it.

**FIGURE 40**

The screenshot displays the 'Review' page in the CAQH ProView system. At the top, a navigation bar includes 'HOME', 'PROFILE DATA', 'DOCUMENTS', 'REVIEW', and 'ATTEST'. Below this, a status bar shows 'Provider Status: Re-Attestation (11/13/2015)', 'Profile Data: Complete', and 'Documents: Incomplete'. The main heading is 'Review', followed by instructions to identify incorrect or missing information and to click 'Attest' when ready. The page is divided into four reviewable sections: 'Application Data' (0 required fixes, 2 suggested fixes), 'Supporting Documents' (0 missing, 0 expired), 'Data Summary' (view all data), and 'State Replica' (download PDF, select state, include supporting documentation). Each section has a corresponding 'View Errors', 'View Documents', 'View/Print Summary', or 'View/Print Replica' button.

**Application Data**  
The system identified errors in your application.  
0 required fixes  
2 suggested fixes  
[View Errors](#)

**Supporting Documents**  
0 missing documents  
0 expired documents  
[View Documents](#)

**Data Summary**  
View all of the data that you entered on one page.  
[View/Print Summary](#)

**State Replica**  
Download a state-specific application replica in PDF.  
Select your state:  
(Select) [dropdown arrow]  
 Include Supporting Documentation  
[View/Print Replica](#)  
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.

## CHAPTER 6: Uploading Supporting Documentation

### Uploading Documents

To complete your data profile, you will need to upload into CAQH ProView any applicable supporting documents. CAQH ProView does not support faxing of supporting documents.

Here are the steps on uploading supporting documents on the Documents section:

1. Scan and save your document (if needed). Please make sure the document is in PDF, TIF, JPG or JPEG format for it to be accepted into the system.
2. Log in to CAQH ProView using your username and password.
3. Click the Documents link on the top navigation menu to go the Documents section. Any missing documents will be shown on this page.
4. Be sure to select the appropriate document name or document type when uploading documents. Each document must to be uploaded separately.

**FIGURE 41**

The screenshot shows the 'DOCUMENTS' section of the CAQH ProView interface. At the top, it displays 'Provider Status: Re-Attestation (10/14/2015)', 'Profile Data: Complete', and 'Documents: Complete'. Below this, the 'DOCUMENTS' heading is followed by instructions: 'The documents that support your CAQH ProView profile are listed below', '- Required documents are indicated with a red \*', '- Highlighted rows require your attention.', and '- Please upload one document into each slot. Make sure that the document you upload corresponds to the document type listed in the Document Name column.' There is also a link for more information and a note that '\*' indicates required documents.

The 'LIST OF DOCUMENTS' table is as follows:

Document Name	State	Uploaded Date	Expiration Date	Status	Document Actions
* Application Release		06/10/2015		Approved	Delete
Certificates of Completion (Med School, Internship etc.)		09/13/2012		Approved	Delete   Replace
* DEA		11/03/2014		Approved	Delete   Replace
* Professional Liability Insurance		02/19/2015		Approved	Delete   Replace
State License		05/21/2015	03/31/2016	Approved	Delete   Replace
State Release		02/19/2015		Approved	Delete   Replace
W-9		05/19/2012		Approved	Delete   Replace

Below the table is an upload form with a dropdown menu labeled 'Select document type', a text input field, and an 'Upload' button. A note states: 'Upload any document you want to add to your list. This is an optional section.'

5. Click "Upload". Click "Browse" to select a file for upload. Then, click "Upload".
6. Your uploaded documents can be viewed on the "List of Documents" found on the upper portion of the same page.

7. Recently uploaded documents will show as “Received.” Once this document is reviewed by CAQH and accepted, the status will change to “Approved”. Until that step occurs this document is not viewable.
8. You will have to click the document name link to be able to view the document. You may also “Replace” an existing document, or to “Delete” a document if necessary.

**FIGURE 42**

LIST OF DOCUMENTS					
Document Name	State	Uploaded Date	Expiration Date	Status	Document Actions
* <a href="#">Application Release</a>		06/10/2015		Approved	<a href="#">Delete</a>
<a href="#">Certificates of Completion (Med School, Internship etc.)</a>		09/13/2012		Approved	<a href="#">Delete</a>   <a href="#">Replace</a>
* <a href="#">DEA</a>		11/03/2014		Approved	<a href="#">Delete</a>   <a href="#">Replace</a>
* <a href="#">Professional Liability Insurance</a>		02/19/2015		Approved	<a href="#">Delete</a>   <a href="#">Replace</a>
<a href="#">State License</a>		05/21/2015	03/31/2016	Approved	<a href="#">Delete</a>   <a href="#">Replace</a>
<a href="#">State Release</a>		02/19/2015		Approved	<a href="#">Delete</a>   <a href="#">Replace</a>
<a href="#">W-9</a>		05/19/2012		Approved	<a href="#">Delete</a>   <a href="#">Replace</a>
<input type="text" value="Select document type"/>				Upload any document you want to add to your list. This is an optional section.	
				<a href="#">Upload</a>	

Here are examples of supporting documents you may need to submit for your application:

- Drug Enforcement Administration (DEA) Certificate
- Controlled and Dangerous Substances (CDS) Certificate
- State medical license(s)
- Malpractice insurance policy face sheet
- A signed Authorization, Attestation, and Release form.

**Authorization, Attestation, and Release Form**

When you initially complete your date profile and attestation, a signed release form is required for your data profile to be complete.

To submit a release form, you need to perform the following steps:

1. The AAR forms applicable to the states where you practice are displayed on the Documents section and will appear as missing if you have not uploaded one for each of your practice states.
2. Click on the “Download” link under “Document Actions” column to download the blank AAR form (see Figure 43).
3. Sign the form and indicate the date it was signed.
4. Upload the form to CAQH ProView.

**FIGURE 43**

LIST OF DOCUMENTS					
Document Name	State	Uploaded Date	Expiration Date	Status	Document Actions
* DEA			08/31/2016	Missing	Upload
* Disclosure	Washington			Missing	Download   Upload
* Professional Liability Insurance				Missing	Upload
* State Authorization	Washington			Missing	Download   Upload
* State License			01/01/2020	Missing	Upload
* State Release	Washington			Missing	Download   Upload
<input type="text" value="Select document type"/> <input type="checkbox"/>				Upload any document you want to add to your list. This is an optional section.	
				Upload	

**Failed Documents**

CAQH will review all submitted supporting documents for accuracy within approximately 48 hours upon submission. A document may fail for the following reasons:

1. Illegible – the document is not clear enough to be read.
2. Not compliant – the document may be missing a date, may be missing a signature, or more than one document may have been included within the same file.
3. Ineligible – the document submitted may have an expired date or does not correspond to the document type selected. For example, if you upload a license to a “Professional Liability Insurance” document type, the document will fail. You will need to upload the license using the “State License” document type.

**Note:** Signed supporting documents must be submitted within 120 days of the signature date. If a supporting document’s signature date is greater than 120 days, it will not be accepted by CAQH ProView.

**North Carolina Providers**

CAQH ProView requires different North Carolina State Release forms for each authorized Participating Organization.

- o If you have authorized individual organizations, you are required to upload a North Carolina State Release form for every health organization that you have authorized.
- o If you have selected global authorization, which authorizes any organization who adds you to their roster, a North Carolina State Release form is required for every health organization that has added you to their roster.

**FIGURE 44**

### Healthcare Organization Authorization

**Overview**

Healthcare organizations using CAQH ProView request access to your self-reported information to support their internal processes, such as credentialing, contracting, managing provider directories and claims processing. By your selections below, you are granting these organizations access to your self-reported information.

At this time, the following organizations have already requested authorization to view your CAQH ProView self-reported information:

Organization Name
ProNet/Aetna, Aetna
Managed Health Network Inc
Blue Cross Blue Shield of North Carolina

- If you are new to CAQH ProView and practice in North Carolina, you will be required to upload a separate, specific State Release form for each organization you have authorized. You must download the specific form, sign it, and upload it in CAQH ProView (see Figure 45).
- If you have initially attested and have already uploaded at least one State Release form, your existing releases will remain in the documents section. However, you will see new slots for “missing” State Release forms. There will be one missing slot for each organization you have authorized.
- Click the ‘Download’ button corresponding to each of the missing State Release forms. The number of North Carolina State Release forms available for download depends on the number of POs who have added you to their roster or the POs you have individually authorized. These State Release forms will be pre-populated with the PO name.
- Sign the State Release forms, indicate the date the forms were signed, and upload in the CAQH ProView Documents section by clicking the ‘Upload’ button corresponding to each of the missing documents.
- The ‘Missing’ status will disappear after you have uploaded these documents.

**FIGURE 45**

### DOCUMENTS

The documents that support your CAQH ProView profile are listed below

- Required documents are indicated with a red \*.
- Highlighted rows require your attention.
- Please upload one document into each slot. Make sure that the document you upload corresponds to the document type listed in the Document Name column.

For more information click the ?

\* Required

**LIST OF DOCUMENTS**

Document Name	State	Uploaded Date	Expiration Date	Status	Document Actions
* State Release - Blue Cross Blue Shield of North Carolina				Missing	Download   Upload
State Release - Managed Health Network Inc				Missing	Download   Upload
State Release - ProNet/Aetna, Aetna				Missing	Download   Upload
Professional Liability Insurance		06/19/2014		Approved	Delete   Replace
Professional Liability Insurance		09/29/2015	06/30/2016	Approved	Delete   Replace

- Documents that require “Download” will have a status of “Missing” until a document is uploaded in that slot.

- State Release forms will be pre-populated with the names of authorized health organizations and will be available for download from the Documents section (see Figure 46).

**FIGURE 46**

**Attestation Statement**  
**(IMPORTANT: Submit Original Only)**  
**This application is to be signed by each individual provider submitting an application.**

*Fill in each space with the name of the Health Plan for which you are applying.*  
**No Stamps or Copies Please**

All information submitted by me in this application, as well as any attachments or supplemental information, is true, current, and complete to my best knowledge and belief as of the date of signature below. I fully understand that any significant misstatement in this application may constitute cause for denial of my application or termination of a resulting participation agreement.

By application for membership in  , I signify my willingness to appear for interview in regard to my application. I authorize  to consult with administrators and members of the medical staffs of hospitals or institutions with which I have been associated and with others, including past and present malpractice carriers, who may have information bearing on the questions in this application. Upon request, I will obtain and provide to  materials pertaining to my qualifications and competence, including, materials relating to complaints filed, any disciplinary action, suspension, or action to curtail my medical- surgical privileges. I further consent to the inspection by representatives of  of all documents that may be material to an evaluation of my professional qualifications and competence.

- If the Document Type is CAQH AAR, the page will not show the actions links for Replace or Download for that document if the status is Approved.
- You are required to upload ALL State Release forms even though the portal shows the remaining releases as optional (only one State Release form is marked with a red asterisk).

## CHAPTER 7: Importing Data from the Practice Manager Module

If your practice has an office manager or clinic administrator who assists with gathering information for credentialing or other administrative purposes for multiple providers, the [CAQH ProView Practice Manager Module](#) may facilitate your data entry process. Data that is the same for multiple providers (e.g., clinic name, address and phone number) can be entered once by a practice manager, rather than having to be entered repeatedly for each individual provider.

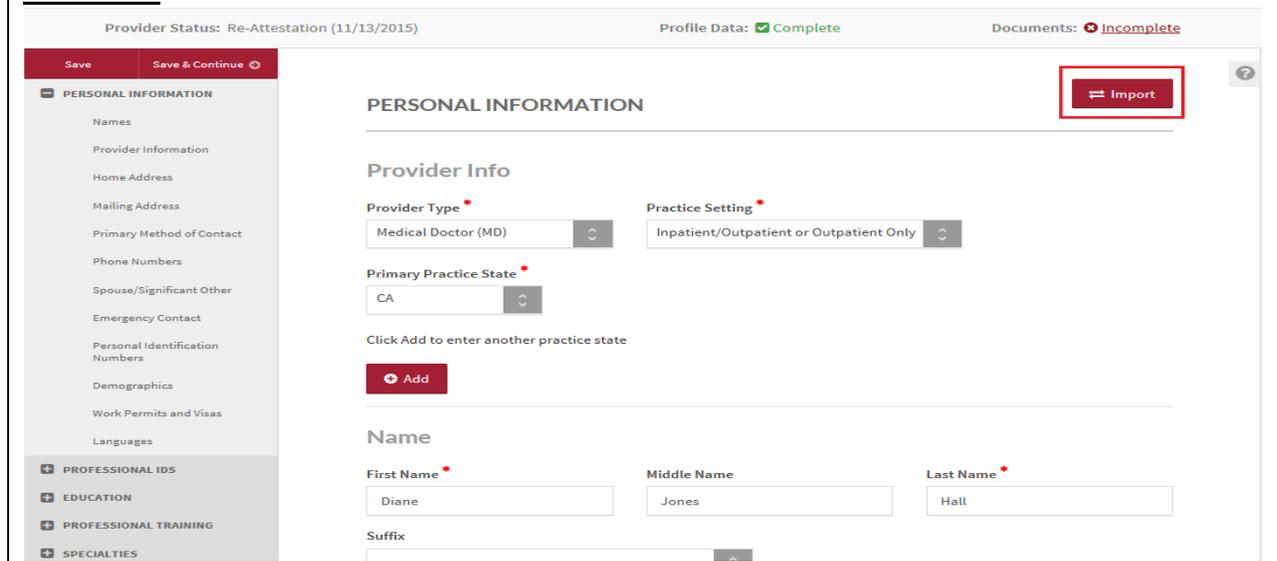
Once a practice manager enters this information for you into the CAQH ProView Practice Manager Module, the practice manager will “export” the data, i.e. transfer the data, to your data profile. You will have the option to view this data and choose to import the data if you desire.

The sections that a practice manager can export to you include:

1. Personal information
2. Professional IDs
3. Education
4. Professional training
5. Specialty
6. Credentialing contact
7. Practice location
8. Hospital affiliations
9. Professional liability insurance

At the top of each of these sections, you will see an “Import” button (see Figure 47 below). If there is data available to you to import into your data profile, this “Import” button will be active and available for you to select to review the data that was entered for you by a practice manager. You can either choose to import the data as a new set of information or replace an existing set of data within the applicable section.

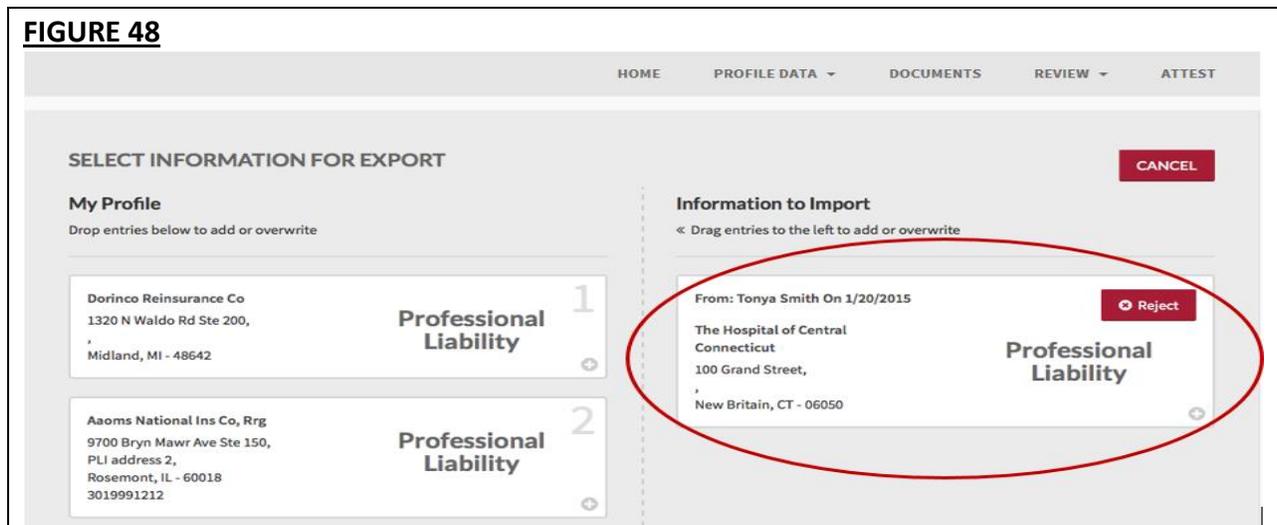
**FIGURE 47**



**Drag & Drop Functionality**

When you click on “Import”, the “Select Information to Import” screen will present. You will use a “drag & drop” functionality to import your data. Drag and drop is a pointing device gesture in which you can select the data to be imported by "grabbing" it and dragging it into your data profile. Here is an example of professional liability information entered by a practice manager that is available for import (see Figure 48).

**FIGURE 48**



To add information to your data profile, click on the box containing the information and drag the box from the right to the left side of the screen.

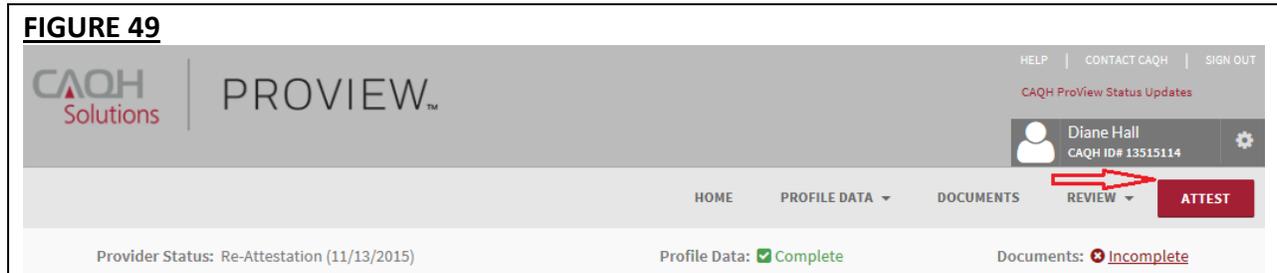
- By hovering the box over information you already have in your data profile on the right side, you can overwrite and replace the information. The system will confirm that this is what you would like to do.
- You can click on “Reject” if you do not wish to import the data into your data profile.

## CHAPTER 8: Completing Your Attestation

### Attesting

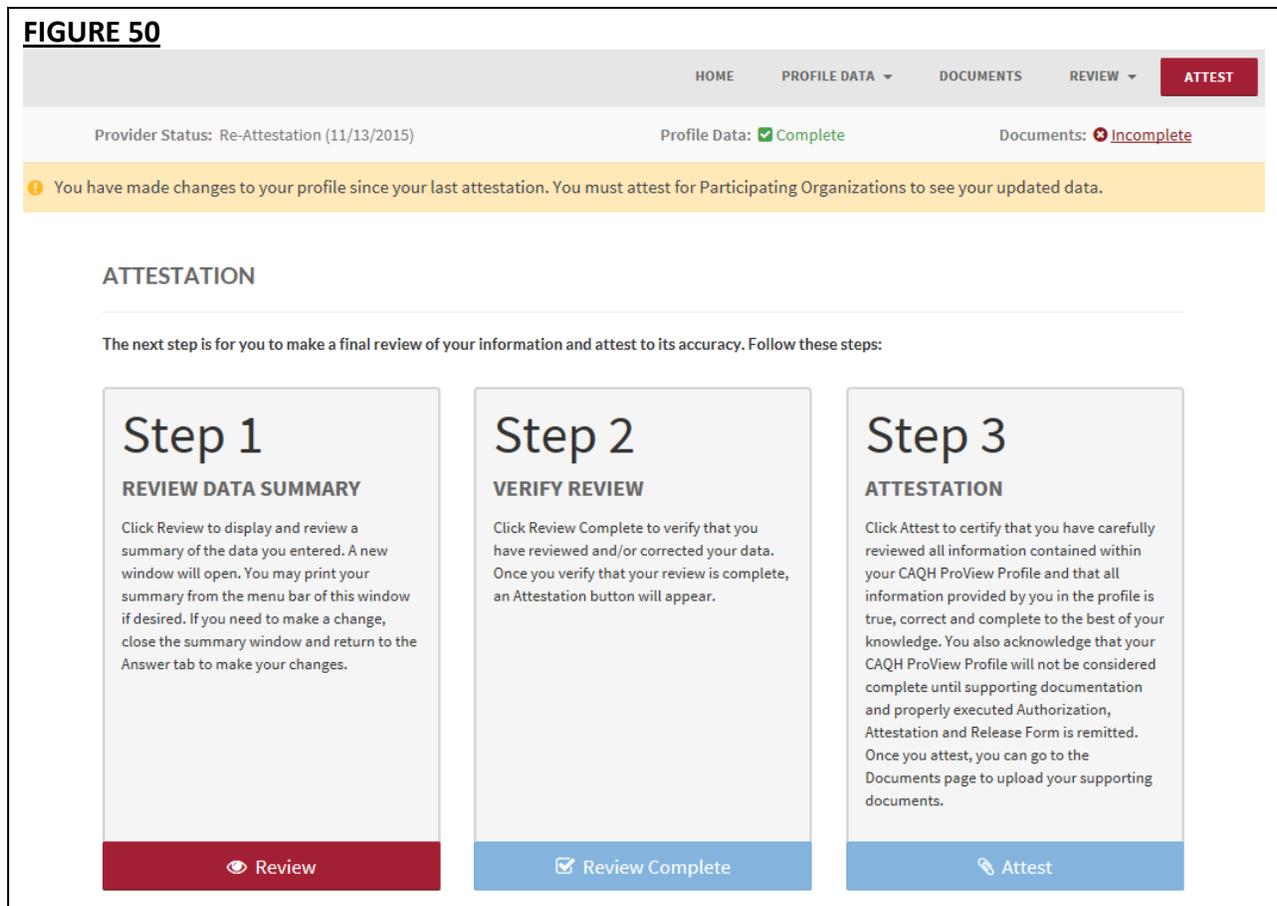
Submitting your attestation is required to complete your data profile. This step allows you to make a final review of your information and to attest to its accuracy. Click on “Attest” from the top navigation bar to begin the process (see Figure 49).

**FIGURE 49**



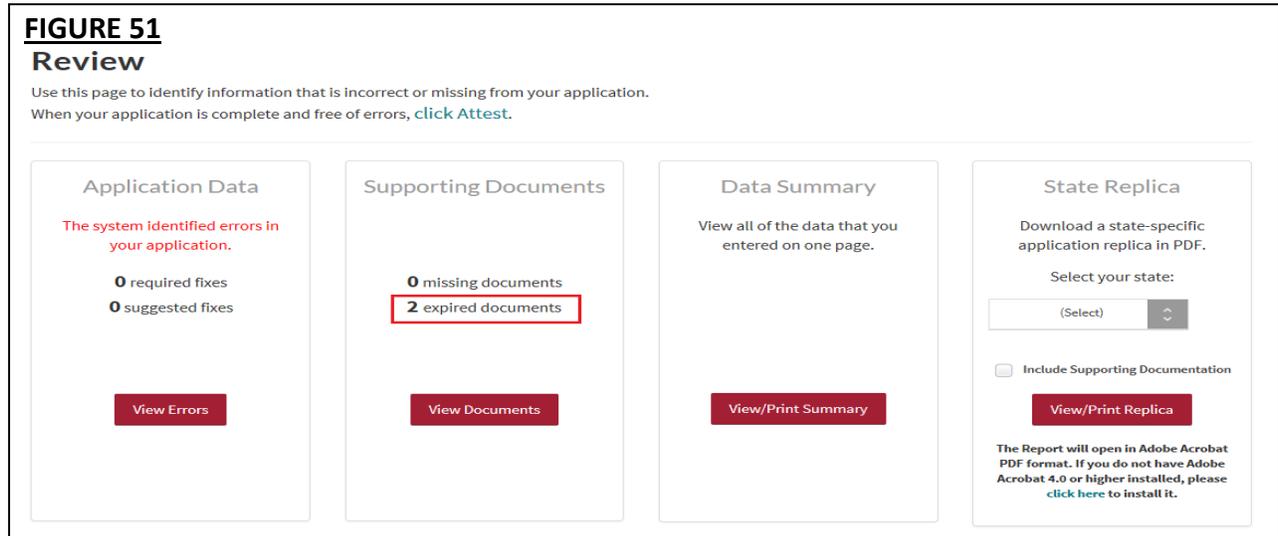
1. The following screen will display (see Figure 50). Select “Review” to display a summary of the data you entered.

**FIGURE 50**

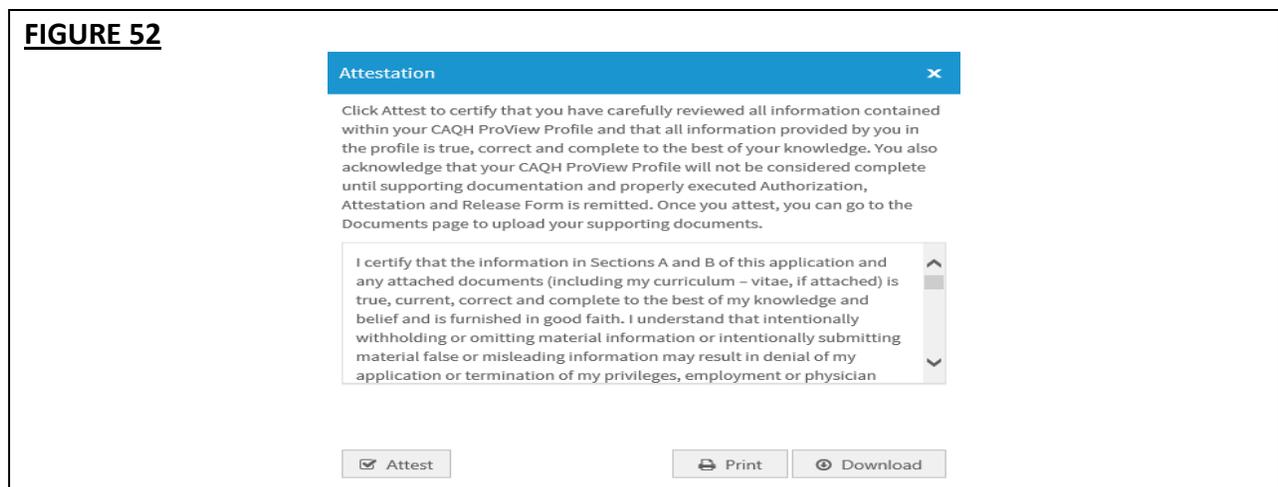


On the Review screen (see Figure 51), you can view if any required fixes or supporting documents need attention.

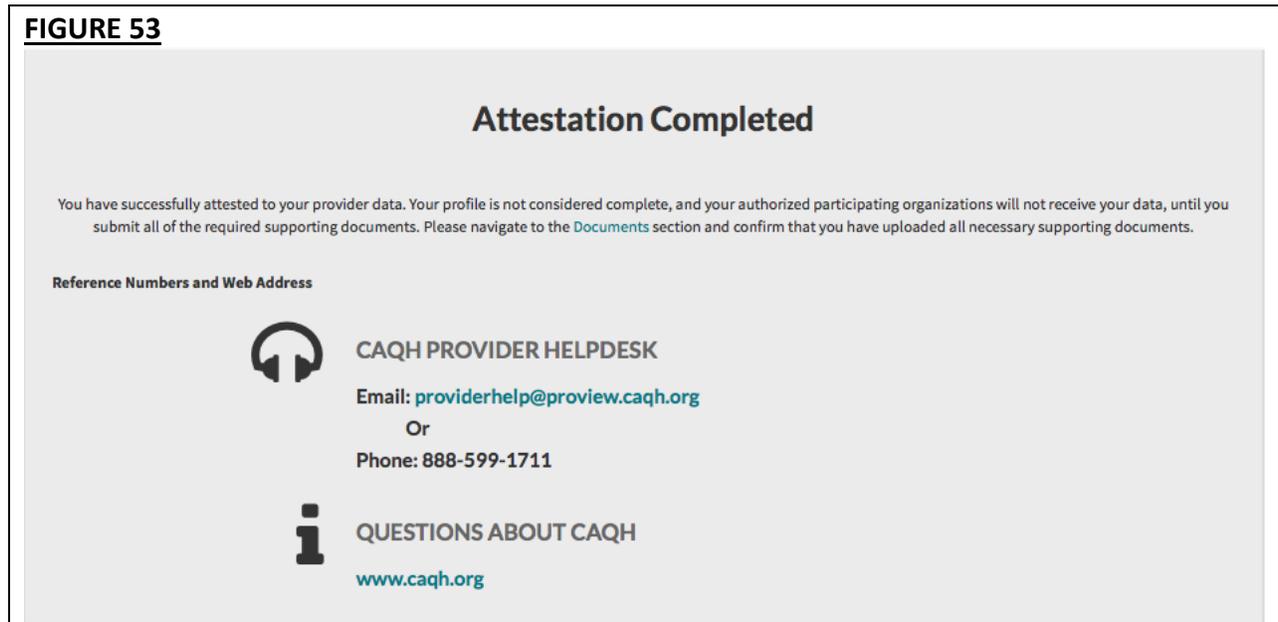
**Note:** If the PLI and/or State License have expired, you will be prompted to update the expiration date and other relevant details on your profile before you can attest. Once these steps are complete you will be able to attest.



2. Select “Review Complete” to verify that you have reviewed your application information.
3. Select “Attest” to certify that you have carefully reviewed all information contained within your CAQH Application and that all information provided by you in the application is true, correct and complete to the best of your knowledge. By doing so, you also acknowledge that your CAQH Application will not be considered complete until supporting documentation and a signed Authorization, Attestation and Release Form are submitted.
4. Once you select “Attest”, you will need to select “Attest” on the Attest Terms pop-up window for the attestation to be processed (see Figure 52).



The “Attestation Completed” screen will then display (see Figure 53).

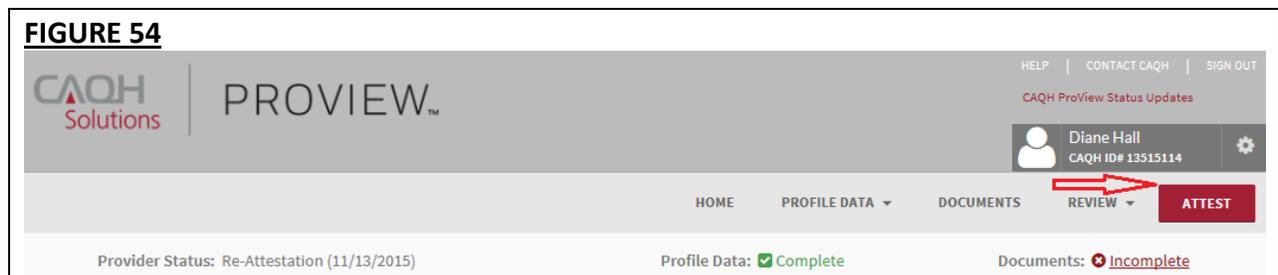


A confirmation will be sent via email to you within approximately 48 hours after all documents have been received and approved.

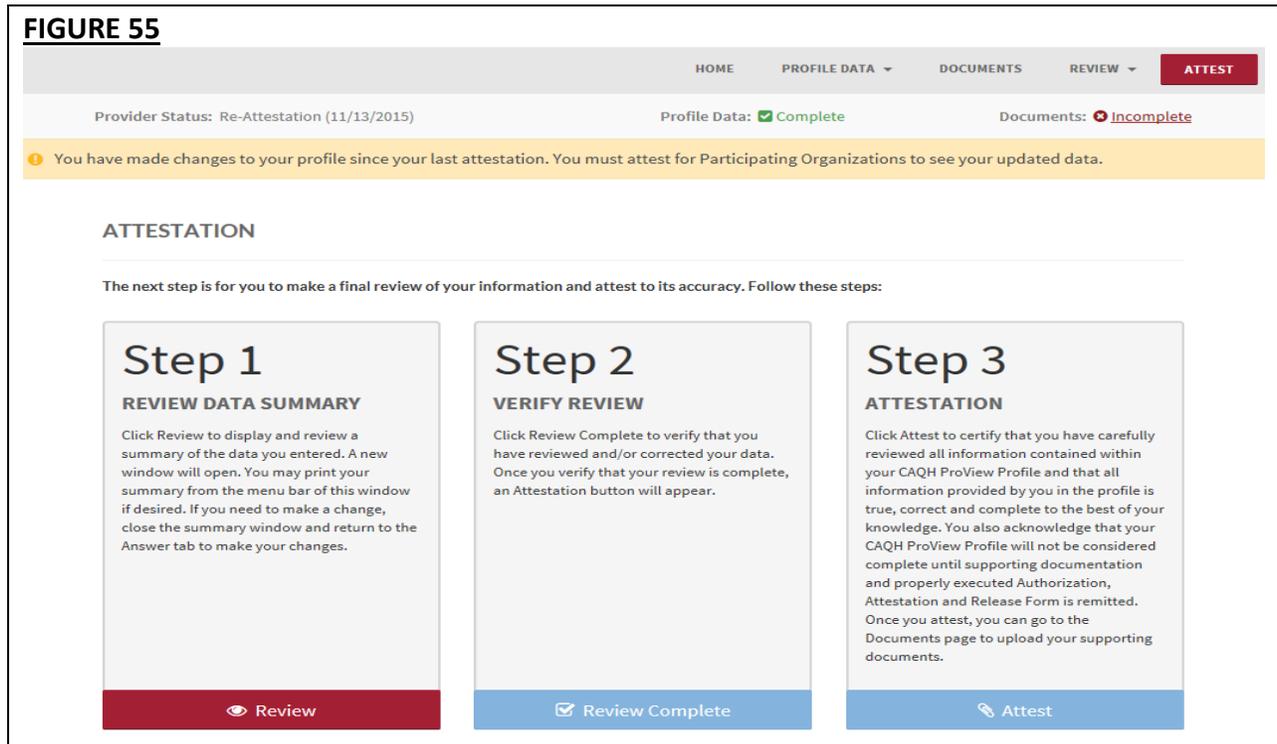
### **Re-Attesting**

Re-attestation is required every 120 days (180 days for Illinois providers) in CAQH ProView to ensure your data is maintained and accurate for health plan use. To complete your re-attestation follow these steps:

1. If you have updates to make to your data profile, click on “Profile Data” from the top navigation bar and then the applicable section to update any necessary information in your data profile.
2. If you need to upload any updated supporting documentation, click on “Documents” from the top navigation bar to upload your documentation.
3. Once you have updated any applicable information or supporting documentation, click on “Attest” from the top navigation bar to begin the re-attestation process (see Figure 54).

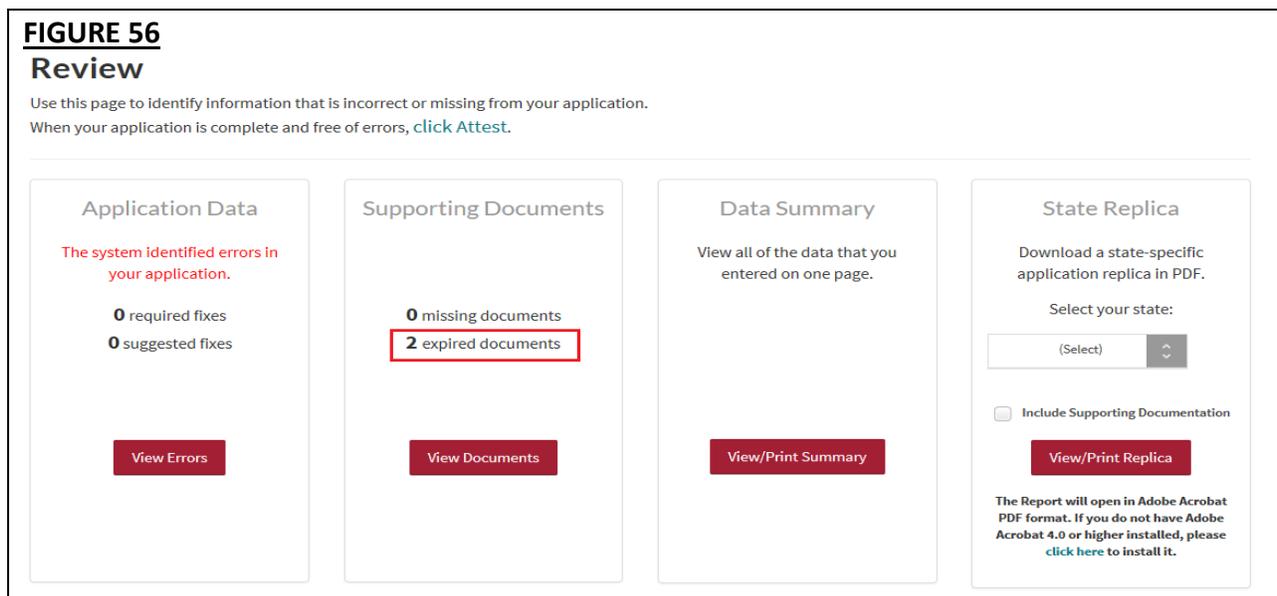


4. Select “Review” to display a summary of the data you entered (see Figure 55).



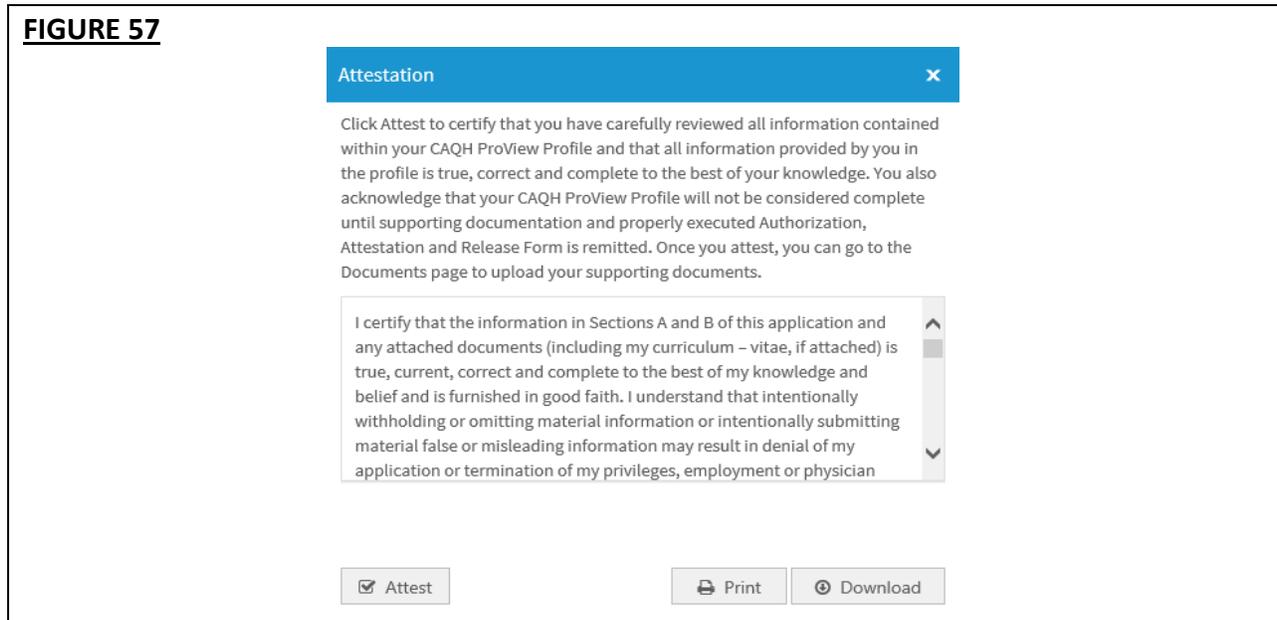
On the Review screen (see Figure 56), you can view if any required fixes or supporting documents need attention.

**Note:** If the PLI and/or State License have expired, you will be prompted to update the expiration date and other relevant details on your profile before you can attest. Once these steps are complete you will be able to attest.



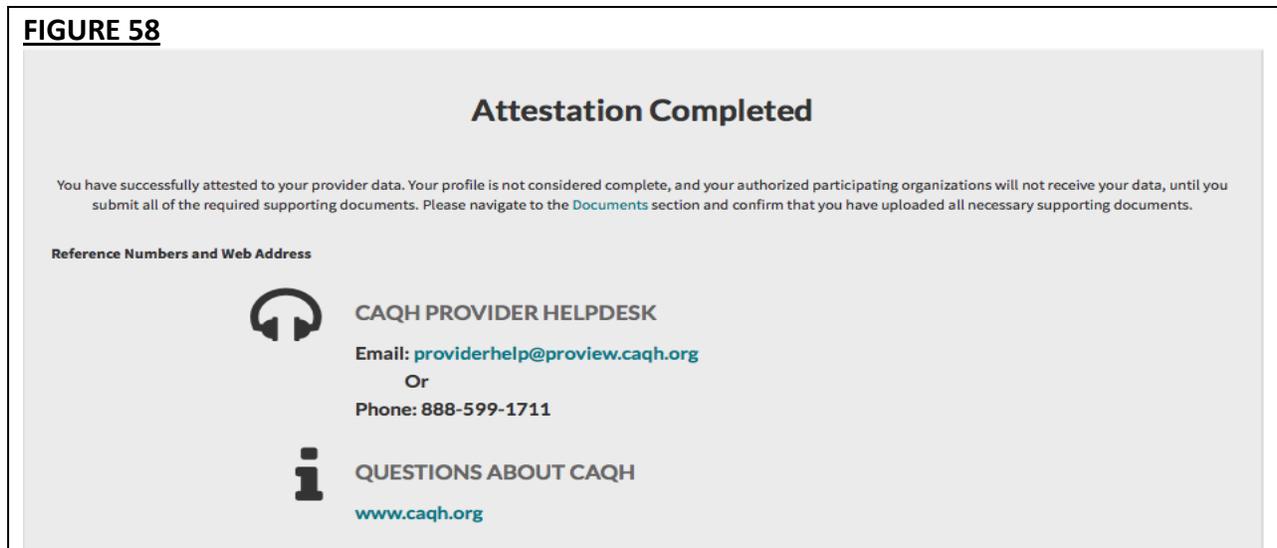
5. Select “Review Complete” once you verify that you have reviewed your application information.
6. Select “Attest” to certify that you have carefully reviewed all information contained within your CAQH Application and that all information provided by you in the application is true, correct and complete to the best of your knowledge.
7. Once you select “Attest”, you will need to select “Attest” on the Attest Terms pop-up window for the attestation to be processed (see Figure 57).

**FIGURE 57**



The “Attestation Completed” screen will then display (see Figure 58).

**FIGURE 58**



A confirmation will be sent via email to you within approximately 48 hours after all documents have been received and approved.

### **Re-attestation Reminder Emails**

Re-attestation is required every 120 days (180 days for Illinois providers) in CAQH ProView to ensure your data is maintained and accurate for health plan use. CAQH Proview will email you to remind you when you are due for re-attestation. System automated generated emails will be sent to your 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.

Verify your primary method of contact email on the Personal Information section. It is important to keep this email accurate and current so that you receive these important messages. You also can enter two additional email addresses in this same section (PMOC CC1 and PMOC CC2) that will be copied on the system generated messages.

<b>APPENDIX</b>
-----------------

**Provider Status**

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

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

**CAQH Provider Support Center Information**

**CAQH ProView Support Center:**

Phone: 888-599-1771

Email\*: [providerhelp@proview.caqh.org](mailto:providerhelp@proview.caqh.org)

**Help Desk Hours:**

Monday – Thursday: 7 AM – 9 PM (EST)

Friday: 7 AM – 7 PM (EST)

\*When emailing the CAQH Provider Support Center include your full name and, if available, your CAQH Provider ID.

**Revision Log**

<u>Version</u>	<u>Updates</u>
Version 1	Original
Version 1.1	<ul style="list-style-type: none"> <li>• Updated <i>System Security</i> section.</li> <li>• Updated <i>Chapter 5 – Review Your Data</i> to reflect current print screens of Review tab</li> <li>• Updated <i>Chapter 8 – Completing Your Attestation</i> to reflect current print screens of Attest tab</li> <li>• Updated <i>Appendix – Provider Status</i> table to reflect accurate names for provider status, specifically “Application Problem”, “Application Data Submitted”, and “Initial Application Complete”.</li> </ul>
Version 2	<ul style="list-style-type: none"> <li>• Updated <i>System Security</i> section</li> <li>• Updated <i>Chapter 6 – Uploading Supporting Documentation</i>. Added information regarding failed supporting documents.</li> <li>• Updated <i>Chapter 8 – Completing Your Attestation</i>. Added information regarding when re-attestation reminder emails are distributed.</li> <li>• Updated sections within <i>Chapter 4 – Completing Your Profile Information</i>. <ul style="list-style-type: none"> <li>○ Clarified that the Disclosure of Ownership questions must be downloaded, signed, and uploaded in order for organizations to access information in replica applications.</li> <li>○ Clarified that primary email and PMOC CC1 and PMOC CC2 are the emails that are sent the automated system generated emails.</li> <li>○ Added additional information regarding authorizing organizations with which a provider does not participate.</li> </ul> </li> <li>• Added reference to “Save” button - users can click on the “Save” button to save their information entered on a screen.</li> </ul>
Version 3	<ul style="list-style-type: none"> <li>• Updated screenshots for all pages/sections to show enhancements on CAQH ProView</li> <li>• Added details on uploading supporting documents</li> <li>• Added details on uploading North Carolina State Release forms</li> <li>• Added some screenshots on the Documents section</li> <li>• Added a section for the Progress Bar</li> <li>• Updated the names of some of the buttons and links</li> </ul>