



PROVIEW[®]

CAQH ProView Enhanced Practice Manager Module

User Guide

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CHAPTER 1: Introduction

The centralized practice location library in the new enhanced practice manager module allows practice managers to manage key practice location information from a single place within ProView.

Centralizing changes to practice location information that is applicable to all providers reduces the time it takes to keep location information up to date, since staff no longer must log in individually to each provider's profile to change the same information. Centralizing data updates means there are fewer opportunities for errors, so health plans receive better directory data, and plan members can access the care they need more easily.

Using the centralized practice location library also reduces the administrative burden on providers by decreasing the amount of information they need to maintain in the provider profile in ProView. Once a provider gives the practice manager permission to manage their location information, changes that the practice manager makes to location information automatically appears in the provider's ProView profile. Practice managers can rest assured that health plans will receive their provider practice location updates automatically, without the provider needing to attest to it.

In addition, the centralized practice location library increases data security and accountability. Because ProView keeps track of affiliation requests and data updates, directors of provider data management have clear insight into who made changes to the data and when.

CHAPTER 2: Registration

Accounts will be created for group users by CAQH. Groups will complete the onboarding form and activation emails will be sent to the individuals for which accounts were requested to complete the registration process.

CHAPTER 3: Logging In

Users will be able to log in to the enhanced practice manager module through the existing practice manager module login screen: <https://proview.caqh.org/pm>

Welcome to the CAQH ProView application LOG IN

CAQH Solutions | **PROVIEW**

CAQH ProView® New Enhanced Practice Manager Module(EPM)

Welcome to CAQH ProView.

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

CAQH ProView has an intuitive, profile-based design and upload functionality that helps simplify data entry and maintenance. The Practice Manager Module is designed for office managers, allowing for information to be entered at one time for multiple providers. There is no need to fill out redundant information for each healthcare provider practicing in your office.

Help reduce inquiries for administrative information, and save even more time by helping your providers complete their profile information. Sign in on the right or click to register and create a new practice manager account.

CAQH ProView Reference Material

- CAQH ProView Dentist Practice Manager User Guide
- CAQH ProView Practice Manager User Guide
- CAQH ProView Bulk Upload Submission Instructions v1.6
- Bulk Upload Template
- CAQH Solutions Training YouTube Site

SIGN IN

Username

[Forgot Username](#)

Password

Password is required

[Forgot Password](#)

Remember me

Sign In

FIRST TIME HERE?

1. **Dentists: Sign in or register for the first time at the American Dental Association's portal. [Register on ADA](#)**
2. **If you received a welcome email, use the link in your email to begin the sign in process.**
3. **If you are new to CAQH ProView, [register now](#).**

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

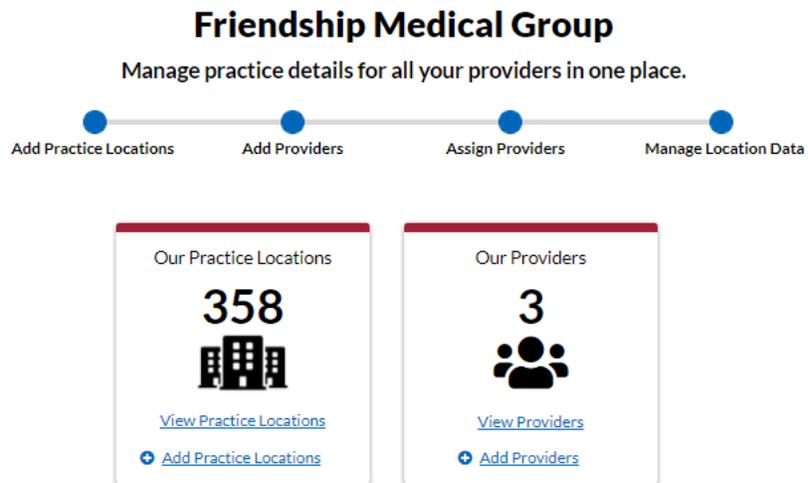
TERMS OF SERVICE
PRIVACY

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CHAPTER 4: Home Page

The CAQH ProView enhanced practice manager module home page will be displayed after a successful login.

The home page contains quick links to view and add practice locations and providers. It also shows the number of practice locations and providers that have been added to the group.



CHAPTER 5: Add Group Profile

Group Profile

Hover your mouse over Our Team and click Group Profile to complete your group profile. The information on this page will be shown to providers when you send affiliation requests and will be pulled into practice location records.

Group users who have been assigned the **Practice Administrator** role will be able to manage the group profile data.

Users who have been assigned the **Directory User** role will have a read-only view of the Group Profile.

Friendship Medical Group

Last Updated by Alexis Comrack on 15/10/20 at 6:10 PM

* Required fields are indicated with a red asterisk. All other fields are optional.

Group Details

This information will be shown to providers when you send affiliation requests, practice locations, and other group-level details.

* Legal Business Name (as it appears on the W-9)

Friendship Medical Group 

* Group Primary Contact

Edward Nygma

* Group Contact Email

Ednygma@wayne.com

Group Contact Title

* Group Corporate Address

14th ST

I have a Building, Suite or Office to add

* City

Gotham

* State

GA 

* Zip Code

12312

The following fields in the Group Profile are marked with a red asterisk and are therefore required.

- Legal Business Name (as it appears on the W-9)
 - This field will be pre-filled with the name that you indicated on your onboarding form. It can be edited.
- Group Primary Contact
 - In this field, put the first and last name of the person that a provider should contact if there are any questions about the affiliation request.
- Group Contact Email
 - In this field, put the email address of the person that you indicated as the Primary Contact.
- Group Corporate Address (Address, City, State, Zip Code)
 - Enter the address that a provider would recognize as the Group’s corporate address.
- Tax ID Number
 - Enter one or more Tax IDs that correspond with the group’s practice location records.
 - Make sure that you add every Tax ID that you will be including in your location upload file. A location record cannot be added unless the Tax ID is saved in your group profile.
 - A Tax ID can only be removed from this list if it is not associated with any location records. If locations are using a Tax ID that you would like to remove, you must assign a new Tax ID to those locations first.

This Tax ID cannot be removed ✕

10 of your Practice Locations use Tax ID 23-4343553. Before you can delete it from your group profile, you must update each of the following locations with a different Tax ID.

Name	Address	Providers
Virginia Hospital Center - Orthopedics	❗ Address review required	0
Virginia Hospital Center	✔ 4601 N PARK AVE CHEVY CHASE MD 20815-4519	236
Virginia Hospital Center - Radiology	✔ 4601 N PARK AVE CHEVY CHASE MD 20815-4519	20
Virginia Hospital Center - Pediatrics	✔ 4601 N PARK AVE CHEVY CHASE MD 20815-4519	4
Virginia Hospital Center - Neurology	❗ Address review required	0
Virginia Hospital Center - Suite 180	✔ 4601 N PARK AVE CHEVY CHASE MD 20815-4519	13
Virginia Obstetrics & Gynecology	✔ 4601 N PARK AVE CHEVY CHASE MD 20815-4519	10
Virginia Hospital Center - Suite 182	✔ 4601 N PARK AVE CHEVY CHASE MD 20815-4519	3
Virginia Hospital Center - Suite 184	✔ 4601 N PARK AVE CHEVY CHASE MD 20815-4519	2
Virginia Hospital Center - Suite 185	✔ 4601 N PARK AVE CHEVY CHASE MD 20815-4519	732

< 1 - 10 of 10 >

[View all Practice Locations](#)

- Group NPI
 - Enter one or more Group NPIs that correspond with the group’s practice location records.
 - Make sure to add any Type 2 NPI that is associated with a location. When you upload your location file, each practice location’s Type 2 NPI must be saved in your group profile first.
 - A Type 2 NPI can only be removed from this list if it is not associated with any location records.

This Group NPI cannot be removed



10 of your Practice Locations use Group NPI 3459003289. Before you can delete it from your group profile, you must update each of the following locations with a different Group NPI.

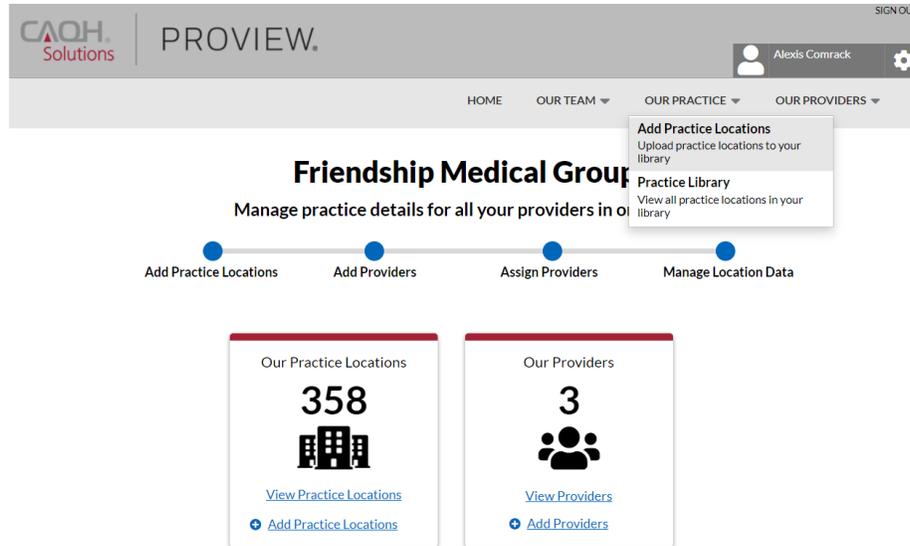
Name	Address	Providers
Virginia Hospital Center - Orthopedics	Address review required	0
Virginia Hospital Center	4601 N PARK AVE CHEVY CHASE MD 20815-4519	236
Virginia Hospital Center - Radiology	4601 N PARK AVE CHEVY CHASE MD 20815-4519	20
Virginia Hospital Center - Pediatrics	4601 N PARK AVE CHEVY CHASE MD 20815-4519	4
Virginia Hospital Center - Neurology	Address review required	0
Virginia Hospital Center - Suite 180	4601 N PARK AVE CHEVY CHASE MD 20815-4519	13
Virginia Obstetrics & Gynecology	4601 N PARK AVE CHEVY CHASE MD 20815-4519	10
Virginia Hospital Center - Suite 182	4601 N PARK AVE CHEVY CHASE MD 20815-4519	3
Virginia Hospital Center - Suite 184	4601 N PARK AVE CHEVY CHASE MD 20815-4519	2
Virginia Hospital Center - Suite 185	4601 N PARK AVE CHEVY CHASE MD 20815-4519	732

< 1 - 10 of 10 >

[View all Practice Locations](#)

CHAPTER 6: Add Practice Locations

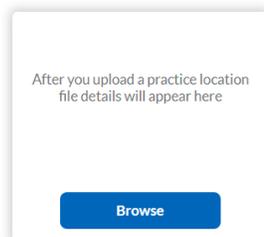
In the Our Practice Section, you will upload practice locations to your library and view and manage all the practice locations that you have added.



To add locations to your library, click on Our Practice>Add Practice Locations.

Add Practice Locations

File Upload



Need a template file? [Download now](#)

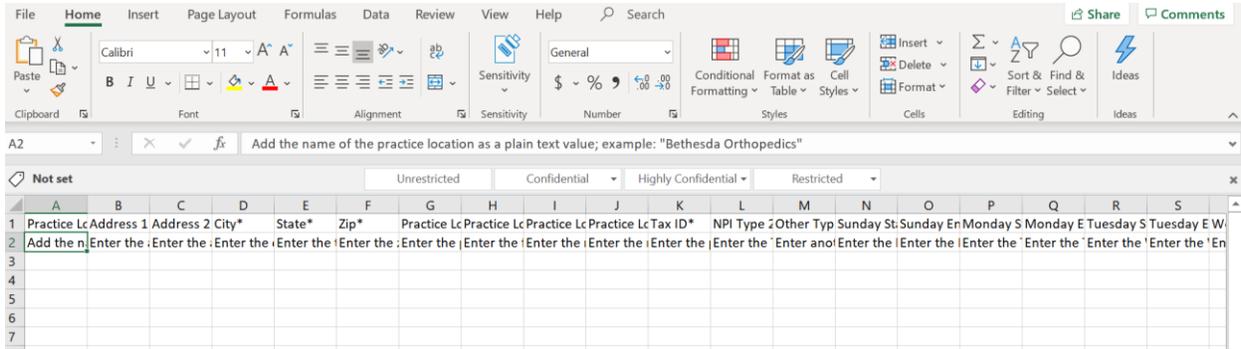
Please make sure your file is in the correct format:

- File format is .csv
- Upload file follows the template structure
- File size is less than 5 MB

First, download the Practice Location template. You must use the practice location template to populate your practice location library.

The location template will download in .csv format however it will be easier to populate your template if you convert it to Excel. Once you convert the template to Excel, convert the Zip Code column and the Tax ID column to text format. This will ensure that any leading zeros in zip codes or Tax IDs are preserved.

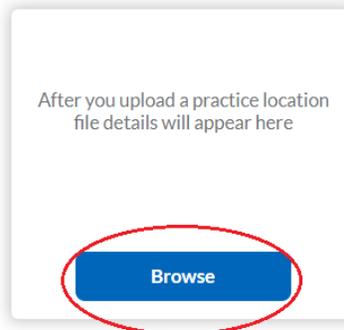
The first row of the template contains the column headings. Required fields are indicated with an asterisk. The second row of the template contains special instructions for each column. These instructions must be strictly followed to avoid errors when uploading the file.



Once all your data is in the file, save the file as .csv. (comma separated) To upload the file, click the Browse button and select the .csv file you saved in on your computer to upload it.

Add Practice Locations

File Upload



Need a template file? [Download now](#)

Please make sure your file is in the correct format:

- File format is .csv
- Upload file follows the template structure
- File size is less than 5 MB

When you upload the file, the system will provide feedback on the status. It will show:

- The total number of location records (rows) in your file.
- The number of location records that you are trying to add that are duplicates because they are either already saved in your location library or are duplicated in the file. (A duplicate record would be one where all the required fields and Address Line 2 are the same.)
- The number of location records (rows) that had errors and could not be added.

Add Practice Locations

File Upload

October 17, 2020 6:20 PM
Friendship Location File V1 in Excel.csv

7 total locations
0 were already in your library
0 could not be added
7 are eligible to be added

[Download Report](#)

[Remove Practice Location File](#) [Add 7 Practice Locations](#)

Need a template file? [Download now](#)

Once the file is processed, click the blue “Add” button to add the practice locations in your file to your Practice Location library. A confirmation message will display to indicate that the locations were successfully added.

Locations Added

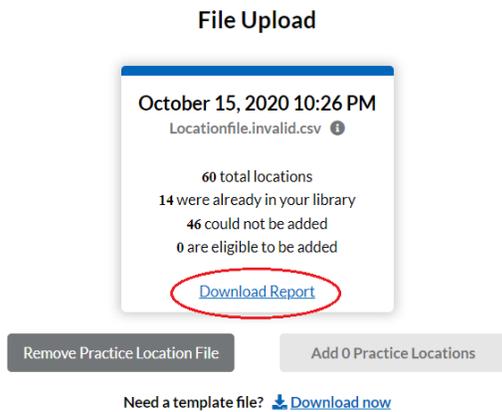
Friendship Location File V1 in Excel.csv, uploaded by Alexis Comrack

7 locations were successfully added to your library.



[View Your Practice Locations](#)

Add Practice Locations



If the file you uploaded has locations that could not be added, you can view the Download Report to get more information.

Click the Download Report link and open the file called Practice Data Elements – Processing Report on your computer.

Location Upload Failure Troubleshooting

When you open that file, you will see one row for each practice location (row) from your original file. Review the first four columns for feedback on what was added and what could not be added for each of the records in your file. Based on the errors indicated, you can adjust your Practice Location file accordingly and re-upload it.

The system checks the following:

- Are all required fields present in the upload file?
- Did each field meet the data validation requirements listed in the download template?
- Were the Tax IDs in the upload file saved in the Group Profile?
- Were the NPIs in the upload file saved in the Group Profile?
- For a given record, did the values in every required field match any other records in the file or already uploaded into the practice library?

Practice Lc	Address 1	Address 2	City	State	Zip	Practice Lc	Practice Lc	Practice Lc	Practice Lc	Practice Lc	Tax ID	NPI Type	Other
Johnny Ca	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Johnny wi	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Keith Moo	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Robert Pla	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Martha W	2412 FIVE STREET		woodbridjVA		22191	5.71E+09				3.23E+08	3.22E+09		
Drake	759 S MAI STREET		WOODSTVA		33664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09	4.56E	
RHCP	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Soundgar	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Pearl Jam	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Audioslav	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Pixies	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09	4.56E	
Def Leppa	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
Mogambo	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09		
hotel calif	759 S MAI STREET		WOODSTVA		22664	2.02E+09	6.17E+09	patient@r	www.pat	3.23E+08	3.22E+09	4.56E	
Mass Gen	2014 Washington St.	Newton	MA		2462	(617)219-	(617)831-7331			42-26605C	1.44E+09		
Mass Gen	2014 Washington St.	Newton	MA		2462	(617)219-	(617)831-7331			42-26605C	1.44E+09		
Mass Gen	2014 Washington St.	Newton	MA		2462	(617)219-	(617)831-7331			42-26605C	1.44E+09		
Mass Gen	2014 Washington St.	Newton	MA		2462	(617)219-	(617)831-7331			42-26605C	1.44E+09		
Mass Gen	2014 Washington St.	Newton	MA		2462	(617)219-	(617)831-7331			42-26605C	1.44E+09		

If you determine that there are too many errors in the file you uploaded and you want to upload a new file without processing the current one, you must clear out the pending file by clicking the *Remove Practice Location File* button and then click *Yes, remove file* button.

Add Practice Locations

File Upload

October 15, 2020 10:26 PM
Locationfile.invalid.csv

60 total locations
14 were already in your library
46 could not be added
0 are eligible to be added

[Download Report](#)

Remove Practice Location File Add 0 Practice Locations

Need a template file? [Download now](#)

Remove Practice Locations File?
Locationfile.invalid.csv, uploaded by Ma'am Tina

This will remove the file from the system.

Yes, remove file
[Go back](#)

Click on *Yes, remove file*.

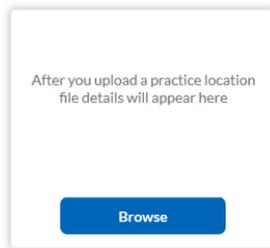
Previously Uploaded Files

On the Add Practice Locations screen, previously uploaded files and their details will display at the bottom. Only files that resulted in location library additions will display. (If you removed a file before adding them to your library, that file will not display.)

Details include when the files were previously processed (date and time in EST), the total number of locations included on the file, how many of these locations were already in the group's library prior to the upload, how many could not be added, and how many were successfully added to the group's library. This display serves as an upload history.

Add Practice Locations

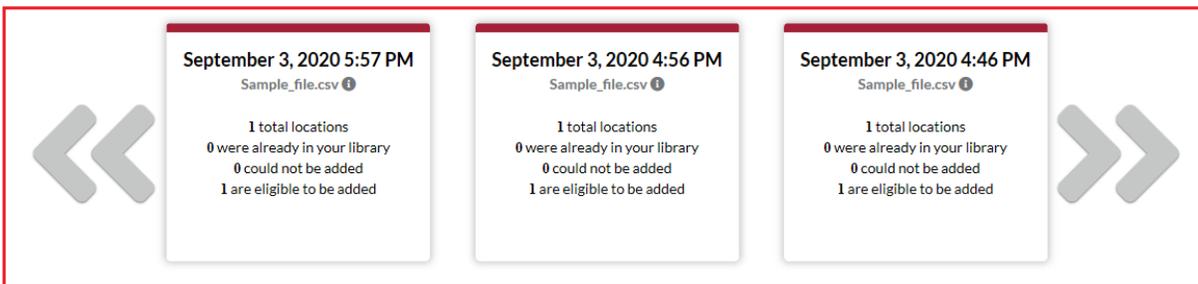
File Upload



Need a template file? [Download now](#)

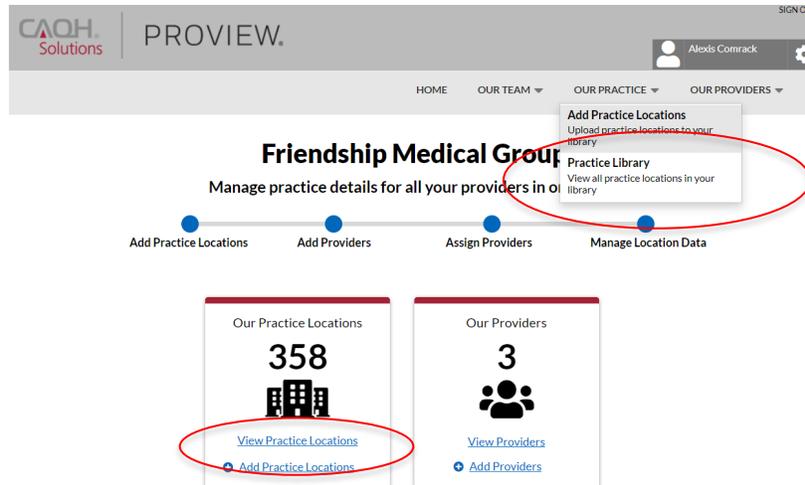
Please make sure your file is in the correct format:

- File format is .csv
- Upload file follows the template structure
- File size is less than 5 MB



Practice Library

Once locations have been uploaded, you can view them in your practice library. On the home page, click one of the links to view your practice library.



You will be directed to a page that shows all the practice locations that you have added.

This page shows the following details:

- Practice Name
 - The name is a hyperlink that when clicked will take the user to the details page for that practice location.
- Practice Address
- Tax ID
- Number of providers that have been assigned to the location.

Our Practice Locations

Name	Address	Tax ID	Providers
Friendship	Search...	Search...	Search...
Friendship Primary Care	Address review required	55555555	0
Friendship Oncology	Address review required	55555555	0
Friendship Orthopedics	Address review required	55555555	0
Friendship Counseling	Address review required	55555555	0
Friendship Dental	Address review required	55555555	0
Friendship Rehabilitation	Address review required	55555555	0
Friendship Pediatrics	Address review required	55555555	0

Address Standardization

When you first upload your locations, you will see a red notification that indicates that the address needs to be reviewed. This is because you must go through the address standardization process for each of your location records before you can assign providers to them.

To standardize an address, click the Practice Name link to get to the Practice Location details screen.

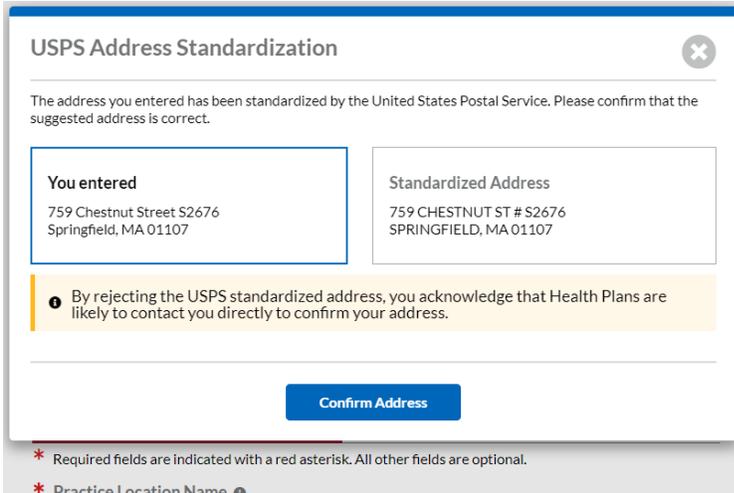
The screenshot shows a dialog box titled "USPS Address Standardization" with a close button (X) in the top right corner. Below the title, it states: "The address you entered matches the address on file with the United States Postal Service." A box labeled "Standardized Address" contains the text: "2412 FIVE FATHOM CIR STREET woodbridge, VA 22191". Below this, a green bar with a checkmark icon contains the text: "The address you entered is an exact match to the address on file with the United States Postal Service." At the bottom of the dialog is a blue "Continue" button. Below the dialog, a breadcrumb trail shows "Location Details" and "0 Providers Assigned". At the bottom of the page, there are two red asterisk notices: "* Required fields are indicated with a red asterisk. All other fields are optional." and "* Practice Location Name".

If the address you entered is already standardized, click continue.

The screenshot shows a dialog box titled "USPS Address Standardization" with a close button (X) in the top right corner. Below the title, it states: "The address you entered has been standardized by the United States Postal Service. Please confirm that the suggested address is correct." There are two boxes side-by-side. The left box is labeled "You entered" and contains: "759 Chestnut Street S2676 Springfield, MA 01107". The right box is labeled "Standardized Address" and contains: "759 CHESTNUT ST # S2676 SPRINGFIELD, MA 01107". Below these boxes is a blue "Confirm Address" button. Below the dialog, a breadcrumb trail shows "Standardize Address" and "0 Providers Assigned". At the bottom of the page, there are two red asterisk notices: "* Required fields are indicated with a red asterisk. All other fields are optional." and "* Practice Location Name".

If the address needs to be standardized, you will see what you entered on the left, and the standardized version on the right.

To select the standardized version, click on the corresponding box and then click the *Confirm Address* button.



USPS Address Standardization

The address you entered has been standardized by the United States Postal Service. Please confirm that the suggested address is correct.

You entered 759 Chestnut Street S2676 Springfield, MA 01107	Standardized Address 759 CHESTNUT ST # S2676 SPRINGFIELD, MA 01107
--	---

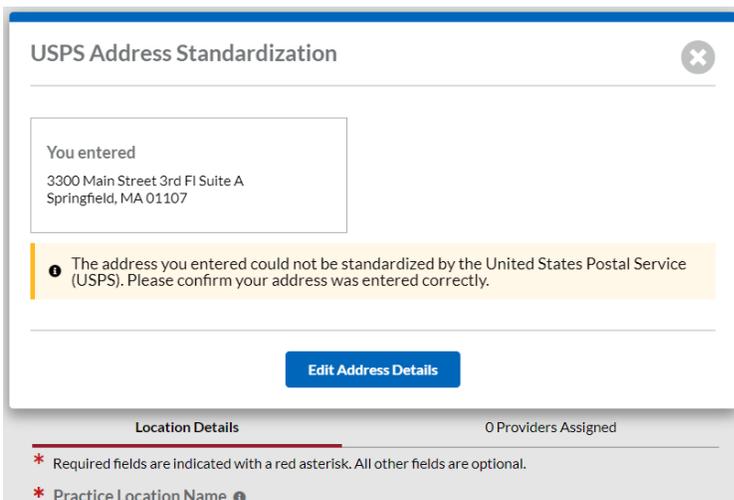
By rejecting the USPS standardized address, you acknowledge that Health Plans are likely to contact you directly to confirm your address.

Confirm Address

* Required fields are indicated with a red asterisk. All other fields are optional.
* Practice Location Name

If the version you entered is preferred, select the “You entered” box and then click on the Confirm Address button.

A notification will remind you that health plans may not recognized the non-standardized version.



USPS Address Standardization

You entered
3300 Main Street 3rd Fl Suite A
Springfield, MA 01107

The address you entered could not be standardized by the United States Postal Service (USPS). Please confirm your address was entered correctly.

Edit Address Details

Location Details 0 Providers Assigned

* Required fields are indicated with a red asterisk. All other fields are optional.
* Practice Location Name

There may be some cases where the address you entered is not recognized by USPS. If you get this message, click on the Edit Address Details button to make sure that the information you entered is correct.

If it looks correct, try moving some of the information in Address 1 to Address 2 so that the standardization process can more easily evaluate what you entered.

Practice Location Details

Martha Wayne Cancer Institute, 32-3232322

2412 FIVE FATHOM CIR STREET
woodbridge, VA 22191

Assign Providers

Archive Location

✔ This address is USPS standardized.

Location Details

0 Providers Assigned

* Required fields are indicated with a red asterisk. All other fields are optional.

* Practice Location Name ⓘ

Martha Wayne Cancer Institute

Location Address

Provide the exact address that patients use to find this practice. Plans will often publish this address in their directories.

When you have standardized the address, you will see a green notification indicating that the address has been standardized.

Practice Location Details

Friendship Family Advocacy Center, 55-5555555

30 Green Street STE 2
Charlestown, MA 02129

Assign Providers

Archive Location

ⓘ This address is not USPS standardized.

Standardize Address

Location Details

0 Providers Assigned

* Required fields are indicated with a red asterisk. All other fields are optional.

* Practice Location Name ⓘ

Friendship Family Advocacy Center

Location Address

Provide the exact address that patients use to find this practice. Plans will often publish this address in their directories.

When you have gone through the standardization process but selected the original version of the address, you will see a yellow notification indicating that the non-standardized version of the address was saved.

You can still assign providers to locations when using the non-standardized address.

Location Details

Once you have gone through the standardization process for your address, you can review the rest of the information about the location to make sure it is correct. The details include the following:

Contact Information

- Practice Location Name
 - Enter the name on the door of the practice here.
- Practice Location Address
 - Enter the address at which a patient would see the provider.
- Appointment Phone Number
 - Enter the phone number that a patient would use to make an appointment.

Practice Location Details

Friendship Behavioral Developmental Pediatrics, 55-5555555

50 NORTH ST
BOSTON, MA 02109

[Assign Providers](#)

[Archive Location](#)

This address is USPS standardized.

Location Details 1 Providers Assigned

* Required fields are indicated with a red asterisk. All other fields are optional.

* Practice Location Name

Location Address

Provide the exact address that patients use to find this practice. Plans will often publish this address in their directories.

* Street 1
(Example: 123 Main St., 123 Main Street NW)

I have a Building, Suite or Office to add

* City * State * Zip Code

* Country

Practice Location Email Address

Practice Location Website

Phone Numbers

* Appointment Phone Number

I have a phone extension to add

Fax Number

Business Identifiers & Location Office Hours

- Tax ID
 - The tax ID that displays on the practice profile is managed in the Group Profile.
- Group NPI
 - The Type 2 NPI that displays on the practice details screen is managed in the Group Profile.
- Monday-Sunday Start and End Times
 - A traditional start and end time can be indicated.
 - To edit an entry, click on the pencil icon.
 - By selecting the 24 hours checkbox, 12:00 AM and 12:00 PM will populate in the start and end time fields. Uncheck the box to indicate a different time.

Business Identifiers

* Tax ID
 

* Group NPI
  

Type of Practice  Other (please describe)

Practice Office Hours 

	Start Time	End Time	
Monday	8:00 am 	5:00 pm 	<input checked="" type="checkbox"/> Open 24-hours
Tuesday	8:00 am 	5:00 pm 	<input checked="" type="checkbox"/> Open 24-hours
Wednesday	8:00 am 	5:00 pm 	<input checked="" type="checkbox"/> Open 24-hours
Thursday	8:00 am 	5:00 pm 	<input checked="" type="checkbox"/> Open 24-hours
Friday	8:00 am 	5:00 pm 	<input checked="" type="checkbox"/> Open 24-hours
Saturday			<input checked="" type="checkbox"/> Open 24-hours
Sunday			<input checked="" type="checkbox"/> Open 24-hours

Accessibility & Languages

The fields in this section are optional. For the Accessibility selections, check the box if the location offers these accessibility options. If the location does not offer these options, leave the box unchecked. This will indicate to health plans that these options are not available at this location.

- Americans with Disabilities Act standards
- Intellectual, Cognitive or Hearing Disabilities
- Accessibility to public transportation
- Additional accommodations
- Languages spoken by office personnel, other than the provider.
 - Languages spoken by the provider are indicated in the provider's Personal Information section of their ProView profile.
- Languages spoken by interpreters

Accessibility

Please indicate how this location is accessible, according to the Americans with Disabilities Act (ADA) standards:

- | | |
|--|--|
| <input type="checkbox"/> Select All | <input checked="" type="checkbox"/> Portable lifts |
| <input checked="" type="checkbox"/> Exterior building | <input checked="" type="checkbox"/> Radiologic equipment |
| <input checked="" type="checkbox"/> Interior building | <input checked="" type="checkbox"/> Signage & documents |
| <input checked="" type="checkbox"/> Wheelchair access to exam room | <input checked="" type="checkbox"/> Parking |
| <input checked="" type="checkbox"/> Exam table/scale/chair | <input checked="" type="checkbox"/> Restroom |
| <input checked="" type="checkbox"/> Gurneys & stretchers | |
| <input type="checkbox"/> Other access for people with disabilities | |

Please specify how this location accommodates people who have intellectual, cognitive or hearing disabilities:

- Text Telephony (TTL)
- American Sign Language
- Mental/Physical Impairment Services
- Other disability services

Please specify how this office is accessible by public transportation:

- Bus
- Subway
- Regional Train
- Other Transportation

Additional Accommodations

- Do you provide Concierge Medicine at this location?
- Does this location provide Child Care services?

Languages

Non-English language(s) spoken by office personnel ⓘ

Non-English language(s) spoken by interpreters ⓘ

Cancel Changes

Save Changes



Click the *Save Changes* button when you have completed your updates. Look for the green confirmation button to make sure your changes were saved.

CHAPTER 7: Add Providers

The Our Providers section is where you will add and manage the providers associated with your group.

Add Providers

To add providers, click on the Our Providers tab, and then select Add Providers. Alternatively, you can select the Add Providers link in the middle of the home page.

The screenshot displays the CAQH ProView interface for 'Friendship Medical Group'. The header includes the CAQH Solutions logo, the 'PROVIEW' title, and a user profile for 'Alexis Comrack'. The navigation menu contains 'HOME', 'OUR TEAM', 'OUR PRACTICE', and 'OUR PROVIDERS'. A dropdown menu for 'OUR PROVIDERS' is open, showing 'Our Providers' (with a red circle around the text) and 'Add Providers' (with a red circle around the text). Below the header, a progress bar shows four steps: 'Add Practice Locations', 'Add Providers', 'Assign Providers', and 'Manage Location Data'. The main content area features two cards: 'Our Practice Locations' with a count of 347 and 'Our Providers' with a count of 3. The 'Add Providers' link in the 'Our Providers' card is circled in red.

CAQH Solutions | PROVIEW. | SIGN OUT | Alexis Comrack

HOME | OUR TEAM | OUR PRACTICE | OUR PROVIDERS

Friendship Medical Group
Manage practice details for all your providers in one place.

Our Providers
View all of the providers that are associated with your practice

Add Providers
Add providers to your practice by uploading a .csv file

Add Practice Locations | Add Providers | Assign Providers | Manage Location Data

Our Practice Locations
347
View Practice Locations
Add Practice Locations

Our Providers
3
View Providers
Add Providers

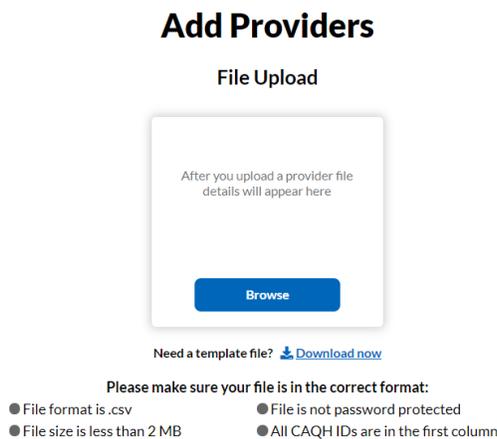
On the Add Providers screen, download the template by clicking the Download now link.

Prepare your file by putting all your CAQH IDs in the column labeled CAQH ID and save your file as a .csv.

Make sure the file meets the following criteria:

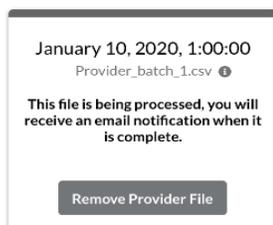
- File format is .csv
- File size is less than 2MB
- File is not password protected
- All CAQH IDs are in the first column

To upload a provider file, click the Browse button to upload a file and select the .csv file that you saved.



Add Providers

File Upload



Need a template file? [Download now](#)

Please make sure your file is in the correct format:

- File format is .csv
- File size is less than 2 MB
- File is not password protected
- All CAQH IDs are in the first column

After the file is uploaded, the tile will display a notification that the file is being processed.

Refresh the page to see the processing results.

Add Providers

File Upload

January 10, 2020, 1:00:00
Provider_batch_1.csv ⓘ
Uploaded by Kathy Higgins

3000 total providers
1500 are already affiliated
500 could not be added
1000 are eligible for affiliation

[Download Report](#)

Need a template file? [Download now](#)

Remove Provider File

Affiliate 1000 Providers

Click the tooltip to display the name of the user who uploaded the file.

Click the Affiliate Providers button to send affiliation requests to all your providers.

Add Providers

File Upload

January 10, 2020, 1:00:00

Send 1000 affiliation requests? ⓘ

This will notify each provider of your request.

In order for your updates to get published, they will need to authorize your access in their profile.

No, go back. Yes, send requests

You will be prompted with a message to confirm. Click *Yes, send requests*.

Request Sent

 ⓘ

1000 affiliations are pending approval. Please have the providers respond to the request within their profile.



[View Your Providers](#)

A Confirmation message will indicate that affiliation requests have been sent to provider profiles.

If the number of providers eligible for affiliation is less than the total number of providers in the file, that is because there are either providers in your file that are already affiliated with your group or there were errors with the provider records in the file. Since the only column in the file is CAQH ID, that means the error must be with the CAQH ID. Either the ID entered is not valid or the ID belongs to a provider record that has a status of Retired, Opt-Out or Deceased. To find out why a provider record in your file had an error, select the Download Report link and view the information.

If you would rather upload a new file rather than upload the file that contains errors, click the Remove Provider File link.

Add Providers

File Upload

January 10, 2020, 1:00:00
Provider_batch_1.csv ⓘ

3000 total providers
1500 are already affiliated
500 could not be added
1000 are eligible for affiliation

[Download Report](#)

Need a template file? [Download now](#)

[Remove Provider File](#) [Affiliate 1000 Providers](#)

And on the confirmation pop up, click the *Yes, remove file* button.

Add Providers

File Upload

January 10, 2020, 1:00:00

Remove Provider File?

provider_batch_1.csv, uploaded by Kathy Higgins

This will permanently remove the file from the system.



[Yes, remove file](#)

[Go back](#)

After files are uploaded and processed, and affiliation requests have been sent, the previously uploaded files will display on the Add Providers screen to serve as a historical reference. The file tiles will show the date and time of upload, the total number of providers, number of providers who were already affiliated, number of providers who could not be added, and the number of providers who received affiliation requests. You may click on the Download Report link to open the file.

Add Providers

File Upload

After you upload a provider file details will appear here

[Browse](#)

Need a template file? [Download now](#)

Please make sure your file is in the correct format:

- File format is .csv
- File is not password protected
- File size is less than 2 MB
- All CAQH IDs are in the first column

The image shows three file tiles arranged horizontally, each representing an uploaded provider file. Each tile contains the following information:

- September 8, 2020 3:26 PM**
SampleAffiliationFile (3).csv ⓘ
- 1 total providers
- 0 were already affiliated
- 0 could not be added
- 1 received affiliation requests
- [Download Report](#)

September 3, 2020 3:15 PM
SampleAffiliationFile (4).csv ⓘ

- 1 total providers
- 0 were already affiliated
- 0 could not be added
- 1 received affiliation requests
- [Download Report](#)

September 2, 2020 9:14 PM
SampleAffiliationFile.csv ⓘ

- 1 total providers
- 0 were already affiliated
- 0 could not be added
- 1 received affiliation requests
- [Download Report](#)

Our Providers List

You can view all the providers that were added to the group on the Our Providers page.

Our Providers

Full Name	CAQH ID	Affiliation	Affiliation Status Updated	Individual NPI
aa_aa	16037197	Pending		
affiliation_demo	16037386	Removed		2345674567
apione_rosterapione	16000266	Accepted	09/01/2020	
atcrinju_xnxhbbbc	16000510	Accepted	09/01/2020	1497701106
bb_aa	16037240	Pending		
bb_aa	16037226	Pending		
bb_aa	16037214	Pending		
Bishop, Mark	16000071	Accepted	09/01/2020	
ckxillob_thplselb	16037225	Accepted		4064771560
CORNELIUS, PATRICK	16031276	Removed		

10 Items per page < 1 - 10 of 162 >

- 10
- 25
- 50
- 100

This screen shows:

- Provider's full name
 - The name is displayed as "last name, first name".
 - The name is displayed as a hyperlink. If the link is clicked, a pop up window will display a list of provider's assigned practice locations, if any have been assigned.
- CAQH Provider ID Number
 - This is the 8-digit CAQH ID that you included in your provider file.
- Affiliation
 - This column shows the status of the affiliation request sent to the provider's ProView profile by the group.
 - The Accepted status indicates that the provider reviewed and accepted the group's request in the provider portal. With a status of accepted, any new or updated practice locations assigned to the provider will be pushed to the provider's profile.
 - The Rejected status indicates that the provider reviewed and rejected the group's request in the provider portal. This status means that location information cannot be pushed from the group's account to the provider's profile.
 - The Pending status means that the provider has neither accepted or rejected the request. A provider with this affiliation status can be assigned practice locations. The locations will not be pushed to the provider profile until the provider accepts the affiliation request.
- Affiliation Status Updated

- This column shows the date when the provider accepted or rejected the affiliation request from the group.
 - For a pending affiliation, waiting for the provider to respond to the affiliation request, the provider's affiliation status updated on date will show the date when the affiliation request was sent.
- Individual NPI
 - This column shows the provider's Type 1 NPI that is saved in the provider's ProView profile.
- Items Per Page
 - Users can set the count of providers to display per page. Click the dropdown to choose from options of 10, 25, 50, and 100 providers per page.

CHAPTER 8: Assign Providers to Locations

Once your practice locations have been uploaded and standardized and your providers have been uploaded and affiliation requests sent, you are ready to assign provider's to locations. When you assign a provider to a location, the Practice Details information in the location profile will be sent to the provider's profile as read only.

To assign a provider to a location, select a practice location. Click the blue *Assign Providers* button in the upper right-hand corner of the location profile.

Practice Location Details

Friendship Counseling, 55-555555

340 MAIN ST
HINGHAM, MA 02043

This address is USPS standardized.

Assign Providers

Archive Location

Location Details 0 Providers Assigned

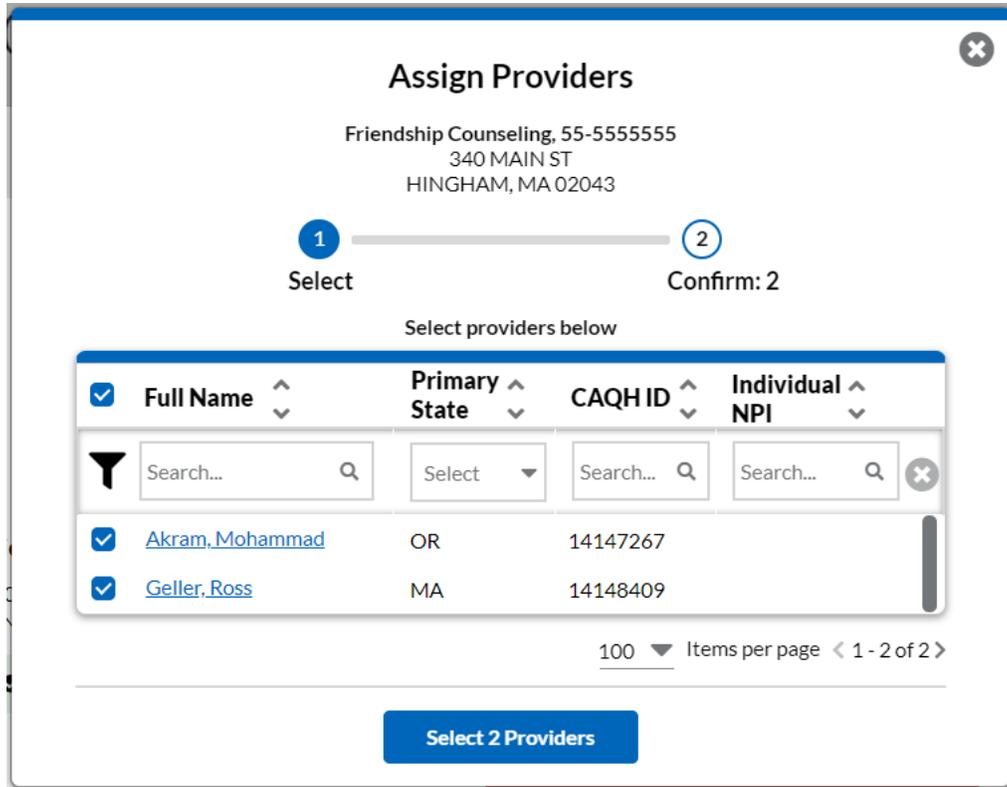
If the providers below have accepted your affiliation request, they will see this location in their profile(s).

<input type="checkbox"/>	Full Name	Affiliation Request	Primary State	CAQH ID	Individual NPI
Providers you have assigned to this location will appear here. You will need to standardize this practice location's address if you have not already done so to assign providers.					

Remove 0 Provider(s) 10 Items per page < 0 - 0 of 0 >

The Assign Providers modal will display containing all of the providers associated with the group that have not been assigned to this location. The Assign Providers list shows:

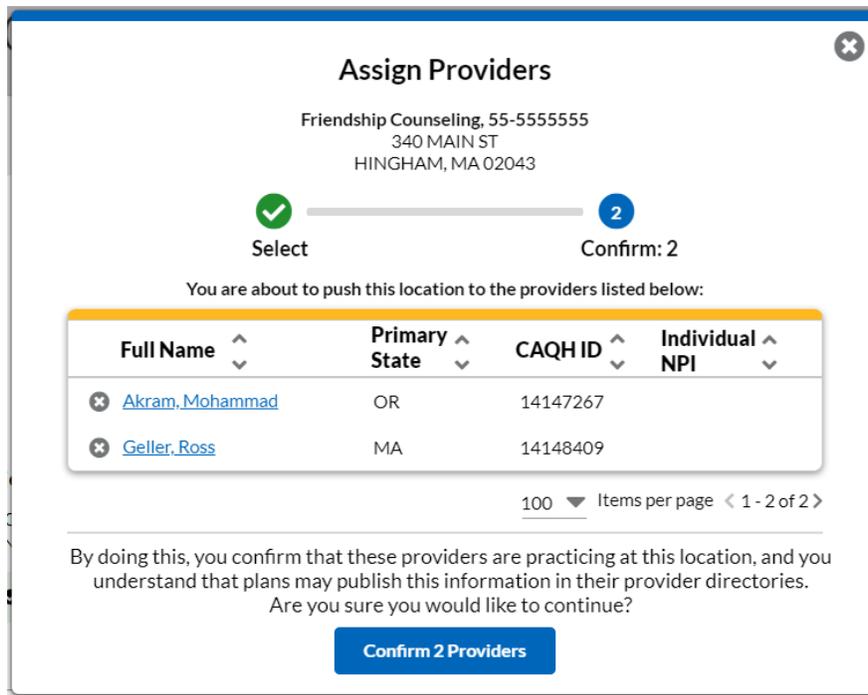
- Full Name
- Primary Practice State
- CAQH ID
- Individual NPI



If you have a lot of providers, you can filter the list or search for individual providers by entering criteria in the search boxes at the top of the list.

To assign one or more providers to this location, select the checkbox(es) to the left of the provider's name. When you have selected all the providers you want to add to the location, select the blue *Select Providers* button.

The confirmation modal will display to show you which providers you are about to assign to the location, and remind you that when you complete the assignment, information will be sent to provider profiles and health plans.



After clicking the confirmation button, the provider assignment is complete and the assigned providers will display on the Assigned providers tab of the practice location profile.

Practice Location Details

Friendship Counseling, 55-5555555
 340 MAIN ST
 HINGHAM, MA 02043

[Assign Providers](#)
[Archive Location](#)

This address is USPS standardized.

Location Details 2 Providers Assigned

If the providers below have accepted your affiliation request, they will see this location in their profile(s).

<input type="checkbox"/>	Full Name	Affiliation Request	Primary State	CAQH ID	Individual NPI
<input type="checkbox"/>	Akram, Mohammad	Accepted	OR	14147267	
<input type="checkbox"/>	Geller, Ross	Accepted	MA	14148409	

[Remove 0 Provider\(s\)](#) 10 Items per page < 1 - 2 of 2 >

Users have the option to Remove Providers from the location on this page. Select the provider by clicking the checkbox. Click the *Remove Provider* button.

AB2 Awe 10, 20-3456888
 13521 OLD HIGHWAY 280 STE 125
 BIRMINGHAM, AL 35242

This address is USPS standardized.

[Assign Providers](#)
[Archive Location](#)

Location Details 5 Providers Assigned

If the providers below have accepted your affiliation request, they will see this location in their profile(s).

<input type="checkbox"/>	Full Name	Affiliation Request	Primary State	CAQH ID	Individual NPI
<input checked="" type="checkbox"/>	leqloevh.jyfiqsx	Accepted	FL	16031588	1234567890
<input type="checkbox"/>	providerthree_demo	Accepted	AA	16037408	1234563456
<input type="checkbox"/>	three_USER_DEV	Accepted	MH	16037382	
<input type="checkbox"/>	usernine_new	Accepted	FM	16037402	
<input type="checkbox"/>	yfuklrda_kmudfdgc	Accepted	NC	16037361	3716424822

[Remove 1 Provider\(s\)](#) 100 Items per page < 1 - 5 of 5 >

You will be prompted to confirm. Click the *Yes, remove providers* button.

Remove 1 Providers?

This location record will be archived in the provider profiles:

AB2 Awe 10, 20-3456888
 13521 OLD HIGHWAY 280 STE 125
 BIRMINGHAM, AL 35242



By doing this, you confirm that these providers are not practicing at this location, and you understand that plans may publish this information in their provider directories.

[Yes, remove providers](#)

[Go back](#)

A confirmation pop-up will be displayed, and the provider will disappear from the list.

CHAPTER 9: Archiving Practice Locations

If one of your group's practice locations is no longer valid (i.e. the practice closed), you can remove it from your location library by archiving it. When you archive a location, it will no longer display in your practice location library.

To archive a practice location record, first remove any providers that are assigned to the location. You will not be able to archive a location until all the providers have been removed.

Select the location that you wish to archive. The details of the location will be displayed.

Click the *Archive Location* button.

Practice Location Details

AB2 Awe 10, 20-3456888
13521 OLD HIGHWAY 280 STE 125
BIRMINGHAM, AL 35242

This address is USPS standardized.

[Assign Providers](#)
[Archive Location](#)

Location Details 6 Providers Assigned

* Required fields are indicated with a red asterisk. All other fields are optional.

* Practice Location Name ⓘ

AB2 Awe 10

If there are providers assigned to the location, you will be prompted to remove the providers from the location.

This location cannot be archived ✕

There are 6 providers currently assigned to AB2 Awe 10.
Before you can archive, you must remove them from the location.



[View Providers at the Practice](#)

Click the View Providers at the Practice link to view the providers assigned to the location. Select the checkboxes to left of the provider name to remove the provider from the location.

Practice Location Details

AB2 Awe 10, 20-3456888
13521 OLD HIGHWAY 280 STE 125
BIRMINGHAM, AL 35242

This address is USPS standardized.

[Assign Providers](#)
[Archive Location](#)

Location Details 6 Providers Assigned

If the providers below have accepted your affiliation request, they will see this location in their profile(s).

<input checked="" type="checkbox"/> Full Name	Affiliation Request	Primary State	CAQH ID	Individual NPI
<input type="checkbox"/> aa_aa	Pending	MN	16037197	
<input checked="" type="checkbox"/> apione_rosterapione	Accepted	NJ	16000266	
<input checked="" type="checkbox"/> providerthree_demo	Accepted	AA	16037408	1234563456
<input checked="" type="checkbox"/> three_USER DEV	Accepted	MH	16037382	
<input checked="" type="checkbox"/> usernine_new	Accepted	FM	16037402	
<input checked="" type="checkbox"/> yfuklrda_kmudfdgc	Accepted	NC	16037361	3716424822

[Remove 6 Provider\(s\)](#) 10 Items per page < 1 - 6 of 6 >

You will be prompted to confirm. Review the details and click *Yes, remove providers*.

Remove 6 Providers?

This location record will be archived in the provider profiles:

AB2 Awe 10, 20-3456888
13521 OLD HIGHWAY 280 STE 125
BIRMINGHAM, AL 35242



By doing this, you confirm that these providers are not practicing at this location, and you understand that plans may publish this information in their provider directories.

[Yes, remove providers](#)

[Go back](#)

A confirmation will display, and the providers will no longer appear on the list. In the provider portal, these locations will be archived, and updates will be sent to plans.

Once all providers have been removed from the location, it can be archived. Select the *Archive Location* button.

[Practice Locations List](#) ✔ Changes saved!

Practice Location Details

AB2 Awe 10, 20-3456888 Assign Providers
13521 OLD HIGHWAY 280 STE 125
BIRMINGHAM, AL 35242 Archive Location

✔ This address is USPS standardized.

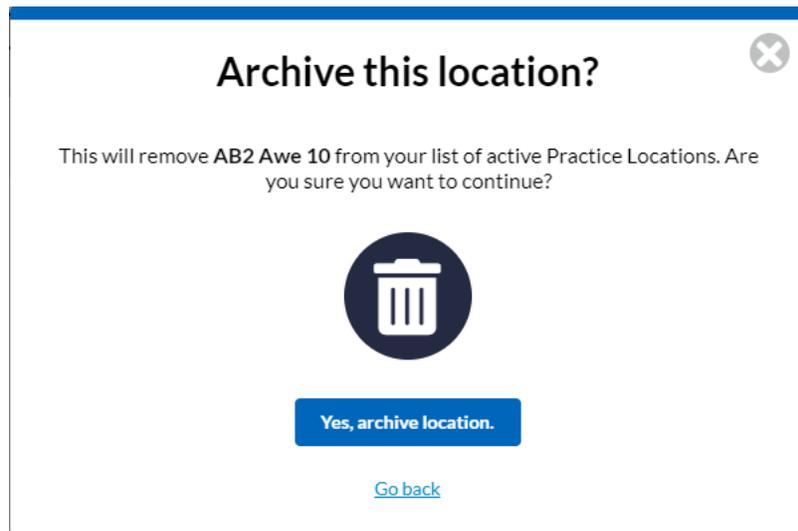
Location Details 0 Providers Assigned

If the providers below have accepted your affiliation request, they will see this location in their profile(s).

<input type="checkbox"/> Full Name	Affiliation Request	Primary State	CAQH ID	Individual NPI
Providers you have assigned to this location will appear here. You will need to standardize this practice location's address if you have not already done so to assign providers.				

Remove 0 Provider(s) 10 Items per page < 0-0 of 0 >

A pop-up message will be displayed to ask for your confirmation. Click *Yes, archive location*.



A confirmation message will be displayed, and the location will be removed from the list.

Revision Log

Version	Date	Updates
Version 1	October 18, 2020	Original