

Directory Maintenance Toolkit

This toolkit includes important information for providers and practice managers who are responsible for directory updates. Please share these materials with your providers to help build awareness around the advantages of maintaining accurate directory information and to explain how CAQH ProView can help.

- **Fact Sheet: Take the Frustration out of Updating Directories (page 2)**
An information sheet that explains the benefits of maintaining accurate directory information and how CAQH ProView simplifies the process of sharing directory updates.
- **Best Practices Checklist: Are your patients getting correct directory information? (page 3)**
Providers and practice managers can use this checklist to help ensure the information they enter in CAQH ProView will result in accurate directory information being shared with patients.
- **Guide: Submitting Directory Changes in CAQH ProView (page 4)**
This guide explains how to use CAQH ProView to maintain directory information and offers helpful tips, as well as links to step-by-step resources.
- **Template Letter to Health Plans Requesting Use of CAQH ProView for Directory (page 5)**
This template is available to providers and practice managers who would like to request that additional health plans use their CAQH ProView profile for directory maintenance.

Take the Frustration Out of Updating Directories

Frequent requests from plans for directory information is frustrating. Sharing updates can be difficult and takes too much time. Using a single process can help.

Maintaining accurate directory information helps patients find you.



Patients need to know your practice locations, whether you are accepting new patients, and if their insurance will be accepted. Keeping directory information up-to-date with your many network health plans is important, but should not take a lot of your time.

Health plans are using CAQH ProView® to update directories.



You can use a single process through CAQH ProView to communicate changes about your practice and professional information with multiple health plans. More than 1.4 million providers and many plans are using CAQH ProView.

It's easy to keep directory information up-to-date.



Each time there is a change to your directory information, simply update your CAQH ProView profile. Relevant changes you make will be reflected in your 'Directory Snapshot'. You can make changes to your directory information at any time and instantly share updates with your health plans.

Why CAQH ProView?

- Reduce work redundancies.
- Decrease the number of requests to update directory information.
- Use a single process to share directory changes with multiple health plans.
- Leverage your CAQH ProView profile to simplify directory maintenance, not just credentialing.
- Available to providers at no charge.



Are your patients getting correct directory information?

Use our best practices checklist below to help ensure you are making accurate directory information available.

In my CAQH ProView® profile:

- I list all practice locations where patients can make an appointment.
- I specify whether I am accepting new patients at each location and with each insurer.
- I provide the office phone number a patient can use to make an appointment.
- I correctly enter suite numbers whenever applicable.
- I include the practice hours of each location.
- I review and accurately respond to any health plan-specific questions.
- I identify and archive old practice locations.
- I appropriately classify the practice locations where patients cannot make an appointment – e.g., those where I cover or fill in for colleagues; read tests, etc.
- I **update** *and* **attest** to my directory information any time there is a change, and review my information at least every 120 days.
- I ask all my network health plans to access CAQH ProView for my up-to-date directory information.

Unchecked boxes?

Address these areas to help improve patient satisfaction.

Learn more about using CAQH ProView to manage your directory updates.

Visit our website: www.caqhproviderdirectory.org

Submitting Directory Changes in CAQH ProView®

Use this guide for helpful tips on how to update directory information in your CAQH ProView profile.

1

Log in to your CAQH ProView profile at <https://proview.caqh.org>.

New users can go to <https://proview.caqh.org> to create a secure account. Review our [step-by-step videos and user guides](#) before you start.

2

Navigate to the “Practice Locations” section to update your profile.

Review and update all the required fields to make sure patients can find you.

- **Ensure** you indicate current practice name, suite number, whether you are accepting new patients, etc., so the most accurate and up-to-date information is included in directories.
- **Avoid** duplicate addresses. If one location (e.g., a medical complex) houses multiple practices, be sure to include suite numbers to distinguish the addresses.
- **Describe** your practice affiliation for each location so health plans can determine whether it belongs in their directories.
- **Indicate** the health plans you accept at the practice-location level, since health plan participation may vary by location. You are not being asked to specify networks/products for a health plan.
- **Share** the phone number patients can call to make an appointment in the “Office Phone Number” field.

3

Review and Attest to your CAQH ProView profile.

Address any errors by navigating to the corresponding section and making updates. Click “**Attest**” once you confirm that the status bar at the top of your profile, “Profile Data,” shows the word “Complete” in green.

Questions? Use the Live Chat function while you are logged into CAQH ProView or call the CAQH ProView Help Desk at 888.599.1771.

Provider Template Letter to Request Health Plans use CAQH ProView for Directory Information

To simplify your directory maintenance process, be sure to request all your health plans use CAQH ProView to update their directories. Visit the CAQH website to view the [list of participating organizations](#). This template may be used in its entirety or adjusted as you desire.

[DATE]

Dear [HEALTH PLAN CONTACT]:

I recently received a request from [HEALTH PLAN] to update and confirm my directory information. As I already keep this information updated in CAQH ProView®, I would like to request that [HEALTH PLAN] refer to my profile for my current directory information.

Any time there is a change to my information, I make those updates in CAQH ProView. My most recent attestation date helps confirm that the information I have provided is complete and current.

I am requesting that all health plans I contract with use CAQH ProView for updating and maintaining their directories. By collecting my information this way, [HEALTH PLAN] should rarely need to contact me directly for directory updates, which will help save time for both of us.

If you are not currently accessing directory information through CAQH ProView, you can learn more [here](#) on how other plans I am contracted with use it today.

Thank you,

[Your Signature]