Registration

If this is the first time entering the Universal Credentialing DataSource, you must first register:

1. Open your Browser (Internet Explorer, Netscape, etc.) and enter the following URL in the Address bar: https://caqh.geoaccess.com/oas

2. Press Enter. The Universal Credentialing DataSource Welcome screen will display. **NOTE:** Hover over the bubbles on the Welcome screen to view text related to each section. Click on the bubbles to open a specific section.

3. Click the Logging in for the first time? Hyperlink. The Getting Started screen will display. This screen provides a high-level overview of the online application including completion time, a summary of information required and suggested materials to have available. **NOTE:** See Attachment A.

4. Choose Next to move to the Authentication screen.

5. Enter your CAQH Provider ID from your welcome packet.

6. Enter at least one of the following additional pieces of information (the more information provided, the better the match response):
   - Social Security Number (XXX-XX-XXXX)
   - Date of Birth (mm/dd/yyyy)
   - DEA Number

7. Click the Log In button.
## Function

### Authentication

As the system is launched in each state CAQH Provider IDs will be sent to each provider in participating health plans. If you have received a CAQH Provider ID, please enter the following authentication information. After successful authentication, you will be able to generate your own unique password and begin using the system.

- **CAQH Provider ID (Required):**
  
- **You will be authenticated if one of the following items matches our records. Please provide as much of the data below as possible.**
  
  - **Social Security Number:** [ ]
  
  - **Date of Birth (mm/dd/yy):** [ ]
  
  - **DEA Number:** [ ]
  
  - **UPIN:** [ ]

[Click NEXT]

8. Enter your registration information - fields marked with an * are required.

9. Click **Submit**

The Registration Successful screen will display.

8. Enter your registration information - fields marked with an * are required.

9. Click **Submit**

The Registration Successful screen will display.

If registration is unsuccessful, a dialog box will appear indicating the field(s) requiring attention. Re-enter and click Submit.
## Log In

1. Enter your Username and Password.
2. Press the Log In button.
3. A dialog box will appear asking if you would like the system to remember your username and password for future log-ins - if you select Yes, you will not be required to enter this information on future logins.

If you check the Remember username/Password box before selecting Log In, this message will not appear.

The CAQH main page will display at the Start tab.

**NOTE:** Once registration is complete, use the browser address above and login using your Username and Password.

## Start Tab

From the Start Page you may select:

- **Complete/Update Application** - start the application process and begin entering your provider information.
- **Your Activity Log** - view your account activity.
- **Tutorial** - view the Universal Credentialing DataSource Tutorial. This requires Flash. Use the link provided to download if necessary.
- **Re-Attest** - use to re-attest that your current information is up-to-date.
- **Print Application** - select to view and print a formatted application and supporting documents for your records.
- **Log Out** - use to log out of the system (information not saved using a Next or Submit button will not be updated/saved).
- **Edit Account Information** - use to edit your account information and/or change your password.

**Note:** Hover over section tabs to see information pop-ups that define the section.
## Function

### Universal Credentialing DataSource Tutorial

Select the Tutorial button to view a tutorial of the Universal Credentialing DataSource. This is a page-by-page walk through of the system.

### Edit Account Information

Click the Edit Account Information to modify your contact information and/or change your password for the Universal Credentialing DataSource.

### Prepare Tab

Use the Prepare Tab to begin the application entry process or to make changes to your provider type, primary office state or hospital-based provider information.

1. Select your provider type from the drop-down list.
2. Select your primary office state from the drop-down list.
3. Select Yes or No to indicate if you practice exclusively within the inpatient setting.

4. Click the NEXT button. The system advances to the Answer tab, Personal Information page.
**Function** | **Description**
--- | ---
**Answer Tab** | 1. Enter your personal information.

   - Click **NEXT** to move to the next page of the Answer tab.
   - Using the Next button saves your entries and advances to the next page of the Answer tab. No validation is performed.
   - **OR**

   - Click **AUDIT** before choosing Next to audit your entries page by page and Save. If an entry is required on the current page a request dialog will appear directing you to the information to complete.

   - **Birth Date (mm/dd/yyyy):**
     - Gender:
     - **Social Security Number:**
     - **National Identification Number:**
     - **ND Country of Issue:**
     - **Are you eligible to work in the United States?**
     - **Non-English languages spoken by provider:**

2. **Add, Edit, Delete, Import Buttons**

   - As you work through the Answer tab, many pages will include Add, Import, Edit and Delete buttons.
   - Use Add to add new sections to Answer tab pages.
   - Use Edit to edit information within page sections.
   - Use Delete to delete sections of information.
   - Use Import to import information entered in the Practice Administrator Module to reduce data entry.

   - Import is only available on the Practice Locations, Hospital Affiliations and Professional Liability Insurance pages. Providers must be associated with a practice manager and the data marked Yes to be included in the export process within the Practice Administrator Module.

   - Import, Practice Locations – adds a new practice
   - Import, Health Care Facility Affiliations – adds a new affiliation(s)
   - Import, “current” Professional Liability Ins. – replaces “current” information
   - Import, “previous” Professional Liability Ins. – adds “previous” carrier(s)
Function | Description
--- | ---
The Add button will sometimes bring up an additional window. After entering information, use the Add or Cancel button on the window to update/save or cancel information.

**Note:** Do not use the close window (X) button in the top right-hand corner of the window. This will update the Add button on the Answer tab page and change it to Cancel – if this happens, click the Cancel button and it will update back to Add. Check the information you entered to assure it was updated/saved before moving on.

### Practice Locations
Use the Add button to enter a new location or use the Import button to import practice locations information entered by a practice manager in the Practice Administrator Module. The Practice Locations section contains multiple pages for each location.

Providers who indicate that they practice exclusively within the inpatient setting are not required to complete the Practice Locations section.

#### Using the Add Button
1. Click the Add button next to Practice Details to enter a new practice location. Page 1 of X (based on standard vs. state application) for this location will display.
2. Use the Next and Back buttons to move through the pages and enter information.
3. Use the View Practice Locations button to return to the Practice Locations page.
4. Use the Save & Audit button to audit entries and save.
5. Use the Next button on the last page to return to the Practice Locations page.
<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Practice Locations page will display -</td>
<td>6. Use the <strong>COPY PRACTICE</strong> button to copy all information for a practice location previously entered to a new location.</td>
</tr>
<tr>
<td>7. Use the <strong>EDIT</strong> button of the new location to “modify” fields for the new location. Only one location may be designated as the Primary Practice and correspondence location. Modify pages 1 through X for each location as needed.</td>
<td></td>
</tr>
<tr>
<td>8. Select Practice Locations Done to move out of the Practice Locations section and to the next section of the Answer tab.</td>
<td></td>
</tr>
<tr>
<td><strong>Note:</strong> When returning to the Practice Locations page to review information, choose the Edit button for the location you wish to review or edit – this will take you to page 1 of X for the location. Use the View Practice Overview button if you wish to return to the Practice Locations overview screen. Use the Practice Locations Done button to move out of this section.</td>
<td></td>
</tr>
<tr>
<td><strong>Using the Import Button</strong></td>
<td>1. Click the Import button next to Practice Details to enter a new practice location. The Import screen will display</td>
</tr>
<tr>
<td>2. Select the Practice Manager from which you want to import data and choose Next. The Import screen will re-display.</td>
<td></td>
</tr>
<tr>
<td>3. Select the Practice information you want to import.</td>
<td></td>
</tr>
<tr>
<td>4. Choose OK. The Practice Locations screen will display.</td>
<td></td>
</tr>
<tr>
<td>5. Use the Edit button for each location imported to update or add information (pages 1 through X for each location).</td>
<td></td>
</tr>
<tr>
<td><strong>–Go To Specific Sections–</strong></td>
<td>Within the Answer tab, use the –Go To Specific Sections– drop-down list to move quickly to different sections. This list is in page order with sub-pages indented beneath page names.</td>
</tr>
</tbody>
</table>
Function | Description
--- | ---
Data Audit | When all sections of the Answer tab have been completed, choosing Next on the last page takes you to the Audit tab. The audit process checks your data and flags areas where problems are found.

1. Click run Audit.

2. If your credentialing application is error free, you will receive the Data Audit valid screen. Choose NEXT to proceed to the Attestation tab.

   If errors are encountered, the Data Audit screen will display with a list of the errors, details and links to the pages containing the errors.

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3. Click the hyperlink of the first Required Fixes error.

4. Correct the Required Fixes error(s) on the page or enter missing information.

   Errors will be flagged with a red * (asterisk). Click the red * to receive information regarding the error.

   4. Correct the Required Fixes error(s) on the page or enter missing information.

5. Click OK at the bottom of the page to update and return to the audit tab.

6. Work through all Required Fixes errors and Suggested Fixes (optional).

7. When the last error has been corrected the Data Audit valid screen will appear. Choose NEXT to proceed to the Authorize tab.
### Function

#### Authorize Tab

The Authorize tab is used to authorize the release of your self-reported data to healthcare organizations.

1. Check the information on the authorization page and make changes if necessary.

2. Choose **SAVE** to update your selections

   - OR -

   Choose **BACK** to move to the previous page

   - OR -

   Choose **NEXT** to update your selections and move to the Attest tab.

#### Attest Tab

The Attest tab is used to review your data summary and certify that the information you have provided is true, correct and complete to the best of your knowledge.

1. Click **REVIEW**

   A data summary displays in PDF format using the Acrobat Reader.

   **Note:** If you do not have the Acrobat Reader you will need to install it for viewing. Use the link provided to access the Adobe site and download the Reader.

### Description

#### Authorize Tab

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1. Check the information on the authorization page and make changes if necessary.

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   - OR -

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   A data summary displays in PDF format using the Acrobat Reader.

   **Note:** If you do not have the Acrobat Reader you will need to install it for viewing. Use the link provided to access the Adobe site and download the Reader.
<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Review your data summary.</td>
<td></td>
</tr>
<tr>
<td>3. Close the data summary using the close window button X in the top right-hand corner of the window. This will close the Acrobat Reader application.</td>
<td></td>
</tr>
<tr>
<td>4. Click REVIEW COMPLETE.</td>
<td></td>
</tr>
<tr>
<td>5. Read the attestation statement and click ATTEST to move to the Attachments tab.</td>
<td></td>
</tr>
</tbody>
</table>

### Step 3: Attestation

Click 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. You also acknowledge that your CAQH Application will not be considered complete until supporting documentation and properly executed Authorization, Attestation and Release Form is submitted. Once you attest, you will be taken to the Attachments tab to prepare your supporting documents for submission to CAQH.

### Attachments Tab

1. Follow the Initial Attestation instructions, if this is your first attestation.
### Function

<table>
<thead>
<tr>
<th>Reattestation Supporting Documentation:</th>
</tr>
</thead>
<tbody>
<tr>
<td>After completing the steps on the attestation tab, follow these additional instructions to complete your reattestation:</td>
</tr>
<tr>
<td>1. Review the supporting documentation on file below. It is your responsibility to ensure that all supporting documentation is current and valid.</td>
</tr>
<tr>
<td>2. If any supporting document has expired, you must submit a new copy with this attestation. To submit new supporting documentation, please print the Fax Cover Sheet, attach your supporting documents and fax to 266-2900-4414.</td>
</tr>
<tr>
<td>3. If your supporting documentation is up-to-date, no further action is required.</td>
</tr>
</tbody>
</table>

### Description

-OR-

If this is a subsequent attestation, follow the Reattestation instructions.

-OR-

View your current documentation on file.

2. Choose **FINISH** to move to the Completed Application page.

3. Choose **LOG OUT** to log out of the system and close.

-OR-

Return to the Start Tab to perform additional functions within the application.

### Current supporting documentation:

<table>
<thead>
<tr>
<th>Name</th>
<th>Received Date</th>
<th>Expiration Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Release</td>
<td>02/12/2002</td>
<td></td>
</tr>
<tr>
<td>Current Professional Liability Insurance Policy Fact Sheet</td>
<td>02/12/2002</td>
<td></td>
</tr>
<tr>
<td>CDP Registration</td>
<td>02/12/2002</td>
<td></td>
</tr>
<tr>
<td>State Controlled Dangerous Substance (CODS) Certificate w/5</td>
<td>02/12/2002</td>
<td></td>
</tr>
<tr>
<td>Workers’ Compensation Certificate of Coverage</td>
<td>02/12/2002</td>
<td></td>
</tr>
</tbody>
</table>

### Your Activity Log

Your Activity Log

Use the Your Activity Log button on the Start tab to review your activity.

**Your Activity Log**

Select this button to view account activity.

View previous and current values for changes, support call information, notifications to provider and date applications sent to provider (if applicable) by clicking on the links provided (underlined text).

### Attestation

The next step is for you to make a final review of your information and attest to its accuracy. Follow these steps:

**Step 1. Review**

Click **Review** to display and review a summary of the data you entered. A new window will open. You may print your summary from the menu bar of this window if desired. If you need to make a change, close the summary window and return to the Answer tab to make your changes.

**Re-Attest**

Use the Re-Attest button on the Start tab to re-attest that current provider information is up-to-date.
Print Application

Use the Print Application button on the Start tab to view and print a formatted application and supporting documents for your records only.

FAQ's and Help

Page specific FAQ's will be displayed in the right-hand column of the page. Click on a question to view the answer.

Within the Answer tab, Click the Help button to access system help.

- Use the Contents tab to access help by section and page.
- Use the Index tab to access help alphabetically by topic.
- Use the Search tab to access help by entering key words.
The graphic illustrates a provider participating with 6 Managed Care Organizations. With the CAQH system, the provider completes the application once. The average provider will spend about 2 hours completing the application (slightly longer with a complex history). All six CAQH-member MCOS use the same application data to credential the provider.
Information you will be asked

- Basic Personal Information
- Education and Training
  - Medical school
  - Graduate school
  - Internships and residencies
  - Fellowships and preceptorships
  - Teaching appointments
- Specialties and Board Certification
- Practice Location Information
  - Practice name and type
  - Address and contact information
  - Billing, office manager and credentialing contact
  - Services, certifications, limitations and hours of operation
  - Partners and covering colleagues
- Hospital Affiliation Information
- Malpractice Insurance Information
- Work History and References
- Disclosure and Malpractice History

Materials that will be helpful

- IRS Form W-9(s)
- Drug Enforcement Administration (DEA) Certificate
- Controlled and Dangerous Substances (CDS) Certificate
- State medical license(s)
- Various identification numbers (UPIN, Medicare, Medicaid etc)
- Malpractice insurance policy(ies)