

# Provider & Practice Administrator Quick Reference Guide



The **CAQH Universal Provider Datasource (UPD)** is the industry standard for collecting provider data required by health plans, hospitals and other managed care organizations for credentialing, claims processing, quality assurance, emergency response, member services, and more. UPD enables physicians and other health professionals in all 50 states and the District of Columbia to submit their information free of charge into a secure, centralized database through an interview-style online process. Complete the UPD data set once and you may never need to fill out paper forms ever again.

## What You'll Need to Start

- ▶ CAQH-supplied **Provider ID number**
  - ▶ Previously completed **credentialing application** (for reference)
  - ▶ List of **all previous and current practice locations**
  - ▶ Identification numbers, such as **UPIN, Medicare, Medicaid, and National Provider Identifier (NPI)**
- ▶ Copies of your:
    - **Curriculum Vitae**
    - **Medical license**
    - **DEA certificate**
    - **CDS certificate**
    - **IRS Form W-9**
    - **Malpractice insurance face sheet**
    - **Summary of any pending or settled malpractice cases**

### STEP FOUR

#### Verify Your Data Entry—Attest

You must complete steps one through three entirely before you can finish the UPD data-entry process by attesting.

1. On the "Attest" page, click "Review" to generate an Adobe pdf version of the information you just entered.
2. Review this Data Summary for completeness.
3. If complete, click "Review Complete", read the Authorization and then click "Attest" to complete the data entry portion of the application.
4. If there are changes to the data, click on the "Answer" tab and use the drop down list to select the section that needs to be revised. "Save" those changes, "Audit" the application and start the "Attest" process again.

### STEP FIVE

#### Fax Supporting Documents

Once you attest, you will be asked to fax in any required supporting documents.

1. The "Attachments" tab will tell you what documents are needed to complete your application.
2. Download the fax cover sheet.
3. Fax the cover sheet and supporting documents (DEA certificates, W-9 forms, etc.) to CAQH at 1-866-293-0414.

Once your application is complete, it will be available automatically to the organizations you authorized. You will need to check with each individual organization to determine your credentialing status.

#### *Maintain the Accuracy of Your Information:*

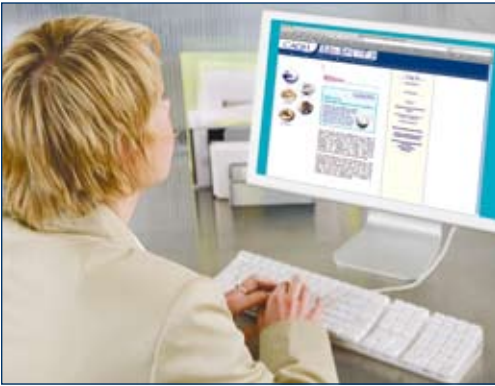
Every four months, you will receive a request from CAQH to re-attest that all of the information in your application is correct.

1. Go online to <https://upd.caqh.org/OAS> at least every four months.
2. Log in.
3. At "Start Page," select "Re-attest."
4. Review and update data as needed.
5. Click on "Attest."

### PRACTICE ADMINISTRATOR MODULE

The UPD Practice Administrator Module makes it easy to enter data common to multiple providers in a group.

1. Go online to <https://upd.caqh.org/OAS>
2. Select "Click here to enter Practice Administrator Module."
3. Click "Logging in for the first time?" to create your account.
4. Enter contact information, username and password to register.
5. Enter data common to multiple providers in a group and click "Export".
6. Remind providers to click the "Import" button to import data common to multiple providers into the application.



- ▶ Follow the steps below to complete the UPD process. UPD automatically moves you through each step when completing the process online.
- ▶ You will need several pieces of information before getting started. (See list on right.)
- ▶ Please allow one to two hours to complete the process in one session.
- ▶ You also can complete the process over the course of several sessions. If completing over multiple sessions, clicking on "Back," "Next," or "Audit" will save your data. When returning, you must log in and select the tab you wish to work on.

## STEP ONE

### Activate Your UPD Registration (First-time Users)

Before you can begin this step, you must be registered with a participating organization and have your Provider ID number and authentication data. The Provider ID number was included in the registration kit that you received from CAQH. The CAQH Support Desk also can supply you with this information. The authentication data will be specific information about you. (i.e., SSN, DOB, etc.)

1. Go online to <https://upd.caqh.org/OAS>
2. Click "Logging in for the first time?"
3. Enter CAQH Provider ID.
4. Enter authentication data.
5. Create username and password (make sure you write down this login information and keep it in a safe place).

## STEP TWO

### Complete the Application

1. Choose the "Complete/Update Application" tab on the "Start Page."
2. Enter the requested information.
3. Use "Audit" to check data entered on the page.
  - ▶ Use "Back" or "Next" to page forward or backward on the application.
  - ▶ Click "Back," "Next," or "Audit" to save data when you are finished entering information on a page or logging out.
4. When you have answered all the questions, click "Next" to proceed to "Audit" the data in the application.
5. Click "Run Audit" to determine if there are any errors or omissions in the application.
6. You must correct any "Required Fixes" before moving to the next step. You may correct any "Suggested Fixes" that are applicable, as the organization(s) you participate with find it helpful to have this information.
7. Click "Next" to proceed to the next step in the process.

## STEP THREE

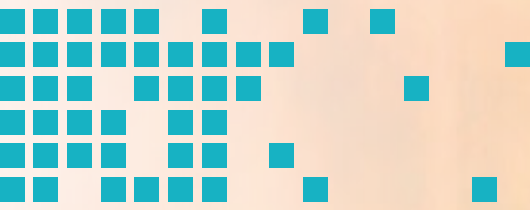
### Authorize Access to Your Information

After completing the online process, your important data and documents are available for revision or review at your convenience. **You keep total control.** Only you can authorize access to your information.

1. On the "Authorize" page, check the listed organizations\* that you would like to receive your information or choose "Check here for all plans to receive data" to select all.
2. Click "Next" to proceed to the next step in the process.

\* If a participating organization you wish to authorize does not appear, please contact that organization and ask to be added to their roster.

Visit [http://www.caqh.org/ucd\\_health\\_participating.php](http://www.caqh.org/ucd_health_participating.php) to view a list of participating organizations.



## Universal Provider Datasource— the industry standard for provider data collection.



- ▶ Simplifies provider data collection for credentialing, claims processing, quality assurance, emergency response and member services, such as directories and referrals.
- ▶ Online, interview-style application eliminates redundant paper forms, reduces administrative burden.
- ▶ The UPD data set meets the data-collection requirements of URAC, the National Committee for Quality Assurance (NCQA) and Joint Commission standards.
- ▶ UPD is supported by America's Health Insurance Plans, the American Academy of Family Physicians, the American College of Physicians, the American Health Information Management Association, the American Medical Association, the Healthcare Administrative Simplification Coalition and the Medical Group Management Association.

### Benefits to Providers

- ▶ Free service for providers.
- ▶ Enter your data once through a single data-collection process.
- ▶ Submit, store, manage and distribute your information electronically.
- ▶ Keep your data safe and secure.
- ▶ Maintain total control of your information.
- ▶ Re-attest in minutes.

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**CAQH**<sup>®</sup>

CAQH, a nonprofit alliance of health plans and trade associations, is a catalyst for industry collaboration on initiatives that simplify healthcare administration. CAQH solutions help promote quality interactions between plans, providers and other stakeholders, reduce costs and frustrations associated with healthcare administration, facilitate administrative healthcare information exchange and encourage administrative and clinical data integration.

Visit [www.caqh.org](http://www.caqh.org) for more information.