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2 **SELF-REGISTRATION & ACCOUNT MANAGEMENT**

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2 Self-Registration & Account Management

In this section, you will learn how to perform the following tasks:

✓ Self-register for a new user account
✓ Log in to the system
✓ Retrieve a forgotten username
✓ Retrieve a forgotten password
✓ Managing unlocked accounts
✓ Log out of the system
✓ Learn about the system time limit for inactivity
✓ View and edit profile
2.1 Account Creation Overview

All EnrollHub users must have a personal account with a username and a password in the system. There are two ways to create an account.

- A person can self-register for an Administrator account.
- An Administrator user can create “child” user accounts for staff members that need to access the same enrollment data.

2.2 Create an Account

To self-register for a new Administrator account, navigate to https://solutions.caqh.org/ and click on the “Register Now” button in the center of the page.
2.2.1 Step 1: User Information

Enter the requested personal information for the user and provide the challenge response. Then click the “Next” button.
2.2.2 Step 2: Company Information

Enter the name, address, and phone number of the company with which you are employed.

2.2.3 Step 3: Account Set Up

Next you will create a username, password, and security questions.

- Your username must have at least 8 characters.
- Your password must conform to the following rules and must meet at least “medium” strength, as indicated by the bar below the “Create Password” field:
  - The passwords must be between 8-20 characters
  - It must include at least 1 number and 1 letter
  - It must include at least 1 upper and 1 lower case letter
  - It must contain at least 1 of the following characters: @ # % * ( ) + = { } ? " ', . –
  - It cannot contain any spaces
  - It cannot contain the following characters: $ < > & ^ ! [ ]
  - It cannot be the same as your Username

![Provider Registration Form](image.png)
- Select and answer the three security questions. You will be asked to answer these questions in the future to confirm your identity so you will need to remember exactly what you entered as answers.

  ✓ The answer fields are case sensitive, which means that you must remember whether you used capital letters or lower case letters in the answers.
  ✓ The answers must be at least three characters long.
  ✓ The answers cannot be longer than 50 characters.

After you have provided an answer for each question, click the “Next” button.
2.2.4 Step 3: Terms of Service

Review the “EnrollHub Terms of Use Agreement”, check the “I Agree” box, and click the “Submit” button. The “Submit” button is not clickable until you check the “I Agree” box. You cannot proceed with your registration if you do not agree to the terms.

After you click the “Submit” button, a pop-up window will indicate that a confirmation message was sent to the email address you provided.
2.2.5 Step 5: Account Activation

An email should appear in your inbox soon after you submit your registration. We recommend that you add donotreply@caqh.org to your safe senders list in your email program. If you do not see the email right away, please check your spam folder or contact the Help Desk for assistance.

You must activate your account prior to using the system. In order to activate your account, you will need to click the link in the activation email you receive shortly after you complete your account registration.

If you do not activate your account, a second email will be sent to you one week after the original sign up. If there is still no activation after the second email, a third and final email will be sent to you two weeks after original signup. If you do not activate your account after the third email, your account will be deleted from the system.

As soon as you activate your account, you are ready to log in and submit enrollments.
2.3 Log In

Once you have registered, and activated your account, you can go to https://solutions.caqh.org at any time to log in. Enter your username and password in the appropriate boxes in the upper right corner of the home page, and click the arrow to the right of password box to login.

2.4 Retrieve Username

If you forget your username, you can request help on the login page.

To retrieve your username, locate the “Forgot your username or password?” message and click the word “username”. In the Forgot Username pop-up, enter your first name, last name, and email address. Then click “Confirm.”

You will see a message that says that your username will be emailed to you. Check your email for the message.

Once validated, you will receive an email with your username and instructions to log in.
2.5 Retrieve Password

To retrieve your password, locate the “Forgot your username or password?” message and click on the word “password”. In the Forgot Password pop-up, enter your username in the appropriate field and click the “Retrieve” button.

Next, enter the answers to the security questions that you set up during registration and click the “Confirm” button. All three questions must match the answers originally provided. Remember that the answer fields are case sensitive so use upper and lower case letters exactly as you used them when you created the answers the first time.

After correctly answering the security questions, you will be instructed to create a new password. The new password cannot be the same as any password previously used. You will not need to change the security questions when you change the password.
2.6 Account Lock Out

If you enter the correct username but an incorrect password five times, your account will be locked. To unlock your account, click on the word password under the login boxes and answer the security questions to unlock your account, reset your password, then log in again.

2.7 Log Out

To log out, click on the “Log Out” button, which can be found in the top right corner. By clicking the “Log Out” button, the session will end and you will be re-directed to the login screen.

2.8 System Inactivity

After logging in successfully, you will remain logged in while actively using the system or until you click the Log Out button located in the upper right corner of the page.

After 10 minutes of inactivity, you will be asked if you want to remain logged into the system. You can click the “Continue” button if you intend to continue or you can click “Log Out” if you are finished using the system. If you do not see the message in time to respond or do not click either button, your session will automatically end after 5 minutes and you must log in again.
2.9 View and Edit Profile

After you log in successfully, you will land on the Summary page. In the upper right corner of that page you will see a welcome message, your username, and the time and date that you last logged in. You will also see your full name and email address.

To view your full profile, click on the “Profile” button.

The profile is made up of three tabs. The Personal Information tab displays user contact information that was entered during account registration. To edit any of the information in the profile, type into the text boxes and click save.
The Login Information tab contains username and password information. Username is not editable and displays in a read only format. The current password is masked and displays as “*****”. If you wish to update the password, you must enter the current password, then enter the new password, and then re-enter your new password. If the password strength indicator says that the password you selected is strong, click the “Save” button.

The next tab is the “Security Information” tab. On this page, the answers that you provided to the security questions during registration are masked and displayed as “*****”. If you wish to make an edit to one of the questions, you must update all three of the questions. You may reuse answers previously used but, you must re-key answers to all of the questions if you wish to edit one of them.

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