Help Getting Started

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The Help Getting Started guide will describe the following topics:

- Description and benefits.
- Product overview.
- Provider users.
- Common terms.
- Quick start guide.
- Provider resources.
- Self-register for a new user account.
- Login to the system.
- Retrieve a forgotten username.
- Retrieve a forgotten password.
- Account lock out.
- Log out of the system.
- Learn about the system time limit for inactivity.
- View and edit profile.
1.1 EnrollHub Description and Benefits

CAQH, a non-profit alliance of health plans and associations, has simplified and streamlined the electronic funds transfer (EFT) enrollment process for providers and payers with EnrollHub™, a CAQH Solution®. Instead of enrolling in EFT individually with each plan, CAQH offers a secure, online system that allows providers to enroll in electronic payments with multiple payers at no cost. This eliminates redundant paper forms and saves administrative time and costs for both providers and payers.

Payers have the option to receive ERA enrollments from providers through EnrollHub as well. ERA enrollment options are payer-specific and are only offered to providers when a payer has elected to activate ERA enrollment.

Product Overview

EnrollHub delivers required enrollment information to payers and allows providers to:

- Enter and update financial information once and send it to multiple payers.
- Submit documents and other information required for bank account verification online.
- Submit ERA enrollment information to participating payers.
- Monitor and manage the status of EFT and ERA enrollments with multiple payers in one centralized location.

CAQH verifies all information and works with the provider to correct issues. Only verified provider enrollment information is forwarded to payers. Providers can monitor the status of their enrollments and make updates to enrollments as needed.

Provider Users

EnrollHub and this user guide refer to the following terms when describing people or entities that interact with the EFT and ERA process.
Provider: This is a general term that is used to refer to the provider entity, practice, or office. This is not referring to a practitioner but instead the billing entity.

Registered User: This term is used to refer to a person that has a username and password for EnrollHub. (See Chapter 2: Create Manage Users for instructions on obtaining a username and password.)

If there is a need for multiple registered users from the same provider office or billing agency to share enrollment data, accounts should be structured so that there is a single Administrator, who self-registers to create an Administrator account. That Administrator can create “child” accounts. The “Administrator” and “child” accounts share the same provider and enrollment data. For more information on “Administrator” accounts, see Chapter 5: Managing User Roles.

EFT and ERA transactions are usually managed by practice managers, administrative assistants, office managers, CFOs, or contracted billing agency staff.

Provider Contact: The Provider Contact is the person who works within the provider office and is responsible for electronic funds transfer. During the enrollment process, the system collects information about the Provider Contact. The Provider Contact may be the same person as the Registered User. The provider contact can authorize administrator users or child users to submit EFT and ERA enrollments on behalf of the provider office.

Provider Authorized Agent and Provider Authorized Agent Contact: While some provider entities manage billing internally, others use outside agencies, which can be called Provider Authorized Agents. The Provider Authorized Agent is a term used in the CORE rules to refer to an organization that is contracted by the provider to manage financial transactions on behalf of the provider office. A Provider Agent Contact is the person at that agency who manages the financial transactions on behalf of the provider office. The Provider Agent Contact may be the same as the Registered User.
Common Terms

This section defines common terms used throughout the EFT system.

Account Number Linkage to Provider Identifier: This field describes the provider preference for grouping (bulking) claim payments. This field is in the Financial Institution Account section of the EFT enrollment process. The provider has the option to group by TIN or by NPI. The preference indicated must match the preference for (v5010 X12 835) remittance advice.

If you select TIN in this field, you are indicating that all claims associated with the specified TIN should be paid to the same bank account for a specific payer.

If your practice has multiple bank accounts which belong to different practice groups, you should select NPI and indicate each practice group’s billing NPI so that the payer will understand which bank account should be used for each claim.

Bank Document: The CAQH system requires that a digital image of a bank document is uploaded to the system as supporting documentation of the bank account owner. The system will accept one of two types of bank documents:

- Bank Letter: A bank letter is used to validate a provider’s bank account. You will need to scan a bank letter and upload the electronic image when you add a new bank account. A bank letter can be requested from your bank’s customer service department.

- Voided Check: A voided check is a blank, unused check with VOID handwritten across it and is used to verify your bank account. You must scan a voided check and upload the electronic image when adding a new bank account. For EFT enrollment, each Provider must include its bank’s routing and account numbers, both of which can be found on the check.

Doing Business As Name (DBA): This refers to the trade name, or fictitious business name, under which the business or operation is conducted and presented to the world, is not the legal name of the legal person (or persons) who actually own it and are responsible for it. The provider name or the DBA that you enter here must match the name that appears on the voided check or bank letter.

EFT and ERA Enrollment Status: When you submit an enrollment, it could have one of the following statuses:

- Enrollment Request Pending: The enrollment information has been submitted to CAQH and the information is being verified.
• Enrollment Requested: CAQH has verified the enrollment information and has passed it along to the payer for processing.

• Received: The payer has received the enrollment. The payer will contact the provider outside of the system user when EFT processing is complete if additional communication is needed.

• Change Enrollment Request Pending: The provider user submitted a change to an existing enrollment. CAQH is verifying the information.

• Change Enrollment Requested: CAQH has verified the enrollment information submitted with the change and has passed the change on to the payer.

• Cancel Enrollment Requested: The provider user has cancelled an enrollment.

• Cancel Enrollment Received: The payer has received the enrollment cancellation.

• Declined: The payer has declined the enrollment. The provider user should view the alert in the message center for details.

• Terminated: The payer has terminated a previously received EFT enrollment.

National Provider Identifier (NPI): The NPI number is used to validate your practice identity.

The Administrative Simplification provisions of the Health Insurance Portability and Accountability Act of 1996 (HIPAA) mandated the adoption of standard unique identifiers for health care providers. The purpose of these provisions is to improve the efficiency and effectiveness of the electronic transmission of health information. The Centers for Medicare & Medicaid Services (CMS) developed the National Plan and Provider Enumeration System (NPPES) to assign these unique identifiers known as National Provider Identifiers (NPI) (www.cms.gov). Health care providers must apply for an NPI number through CMS and the NPPES.

An Associated NPI refers to billing NPIs that are used for a single provider or group of providers within a larger entity. Associated NPIs are indicated when providers within an entity need to be paid to multiple bank accounts.

Provider Name: The Provider Name is the name of the provider receiving reimbursement from payers. The name as it is entered either here or in the Doing Business As Name (DBA) field must match what appears on the voided check or bank letter that will be uploaded later in the process.

Provider Federal Tax Identification Number (TIN): Your tax identification number is assigned to your practice by the Internal Revenue Service (IRS). It is also sometimes known as Employer Identification Number (EIN). In the case of a sole proprietorship, the provider might not have a Tax ID and would use his or her social security number instead.

Routing Number: A routing number is a unique code present on a check assigned by the American Bankers Association (ABA) that identifies a bank or finance institution issuing the check.

You can consult your bank to determine where routing numbers are found. Typically,
they can be found on checks and deposit slips.

Verification: CAQH performs the following three verification steps on provider enrollment information before sending the information to the payer.

- Bank Verification: CAQH checks to make sure that the name printed on the voided check or bank letter matches the information entered in the Provider Details section of the enrollment. Next, a pre-note transaction is sent which will verify the accuracy of the bank account number and the bank routing number that was entered. If either of those checks fail, provider users will be notified and the information must be fixed before an enrollment is submitted to the payer.

- Identity Verification: When you submit an enrollment to a payer, CAQH confirms that the person registering for an account and entering enrollment information is authorized to do so by the provider entity.

- Clearinghouse: A clearinghouse is a company or service hub that connects providers and payers so that they can send and receive electronic claims information.
Quick Start

The following are the steps to submit an EFT or ERA enrollment. Please review the rest of this guide for details of all of the functionality in the system.

Create an account at https://solutions.caqh.org by:
- Clicking the Register button.
- Enter required personal information.
- Establish a username and password.
- Set up security questions.

Activate your account and log in:
- An activation email will be sent to you. You must click on the link in the email to activate your account.
- Log in to complete the enrollment process.

Create a provider record:
- Enter the practice name or billing entity name (not the practitioner name, unless the practitioner name and the billing/entity name are the same).
- Enter the entity’s TIN and NPI.
- Enter contact information.
- Enter authorized agent (i.e. billing agency) information, if applicable.

Add at least one bank account to the provider record:
- Enter financial institution name, routing number, account type, and account number.
- Indicate if this bank account will be used for all claims related to the TIN that you entered or indicate that the bank account will be used for specific billing NPIs. If the bank account will be used for specific NPIs, you will enter those Associated NPIs.
- Upload a voided check or bank letter.

Submit EFT enrollment(s) once you have entered provider information and at least one bank account:
- Select the bank account and the payer(s) with which you wish to enroll.
- Accept the payment terms agreement.
- Click the Confirm button to complete your submission.

Submit ERA enrollments for participating payers. Some payers that use EnrollHub to receive EFT enrollments also use EnrollHub to receive ERA enrollments.

If you submit an EFT enrollment to a payer that participates with EnrollHub for ERA, you will be asked if you would like to submit an ERA enrollment for that payer. Your EFT enrollment will not be impacted by this decision.
Provider Resources

CAQH offers in-product and in-person resources to help providers use EnrollHub.

Product Tour

Upon initial login, a product tour pop-up window will display a high-level product overview. Click the Next button to browse through the product tour.

To close the product tour, click the X in the upper right corner of the pop up or click the Close Tour button.

To refer to the tour later, click the Product Tour link in the upper right corner of the Provider List screen.
Provider User Guide

When logged in to the product, click the User Guide link at the top of each screen. The table of contents will list all of the chapters with a description of each and indicate when the user guide was last updated.

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Provider FAQs

You can find a link to Provider FAQs at the top of each portal.
Late or Missing EFT:

If you believe you are missing an EFT, please review your personal bank account over a four (4) day range to see if the funds had settled. If you are still unable to find the EFT, please contact your bank for assistance. If your bank is unable to resolve your inquiry, please contact your selected payer(s) directly.

Trading Partner ID

A Trading Partner ID is an optional field for ERA enrollment requests. When enrolling for both EFT and ERA through CAQH, and you are a direct ERA receiver, please enter your Trading Partner, Submitter or Device ID. All ERA's will be delivered to this one location. If you receive ERA's via a third party, (example: Clearing House or Billing Service), please contact that entity to obtain the trading partner ID or ask that they submit an enrollment request on your behalf.

CAQH Help Desk

If you need to work with a customer service representative, the CAQH help desk is available by phone or email during business hours.

CAQH Provider Help Desk: 844-815-9763
efthelp@enrollhub.caqh.org

Help Desk Hours:
7am-9pm EST Monday-Thursday
7am-7pm EST Friday
Account Creation Overview

All EnrollHub users must have a personal account with a username and password. 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.

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.
Step 1: User Information

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

Enter your company name, address, and phone number.

![Provider Registration Form](image)

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

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.
Step 4: 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.
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. To activate your account, you will need to click the activation link in 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.
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.

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 indicating 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 login.
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.
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.

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.

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 use of the system 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.
View and Edit Profile

After you log in successfully, you will land on the Summary page. In the upper right corner 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 re-use answers previously used but, you must re-key answers to all the questions if you wish to edit one of them.