

Table of Contents

System Guidelines

- Design Guidelines.....2**
 - Color
 - Typography
 - Iconography
 - Shapes
 - Shadows
 - Responsiveness
- Input Fields.....3**
 - Input States
 - Tooltips
 - Dropdowns
- Buttons.....4**
 - Primary
 - Secondary
 - Disabled
- Live Chat.....5**
- Modals.....6**
 - Success
 - Authorizations
 - Reconfirm
 - Scrolling Modals
- Search Functionality.....7**
- Card Animations.....8**
 - Hover State
 - Flip
- Back Button.....9**
- Tables.....10**
 - Pagination
- Calendar.....11**

Groups Components

- Cards.....12**
 - Confirm Roster Card
 - File Processing Card
 - Authorization Cards
 - Pending
 - Authorized (No Data)
 - Authorized
 - Denied
- Snapshot.....13**
- Upload Process Features.....14**
 - First Time User
 - Previous Users
- Menus.....15**
 - Header
 - Footer
 - Authorizations Menu Filter
- Errors.....16**

Participating Organizations Components

- PO Portal Group Profile Cards.....17**
 - Group Information
 - Subscription Information
 - Data Not Available
 - Retrieve Data
 - Error States

VeriFide Components

- Graph Data Charts.....18**
 - Normal Re-creds
 - Initial/Urgent Re-creds
 - SLAs
 - File Timeliness
 - Data Quality
- Data Cards.....19**
- VeriFide Menus.....20**






System Guidelines

There are four guidelines to follow when designing for CAQH:

- Self-guided:** Users should be able to easily navigate the process without having to engage support
- Simple:** Allow users to focus on single tasks at a time
- Forward thinking:** Create responsive design patterns that can be used in future projects
- Accessible:** All elements should pass WCAG 2.0 AA standards

Color

Color is used to highlight function. Brand red is used in the logo and to highlight pending cards in the Authorized section. Green is used for positive actions (success messages and authorized cards). CAQH blue is the primary action color. Shades of gray are used in the header and footer, for secondary action and card backgrounds. The CAQH Yellow is used as a tertiary color to highlight special information. Bright red is used for error alerts.

			
Brand Red #A31236 <i>Used for logo and brand highlights</i>	Dark Gray #737678 <i>Used for secondary actions</i>	Light Gray #E6E6E6 <i>Used for disabled states</i>	CAQH Blue #0066BA <i>Used for primary actions, highlights, and text links</i>
			
Green #218F30 <i>Used for success messages and positive feedback</i>	Red #DCD151D <i>Used for error messages and to call attention to a field</i>	Yellow #FFB81D <i>Used for informational messages about the system</i>	

Typography

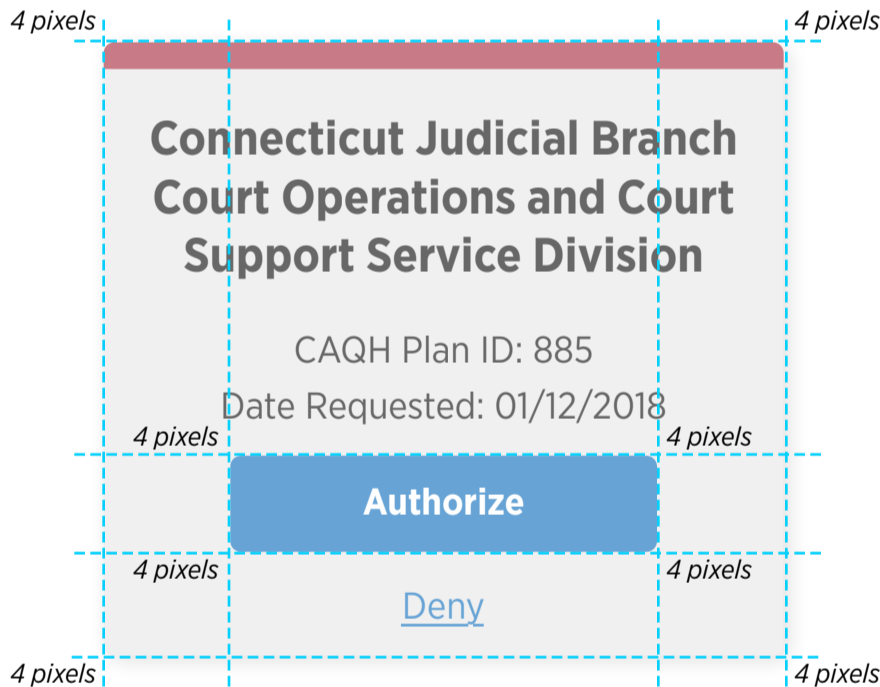
Gotham Narrow Book and Bold are used to match the marketing brand standards. Helvetica, Arial and Source Sans are used for systems/browsers that don't support web fonts.

Iconography

All icons are from Font Awesome. (fontawesome.io)

Shapes

All buttons, cards, and tables have a 4px rounded corner.



Shadows

There are shadows on all cards, tooltips, dropdown menus, tables, and modals. All shadows have the same specifications as outlined below.

- Shadow 1**
Color: #000000
Opacity: 14%
X: 0
Y: 2
Blur: 4
Spread: 0
- Shadow 2**
Color: #000000
Opacity: 12%
X: 0
Y: 3
Blur: 4
Spread: 0
- Shadow 3**
Color: #000000
Opacity: 20%
X: 0
Y: 1
Blur: 5
Spread: 0

Group Information

Last Confirm Date: 02/06/2018

- ✔ **Group Status:** Active
- ✔ **Authorization Status:** Authorized

Admin Email: admin@smithinternalmedicine.com
CAQH Group ID: 224
Primary Tax ID: 108978566

[View Previous Confirm Dates](#)

Responsiveness

Groups is built on the Bootstrap front-end framework and uses the Bootstrap's media queries to create responsive breakpoints. Review [Bootstrap's layout guidelines](#) for more information.

```
// Extra small devices (portrait phones, less than 576px)
// No media query for `xs` since this is the default in Bootstrap

// Small devices (landscape phones, 576px and up)
@media (min-width: 576px) { ... }

// Medium devices (tablets, 768px and up)
@media (min-width: 768px) { ... }

// Large devices (desktops, 992px and up)
@media (min-width: 992px) { ... }

// Extra large devices (large desktops, 1200px and up)
@media (min-width: 1200px) { ... }
```

There are five categories used for input fields:

Initial
 Line Stroke: 2px
 Label Text: 16px
 Text Line Spacing: 20px
 Text color: #737678
 Line color: #D2D3D4

Label text

Focus
 Line Stroke: 2px
 Line color: #0066BA

Hidden Text: 16px
 Hidden Text Line Spacing: 20px
 Hidden Text color: #737678

Label Text: 12px
 Label Text Line Spacing: 16px
 Label Text Color: #0066BA

Label text
Hidden text

Error
 Line Stroke: 2px
 Line color: #DC151D

Hidden Text: 16px
 Hidden Text Line Spacing: 20px
 Hidden Text color: #737678

Label Text: 12px
 Label Text Line Spacing: 16px
 Label Text Color: #0066BA

Error Text: 12px
 Error Text Color: #DC151D

Label text
Hidden text
 Error text

Completed
 Line Stroke: 2px
 Line Color: #D2D3D4

Label Text: 12px
 Label Text Line Spacing: 14px
 Label Text Color: #D2D3D4

Completed Text: 16px
 Completed Text Line Spacing: 20px
 Completed Text color: #000000

Label text
Completed Text

Disabled
 Line Stroke: 2px
 Line Color: #D2D3D4

Label Text: 12px
 Label Text Line Spacing: 14px
 Label Text Color: #D2D3D4

Disabled Text: 16px
 Disabled Text Line Spacing: 20px
 Disabled Text color: #D2D3D4

Label text
Disabled Text

Every input line has a 2px stroke. All text is font Gotham Narrow.

Initial State

Unless prefilled with data, all input fields start at the initial state.

Focus State

When an input field is clicked on, the label text is animated to slide up to the top left corner and becomes Gotham Narrow Book 12px with 16px line spacing. The label text and input line become CAQH blue (#0066BA), and hidden text becomes visible. The hidden text can indicate any help a user may need to fill in the text. (i.e. email address format, phone number format, password requirements, etc.). When typing in a focus state, the hidden text disappears and the typed text is black (#000000).

Error State

After entering data into an input field and the user clicks outside of the field, the system should check for an error. Errors should be checked in real time, not after a user submits data. If an error is found, the line turns red and error text appears below the field that details the error.

Completed State

If there is no validation required, the focus state turns to the completed state when the user clicks away from the field. If there was validation required and an error was displayed, the error state turns to the completed state when the error has been fixed.

Disabled State

There are occasions where a disabled state is necessary to show that the information has been recorded, but the field cannot be edited past a certain point in the process. The disabled state cannot be clicked on or modified.

More Information Tooltip

Throughout the profile registration process, there will be many input fields that require an explanation to assist users in filling out their data. In these situations, we use an information icon that allows a user to hover over it to get more information. The blue tooltip that appears is content-driven, meaning its size is based on the amount of text it is displaying. Its right side is anchored, while the height of the box and the left side will expand or shrink depending on the content.

Input with info icon

Billing Tax ID(s)

12-48596852



Hover over icon

Billing Tax ID(s)

12-48596852



This is a tooltip. The height and width will vary in size depending on the content.

Dropdown Style

For questions that require a dropdown style (i.e. pick from a list of options), there are three states for the item. All of the text in the dropdown is Gotham Narrow Bold, 16px, and varies in color depending on the state of the item.

Inactive State

The inactive state is similar in style and functionality to the initial input field.

Text color: #737678
 Line Color: #D2D3D4
 Arrow Color: #737678

Dropdown Question

Active State

The active state for the dropdown displays up to nine items at a time. Shadowing of the dropdown list helps to highlight the active state. To select, a user needs to click on the option. The hover color follows the mouse to help make selection easier.

Text color: #737678
 Line color: #D2D3D4
 Arrow color: #737678
 Option text color: #000000
 Hover fill color: #E5EFF8

Shadow 1
 Color: #000000
 Opacity: 14%
 X: 0px
 Y: 2px
 Blur: 4px

Shadow 2
 Color: #000000
 Opacity: 12%
 X: 0px
 Y: 3px
 Blur: 4px

Shadow 3
 Color: #000000
 Opacity: 20%
 X: 0px
 Y: 1px
 Blur: 5px

Dropdown Question

Option 1

Option 2

Option 3

Option 4

Option 5

Option 6

Option 7

Option 8

Option 9

Completed State

The completed state in a dropdown is shown when the user selects one of the options from the list. The difference between the initial and completed state is the text color.

Text color: #000000
 Line Color: #D2D3D4
 Arrow Color: #737678

Option 1

Button States


Primary Button

The primary button is CAQH blue with white text. This button is used to show the primary actions that should be taken on a page. The button is two columns wide on a bootstrap layout, which will be responsively resized when the screen size is changed. It should always be two columns wide.

 A blue rectangular button with rounded corners and the word "Value" in white text.	Background Color: #0066BA Text Size: 14px Text Color: #FFFFFF	Text Font: Gotham Narrow Bold Text Alignment: Center Corner Radius: 4px
--	---	---


Primary Button Hover State

On a hover of the primary button, it will change colors.

 A dark blue rectangular button with rounded corners and the word "Value" in white text.	Background Color: #002887 Text Size: 14px Text Color: #FFFFFF	Text Font: Gotham Narrow Bold Text Alignment: Center Corner Radius: 4px
---	---	---

Secondary Button

The secondary button is also two columns wide and responsive on all screen sizes on a grid layout within the Bootstrap framework. This button is used to display an additional action that the user can take, but it should not immediately draw their attention. There should never be a secondary button on a page without a primary button.

 A grey rectangular button with rounded corners and the word "Value" in white text.	Background Color: #737678 Text Size: 14px Text Color: #FFFFFF	Text Font: Gotham Narrow Bold Text Alignment: Center Corner Radius: 4px
--	---	---


Secondary Button Hover State

On hover of the secondary button, it will change colors.

 A dark grey rectangular button with rounded corners and the word "Value" in white text.	Background Color: #333638 Text Size: 14px Text Color: #FFFFFF	Text Font: Gotham Narrow Bold Text Alignment: Center Corner Radius: 4px
---	---	---

Disabled Button

This button is used to show the user that an action can be taken on this page, but they need to complete a different action in order for this button to activate. See examples below for clarity.

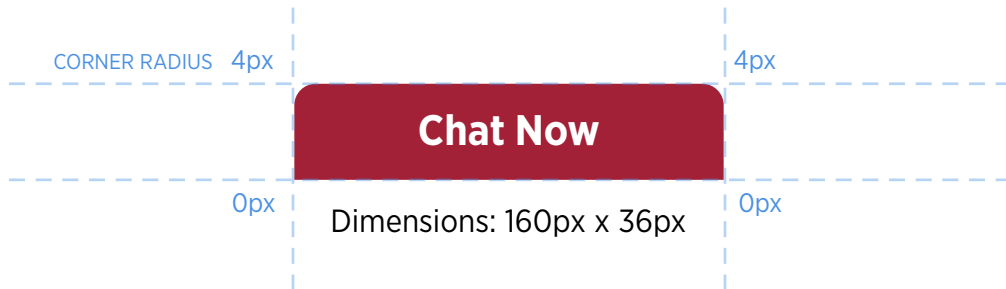
 A light grey rectangular button with rounded corners and the word "Value" in grey text.	Background Color: #E6E6E6 Text Size: 14px Text Color: #737678	Text Font: Gotham Narrow Bold Text Alignment: Center Corner Radius: 4px
---	---	---

There is no hover state for a disabled button. On a hover, the pointer should change to a “not allowed” sign.



Live Chat

The chat box is a way for users to get quick access to CAQH operations and support. When implemented, the chatbox should always remain within the browser window, and remain sticky to the bottom right corner within the 12 column grid. When a user clicks on the tab, the default chat box window should slide up from the bottom and remain active until the user closes the chat. If the user scrolls down to the bottom of the page, the chat tab should stop at the top of the footer. It shouldn't overlap the footer at all.

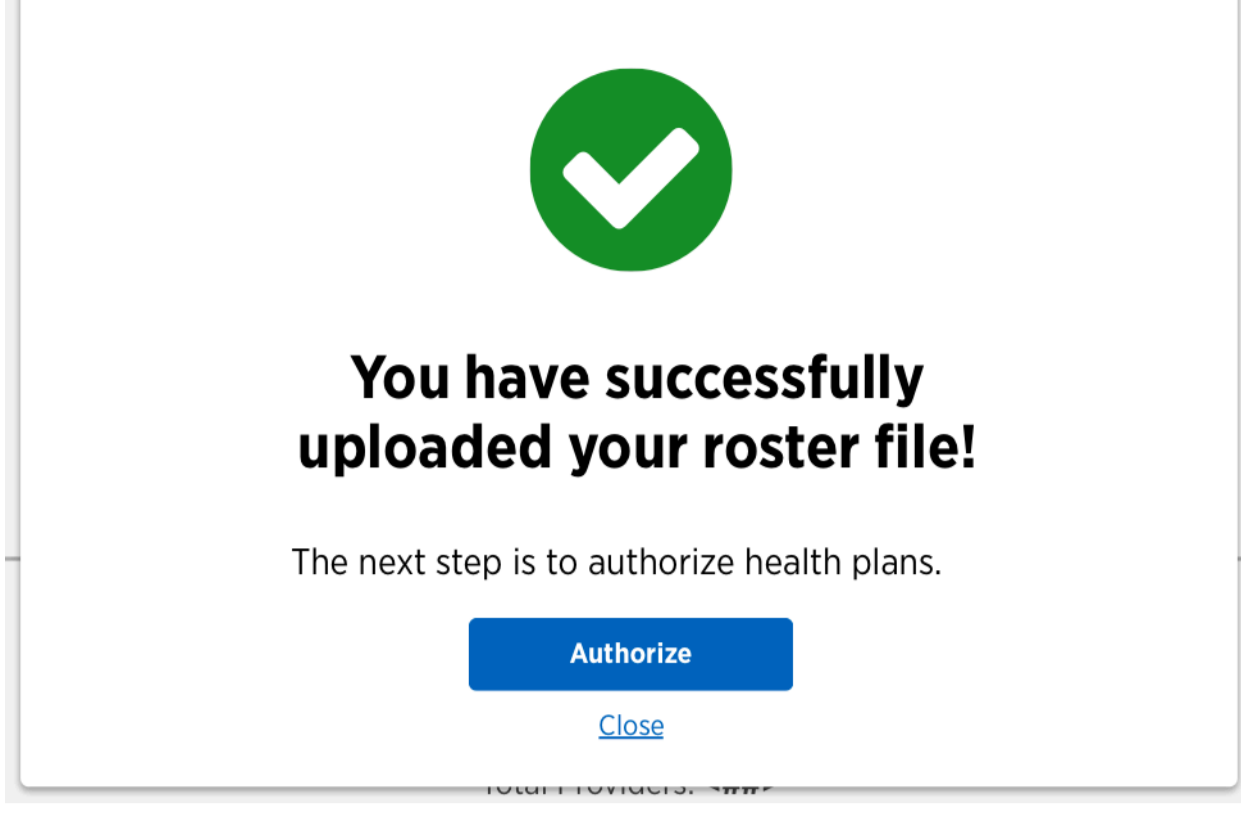


Background color: #A31236
Text color: #FFFFFF
Text font: Gotham Narrow Bold
Text size: 16px

Modals are used give a quick message to the user. We use them to show success messages and when we need a user to confirm that the selected action is the one they want to take. The modals require the user to take an action, either by cancelling the action with the cancel link, or selecting the primary button to confirm the action. All modals appear in front of a gray overlay that covers the screen behind the box. This helps call out the modal and keep the user focused on the task in front of them. All design specifications are at the bottom of this page.

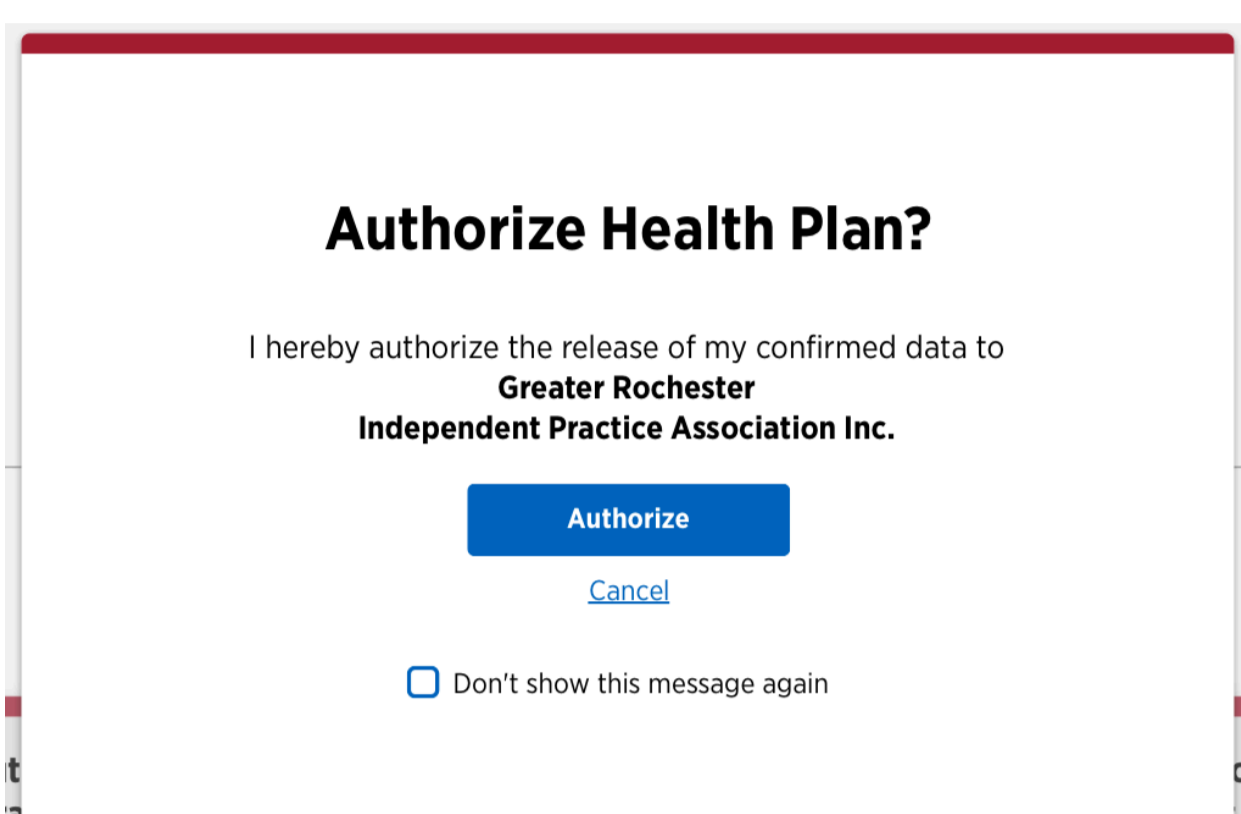
Success Modal

Success modals are used to show the user that they have successfully completed an action. From these modals, users should be redirected with an action button, but they also have the ability to close the window by either clicking on the close link, or clicking outside of the modal. All success messages display a green checkmark icon, a message of what was successfully done, and a primary action button.



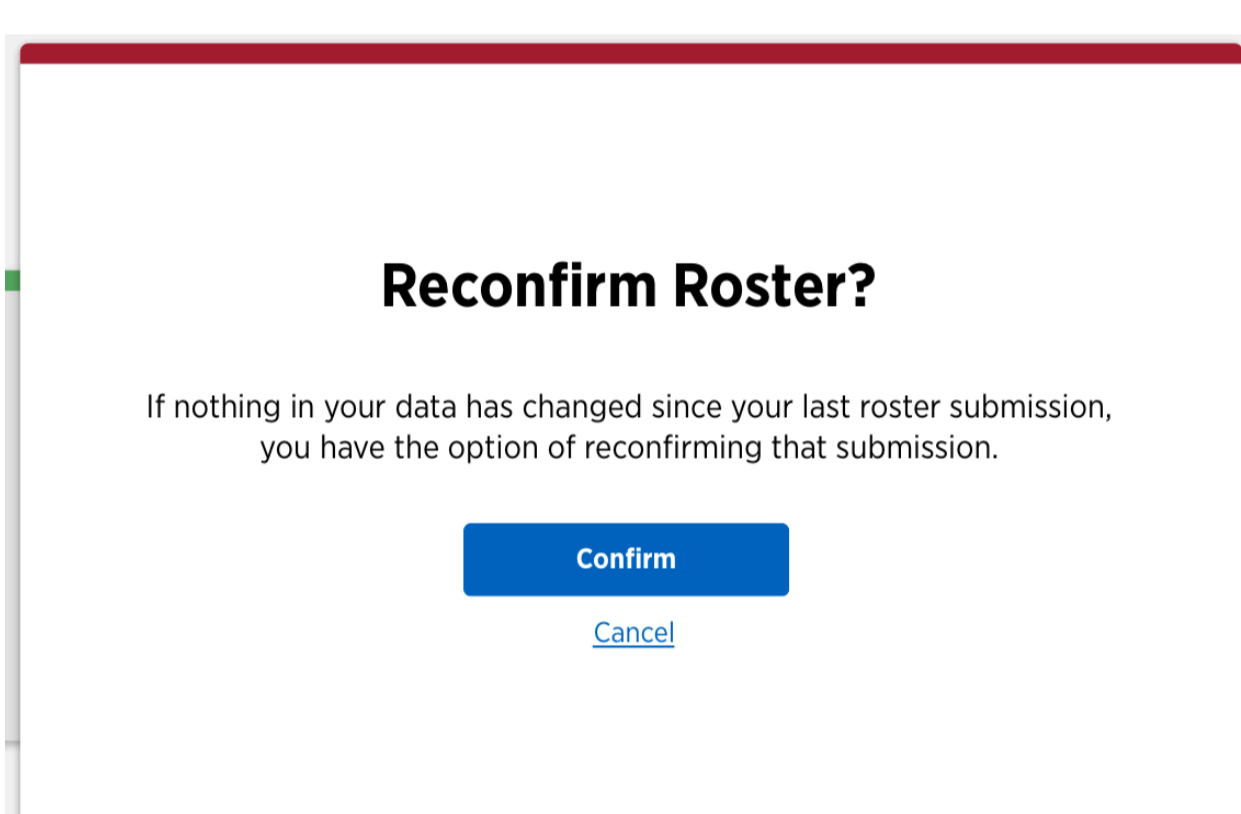
Authorizations Modal

When a user either authorizes, denies, or revokes an authorization, they are asked to confirm this action with a modal display. On the confirm authorization modal display, the user has the option to select “Do not show this message again.” This option is not available when denying or revoking an authorization, because we want the user to double check these actions before continuing. For all three of these actions, the user cannot click outside of the modal to close, and there is no “x” in the top right corner. The purpose of this is to force the user to complete the action, we do not want them to constantly postpone the decision. On all authorization modals, the health plan affected by the action should be displayed in Gotham Narrow Bold font.



Reconfirm Modal

The reconfirm modal is used when the data in the roster has not changed, but the group wants the health plans to know that all of their data is up to date. The flow consists of two modals that appear within the reconfirm process. The first is the same as the authorizations modal. The user cannot click outside of the box to close, and there is no “x” in the top right corner. Once a user clicks on the primary action button to reconfirm the file, the modal becomes a success modal (see above). At this point, they receive a success message, and clicking outside of the box will close the modal.



Modal Specifications - Regular Size

Gray Overlay
Covers everything behind the modal
Color: #D8D8D8
Opacity: 30%

Modal Specifications
Dimensions: 600px x 400px
Red stripe color: A32136
Stripe height: 10px

Modal Contents
All content within the modal has 30px of spacing
The space between the action button and cancel link is 10px
All content should be centered (horizontally and vertically) within the modal

Larger Modal

There may be occasions where the regular size modal will not be large enough to contain the content. If this is the case, we can extend the height of the modal to be 100px taller. This is for special cases only, and the modals should remain the original 600px x 400px whenever possible.

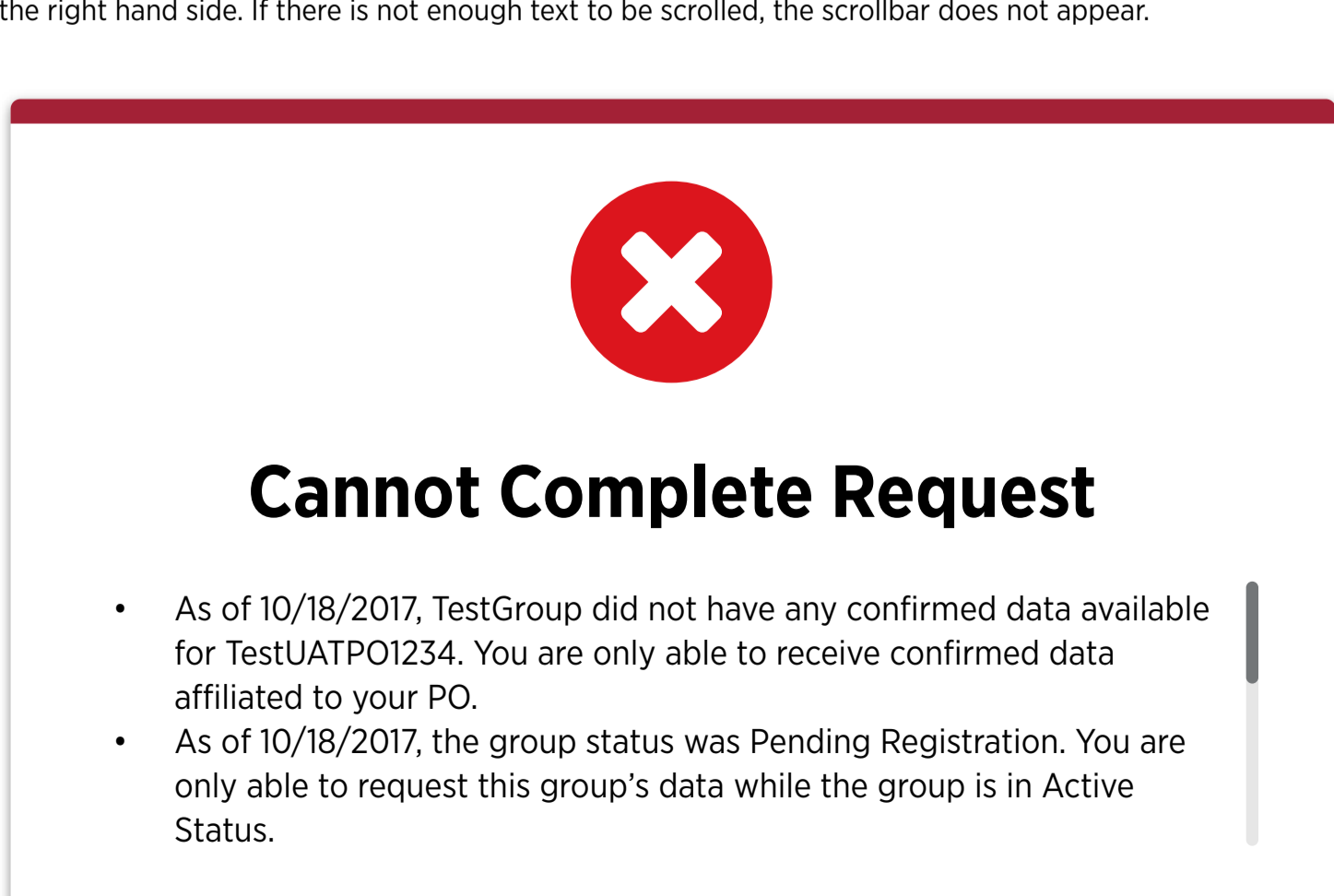
Gray Overlay
Covers everything behind the modal
Color: #D8D8D8
Opacity: 30%

Modal Specifications
Dimensions: 600px x 500px
Red stripe color: A32136
Stripe height: 10px

Modal Contents
All content within the modal has 30px of spacing
The space between the action button and cancel link is 10px
All content should be centered (horizontally and vertically) within the modal

Scrolling Modal

There may be occasions where the errors shown in the modal will be extensive. When this is the case, the text will be able to be scrollable. When there is information that can be scrolled, the scrollbar is shown on the right hand side. If there is not enough text to be scrolled, the scrollbar does not appear.



Search Functionality

The search functionality is an important part of the authorization page. A group user can use search to find a health plan they have a relationship with to view when they last received the group's data, or they can use the search bar to add a new plan to their authorizations list.

There are three states that the search bar can be in:

Initial

This is the state in which the search bar will be in when the page loads. When a user clicks on the search field, it turns into the focus state.



Focus

This is the state the search bar will be in when the user is typing to search for a health plan. The bar stays in this state until the user either clicks on the search icon, or presses enter. Once the search is entered, the bar turns into the close state.



Close

This is the state the search bar will be in when the user has successfully searched a for a plan. To return to the original state of the authorization page, the user can click either the 'x' in the search bar, or the 'Authorize' tab in the navigation bar to re-load the page with their authorized



Error

This is the state the search bar will be in when the user has not input enough information for the search to start looking for matches. For example, when searching for a CAQH ID that is 8 digits long, if the user only inputs three, this state will appear to explain that they need to add more to the search criteria.



Important Notes

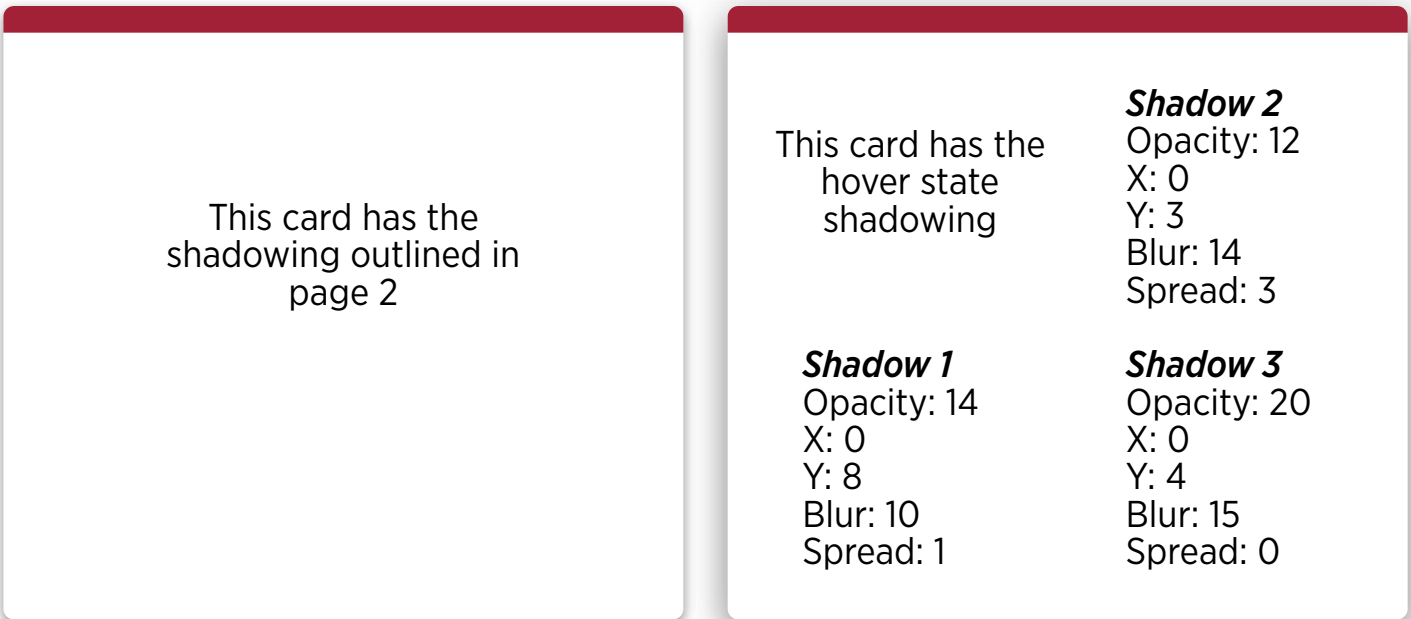
- When a user searches, there should be an auto-fill dropdown with suggestions of health plans in the CAQH system.
- The Add New card only appears when a user searches for health plans. It is placed before the pending cards and sorted in alphabetical order.
- The menu navigation within Authorization can be refined using the search. While a search term is active (i.e. until the search bar is cleared), the tabs for all, pending, authorized, and denied are filtered by the search term.

Card Animations

Most of the cards throughout this tool have an animation associated with them. This could be the card flip to show more information on the back, or elevating the card to show that a user can click on it to perform an action.

Card Hover State

On a card that is clickable, when the mouse hovers over the card, it will elevate slightly to indicate that we can click it. On cases when this occurs, the entire card is clickable.

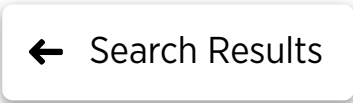


Card Flip Animation

When a card has more information to be displayed, we use the back of the card. The front of a card that flips will have some action on the front that activates the flip - this can be an edit pencil icon, a hyperlink, or a button, for example. When the card flips, it should rotate along its central axis, flipping from the right side.

Back Button

Within the ProView Portal, there may be user flows that bring a user to a page that displays more information. The back buttons are used to help the user find out more information while not disrupting the flow that they were in prior to looking at a more detailed view of a person, group, or status. These buttons are reponsive in width, so they change in size based on where the user was directed from.



Button Dimensions

W: variable width

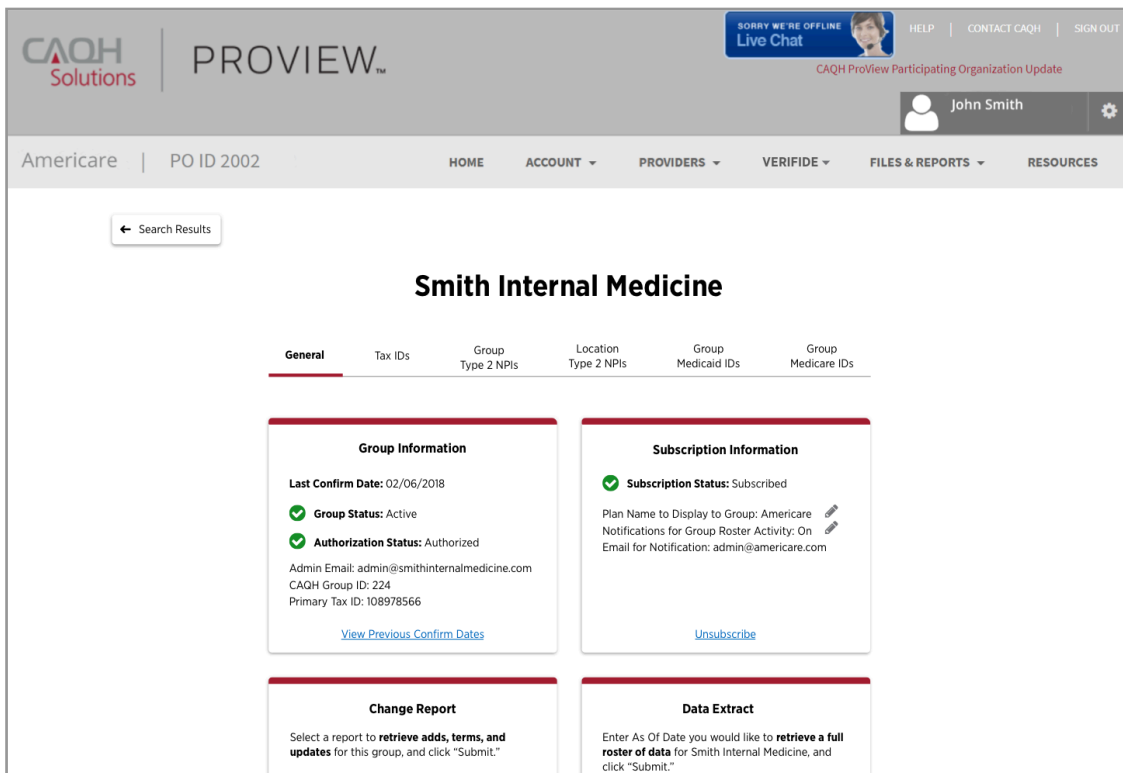
H: 36px

Text Size: 14px

Text Weight: Gotham Narrow Book

Standard Shadow (same as the cards and modals)

Button in Context



Tables are used in the portal when there is too much information to display on a card, and when we need to display more information on a page. While the general table design is the same, the content within the tables varies based on the page it is displayed on. There are several columns that require a filter to narrow down the search results. These fields are filtered with a dropdown menu of options. When an item on the list is a link, it will redirect to a page with more details, usually a group profile page. On a hover, the entire row becomes a light blue (#E5EFF8) to indicate what group the action will apply to. Finally, each row on the table has a “three-dot menu” available on the right side of every row. This menu provides additional, quick-action functionality to the user, such as subscribing to a group, view the group profile, or request data from a group. To close this menu, the user can click anywhere outside of the box. All functionality within the table is also available from the individual group profile pages.

Pagination in Tables

All tables have pagination on the bottom right corner. Table data shows 10 results at a time. The navigation arrows should only be active when there are additional pages to show the user. If the table has more than ten items, the arrows should be active if navigation is possible (either right or left). If the table results are less than ten, the total number of items should still be displayed, but both arrows should be disabled.

NOTE: There is one exception for paginated tables. When a user starts in the “request a new group” flow, and a group with the tax ID has it as their primary is a result, there is only one row of data displayed in this table. This search result does not have any pagination and will only ever show one result in this section.

Small Tables

Because the table has less than ten items to display, the pagination is displayed but the arrows are both disabled.

Group Name	CAQH Group ID	Group Status ▾	Subscription Status ▾	Authorization Status ▾	
Smith Internal Medicine	223	Active	Subscribed	Authorized	⋮
Johnson IPA	123	Active	Unsubscribed	Not Authorized	⋮
BeWell Hospital	200	Active	Subscribed	Not Authorized	⋮

1 - 3 of 3 < >

Select Menu

The blue bar shows the hover state on any row when hovered over. In this example, the three dot menu is clicked for this group. The user can click anywhere outside of the menu to close it.

Group Name	CAQH Group ID	Group Status ▾	Subscription Status ▾	Authorization Status ▾	
Smith Internal Medicine	223	Active	Subscribed	Authorized	View Group Profile
Johnson IPA	123	Active	Unsubscribed	Not Authorized	⋮
BeWell Hospital	200	Active	Subscribed	Not Authorized	⋮

1 - 3 of 3 < >

Large Tables

With more than ten items to display, the pagination is active on this page. For example, if the user clicked on the right arrow once, the pagination would change to 11-20, with both arrow enabled.

Group Name	CAQH Group ID	Last Confirm Date ▾	Group Status ▾	Authorization Status ▾	
Smith Internal Medicine	223	01/12/2018	Active	Authorized	
Johnson IPA	123	12/13/2018	Active	Authorized	
BeWell Hospital	200	01/28/2018	Active	Authorized	
Jones Pediatrics	120	10/03/2018	Active	Authorized	
Davis Internal Medicine	223	07/20/2018	Active	Authorized	
Green Hospital	123	06/22/2018	Request Recieved	Not Authorized	
Meridian Health	145	01/11/2018	Active	Authorized	
American Pediatrics	300	10/03/2018	Opt Out	Not Authorized	
Stepping Stone IPA	184	01/28/2018	Active	Authorized	
James IPA	328	03/10/2018	Active	Authorized	

1 - 10 of 25 < >

The calendar drop down can be accessed when a user needs to select a date for requesting data that requires a date as input. They also have the ability to edit the date directly in the input field, without the calendar dropdown. When a calendar date picker is needed, the calendar icon (📅) will appear within the input text label field. The user can click on the icon and the current month will appear. There are navigation arrows to access months in the recent past, as well as a dropdown menu to access months. To exit the calendar dropdown, a user can select a date and it will automatically close. If the user would like to keep the current date, or cancel the selection, they can click anywhere outside of the calendar to cancel.

Idle State

The idle state is has the same styling and functionality as the initial input label (page 3). The calendar icon is 27px wide and 30px in height, with the color #737678.

As of



Completed State

The completed state is has the same styling and functionality as the completed input label (page 3). The calendar icon is 27px wide and 30px in height, with the color #737678.

As of

02/15/2018

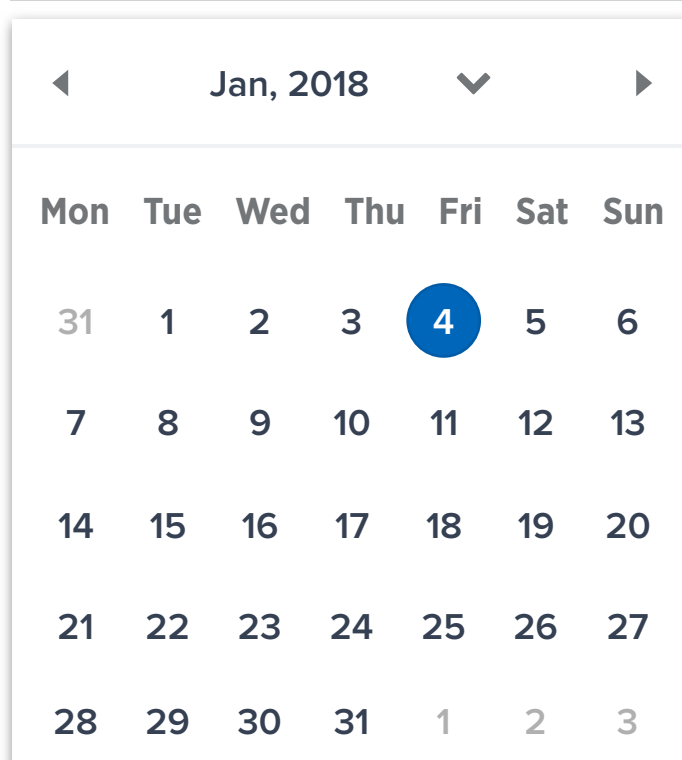


Active Calendar Dropdown

The calendar dropdown should appear 7px beneath the input field and centered. Its shadowing is consistent with the rest of the design system. The user can click on the date they would like to select, or select any part of the screen outside of the dropdown to cancel.

As of

02/15/2018



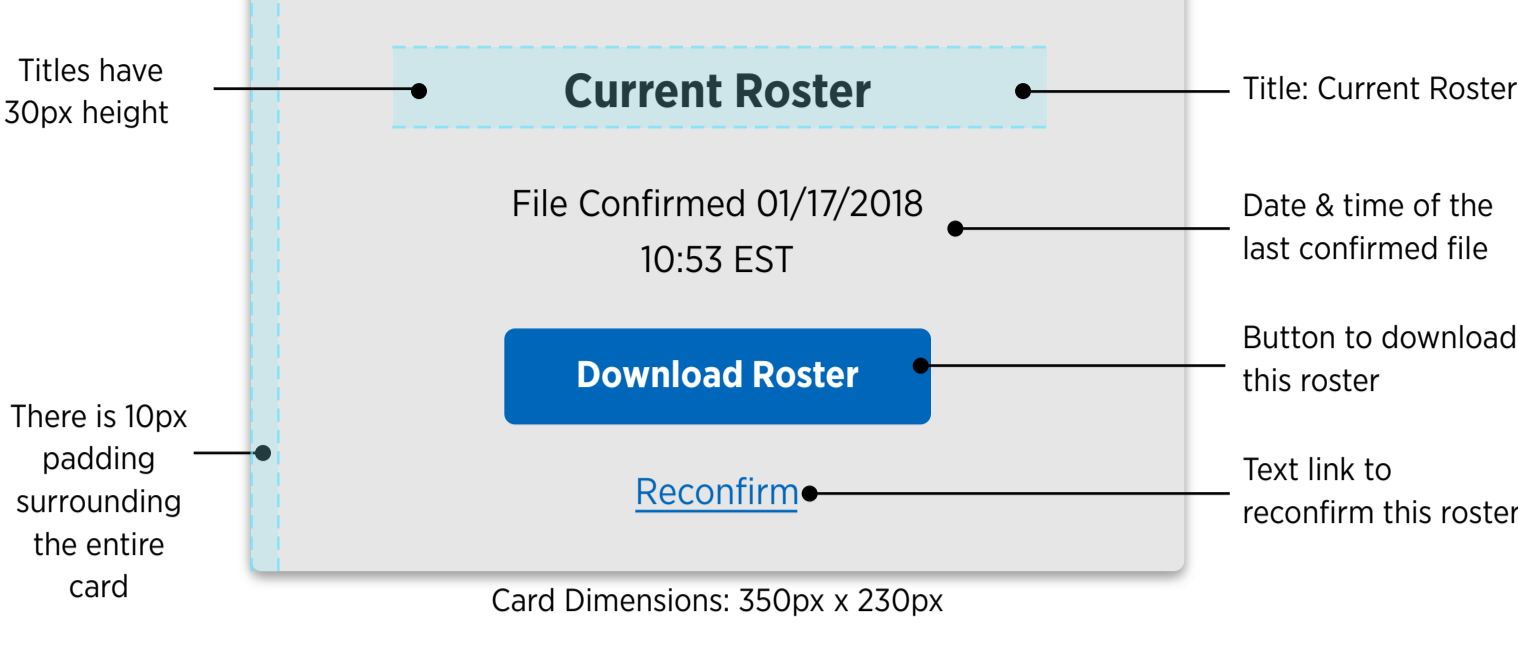
Groups Components

Confirm Roster Card

The confirm roster card is displayed only on the roster page, after the user has uploaded and successfully processed the initial file. While the file is processing, the user will see the File Processing Card (below). After a successful upload, the color strip at the top turns green (#218F30) and stays green until X amount of days before the user needs to either upload a new file, or reconfirm their current roster. When the card ages X amount of days, the color strip will turn brand red (#A32136), signalling to the user that action needs to be taken to update their roster file.

The current roster that is displayed and available for download is the “cleaned up” version that CAQH will provide after it processes the file. This means that the roster available to download would strip out the terminated providers, standardize the addresses, etc.

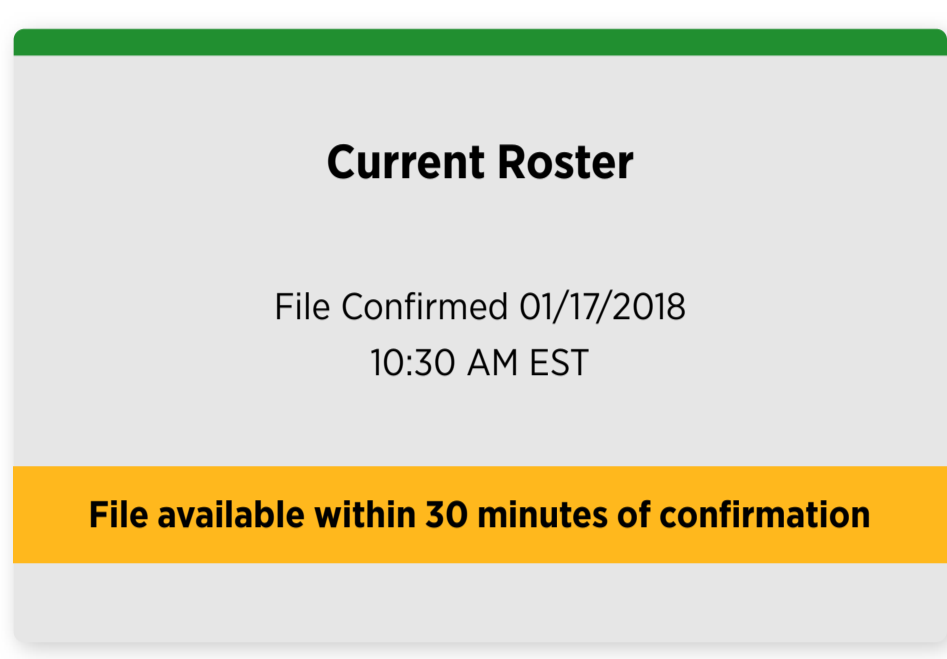
Within the confirm roster card, the following information is displayed:



Confirm Roster Card - File Processing

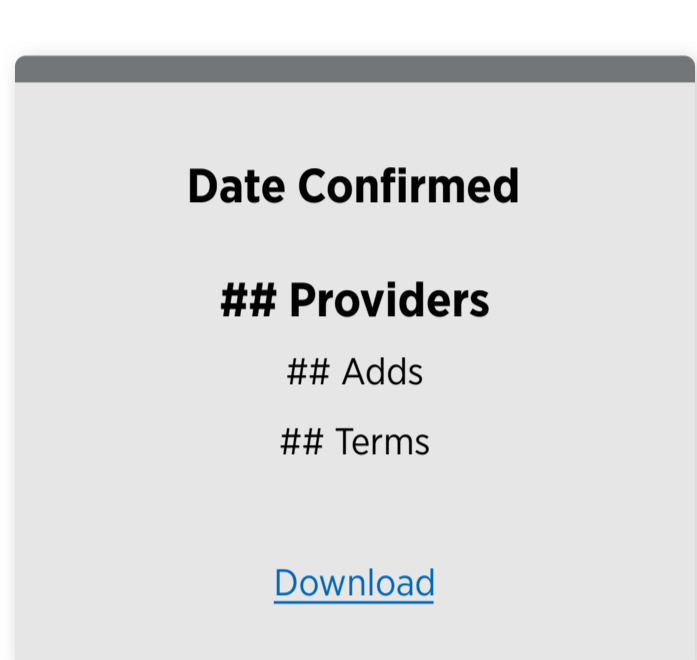
Immediately after the user uploads a file, the current roster card changes slightly to let the user know that the file is currently being processed by the system, and that it will be available after the processing is complete. While the file is being processed, the card displays the date and time the file was uploaded, and the download roster button is temporarily removed. Its replacement is a yellow stripe (just like *Authorized (No Data) Cards*) with text explaining that the file will be ready in 30 minutes or less.

Please note: not all files will require this processing time, and this card should only be used when necessary. This is an edge case, and only designed in case we need it.



Previous Roster Cards

Previous roster cards are used to display up to 24 past confirmed rosters. If a file is unsuccessfully uploaded, the roster is not added to this list. A user has the ability to download a past roster if they need to from the card. They will get the “dirty” version of the roster - meaning that the file they uploaded is the exact file they will receive. It will not clean up the addresses or terminated providers, etc. All previous roster cards are found under a dropdown section within the roster page. They should be sorted in order by date, with the most recent roster at the top left.



Authorization Cards

There are five authorization card types: pending, authorized (no data), authorized, denied, and add new. The purpose of the authorization cards is to display quick, critical information to group users that they are able to find and record at a glance. The cards are responsive, meaning they will fit accordingly to any screen size. When all cards are displayed, they are sorted alphabetically and follow this pattern:

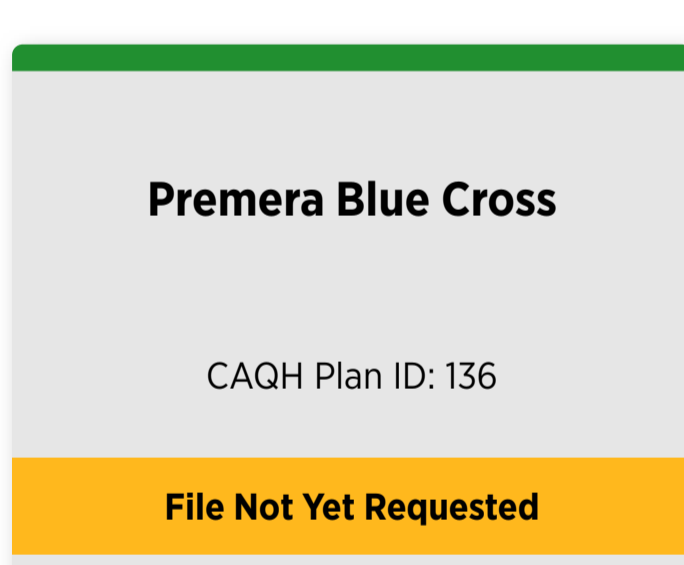
1. Add New
2. Pending Cards
3. Authorized - File Not Yet Requested
4. Authorized
5. Denied

The following is a list of features that each card provides to a user.



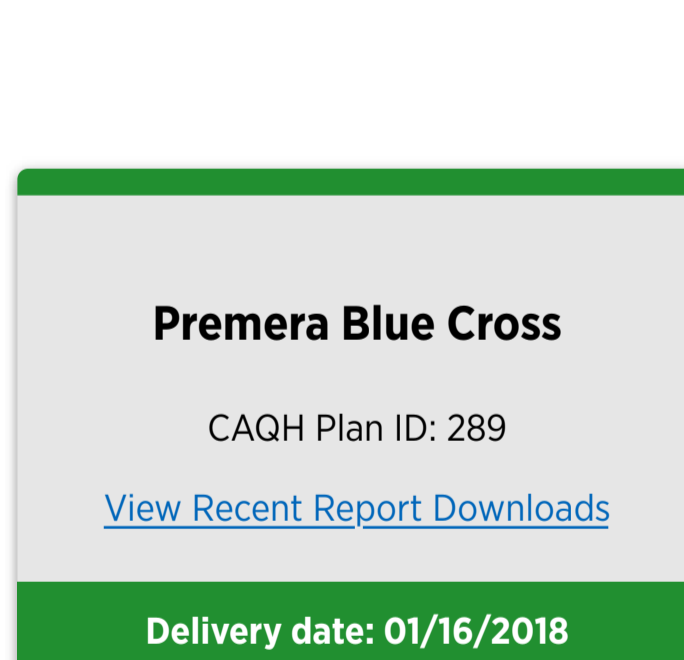
Pending Authorization Card

The pending authorizations will always appear at the top of list on the Authorize page. A group will receive one of these cards when a plan subscribes to their data. The date the plan subscribed is the “Date Requested,” listed on the card. The health plan name can have a maximum of three lines of text before it gets cut off at the bottom (75 characters). The user has the ability to either authorize or deny a health plan from this card. When a user pushes the “Authorize” button for the first time, a modal appears asking them to confirm the authorization. They have an option not to show this message again, but it is defaulted to show every time. Once authorized, the health plan card turns into the *authorized (no data) card*.



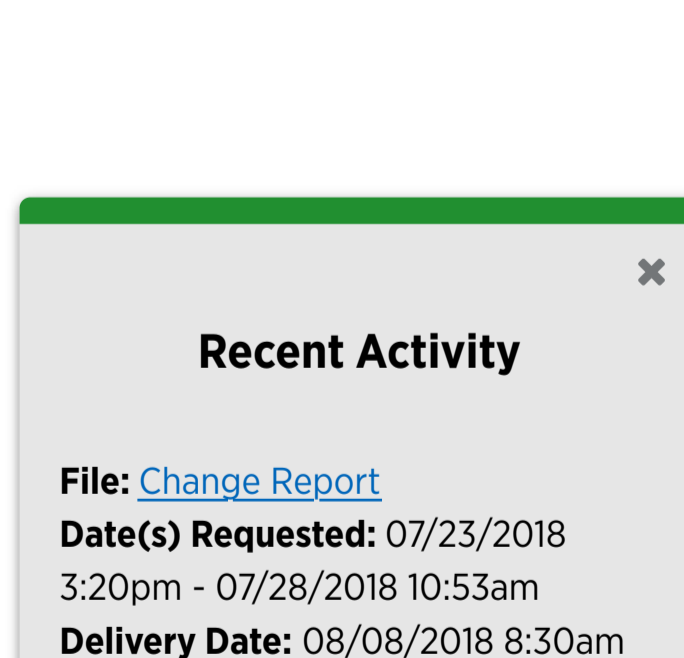
Authorized (No Data) Card

This card is the default card that is displayed after a user authorizes a plan for the first time. The green stripe at the top indicates that the plan is authorized, but has not yet requested data from the group. A group user may revoke the authorization at any time. Once a plan has requested data, the card changes to the *authorized card*, where the delivery date is displayed. All authorized (no data) cards should be sorted in alphabetical order.



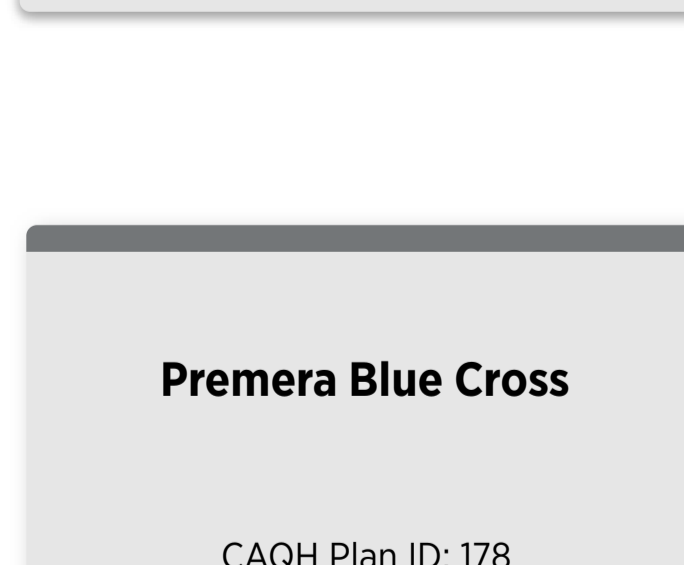
Authorized Card (front)

Once users get settled into the system, this card will be the displayed most. On a quick glance, a user can see the plan name, ID, and date their data was delivered to the plan. They have the ability to revoke the authorization at any time. All authorized cards should be sorted in alphabetical order.



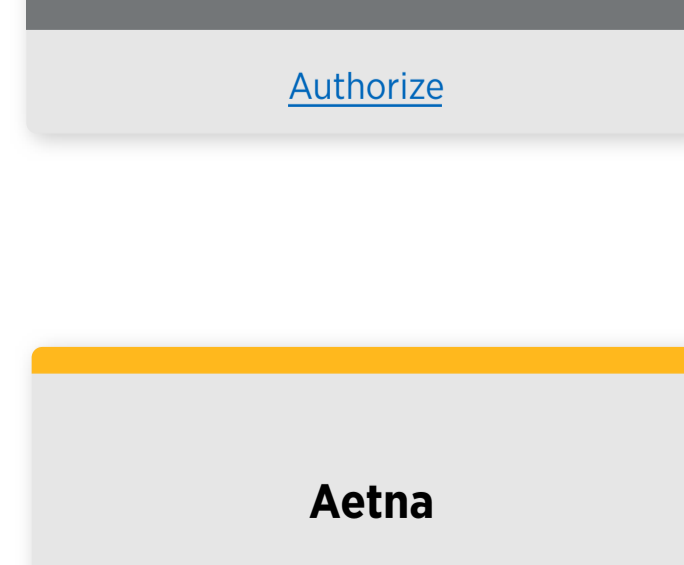
Authorized Card (back)

The back of the authorized card will show a quick preview of the most recently received data from the health plan. The user has the capability to download the file they received directly by clicking on the link. If the group wants a more detailed history, and more files, they can click on the see more link and it will bring them to a more detailed history page.



Denied Card

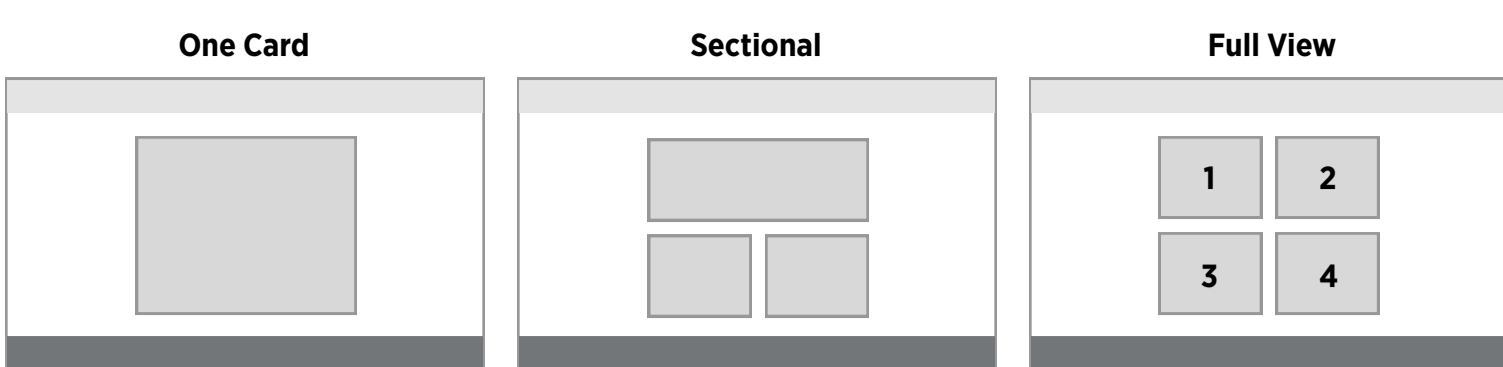
If a group decides to either terminate a relationship with a health plan, or deny them authorization when they subscribe, the plan card goes to a denied state. A gray strip on both the top and middle of the card indicates that the plan is in an unauthorized state. However, if a group chooses to have a relationship from the plan, they can do so by clicking the “authorize” text link. It will bring up a modal to confirm the authorization depending on the users preferences.



Add New Card

If a group wishes to preemptively authorize a plan before they subscribe to the group’s data, they can search for them in within the authorizations page. (for more detail on searching, please visit the search functionality page.) Only during a search do these cards appear in the authorizations list. When they do appear, they are the first cards sorted, and are listed in alphabetical order. The only action a user may take with these cards is to authorize the plan.

The Snapshot page has three possible states:



One Card

This is displayed for first time users that have completed their user profile and group profile, but have not yet uploaded a roster file. The content on this card will explain that they need to upload a roster file for health plans to access their data, and give an actionable button that will bring them to the first time upload screen. If the user has tried to upload a file but has not yet been successful, this card will still appear. It will only disappear after the first successful confirmed roster is uploaded.

Sectional

The sectional view is for users that have an action that needs to be addressed as soon as possible. This could be uploading a more current roster, authorizing health plans, etc. The top section of the snapshot page includes explanatory text detailing what needs to be done, and provides an action button. This button will redirect them to the appropriate page.

Full View

The full view is what users will see all of the time once they have uploaded a file and authorized health plans. This is the main view for the tool. There are four cards on this page. The entire card is clickable, but there are also text links in the card, it will redirect a user to its respective page:

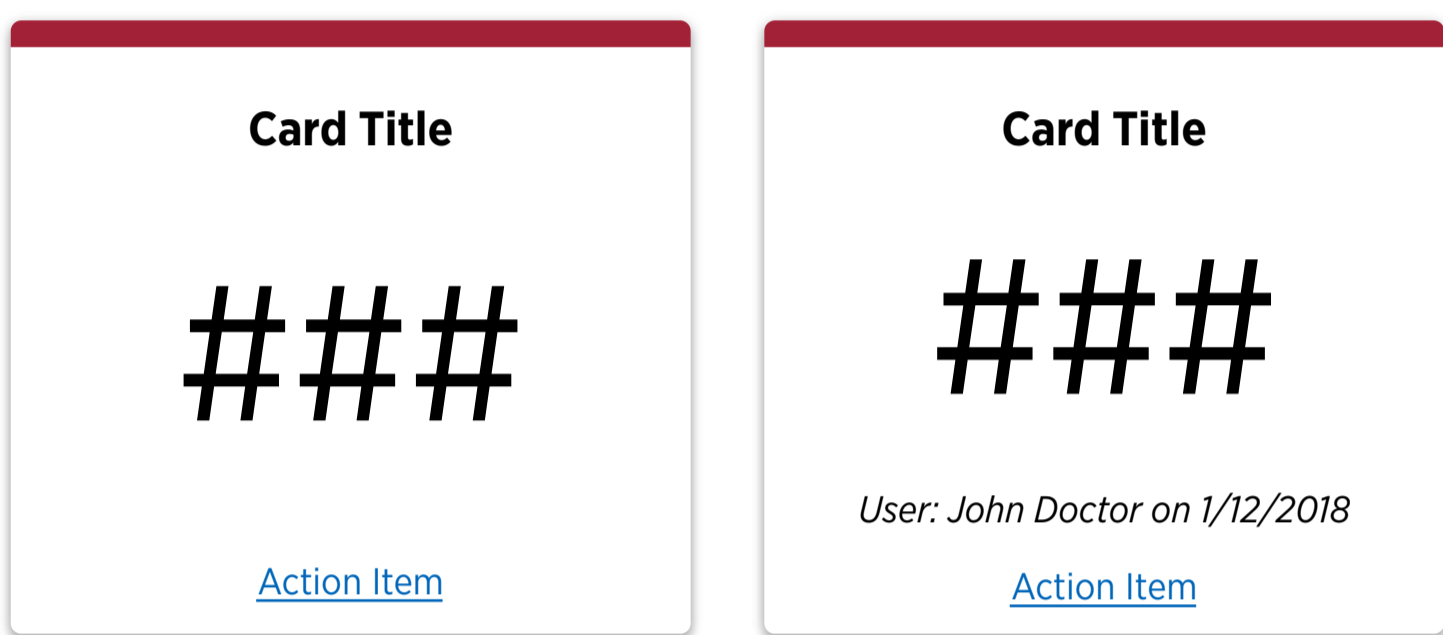
1. Number of Pending Authorizations > Redirects to Pending Authorizations Tab within Authorize.
2. Number of Health Plans subscribed > Redirects to Authorize.
3. Days since last upload, user who uploaded > Redirects to Roster.
4. Days since last login, user who logged in > Redirects to user history.

Snapshot Card Varieties

There are a variety of snapshot cards based on the content and portal functionality. There are different cards for groups and health plans.

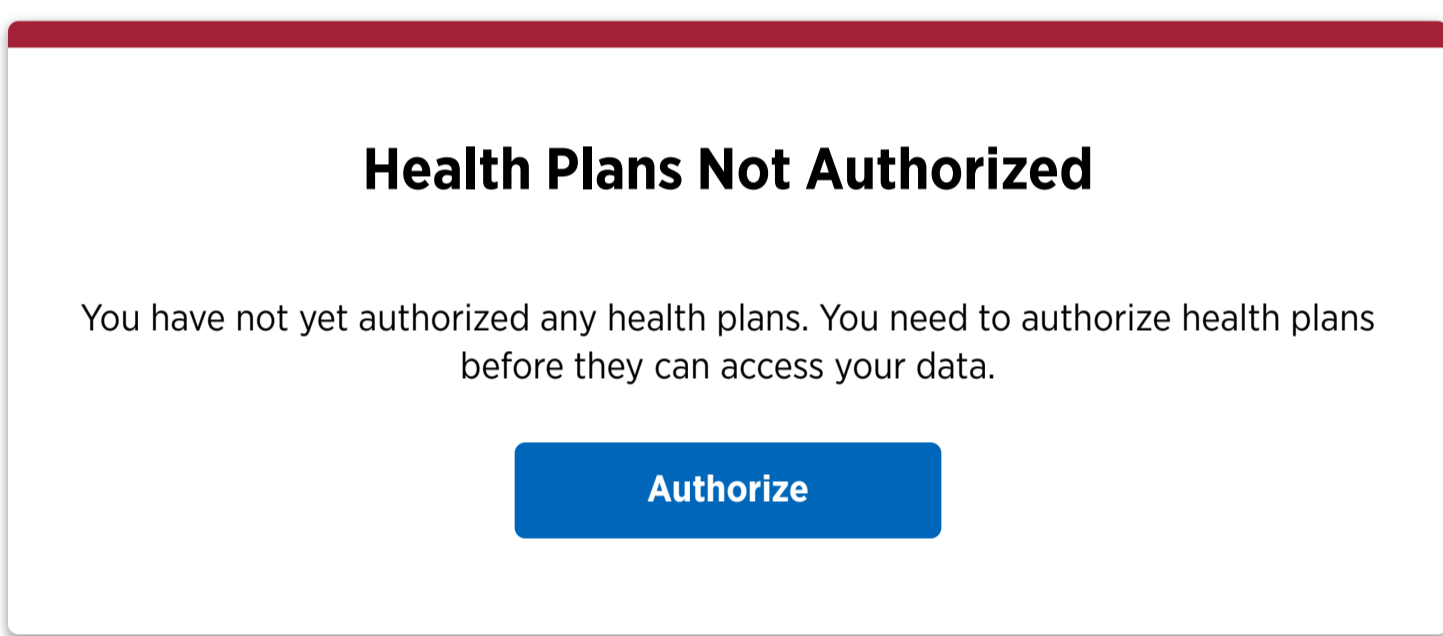
Groups Cards

Typical cards for the dashboard. The left is used to display a number statistic, card title, and an action link. The right card adds ability to see the last user who completed the action. The entire card should be clickable, but the user can click on the link as well.



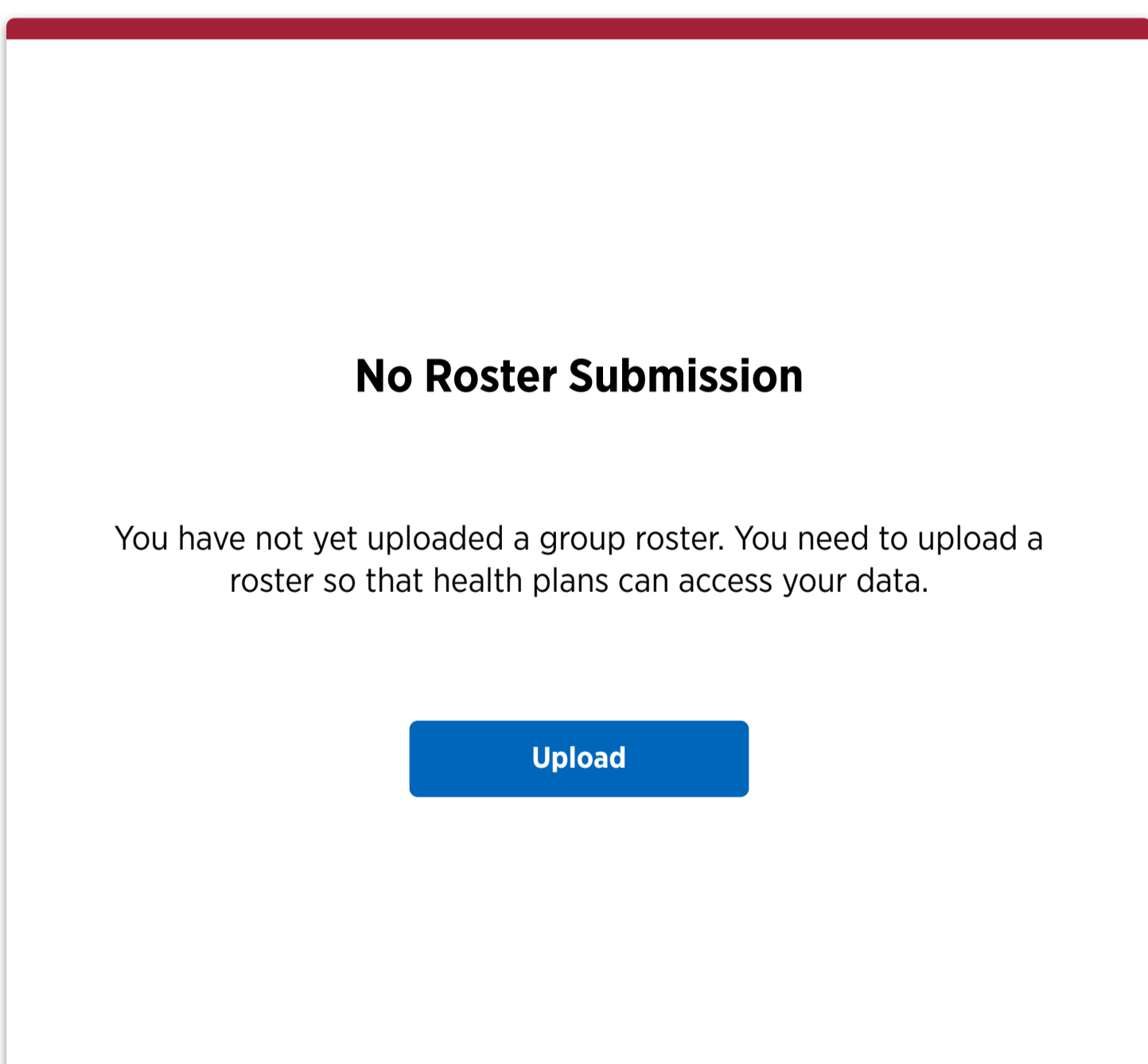
Sectional Card

A sectional card used to take up half of the real estate to call out an important action.



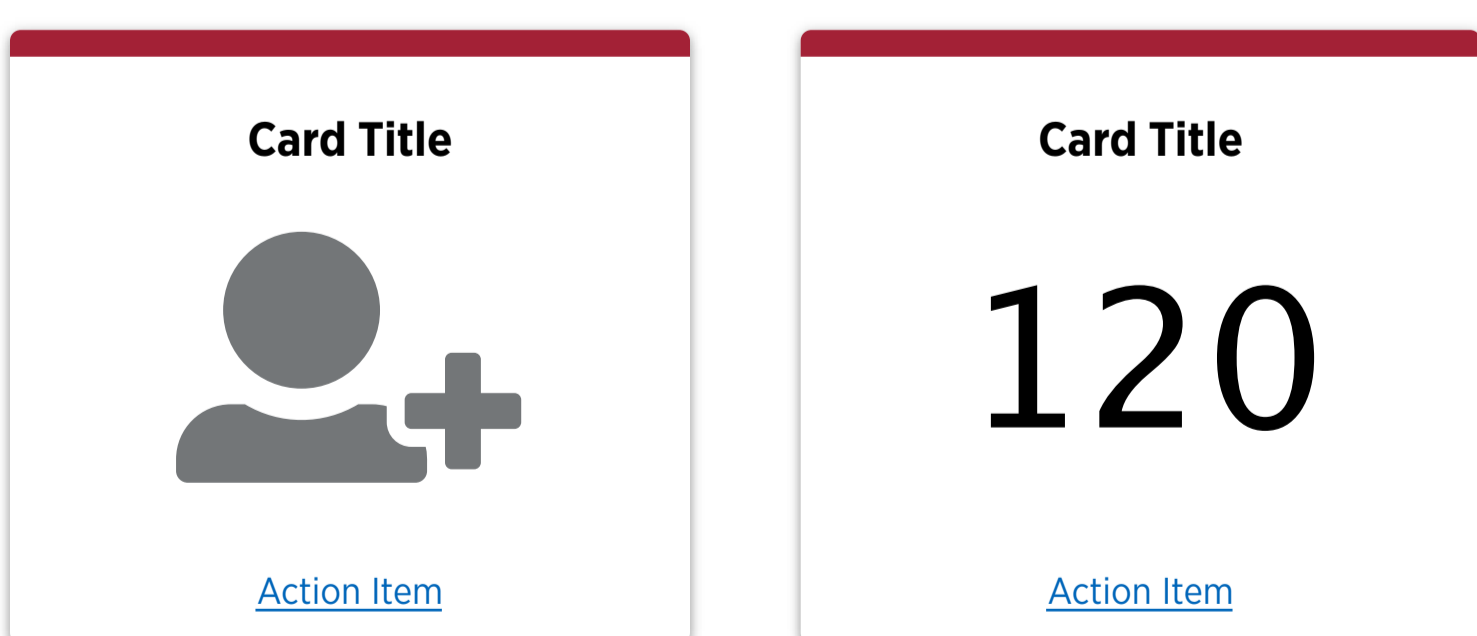
Full Card

A full card. This card is used to force a user to complete a required action immediately. It should sit in front of all other cards until the user clicks the button, or the card to bring them to the appropriate page to complete the action.



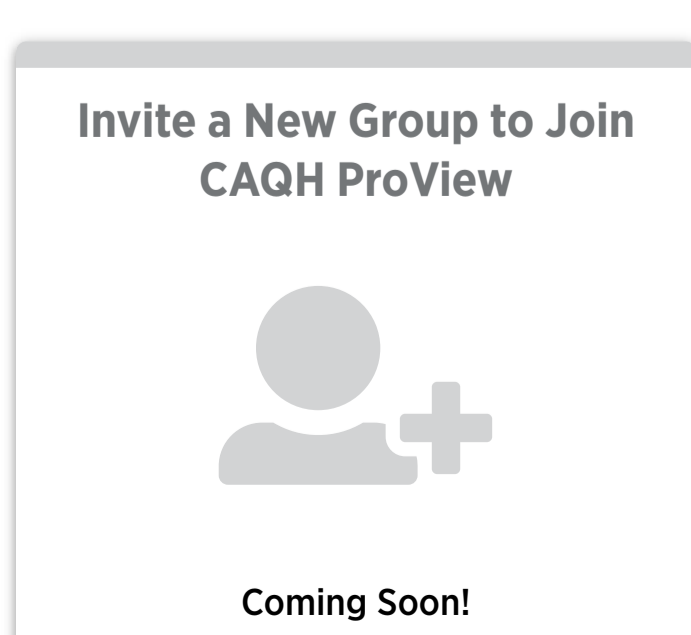
PO Portal Cards

While the dashboard for health plans is not as dynamic as the groups dashboard with different views, the cards are still fully responsive. Instead, the user is presented with four card at all times. The cards have plenty of white space for a number statistic, or an icon from Fontawesome. All icons should be brand gray, all text should be black.



Health Plan Portal Card - Deactivated

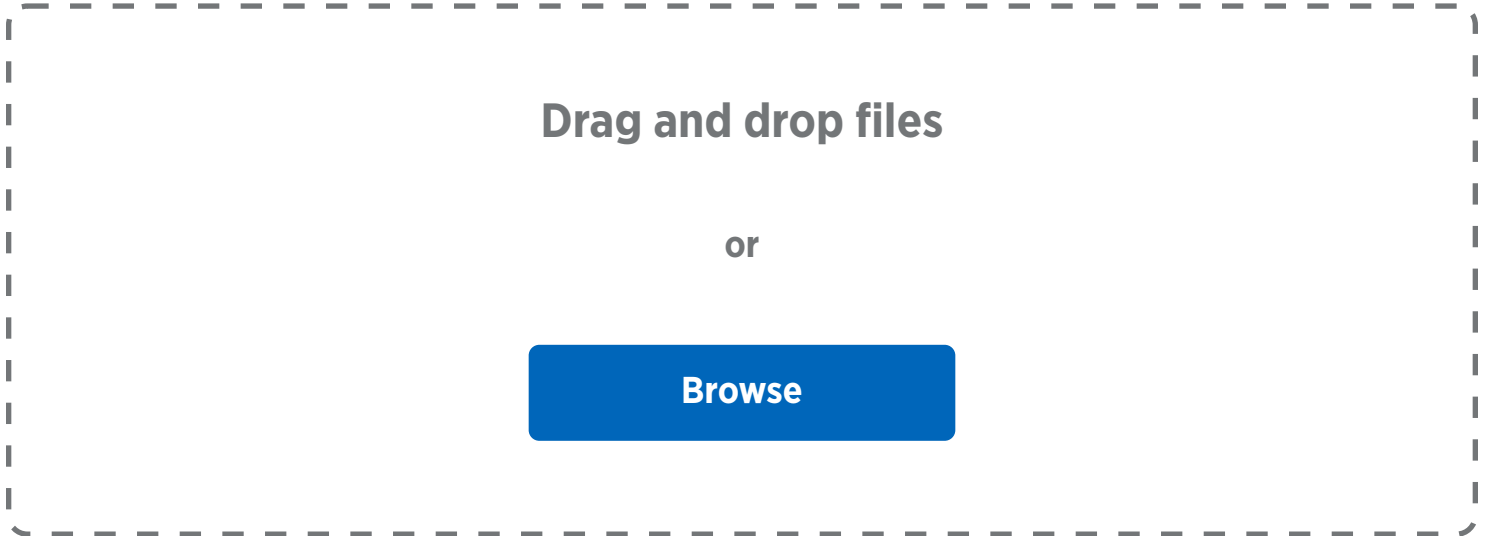
If a section of the site is still in development, we have an inactive card that shows upcoming functionality. This card is cannot be clicked on, and is grayed out.



First Time Users

For first time users uploading a file, they do not see the current roster card, or previous rosters dropdown. Instead, there is some text detailing the correct process that CAQH wants them to take when they upload a file to the system. For first users, this process is to download the roster template file, fill in the data, and upload the file to the system. To upload a file, they can drag and drop the file into the target box, or browse files through the file explorer. After a successful upload, the view on the upload roster page changes slightly, and this target shares the same space with the current roster card, shown below.

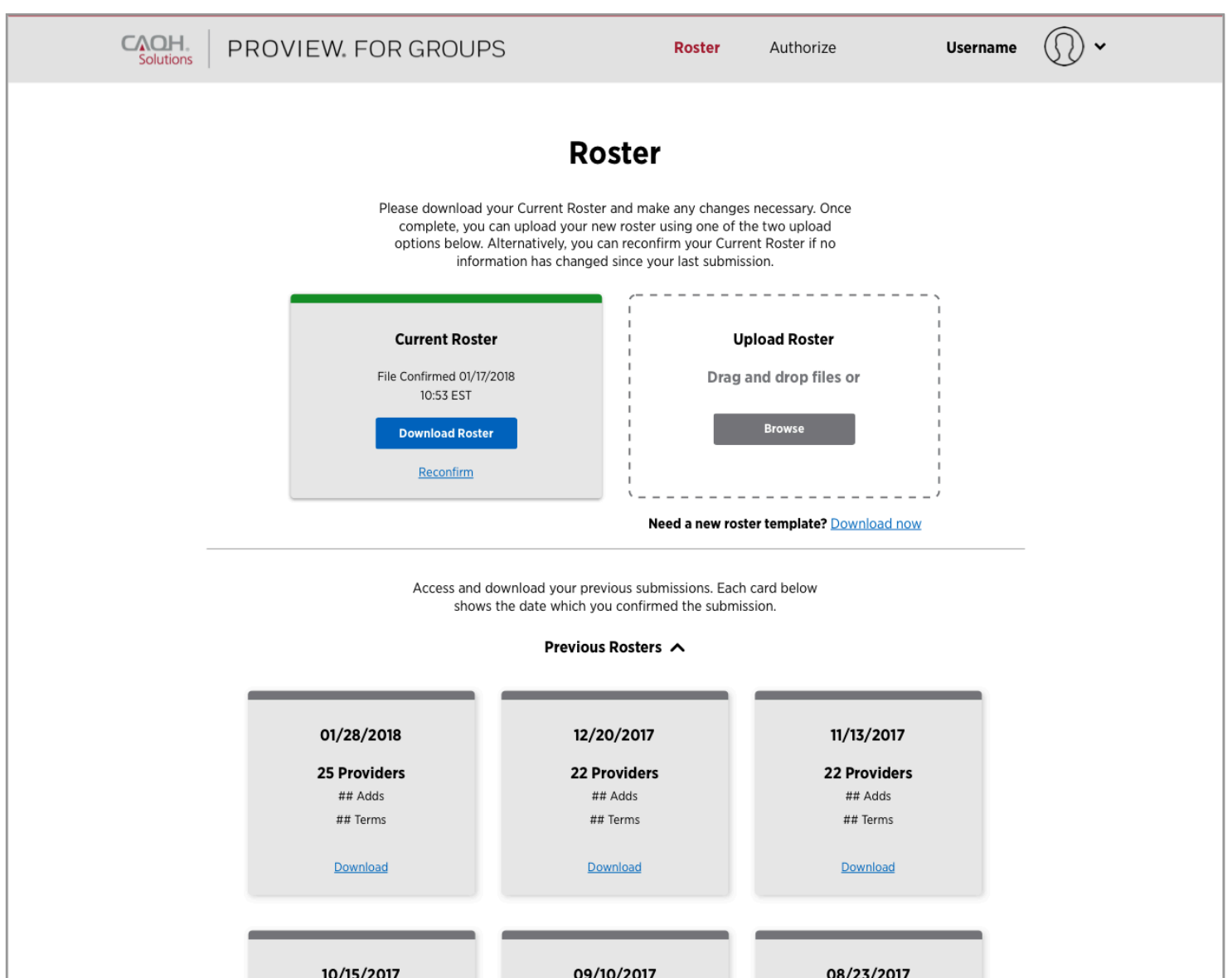
First Time Users Upload Target



Need a new roster template? [Download now](#)

Previous Users

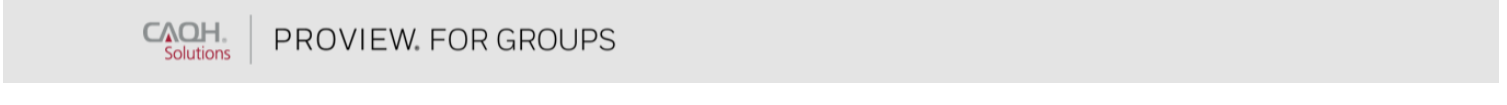
After users have successfully uploaded and confirmed a roster, their view within the upload page changes slightly (shown below). The file that the user has uploaded gets cleaned up and is available for download within the current roster card (*for additional information on the current roster card, please look at the Cards Page*). There should be some explanatory text detailing the correct process for downloading a current file, editing the contents, and uploading the file with the changes at the top of the roster page. All rosters under the “previous rosters” section will be the original files that the user has uploaded to the system, and will contain the past 24 confirmed files. By default, the previous rosters dropdown is closed to avoid too much information on the page. To activate the dropdown, the user can click on either the Previous Rosters text, or the dropdown arrow. When the dropdown is selected, the arrow flips to point upward, when closed, the arrow points as shown. They are available to download for auditing purposes. Previous users still have an upload target in which they can drag and drop their roster, or browse for the file in their computer. If needed, there is always an option to download a new template under the upload target.



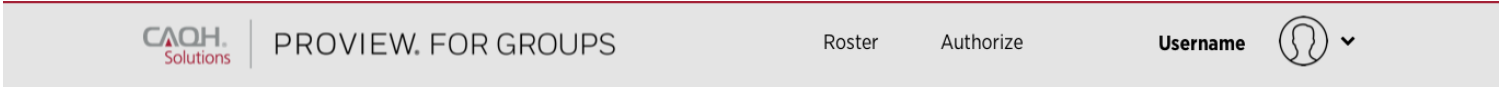
There are two types of menus used within the system:

Header Navigation

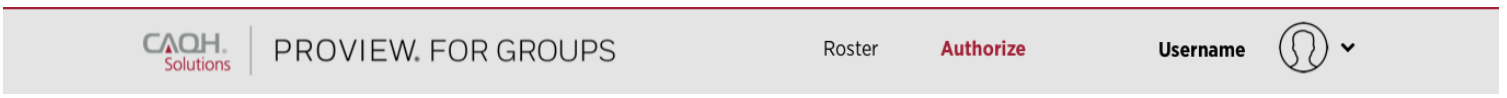
This is the main menu bar (*please note: not to scale*). It stays at the top of the tool to help the user navigate to functions they need. When a user is on a specific page, the menu items at the top may change color to indicate where they currently are in the tool. (**Note:** The initial menu is only shown while the individual user is registering, and while they register their group. After registration is complete, the general menu will always be available.) Clicking the CAQH Proview for Groups logo will always bring users back to the main snapshot/dashboard page. There are additional features under the profile image. A group user can view their profile, view the group profile, find help, and sign out.



Initial menu



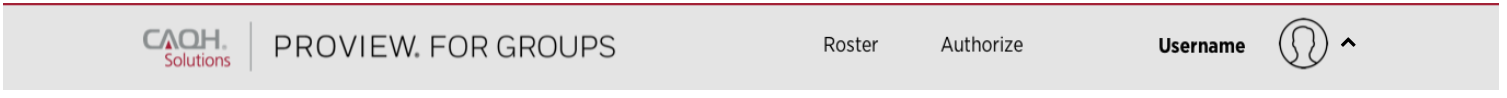
General menu



When a user is in the authorize pages, authorize is highlighted



When a user is in the roster pages, roster is highlighted



Dropdown menu. The arrow flips up and the menudrops down

Header Navigation Specifications

The gray background and red highlight stripe always stretch to be as wide as the screen size. The content of the bar is contained in the 12 column grid provided by the bootstrap framework.

- Gray Background color: #E4E4E4
- Red Stripe color: #A32136
- Stroke: 2px
- Roster & Authorize Text: 18px, Gotham Narrow Book
- Username Text: 18px, Gotham Narrow Bold
- CAQH Logo dimensions: 243px x 43px

Dropdown Box

- Background color: #E4E4E4
- Text Color: #000000
- Text Alignment: Right
- Text: Gotham Narrow Book, 18px
- Line Separator Color: #979797
- Spacing: 30px between lines

Footer Navigation

The footer is not sticky to the window and always has 50px of space between the end of the content of the page and the top of the bar. The only situation in which there could be more space between the content and footer is if the content does not extend beyond the browser height. The footer displays copyright information, FAQ/Help, Terms of Service, and any other legal links necessary. (*please note: not to scale*). The footers responsiveness is the same as the header - all content is contained within the 12 column grid, and the background color extends to the width of the window size.



Footer Navigation Specifications

- Background color: #737678
- Text color: #FFFFFF
- Text: Gotham Narrow Book, 14px

Authorizations Filter Menu

The authorizations menu appears above the cards to help users sort and navigate their cards on the page. This will be more valuable for groups with more health plans to manage. The menu allows users to filter through the following categories: All, Pending, Authorized, and Denied. (*Note: when a user searches to add a new health plan preemptively, there is not an Add New Filter. All of these cards will appear first and only in the All tab of the menu until the search is cleared.*) When the tab is active, the color strip of the matching cards goes to the bottom of the selected tab and the tab text becomes bolded. View examples below.

All	Pending	Authorized	Denied
All	Pending	Authorized	Denied
All	Pending	Authorized	Denied
All	Pending	Authorized	Denied

Dimensions

- Width: 540px
- Height: 52px
- Text: Gotham Narrow Bold & Book, 18px
- Color Stripe: 4px thick, 30px padding on each side around text
- Line: 1px thick, #979797

Edit Group Profile Menu

The edit group profile menu appears when a group would like to edit their group data, tax IDs, NPIs, and medicare and medicaid IDs. The menu bar has 6 tabs: General, Tax IDs, Group Type 2 NPIs, Location Type 2 NPIs, Group Medicaid IDs, and Group Medicare IDs. The general tab has fields for the CAQH Group ID, Email, Group Name, Primary Tax ID, and the groups default authorization setting. All fields are editable except the CAQH Group ID number and email. If the user attempts to change their primary tax id, the system will validate that it does not already exist. If it exists, they will get an error on the input field (see error state input field) and will not be able to save. For all edit pages, the save button does not become active until changes have been made. Once edits have been made and there aren't any errors, the button becomes primary and the user can save the edits.

General	Tax IDs	Group Type 2 NPIs	Location Type 2 NPIs	Group Medicaid IDs	Group Medicare IDs
General	Tax IDs	Group Type 2 NPIs	Location Type 2 NPIs	Group Medicaid IDs	Group Medicare IDs
General	Billing Tax IDs	Group Type 2 NPIs	Location Type 2 NPIs	Group Medicaid IDs	Group Medicare IDs
General	Billing Tax IDs	Group Type 2 NPIs	Location Type 2 NPIs	Group Medicaid IDs	Group Medicare IDs
General	Billing Tax IDs	Group Type 2 NPIs	Location Type 2 NPIs	Group Medicaid IDs	Group Medicare IDs
General	Billing Tax IDs	Group Type 2 NPIs	Location Type 2 NPIs	Group Medicaid IDs	Group Medicare IDs

Dimensions

- Width: 730px
- Height: 52px
- Text: Gotham Narrow Bold & Book, 18px
- Color Stripe: 4px thick, color #A32136, 20px padding on each side around text
- Line: 1px thick, #979797

There are two types of errors within the system: System errors, and content errors.

System Errors

System level errors are used when there is something that has happened/or a notification for what will happen to the system. This includes notifications for scheduled system maintenance, notifications for downtime, or general notifications from the operations staff. The color of the background for the error indicates what type of error is it. The content and timing of when these errors go out will be controlled by CAQH operations. The styling follows the header/footer styling - all content is contained within the 12 column grid, the color extends to the width of the browser window. All system messaging will appear directly under the header bar, above of any page title.

Content Driven Errors

Content driven errors are displayed when something has gone wrong with an action that an individual user has taken. This could include, but is not limited to, uploading the wrong file type or invalid login information. These errors messages are displayed above the location of the error, and should have meaningful messaging to help guide the user in how to solve the problem. The width and height of these messages vary based on the content inside.

Error Styling

Error Message



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.

Information Message



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod



CAQH Information Message



Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod



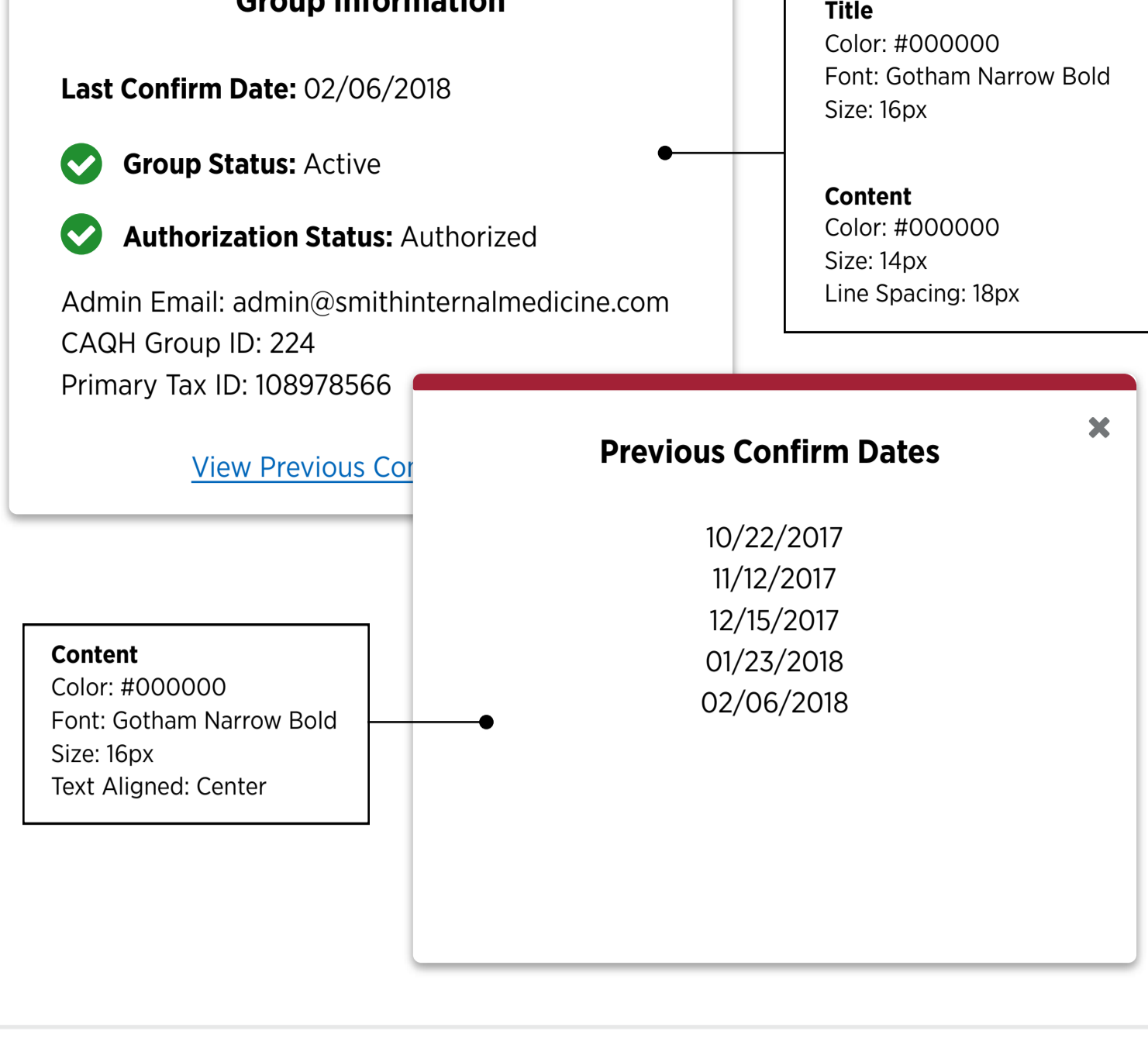
***For more information on how errors are displayed, please look at the following visual design prototypes:
Snapshot Error, Upload Roster Error, or Login Error***

Participating Organizations Components

The group profile cards provide a quick look at all of the actions that a health plan can take within a group profile, as well as provide the most critical information about a group. The title of all group profile pages is the group name. There are four group profile card types: group information, health plan status information, change report request, and data extract request. These cards appear under the general tab of sub navigation within a group profile page. The navigation bar has the same style and functionality as the groups portal.

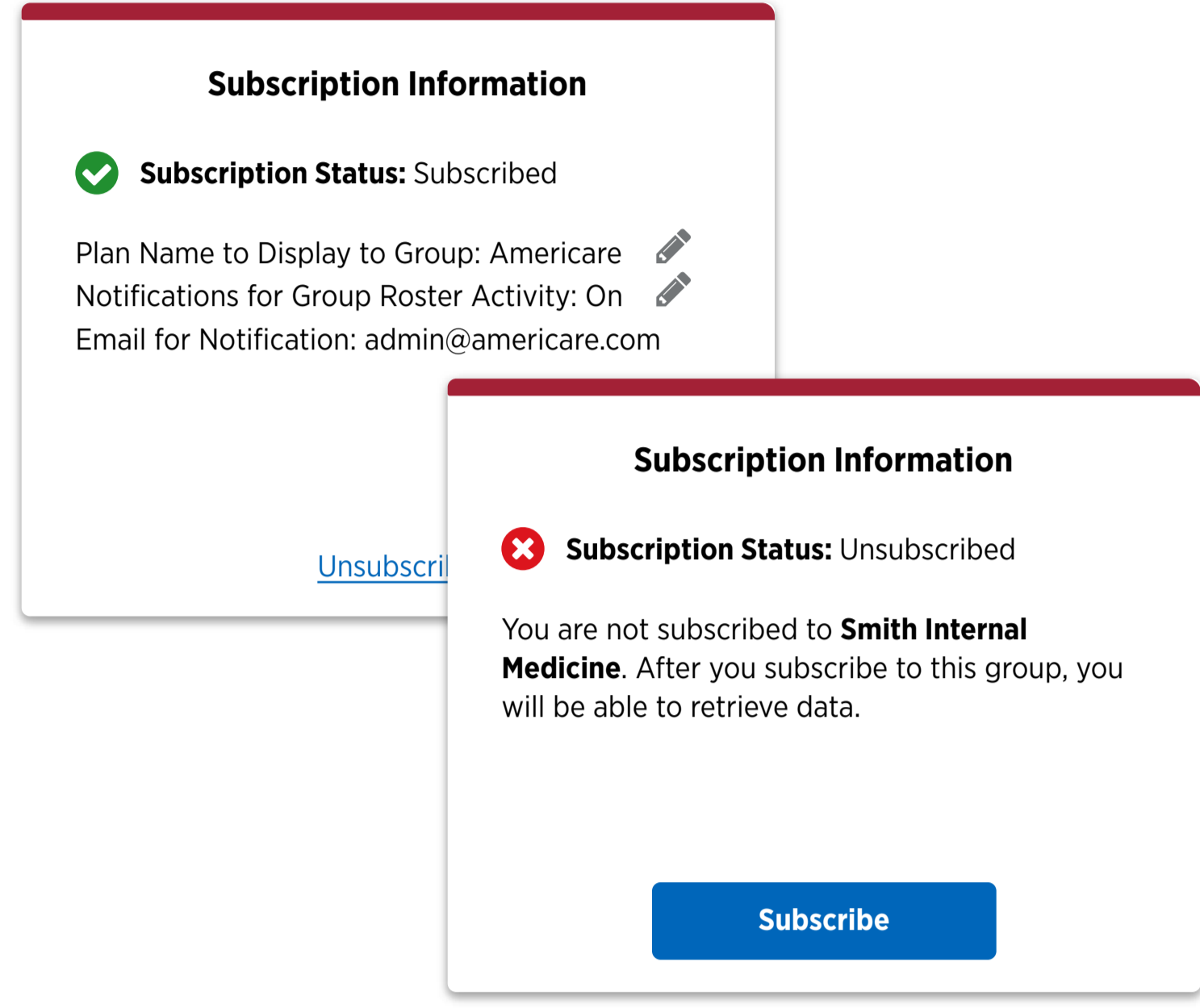
Group Information

The group information card has the ability to flip over. On the front, the card displays the primary contact email, the groups CAQH Group ID, their primary tax ID, the last confirmed date of data, and the group status and authorization status. While most information will not extend beyond the card, the email address has 35 characters available to display. If the email is too long, it gets truncated at the end with an ellipsis (ex. reallylongemailaddress@emai...). The card title is centered, while the content within the card is left aligned. There is a link on the front that flips the card over and displays the last five dates the group successfully uploaded and confirmed their data. To close the card, the user can click on the 'x' in the top right corner.



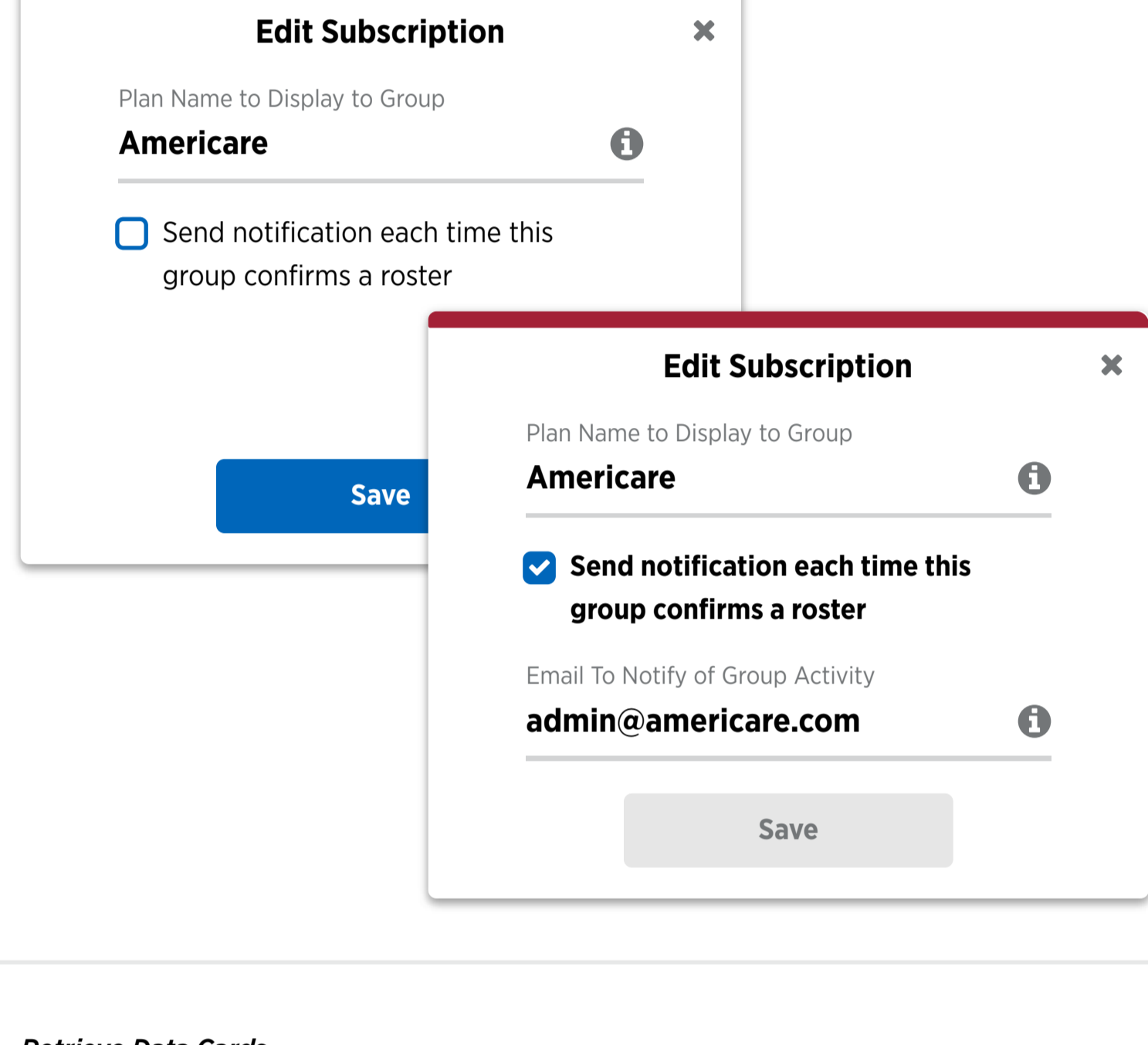
Subscription Information Card (Front)

The subscription information card displays a health plans status (subscribed/unsubscribed), the plan name they want to display to the group, and the option to opt-in to notifications when the group uploads and confirms their data. While the health plan is unsubscribed, these actions are not editable, and a message is displayed explaining why they cannot see information. When a health plan subscribes to a group, they can change these settings in the modal that appears, or can edit them at any time within this card on the group profile page. If the health plan has not opted in to email notifications, the email field will not appear. The PO user has the option to unsubscribe at any time with the unsubscribe text link, which will result in a modal pop up confirming the action. Editing the subscription information with flip the card around to the back (see below).



Subscription Information Card (Back)

The back of the subscription information card allows the health plan to edit the name they display to the group, opt-in or opt-out of notifications when a group has uploaded and confirmed data, and provide the email that receives notifications. To flip the card back over, the user can click on the 'x' in the top right corner. The save button remains disabled until the information is edited within the card. If the user does not click the save button, the changes will not be saved.

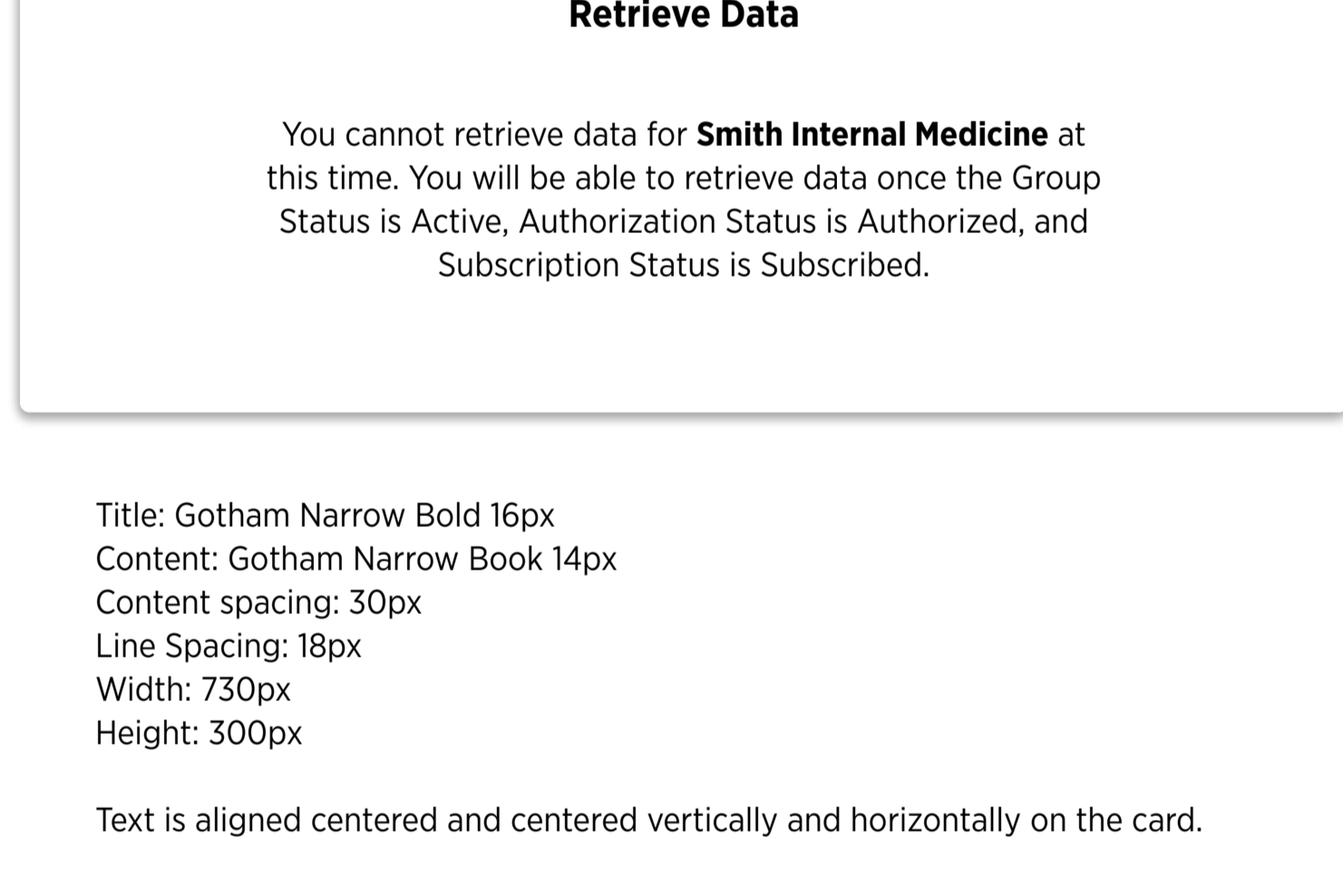


Retrieve Data Cards

The retrieve data cards are found on the group profile pages as well. These cards are an easy way for a health plan user to get quick access to group data without having to go through the request data flow. This feature will only be available if all statuses from the cards above are green. If the group is not active, the health plan is not authorized, or not subscribed, the card shows a summary of why they cannot receive their data at this time.

Retrieve Data Not Available

This card is displayed when a group is not active, a health plan is not authorized, or the health plan is not subscribed to the group.



Title: Gotham Narrow Bold 16px
 Content: Gotham Narrow Book 14px
 Content spacing: 30px
 Line Spacing: 18px
 Width: 730px
 Height: 300px

Text is aligned centered and centered vertically and horizontally on the card.

Retrieve Data Cards

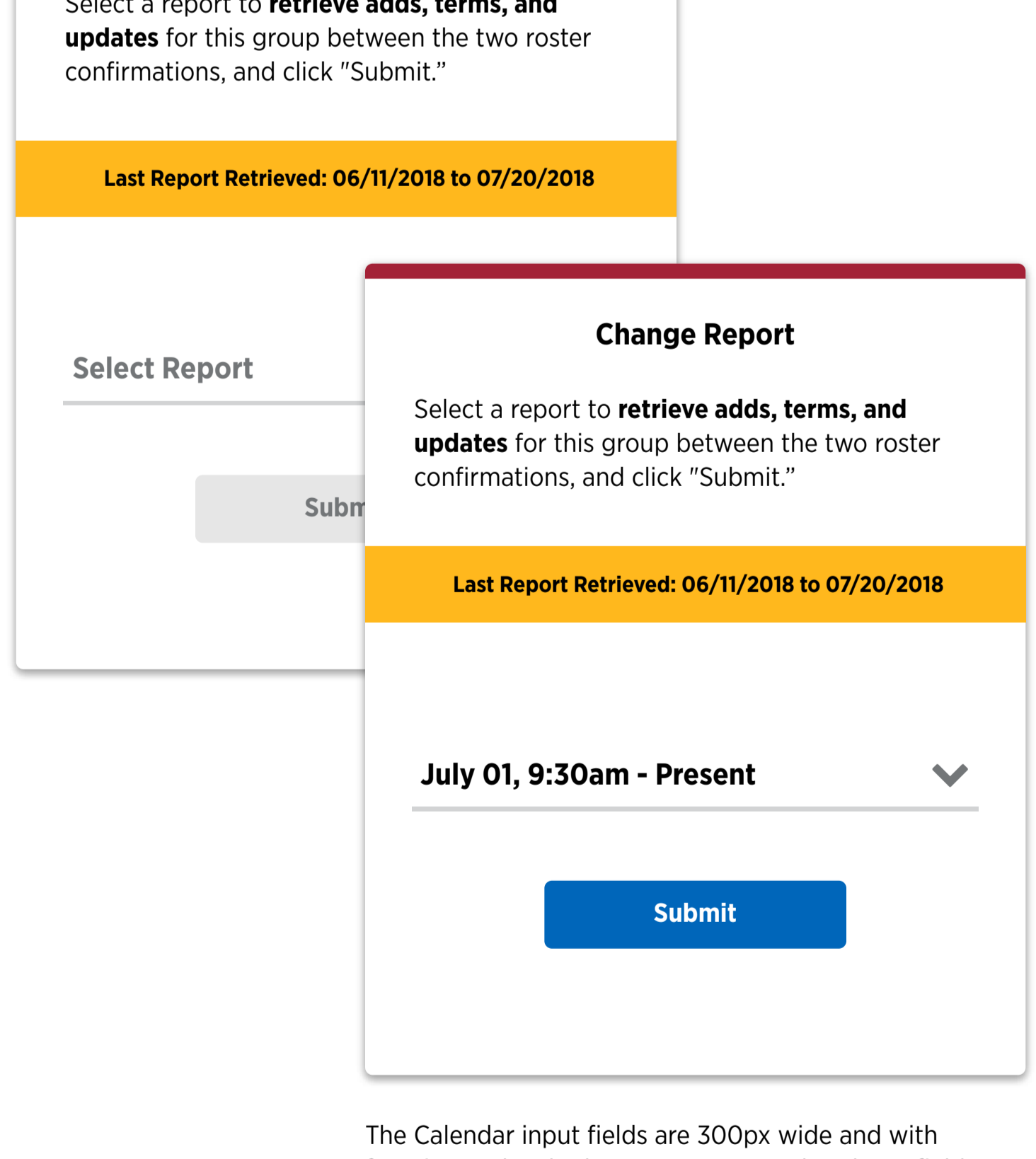
There are two ways a user can enter a date into the input field. Dropdowns, or using a date picker, depending on the content requested. Clicking on the icon will display a calendar dropdown. Clicking on a date will close the dropdown, and clicking outside of the dropdown will cancel and remove the dropdown. (For more information on Calendars, see page 15).

Change Report (Inactive & Active)

There are two states that this card can be in - inactive and active. The card starts at a default of inactive and becomes active once the user has input valid dates. This card has a short explanation, the last time the change report was requested, a field to select a report from a preselected list, and a submit button.

Title: Gotham Narrow Bold 16px
 Content: Gotham Narrow Book 14px
 Line Spacing: 18px

Text is aligned centered and centered vertically and horizontally on the card.

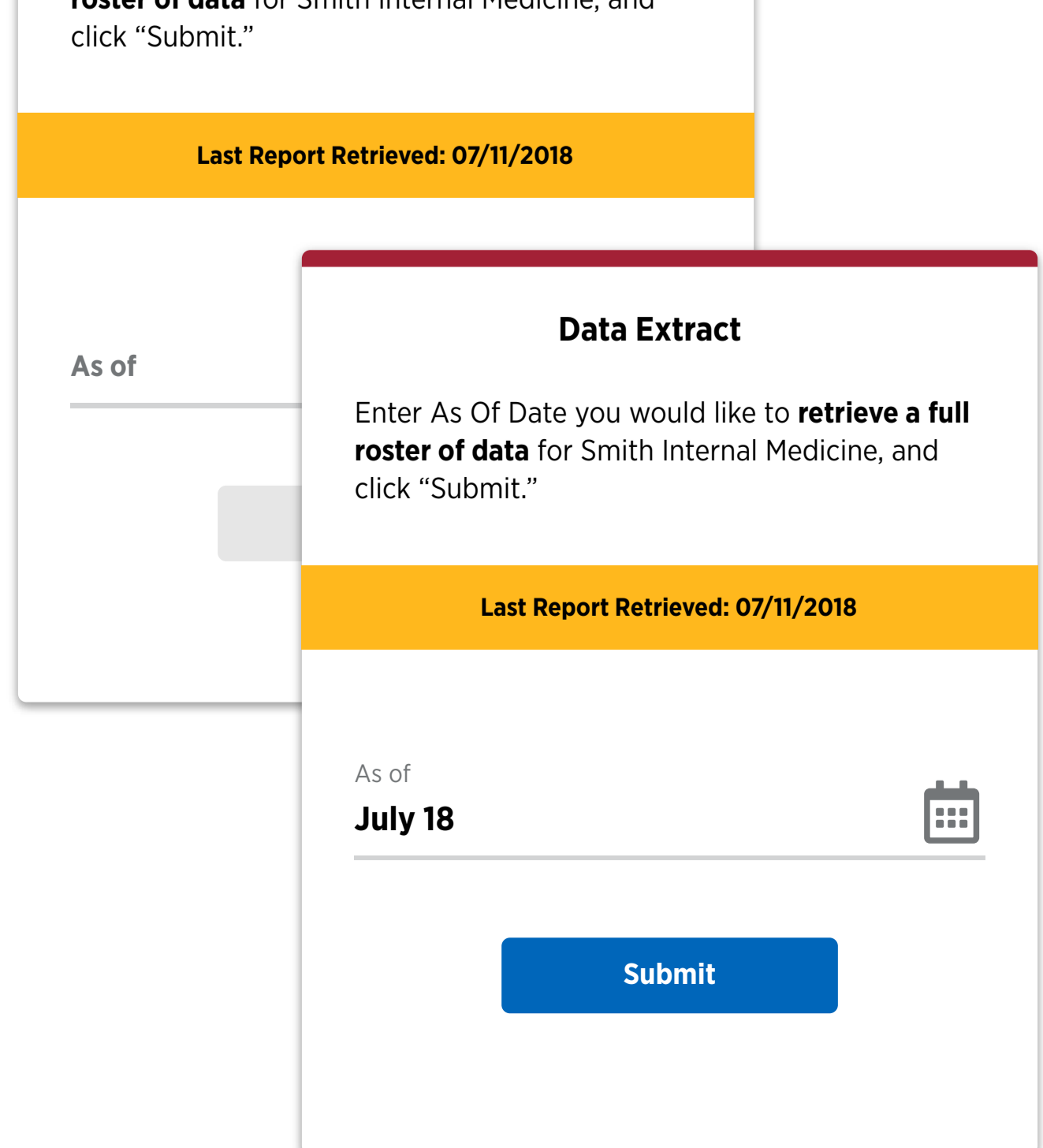


The Calendar input fields are 300px wide and with function and style the same as a completed text field, with the addition of a calendar dropdown (see page 3).

The buttons are 2 columns disabled and primary buttons.

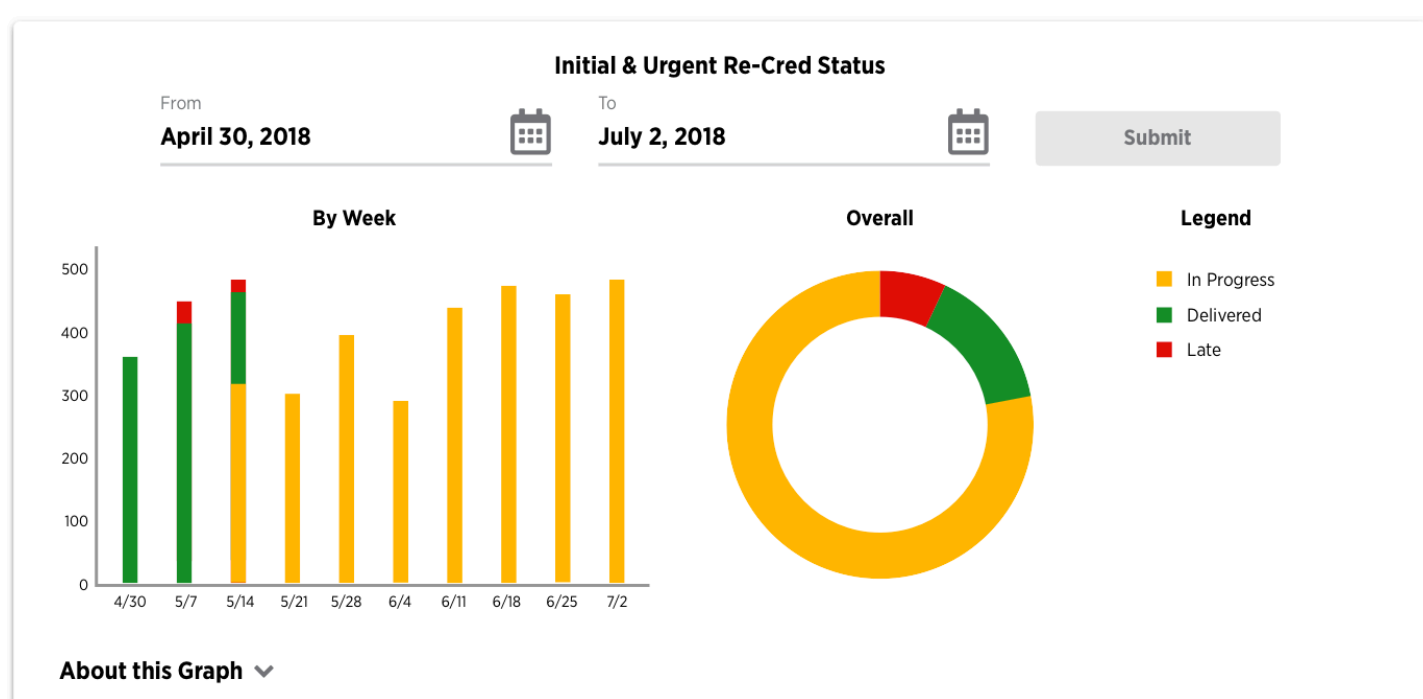
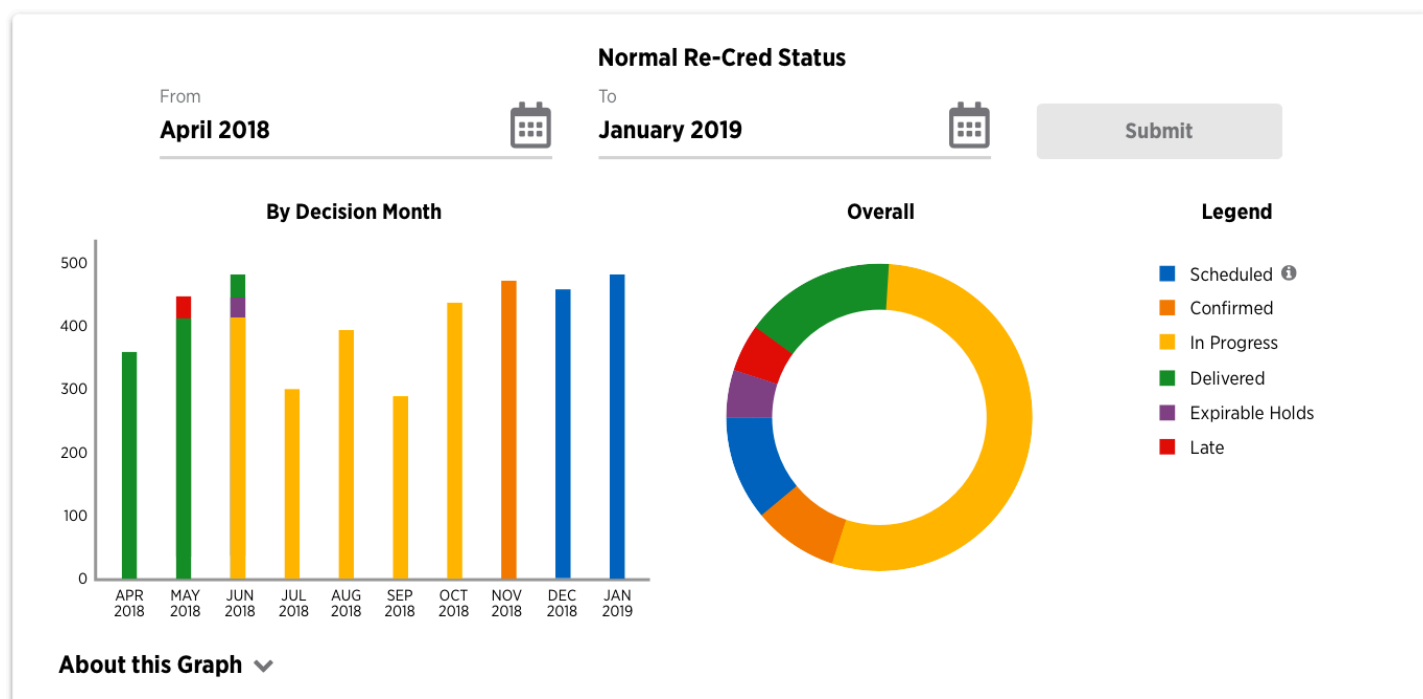
Data Extract Report (Inactive & Active)

There are two states that this card can be in - inactive and active. The card starts at a default of inactive and becomes active once the user has selected a valid date. This card has a short explanation, the last date range the data extract was requested, one input field for the as of date, and a submit button. The date selected on this card cannot be in the future.



VeriFide Components

The VeriFide portal is a dashboard for tracking primary source verification orders for providers. The home page of this portal (aka the “dashboard”) is the main location for taking a quick look at the status of orders, or for digging deeper into the details and finding individual statuses. The dashboard is made up of cards with multiple graphs and customizable features. The shows the order status of normal and initial PSV orders, but can be changed by selecting different tabs, *order status*, *performance*, and *SLAs*. For graphs that do not require an overall view, this graph is simply taken out and the bar graph is extended to fill the space. The legend for all graphs only contains the categories that are in the graph. (For additional examples of this, please see initial/urgent re-creds below)



About this Graph

All graphs have an “About this Graph” section that gives a short description of what is shown in the graph. For first time users, all about sections should be opened. The user can click on the dropdown arrow or the text to close the paragraph. After a user closes the paragraph and leaves the page, it should remain in the state that the user had it when they left the page.

Slideout Tray

When a user starts to click on the graph to dig into the details, a slideout tray appears beneath the graph card. This section has a table that shows details about the graph selected. The content changes based on the order status or what is selected on the graph. See the table below for what information appears.

Normal Re-Cred Status

From **April 2018** To **January 2019** [Submit](#)

By DecisionMonth

June 2018 Summary

Legend

- Scheduled
- Confirmed
- In Progress
- Delivered
- Expirable Holds
- Late
- [Clear results](#)

June 2018 Details

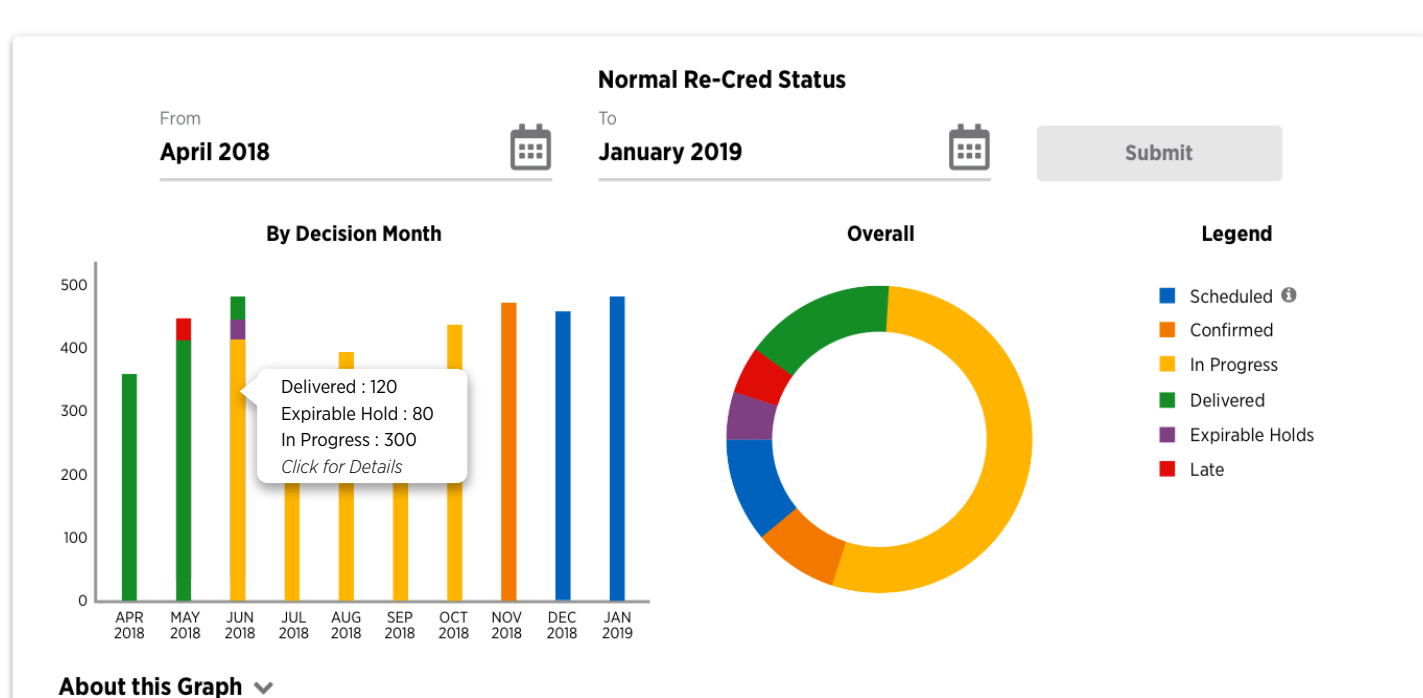
Search

Provider Name	CAQH ID	Practice State	TDD	ADD	Order Status	Expiring Item
Earl Atkins	123	OR	06/12/2018	06/10/2018	Delivered	
Dennis Aguilar	887	VT	06/11/2018	n/a	Expirable Hold	License
Luella Todd	145	MT	06/20/2018	06/14/2018	Delivered	
Maria Williams	660	ID	06/21/2018	06/15/2018	Delivered	
Brandon Zimmerman	893	KY	06/10/2018	n/a	In Progress	
Georgie Matthews	564	NH	06/12/2018	n/a	Expirable Hold	CDS
Jim Logan	334	OH	06/21/2018	n/a	In Progress	
Edna Goodman	675	IA	06/30/2018	n/a	In Progress	

[Download Report](#)

Hover States

Both the bar chart and doughnut chart can be hovered over to show more information. The user can click on any bar of the bar chart to isolate the data and show the slideout tray with more information.



Isolated States

When a user clicks on a bar in the chart, it isolates the month/week/time frame that it represents. In addition to showing the slideout tray, the doughnut chart changes to show only the contents of the isolated time period. A user can further isolate the data by clicking on a part of the doughnut chart or the text category in the legend. Doing this will further refine the table data in the slideout tray.

Normal Re-Cred Status

From **April 2018** To **January 2019** [Submit](#)

By DecisionMonth

June 2018 Summary

Legend

- Scheduled
- Confirmed
- In Progress
- Delivered
- Expirable Holds
- Late
- [Clear results](#)

June 2018 Expirable Holds

Search

Provider Name	CAQH ID	Practice State	RDD	Hold	Expiration Date
Dennis Aguilar	887	VT	06/10/2018	License	07/01/2018
Georgie Matthews	564	NH	06/14/2018	CDS	07/25/2018
Danny Jefferson	274	NY	06/25/2018	CDS	07/03/2018
Jane French	123	AZ	06/12/2018	DEA	07/10/2018
Johanna Tucker	897	RI	06/12/2018	DEA	07/10/2018
Carolyn Reese	224	KS	06/30/2018	License	07/04/2018
Eleanor Lee	116	NM	06/13/2018	CDS	07/20/2018
Dean Howard	441	CT	06/18/2018	DFA	07/21/2018

[Download Report](#)

About this Graph

The bar chart shows the status of your re-credentialing PSV Orders for each decision month. Select a month to view the breakdown for that month in the donut chart on the right. Select a category in the donut chart to see a list of corresponding orders.

Clear Results

When a user starts to refine the graphs and dig into the details, a “clear results” link appears below the legend. Clicking this will bring the graph back to its original state. (see above)

Similar to the PO portal and the Groups portal, the VeriFide portal also uses cards to show data in a simple, digestible card. These cards can flip to show more information, and are color coded to match the colors from the graphs on the dashboard.

Provider Name

CAQH Provider ID: 77865644
 PO Provider ID: 3452
 Order Status: Scheduled
 Target Delivery Date: 06/12/2018
 Primary Practice State: NJ

[View Order](#)

Scheduled

This card shows the order status of scheduled PSV orders. A user can modify a request (change the TDD or cancel the order).

Color Bar: 10px
 Color: #FFB81D
 Rounded Corners: 4px

Provider Name

CAQH Provider ID: 12312467
 PO Provider ID: 14579
 Order Status: Confirmed
 Target Delivery Date: 07/12/2018
 Primary Practice State: NJ

[View Order](#)

Confirmed

This card shows the order status of confirmed PSV orders. A user can modify a request (change the TDD or cancel the order).

Color Bar: 10px
 Color: #0066BA
 Rounded Corners: 4px

Provider Name

CAQH Provider ID: 12345678
 PO Provider ID: 7865
 Order Status: Delivered
 Actual Delivery Date: 05/12/2018
 Primary Practice State: NJ

[View Order](#)

Delivered

This card shows the order status of delivered PSV orders. A user can download the report and see the status of the PSV.

Color Bar: 10px
 Color: #218F30
 Rounded Corners: 4px

Provider Name

File Classification

A : 12
 B : 0
 C : 0
 D : 0
 Q : 0

[Download Report](#)

Delivered (Back)

A user can see a quick view of the results of the PSV order by flipping the card over.

Provider Name

CAQH Provider ID: 87685634
 PO Provider ID: 2345
 Order Status: In Progress
 Target Delivery Date: 05/12/2018
 Primary Practice State: NJ

[View Order](#)

In Progress

This card shows the order status of in progress PSV orders. A user can see the scheduled delivery date.

Color Bar: 10px
 Color: #7D4182
 Rounded Corners: 4px

Provider Name

CAQH Provider ID: 89786756
 PO Provider ID: 89543
 Order Status: Expirable Hold
 Target Delivery Date: 05/12/2018
 Hold Item: License
 Primary Practice State: NJ

[View Order](#)

Expirable Hold

This card shows the order status of expirable hold PSV orders. A user can see the what item is on hold.

Color Bar: 10px
 Color: #007B8B
 Rounded Corners: 4px

Provider Name

CAQH Provider ID: 99786775
 PO Provider ID: 123
 Order Status: Late
 Target Delivery Date: 02/13/2018
 Primary Practice State: NJ

Late

This card shows the order status of late PSV orders.

Color Bar: 10px
 Color: #A32136
 Rounded Corners: 4px

Provider Name

CAQH ID: 12345678
 PO Provider ID: 2345
 ProView Status: Reattestation
 Order Status: Never Ordered

[Order PSV](#)

New Provider

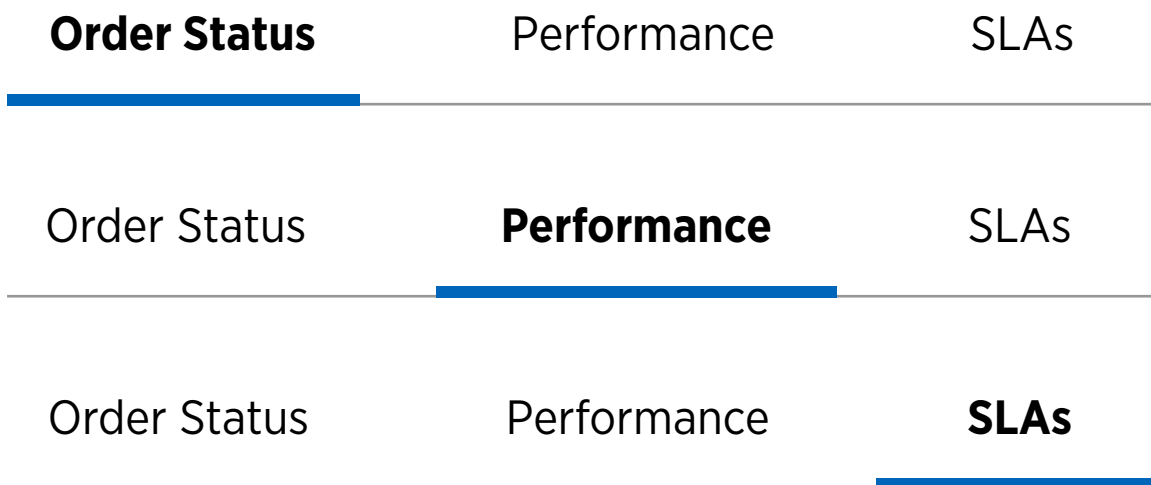
This card shows information of a provider that the PO has never had contact with before. They can order PSV for this provider by clicking on the link.

Color Bar: 10px
 Color: #737678
 Rounded Corners: 4px

There are a few menus/filters within VeriFide - the dashboard filter, the navigation menu, and the search filter. All of the menus are used to help the user navigate throughout the tool.

Dashboard Filter

This is the filter that appears on the dashboard of the VeriFide tool. It is defaulted to show 'Order Status' graphs first. The user can click on any of the remaining tabs to filter the graphs based on performance, or SLAs. When a tab is active, the text becomes Gotham Narrow Bold, with a 4px blue bar (#0066ba) beneath it.



Search Filter

This is the filter that appears when a user is searching for a provider to order Primary Source Verification (PSV) for, or finding the PSV order status of an individual provider. The default setting for this filter is 'All.' When active, the text will become Gotham Narrow Bold and the color bar beneath the tab will coordinate with the color of the card. When a user searches for a provider and clicks through the tabs, the results should always show the search results until the field is cleared.

