

Provider Data Management User Guide

Oct. 2023

Provider Data Management (PDM) is an Availity[®] Essentials tool that allows **professional, facility and ancillary providers** to quickly update, validate and attest to the accuracy of their provider information on file with Blue Cross and Blue Shield of Illinois (BCBSIL). If you are not an Availity Essentials registered user and would like to use this application, go to <u>Availity</u> and sign up at no cost.

PDM offers two workflows:

- 1) Core PDM: Update all information about your business and provider(s) directory, as well as key staff directory.
- 2) Directory Verification: Verify and/or update your business' directory information every 90 days as part of the federal Consolidated Appropriations Act (CAA).

Important Information:

- → If your provider organization has NOT completed the <u>Core PDM attestation in the last 3 months</u>, but only submits the quarterly <u>Directory Verification</u> attestation workflow, BCBSIL ONLY receives updates to the provider's name and service location(s).
- → Submitting quarterly <u>Directory Verification</u> contains a smaller subset of provider information and does not include all the provider profile details needed for BCBSIL to fully maintain an accurate file for the provider(s).
- → To ensure BCBSIL receives and maintains the most up-to-date provider information, the **best practice** is for your provider organizations to submit a <u>Core PDM attestation each time an update is made to the provider profile</u> **AND** at <u>the end of each quarter, immediately following the Directory Verification update made</u> to the provider(s) profile.

Guidance on PDM Updates for BCBSIL

ACCEPTED by BCBSIL through PDM

- Business website URL
- Provider's personal information
- Service location address change
- Service location contact information
- Languages spoken
- Hours of operation
- Payment address change and contact information

NOT ACCEPTED by BCBSIL through PDM

The below updates and provider types requesting changes should be completed by using the appropriate form on the <u>Verify and Update</u> <u>Your Information</u> page of our website:

Type of Updates:

- National Provider Identifier (NPI) or Tax ID number changes
- Business closure
- New provider or new service location
- Inactivate a provider or delete service location
- Organization's business name changes
- Doing Business As (DBA) name
- Edit to participating payer network information
- Accepting new patients

Provider Types:

Laboratory & Dental

User Guide Quick Reference Links

- → Refer to to pages 2, 3, 4, and 5 to Get Started and view the Directory Verification workflow
- → Refer to pages 6, 7, and 8 to view the Core PDM workflow
- → Refer to page <u>9</u> to view PDM Reporting

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Availity Administrator:

Access must first be granted to users by going to My Account Dashboard \rightarrow Manage My Organization \rightarrow Manage My Team(s) \rightarrow Add User or select Actions to Edit User Role \rightarrow Expand User Role and select Provider Data Management

1) Directory Verification Workflow

The **Directory Verification** workflow allows users to make information and demographic updates for their organization. Users will receive quarterly notifications in the **Notification Center** when it's time to verify directory information.

As a reminder, the **best practice** is for your provider organizations to submit a <u>Core PDM attestation each time an update is made to the</u> provider profile **AND** at the end of each quarter, immediately following the Directory Verification update made to the provider(s) profile.

Providers are required to verify and/or update the following information about their organization every 90 days:

- Name
- Specialty (updates are ONLY accepted by BCBSIL through the contracting process)
- Address
- Phone number

Business Profiles

Why should I do this?

Digital contact information (website)



Access the Directory Verification workflow from the PDM dashboard

Correct error	to submit to payers. If you are h	aving trouble, call 1-800	-AVAILITY (282-4548). Take	Action =
It's a new g				Contraction of the second s
Quarterly su	missions build trust with patients	hat your information is c	correct and reliable.	Action
	Quick Ti):	and the second se	

Quick Tip:

→ During verification, you can add, edit or delete information, as needed. Once you have verified the information, you must attest to its accuracy before sending the data to BCBSIL.

Directories are past due for	or verification	Directories require quarterly check-i	ns O	Directories haven't been started
Search 1y am I seeing these businesses? ①	Q T Filters ×	EXCLUDE CLOSED BUSINESSES CLEA	AR ALL	🖬 List 🛛 👪 Gri

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Directory Verification – Manage Business

Manage Business – manage, edit or delete the following information for your organization:

- General Information verify and/or update business name
- Service Locations manage existing business location
- ▶ Specialties updates are ONLY accepted by BCBSIL through the contracting process
- Hospital Affiliations updates are NOT currently accepted by BCBSIL

Quick Tips:

- → Include all service locations for your organization in Service Locations section.
- → Primary service locations cannot be deleted.
- → Indicate the appropriate Appointment Phone Number in the Service Locations section to ensure patients can contact your organization via phone.

Note: Sections that have errors will display red error badges. You cannot proceed to the next step until all errors are resolved.

NESS ABC Clinic		Give Feedback
Step 1 Manage Business @ (Business & Location information) 1 Error	Step 2 Manage Type 1 Providers (Practitioners or individuals)	Step 3 Submit Verified Profile (Submit updates to your participating payers)
General Information		
Toggle between sections to co	omplete your business information. Attest when y	your record is up-to-date.
	General Information O ABC Clinic Manage General Information	
	Ress ABC Clinic	Step 1 Step 2 Manage Business @ (Business & Location information) Image Type 1 Providers (Practitioners or individuals) Image Business & Location information Image Type 1 Providers (Practitioners or individuals) Image Business & Location information Image Business (Practitioners or individuals) Image Business (Practitioners or individuals) Image Business (Practitioners or individuals) Image Business (Practitioners or individuals) Image General Information (Practitioners or Individuals) Image General Information Image General Information (Practitioners or Individuals) Image General Information Image General Information Image General Information Image General Information

Directory Verification – Updating Service Locations

Important Information for Updating Service Location/Address:

When updating an address, it's important that providers **DO NOT delete** the old service location and then add the new service location but **EDIT the location instead**. When a service location is deleted, BCBSIL receives notification that the new location is now inactive, and providers will not be practicing at a new location. This action will also terminate the location from the BCBSIL system, which removes the location from displaying to our members in the BCBSIL Provider Finder[®] and may cause complications with claims processing.

The address should **ONLY be deleted** if that service location is closing, and the provider(s) will no longer be practicing at another address. If you delete a service location and subsequently add a new service location, BCBSIL will not recognize that the office address has relocated from point A to point B.

Note: Availity occasionally receives data files containing provider business information from participating payers. If data contains information about the provider that is not in PDM or is different than what was previously submitted, a payer request displays. You can accept, decline or review these updates later.

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Directory Verification – Updating Service Locations (continued)

Service Locations – edit your address with BCBSIL by using one of the following options.

Street Address 2 (optional)

City

Beach City

First Option

- Select Manage Business
- Select Service Locations
- Select Manage This Service Location
- Select Modify Service Location Address
- Enter the modified address
- Save changes

Note: When editing an address, select the USPS standardized version of the address suggested by Availity. This validation reduces the risk of the address failing to update.

Did you mean this instead?					
• 300 E. ANYWHERE ST. BEACH CITY, IL. 12345					
Use the address I entered.					
Cancel Submit					

Appoir No offic	ntment Phone: +1-555-555-5555 e hours defined for this service location
Manage this Service Location	Add a new Service Location Delete this Service Location
odify Service Location Address	S
Service Location is a Mobile Lo	. j
ervice Location Name (optional)	
ABC Organization	
treet Address 1	
123 Anuwhere St	
1207 (ilywhere of.	



- Select Manage Business
- Select Service Locations
- Select Delete this Service Location
- Select The address needs to be modified
 OR

This location is closing, and the providers/key staff are moving to a new location

If you select The address needs to be modified, enter modified address

Save changes



State

Illinois

The address needs to be modified

This business has never provided services at this location

This location is a duplicate

This location is closed or closing permanently This location is closing and the providers/key staff are moving to a new location

Continue to next page

ZIP Code 12345

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Directory Verification – Updating Service Locations (continued)

Second Option (continued)

- If you select This location is closing and the providers/key staff are moving to a new location, specify if you're relocating to an existing address or a new one
- Select Continue, leaving the Relocating to Existing Location box unchecked
- This will enable you to edit the location and enter the modified address
- Save changes and Submit the attestation

"5000 Meadowland Parkway, Beach City, Illinois, 123 be removed.	45" WI
Reason	
This location is closing and the providers/key staff are	•
Date of Relocation	
01/03/2022	**
 Relocating to an Existing Location.	

Directory Verification – Manage Providers

Manage Providers – manage, edit or delete the following information for providers within your organization:

 General Information – verify and/or update provider's name Service Locations – manage 	← PDM Dashboard	Step 1 Manage Business (Business & Location Infor	: 😧 mation)	Step 2 Manage Type 1 Providers (Practitioners or Individuals)	Stap 3 Submit Verified Profile (Submit updates to your participating payers)
 Specialties – update to NPI, Tax ID, or Medicare/Medicaid IDs are NOT currently accepted by BCBSIL Specialties – updates are ONLY accepted by BCBSIL through the contracting process Hospital Privileges – updates are NOT currently accepted by BCBSIL 	Search Add an Individual P Phillip Belding TYPE I INF: 12345780 PRIMARY TAXONOMY CODE: 102 Delete Provider	Q rowder to this Rusiness	PHILLI General Inform Service Locat	P BELDING nation Phillip Belding - Manage General Inform tions 123 Anywhere St. Beach Cli Manage this Service Location Add an	ale 👁 ation ty, IL, 12345 👁 new Service Location
Quick Tips:			Specialties	NPI 1234567890 Manage this Identifier Add a n	ew Identifier
 → The service locations in Manage Provider locations setup in the Manage Business s → There must be at least one Service Location → As a reminder, when updating a Service Location instead of deleting and a 	are based on th ection. on assigned to e ocation select N adding a new ad	ne service Pach provider. Aanage this Idress.	Hospital Privil	PRIMARY Taxonomy 102L0 Behavioral Health & Social Service Pro Manage this Specialty Add a n Jeges You do not have any Hospita Add a new Hospital Priv	0000X O viders - Psychoanalyst ww Specialty

- Once all updates have been applied to the Manage Providers section, select Step 3: Submit Verified Profile
- Review and agree to the information provided by selecting I agree with the above statements, and want to send this information to the health plans shown
- Select Submit Verified Profile

Note: To learn how to submit a Core PDM workflow for your business and providers, proceed to page 6.

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2) Core PDM Workflow

The core PDM workflow allows you to update your organization's demographic data and provider directory. Users will be directed to this workflow if the organization selected has already completed the quarterly directory verification.

As a reminder, the **best practice** is for your provider organizations to submit a <u>Core PDM attestation each time an update is made to the</u> provider profile **AND** at the end of each quarter, immediately following the Directory Verification update made to the provider(s) profile.

- The list or grid at bottom of PDM Dashboard indicates the businesses you have access to and their primary Tax ID
- Businesses will display with the following status color:
 - **Red** past due for quarterly check-in.
 - Yellow within 20 days of being past due for quarterly check-in.
 - Blue business has never been verified or started.
 - Green quarterly check-in completed and now eligible for providers to manage the full provider profile (core PDM). All other status must be completed before accessing the core PDM profile.

Quick Tip:

- → Some cases may have a Quick Verify option to complete a business' directory verification in one click if:
 - The directory verification has previously been completed for the business.
 - The business does not have any pending payer updates.
 - The data to be verified for the business does not contain any errors.

/ou have 6 businesses that need to	Don't see your business listed? Search and /					
Search	Q	▼ Filters	* EXCLUDE CLOSED BUSINESSES	CLEAR ALL	II 1	List III Grid
/hy am I seeing these businesses? 🛈						
212121212 - Clinic ABC	Last Verified 02/18/2020		Next Verification Due 05/18/2020	Status Past due. Verify now		=
323232323 - ABC Orthopedics	Last Verified 07/09/2020		Next Verification Due 10/07/2020	Status Quarterly Check-In Required	Nothing Appears to Have Changed Đ Quick Verify	=
454545454 - Southside Imaging	A This busines	s has never b	een verified	Status Not Started		
3234567899 - ABC Clinic	Last Verified 07/01/2020		Next Verification Due 09/29/2020	Status Check-In Complete		

Select the business card or action menu (=) to access and complete the full PDM profile.

Core PDM – Manage Business

Manage Business – manage, edit or delete the following information for your organization:

- General Information manage existing or delete the business information
- Service Locations manage service locations
- Mailing Addresses manage mailing address
- Payment Addresses manage payment address
- Certifications updates are NOT currently accepted by BCBSIL
- Licenses updates are NOT currently accepted by BCBSIL
- Identifiers update to NPI, Tax ID, or Medicare/Medicaid IDs are NOT currently accepted by BCBSIL
- Specialties updates are ONLY accepted by BCBSIL through the contracting process
- Hospital Affiliations updates are NOT currently accepted by BCBSIL
- Key Staff manage existing, add or delete key staff

Quick Tips:

- → Review each section even if there are no errors listed to ensure all the organization's information is correct.
- → The data you enter in the Manage Business section will populate the options you can assign to your providers in the Manage Providers section.

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Core PDM – Manage Business (continued)

Once all updates have been applied to the Manage Business section, select Step 2: Manage Providers to proceed to the next section



Core PDM – Manage Providers

Manage Providers – manage, edit or delete the following information for providers within your organization:

- ▶ General Information verify and/or update provider's name
- Service Locations manage service locations
- Mailing Addresses manage mailing address
- Payment Addresses manage payment address
- Certifications manage existing, add or delete certifications
- Degrees manage existing, add or delete degrees
- Licenses updates are NOT currently accepted by BCBSIL
- ▶ Identifiers update to NPI, Tax ID, or Medicare/Medicaid IDs are NOT currently accepted by BCBSIL
- Specialties updates are ONLY accepted by BCBSIL through the contracting process
- Hospital Privileges updates are NOT currently accepted by BCBSIL

Note: If your provider type does not include individual providers, you may skip the **Manage Providers** section and only attest to the business information.

Quick Tips:

- → Service Locations listed are based on the service locations added to the Manage Business section.
- → If the service location for the provider is not available, select Add a Service location to the business to add the address in the Manage Business section.
- → When updating a Service Location select Manage this Service Location instead of deleting and adding a new address.
- → If the provider's office hours are different from the business, uncheck This provider has the same office hours as the business at tis location in the Service Locations section.

Core PDM – Manage Providers (continued)

Once all updates have been applied to the Manage Providers section, select Step 3: Submit Verified Profile

Manage Providers ABC Clinic	
Search Q	PHILLIP BELDING
Phillip Belding	General Information
Printip Defuting TYPE 1 NP: 124567850 PRIMARY TAXONOMY CODE: 102L00000X Delete Provider	Phillip Belding - Male English Manage General Information
•	Service Locations
	123 Anywhere St. Beach City, IL, 12345 O Manage this Service Location Add a new Service Location
	Mailing Addresses
	At least one Mailing Address is Required. Add a new Mailing Address
	Payment Addresses
	At least one Payment Address is Required. Add a new Payment Address
	Certifications
	You do not have any Certifications. Add a new Certification
	Degrees
	You do not have any Degrees. Add a new Degree

Review and agree to the information provided by selecting I agree with the above statements, and want to send this information to the health plans shown

Select Submit Verified Profile

Things to keep in mind	
Availity works with many of your health plans to share and update information about your organization, including your locations and health care providers. The health plan(s) shown above will receive your verification that the information you've reviewed is correct, along with any updates to the information you have provided. The plan(s) will use that information to keep their systems, including provider directories, up-to-date.	
When you submit this form, you agree that:	
 Availity and the health plan(s) indicated have permission to verify and use the information you are submitting. You have authority to conduct day-to-day business, including providing updates to your information, on behalf of your organization and its health care providers. The information you provide is correct and complete to the best of your ability. You will notify your health plan(s) about any future changes to the information you provided today, in accordance with the contractual obligations you have with each health plan. Future changes to the business structure of your organization or other information you have provided today may require you to complete the verification and update workflow again. The changes you have made today are not changes to your contractual agreements between your organization and your payer(s). 	
✓ I agree with the above statements, and want to send this information to the health plans shown.	
Submit Venified Profile	

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PDM Reporting

PDM Reporting allows you to view reports of the data successfully submitted to BCBSIL and other participating payers for specific PDM attestations.

To view these reports, select action menu (=) for the business and click Review History of Updates

u have 6 businesses that need to	be verified this qu	larter and 2	that are good to go.		Don't see your business listed? O Sea	irch and
Search	Q	▼ Filters	* EXCLUDE CLOSED BUSINESSES	CLEAR ALL	📰 List	III G
y am I seeing these businesses? 🕄	•					
212121212 - Clinic ABC	Last Verified 02/18/2020		Next Verification Due 05/18/2020	Status Past due. Verify now		=
323232323 - ABC Orthopedics	Last Verified 07/09/2020		Next Verification Due 10/07/2020	Status Quarterly Check-In Required	Nothing Appears to Have Changed O Quick Verify	Ξ
454545454 - Southside Imaging	A This busines	ss has never b	een verified	Status Not Started		=
3234567899 - ABC Clinic	Last Verified 07/01/2020		Next Verification Due 09/29/2020	Status Check-In Complete		
					Verify Directory Listing Review History of Upo	g dates
					Close This Business	

On the Reporting page, click Download Report to create a PDF of a specific PDM submission for your records

Reporting ABC C	linic		
uccessful Attestations			
Application	Date & Time Submitted	Submitter	Report Links
Core PDM	11/30/2021 at 8:20AM	Demo Nelson	Download Report
Directory Verification	09/01/2021 at 10:15AM	Demo Nelson	Download Report

Have questions or need additional education? Email the BCBSIL Provider Education Consultants.

Be sure to include your name, direct contact information & Tax ID or billing NPI.

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