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 **Availity** 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 Core PDM attestation in the last 3 months, but only submits the quarterly Directory Verification attestation workflow, BCBSIL **ONLY** receives updates to the provider's name and service location(s).*

→ *Submitting quarterly Directory Verification 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 Core PDM attestation each time an update is made to the provider profile **AND** at the end of each quarter, immediately following the Directory Verification update made 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 Verify and Update Your Information 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*
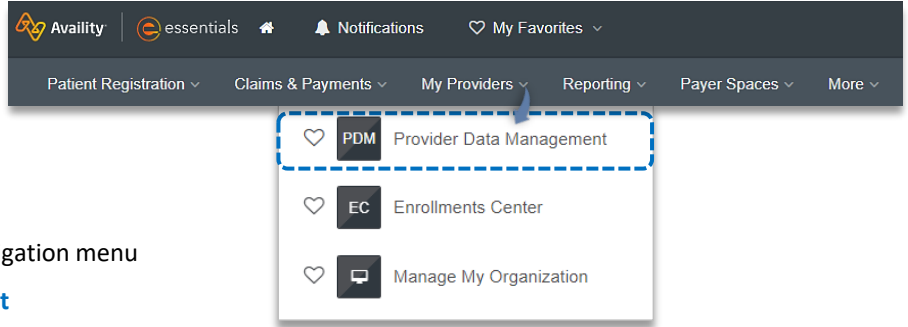- *Accepting new patients*

Provider Types:

- *Laboratory & Dental*

User Guide Quick Reference Links

Getting Started & Accessing PDM

- Go to [Availity](#)
- Select **Availity Essentials Login**
- Enter User ID and Password
- Select **Log in**

- Select **My Providers** from the navigation menu
- Select **Provider Data Management**

Availity Administrator:

Access must first be granted to users by going to *My Account Dashboard → Manage My Organization → Manage My Team(s) →*

Add User or select Actions to Edit User Role → Expand User Role and select **Provider Data Management**
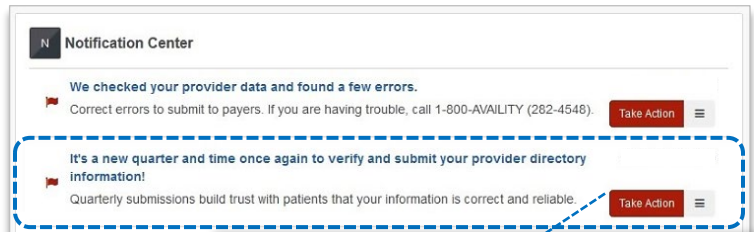
1) Directory Verification Workflow

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> <u>provider profile</u> **AND** <u>at the end of each quarter, immediately following the Directory Verification update made to the provider(s) profile.</u>

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
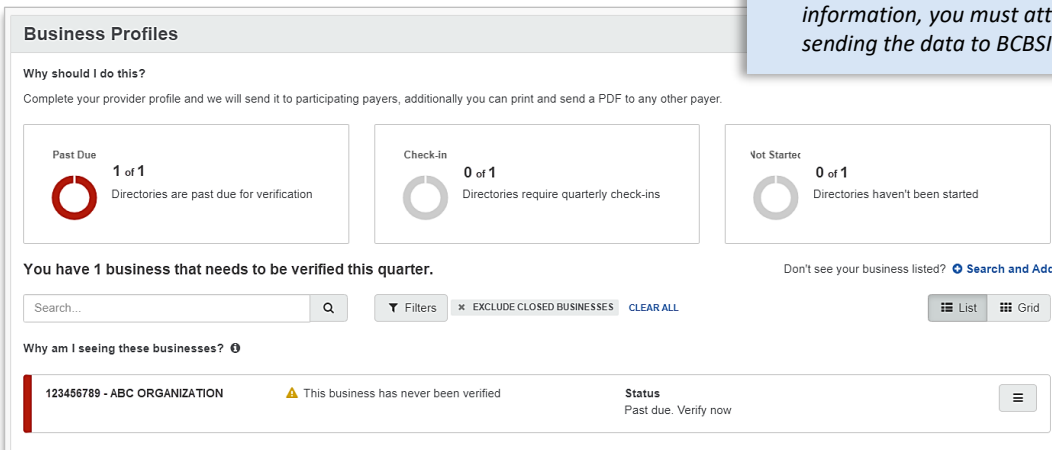- Phone number
- Digital contact information *(website)*

Quick Tip:

→ *Select* **Take Action** *to start the quarterly provider directory verification from the* **Notification Center**.

Directory Verification – *Manage Business*

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.*

- Access the **Directory Verification** workflow from the **PDM dashboard**

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.*

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.

Directory Verification – *Updating Service Locations (continued)*

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

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?

PDM ● 300 E. ANYWHERE ST. BEACH CITY, IL. 12345

○ Use the address I entered.

Cancel | Submit

5000 Meadowland Parkway, Beach City, IL, 12345 ✓
Appointment Phone: +1-555-555-5555
No office hours defined for this service location

Manage this Service Location | Add a new Service Location | Delete this Service Location

---

Modify Service Location Address

☐ Service Location is a Mobile Location

Service Location Name (optional)

ABC Organization

Street Address 1

123 Anywhere St.

Street Address 1

5000 Meadowland Parkway

Street Address 2 (optional)

City	State	ZIP Code
Beach City	Illinois	12345

Second Option

- ▶ 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

5000 Meadowland Parkway, Beach City, IL, 12345 ✓
Appointment Phone: +1-555-555-5555
No office hours defined for this service location

Manage this Service Location | Add a new Service Location | Delete this Service Location

---

PDM   **Are you sure you want to delete this Service Location?**
"5000 Meadowland Parkway, Beach City, Illinois, 12345" will be removed.

Reason

Select one   ▲

🔍

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

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

PDM

Are you sure you want to delete this Service Location?

"5000 Meadowland Parkway, Beach City, Illinois, 12345" will be removed.

Reason

This location is closing and the providers/key staff are... ▼

Date of Relocation

01/03/2022

☐ Relocating to an Existing Location.

Cancel   Continue

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 existing provider's location*

- ▸ 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*

Quick Tips:

→ *The service locations in **Manage Provider** are based on the service locations setup in the **Manage Business** section.*

→ *There must be at least one **Service Location** assigned to each provider.*

→ *As a reminder, when updating a **Service Location** select **Manage this Service Location** instead of deleting and adding a new address.*

← PDM Dashboard	Step 1 **Manage Business** ❓ (Business & Location information)	Step 2 **Manage Type 1 Providers** (Practitioners or Individuals)	Step 3 **Submit Verified Profile** (Submit updates to your participating payers)

Search... 🔍

＋ Add an Individual Provider to this Business

Phillip Belding
TYPE 1 NPI: 1234567890
PRIMARY TAXONOMY CODE: 102L00000X
Delete Provider

PHILLIP BELDING

General Information

Phillip Belding - Male ✔
English
Manage General Information

Service Locations

123 Anywhere St. Beach City, IL, 12345 ✔
Manage this Service Location   Add a new Service Location

Identifiers

NPI 1234567890 ✔
Manage this Identifier   Add a new Identifier

Specialties

PRIMARY Taxonomy 102L00000X ✔
Behavioral Health & Social Service Providers • Psychoanalyst
Manage this Specialty   Add a new Specialty

Hospital Privileges

You do not have any Hospital Privileges.
Add a new Hospital Privilege

- ▸ 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 *.*

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> <u>provider profile **AND** at the end of each quarter, immediately following the Directory Verification update made</u> 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:

> **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.*

  ▸ **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.*

▸ 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.*

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

PDM Manage Business ABC Clinic

| General Information |
| Service Locations **3 Errors** |
| Mailing Addresses **1 Error** |
| Payment Addresses **1 Error** |
| Certifications |
| Licenses |
| Identifiers |
| Specialties |
| Hospital Affiliations |
| Key Staff **2 Errors** |

General Information

Toggle between sections to complete your business information. Attest when your record is up-to-date.

General Information ✓
ABC Clinic
Manage General Information

Quick Tips:

→ Make sure all service locations for your organization are listed in *Service Locations* section.
→ Primary service locations cannot be deleted.
→ When updating a *Service Location* select *Manage this Service Location* instead of deleting and adding a new address.
→ The *Key Staff* section requires a medical director and an owner to be listed.
→ As a reminder, you may see **red error badges**, which indicate errors or requests from BCBSIL that need be verified and/or updated. You cannot proceed to the next step until all red error badges are resolved.

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**

▶ 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**

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**

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