BlueCross BlueShield
of Montana

Manage My Organization User Guide

*Both Availity administrators and non-administrators can add a provider to Manage My Organization. The permission for this feature is part of the **Base** role that administrators assign to user(s).*

*Note: Only administrators can edit business information for existing organization(s) in **Manage My Organization**.*

Manage My Organization in Availity® Essentials allows you to add and/or edit provider(s) within your organization(s).

*Adding providers to **Manage My Organization** should be completed prior to utilizing the Availity self-service applications, as this ensures providers in your organization are available in the **Select a Provider** drop-down listing in each tool.*

Not registered with Availity Essentials?

Complete the online guided registration process today via Availity, at no cost.

April 2024

The following instructions display how users access and setup Manage My Organization in Availity.

Step 1

> Login to **Availity Essentials**

> Access and start Availity **Manage My Organization** setup

Step 2

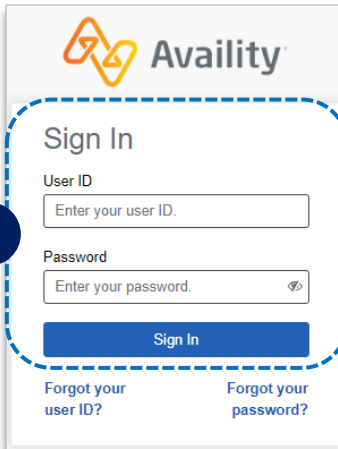> Complete the 4-step setup process for **Manage My Organization**

Step 3

> **Upload Multiple** Providers

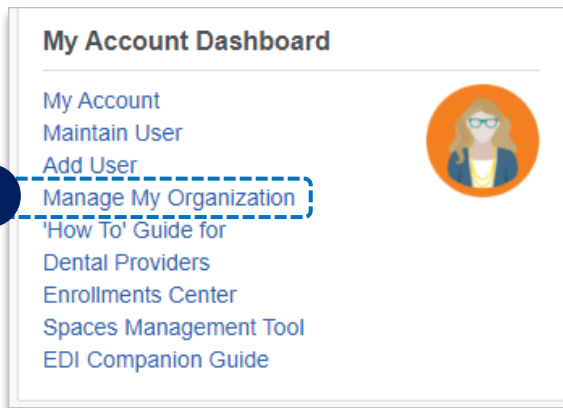> **Support** to assist with setting up and using **Manage My Organization**

1 Assigned users can access this tool by following the instructions below:

▸ Go to **Availity**

▸ Select **Availity Essentials Login**

▸ Enter User ID and Password

▸ Select **Log in**

1

Availity

Sign In

User ID

Enter your user ID.

Password

Enter your password.

Sign In

Forgot your user ID?   Forgot your password?
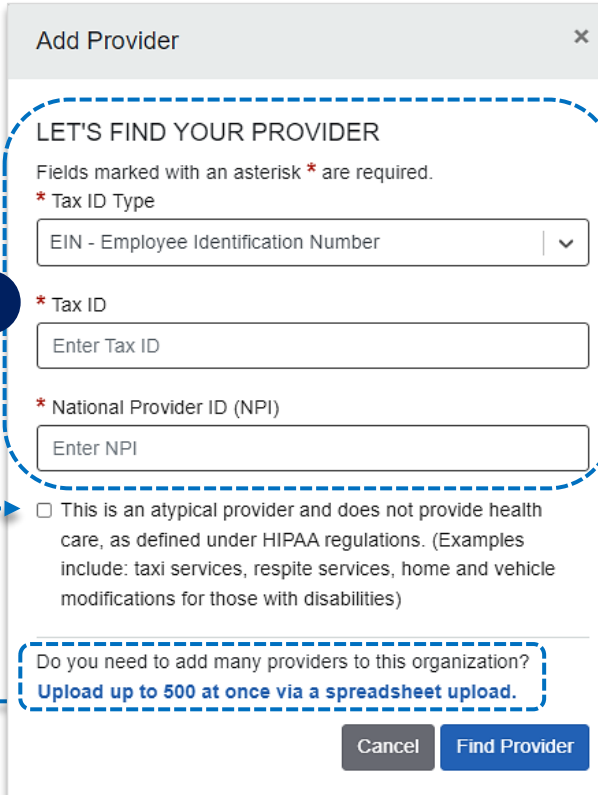
2 Select **Manage My Organization** from *My Account Dashboard* on the Availity homepage

My Account Dashboard

My Account
Maintain User
Add User
2 Manage My Organization
'How To' Guide for Dental Providers
Enrollments Center
Spaces Management Tool
EDI Companion Guide

(A) Within **Manage My Organization**, select **Manage Providers**, then **Add Provider(s)**

Providers   ▶ Watch a video   **(A)** Manage Providers ▾

Search for a provider by name, taxonomy code, or address..   🔍

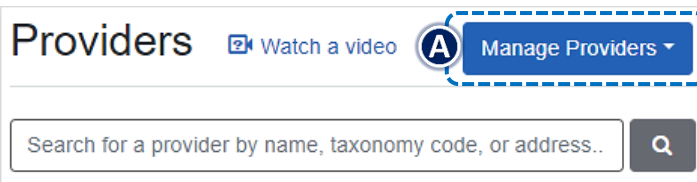**3** Select the **Tax ID Type:**

▸ **EIN** – *Employee Identification Number*

▸ **SSN** – *Social Security Number*

▸ Enter the **Tax ID** and **NPI number**

▸ Select **Find Provider**

Note: *Check this box to **add atypical provider(s)** to your account who are not assigned an NPI number*

Add Provider ✕

LET'S FIND YOUR PROVIDER

Fields marked with an asterisk * are required.

* Tax ID Type

EIN - Employee Identification Number ▾

3

* Tax ID

Enter Tax ID

* National Provider ID (NPI)

Enter NPI

☐ This is an atypical provider and does not provide health care, as defined under HIPAA regulations. (Examples include: taxi services, respite services, home and vehicle modifications for those with disabilities)

Do you need to add many providers to this organization? **Upload up to 500 at once via a spreadsheet upload.**

Cancel   **Find Provider**

Quick Tips:

→ *If you have multiple providers to add to your organization, select "Upload up to 500 at once via spreadsheet upload."*

→ *Refer to pages 5 and 6 for more detailed instructions.*

Associated provider information will return based on the Tax ID and NPI numbers entered.

Step 1) Review and/or update the provider **Name** and **Primary Specialty/Taxonomy** and select **Next**

Step 2) Review and/or update the provider **Identifiers** and select **Next**

Step 3) Review and/or update the provider **Address** and select **Next**

Step 4) Review all information, choose the **provider's relationship to your organization**, then click "**I certify that this provider's information is correct**" and **Submit**

1

Provider Information — Identifiers — Addresses — Review

Fields marked with an asterisk * are required.

Looks like there's a match!

Please review and/or update all of this provider's information.

PROVIDER SEARCH RESULTS:

ABC ORGANIZATION

* Provider Type
Group/Facility

* Group Name/Facility Name
ABC ORGANIZATION

* NPI
1234567890

* Primary Specialty/Taxonomy
282N00000X Hospitals|General Acute Care Hos...

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2

Provider Information — **Identifiers** — Addresses — Review

Fields marked with an asterisk * are required.

Identifiers

Add or edit this provider's identifiers (Tax ID, Medicaid ID, payer assigned IDs).

ABC ORGANIZATION

Primary Tax ID
* Tax ID Type
EIN - Employee Identification Number

* Tax ID
999999999

⊕ **Add additional Tax ID**

Identifiers

⊕ **Add identifier**

Back Next

3

Provider Information — Identifiers — **Addresses** — Review

Provider Address(es)

Add or edit address and service location information for this provider.

ABC ORGANIZATION

Physical/Billing ≡
123 E STREET
CITY, STATE 12345-1234
(555) 555-5555

⊕ **Add an address**

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4

Add Provider ✕

Provider Information — Identifiers — Addresses — Review

Fields marked with an asterisk * are required.
Review all of the information provided below and ensure that everything is correct.

ABC ORGANIZATION ☑ Edit

NPI   Primary Specialty/Taxonomy
        282N00000X HOSPITALS|GENERAL ACUTE CARE
        HOSPITAL|NOT APPLICABLE

Identifiers ☑ Edit

Tax ID(s)
        (EIN -
Primary)

Addresses ☑ Edit

Physical/Billing
123 E STREET
CITY, STATE 12345-
1234
(555) 555-5555

☐ * I certify that this provider's information is correct

Back Submit

Follow the steps below to upload and add up to <u>500 providers</u> using a single comma separated value (CSV) file.

1 ▶ After selecting **Add Provider** in **Manage My Organization**, click **Upload up to 500 at once via a spreadsheet upload**

Add Provider ✕

LET'S FIND YOUR PROVIDER

Fields marked with an asterisk * are required.

* Tax ID
[Enter Tax ID]

* Type
[EIN ▾]

* National Provider ID (NPI)
[Enter NPI]

☐ This is an atypical provider and does not provide health care, as defined under HIPAA regulations. (Examples include: taxi services, respite services, home and vehicle modifications for those with disabilities)

1 Do you need to add many providers to this organization?
Upload up to 500 at once via a spreadsheet upload.

[Cancel] [**Find Provider**]

Quick Tips:

→ *The main heading row is required in the CSV file.*

→ *Expand the height and width of the columns in the CSV file to review specific instructions on how to enter the format of the required or optional information.*

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2 ▶ On the **Upload and enroll a list of providers** window, select **Download sample file** for the sample CSV file to download to your computer

    ▶ Open the CSV file, review the main heading columns, enter the **required** information and then **save**

    ▶ To upload the completed CSV file, click **Choose a file,** browse to the location of the CSV file on your computer and click **Open**

Upload and enroll a list of providers ✕

Upload up to 500 providers to ABC Organization

Upload spreadsheet of providers in .csv format.
View instructions on bulk uploading providers. ❓

Download sample file.

2 ⊕ Choose a file

NOTE: If you are including payer assigned provider identifiers (PAPI's) in your spreadsheet, the payer name must be correct. Please refer to the list of **Participating Payers** for exact spelling.

[Back] [Next]

📄 bulk-upload-provi....csv ⌃

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3 ▸ The CSV file displays on the **Upload and enroll a list of providers** window

▸ Select **Next**

3 Upload and enroll a list of providers ✕

Upload up to 500 providers to ABC Organization

Upload spreadsheet of providers in .csv format.
View instructions on bulk uploading providers. ❓

Download sample file.

bulk-upload-provider-roster-headers.csv 🗑 ◀ - - - - -

Quick Tip:

→ To remove the CSV file, click the **trash can** icon.

NOTE: If you are including payer assigned provider identifiers (PAPI's) in your spreadsheet, the payer name must be correct. Please refer to the list of **Participating Payers** for exact spelling.

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4 ▸ **Review** any error messages associated with the uploaded CSV file

▸ Message(s) indicates which line items in the CSV file require corrections

▸ Correct the errors and then upload the CSV file again

- **Green** = *Successfully Added*
- **Red** = *Contained Errors*

Quick Tip:

→ When correcting errors in the CSV file, remove the rows for the successfully added providers to prevent duplicate errors of adding the same provider more than once. The CSV file you upload again should only contain the rows with the corrected provider information.

Upload and enroll a list of providers

Provider bulk upload completed with errors

File name: **papicsvMulti.csv**

4 ✅ 3 provider(s) successfully added
❌ 1 provider(s) contained errors

Download all errors to a CSV file

The following providers were not added:

Line Number	Error Reason
5	Enter a valid primary specialty/taxonomy code.

NOTE: If the file name above looks incorrect, please click the 'Refresh' button below to refresh the results.

Refresh Close