



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

**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, BCBSMT **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 BCBSMT to fully maintain an accurate file for the provider(s).
- To ensure BCBSMT 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 BCBSMT

### ACCEPTED by BCBSMT 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 BCBSMT 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:

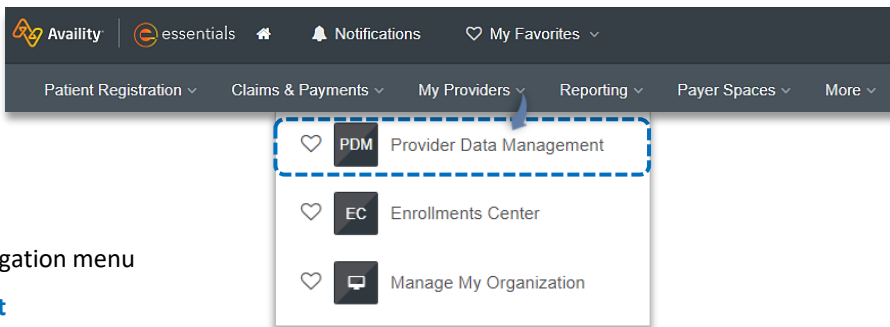
- ▶ *Laboratory and Dental*

## 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 [9](#) to view **PDM Reporting**

## 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](#)

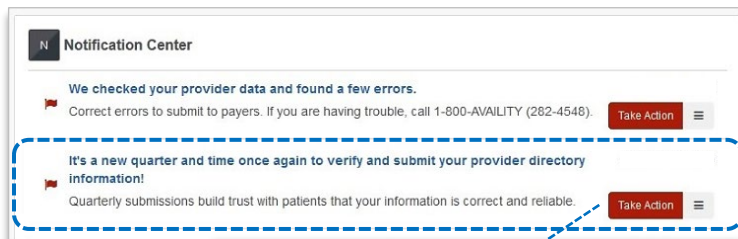
## 1) Directory Verification Workflow

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 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.*

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

- ▶ Name
- ▶ Specialty (*updates are ONLY accepted by BCBSMT through the contracting process*)
- ▶ Address
- ▶ Phone number
- ▶ Digital contact information (*website*)

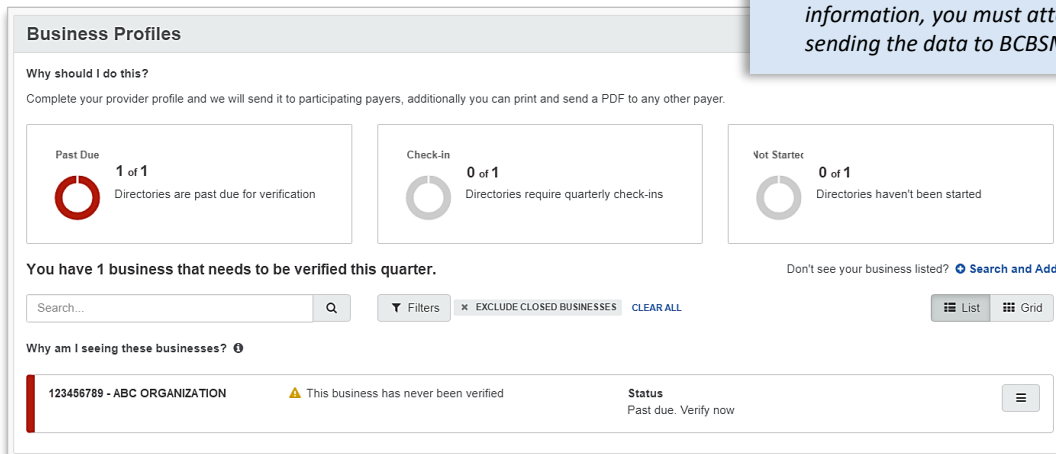


### Quick Tip:

→ Select [Take Action](#) to start the quarterly provider directory verification from the **Notification Center**.

## Directory Verification – Manage Business

- ▶ Access the [Directory Verification](#) workflow from the [PDM dashboard](#)



### 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 BCBSMT.

## 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 BCBSMT through the contracting process
- ▶ Hospital Affiliations – updates are *NOT* currently accepted by BCBSMT

### 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, BCBSMT 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 BCBSMT system, which removes the location from displaying to our members in the BCBSMT 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, BCBSMT 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 BCBSMT 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.

**5000 Meadowland Parkway, Beach City, MT. 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)

Street Address 1

Street Address 1

Street Address 2 (optional)

City State ZIP Code

City	State	ZIP Code
Beach City	Montana ▼	12345

Did you mean this instead?

**PDM**  300 E. ANYWHERE ST.  
BEACH CITY, MT. 12345

Use the address I entered.

**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, MT. 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, Montana, 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

**Continue to next page** ➔

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

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 BCBSMT
- ▶ Specialties – updates are ONLY accepted by BCBSMT through the contracting process
- ▶ Hospital Privileges – updates are NOT currently accepted by BCBSMT

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.

- ▶ 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](#).

## 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 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.*

- ▶ 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.

You have 6 businesses that need to be verified this quarter and 2 that are good to go. Don't see your business listed? [Search and Add](#)

Search...  Q Filters EXCLUDE CLOSED BUSINESSES CLEAR ALL List Grid

Why am I seeing these businesses? ⓘ

Business ID - Name	Last Verified	Next Verification Due	Status	Actions
212121212 - Clinic ABC	02/18/2020	05/18/2020	Past due. Verify now	⋮
323232323 - ABC Orthopedics	07/09/2020	10/07/2020	Quarterly Check-In Required	⋮ Nothing Appears to Have Changed ⓘ Quick Verify
454545454 - Southside Imaging	⚠ This business has never been verified		Status Not Started	⋮
323456789 - ABC Clinic	07/01/2020	09/29/2020	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 BCBSMT
- ▶ Licenses – updates are NOT currently accepted by BCBSMT
- ▶ Identifiers – update to NPI, Tax ID, or Medicare/Medicaid IDs are NOT currently accepted by BCBSMT
- ▶ Specialties – updates are ONLY accepted by BCBSMT through the contracting process
- ▶ Hospital Affiliations – updates are NOT currently accepted by BCBSMT
- ▶ 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 BCBSMT 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 BCBSMT*
- ▶ Identifiers – *update to NPI, Tax ID, or Medicare/Medicaid IDs are NOT currently accepted by BCBSMT*
- ▶ Specialties – *updates are ONLY accepted by BCBSMT through the contracting process*
- ▶ Hospital Privileges – *updates are NOT currently accepted by BCBSMT*

**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**

PDM
Manage Providers
ABC Clinic

[+ Add an Individual Provider to this Business](#)

**Phillip Belding**

3 Errors

TYPE 1 NPI: 1234567890

PRIMARY TAXONOMY CODE: 102L00000X

[Delete Provider](#)

## PHILLIP BELDING

### General Information

Phillip Belding - Male 1

English

[Manage General Information](#)

### Service Locations

123 Anywhere St. Beach City, MT. 12345 ✓

[Manage this Service Location](#)   [Add a new Service Location](#)

### Mailing Addresses

At least one Mailing Address is Required. 1

[Add a new Mailing Address](#)

### Payment Addresses

At least one Payment Address is Required. 1

[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:

1. Availity and the health plan(s) indicated have permission to verify and use the information you are submitting.
2. 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.
3. The information you provide is correct and complete to the best of your ability.
4. 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.
5. 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.
6. 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 Verified Profile



PDM Reporting

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

- ▶ To view these reports, select **action menu** (☰) for the business and click **Review History of Updates**

You have 6 businesses that need to be verified this quarter and 2 that are good to go. Don't see your business listed? [Search and Add](#)

Search...  Q Filters EXCLUDE CLOSED BUSINESSES CLEAR ALL List Grid

Why am I seeing these businesses? ⓘ

212121212 - Clinic ABC	<b>Last Verified</b> 02/18/2020	<b>Next Verification Due</b> 05/18/2020	<b>Status</b> Past due. Verify now	<span>☰</span>	
323232323 - ABC Orthopedics	<b>Last Verified</b> 07/09/2020	<b>Next Verification Due</b> 10/07/2020	<b>Status</b> Quarterly Check-In Required	Nothing Appears to Have Changed ⓘ <span style="background-color: #007bff; color: white; padding: 2px 5px;">Quick Verify</span>	<span>☰</span>
454545454 - Southside Imaging	⚠ This business has never been verified		<b>Status</b> Not Started	<span>☰</span>	
3234567899 - ABC Clinic	<b>Last Verified</b> 07/01/2020	<b>Next Verification Due</b> 09/29/2020	<b>Status</b> Check-In Complete	<span>☰</span>	

Verify Directory Listing  
Review History of Updates  
Close This Business

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

**PDM Reporting** ABC Clinic

**Successful Attestations**

Application	Date & Time Submitted	Submitter	Report Links
Core PDM	11/30/2021 at 8:20AM	Demo Nelson	<span style="border: 1px dashed #007bff; padding: 2px;">Download Report</span>
Directory Verification	09/01/2021 at 10:15AM	Demo Nelson	<span style="border: 1px dashed #007bff; padding: 2px;">Download Report</span>

**Have questions or need additional education?** Email the [BCBSMT Provider Education Consultants](#).

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