



Provider Data Management (PDM) is a web-based application in the Availity® Provider Portal that allows providers to update their organization’s information and provider directory quickly and efficiently with Blue Cross and Blue Shield of Montana (BCBSMT). Providers have the ability to update, validate and confirm the accuracy of their information using PDM.

What type of updates are accepted by BCBSMT through PDM?

Provider organization’s information changes and provider demographic updates can be made through PDM, as long as a new contract is not required to support the change (for example, a Tax ID change is not appropriate for PDM). Here are some examples of updates BCBSMT accepts through PDM:

- ▶ Organization’s business name and addresses
- ▶ Individual provider’s personal information and practicing locations
- ▶ Languages spoken
- ▶ Hours of operation
- ▶ Contact information for physicians and key staff members
- ▶ Providers and practicing locations no longer active

What type of updates are NOT accepted by BCBSMT through PDM?

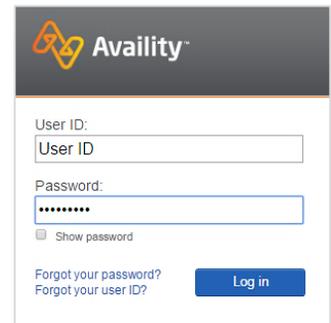
Provider organizations comprised of multiple groups with the same Tax ID, such as facilities, hospitals and medical groups should request updates by completing the BCBSMT Demographic Change Form. Additionally, the following updates should be made by completing the appropriate form in the Network Participation section at bcbsmt.com/provider:

- ▶ Adding new providers or physicians to the organization
- ▶ Provider licenses
- ▶ Individual provide specialties
- ▶ New address for the organization or physician
- ▶ Hospital affiliations
- ▶ National Provider Identifier (NPI) or Tax ID numbers

PDM is accessible to existing Availity Administrators and users assigned the Provider Data Management role. If you are not an Availity registered user and would like to use this application, go to availity.com and select Register to sign up today.

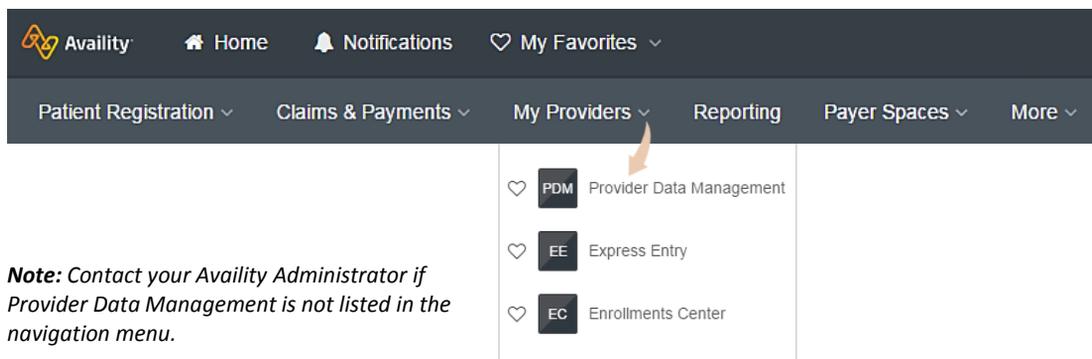
Getting Started

- ▶ Go to availity.com
- ▶ Select **Availity Portal Login**
- ▶ Enter User ID and Password
- ▶ Select **Log in**



Accessing PDM

- ▶ Select **My Providers** from the top main menu
- ▶ Select **Provider Data Management**



Note: Contact your Availity Administrator if Provider Data Management is not listed in the navigation menu.

Directory Verification

The Directory Verification process provides an easier and shorter workflow for users to make information and demographic updates for their organization and providers.

Availity users will receive a Directory Verification notification in their **Notification Center** on a quarterly basis to meet the Centers for Medicare & Medicaid Services (CMS) requirements.

Every 90 days, providers must verify the following information about their organization:

- ▶ Organization's service locations
- ▶ Organization's specialties
- ▶ Organization's hospital affiliations
- ▶ Providers in your organization's provider directory

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 – Select a Business

On the PDM page, select your business in the **Select a Business** field, then click **Continue**

Businesses

You have **1 business** that needs to be verified this quarter.

Why should I do this? Once and done. Complete your provider profile and we will send it to participating payers. You can print and send a PDF to any other payer.

Don't see your business in the list below? [+ Add a business to the list.](#)

Select a Business

Verify Now

REMINDER: You can save your work anywhere in the process and come back at any time to submit your profile to payers

Cancel
Continue

[+ Show all options](#)

Quick Tips:

- If you do not see your business listed, click **Add a business to this list**.
- Expand **Show all options** to complete the Core PDM workflow. Refer to [page 4](#) for step-by-step instructions.

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 or delete the business location*
- ▶ Specialties – *updates in this section are NOT currently accepted by BCBSMT*
- ▶ Hospital Affiliations – *updates in this section are NOT currently accepted by BCBSMT*

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

- General Information
- Service Locations 3 Errors
- Specialties
- Hospital Affiliations

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](#)

[Next: Manage Providers →](#)

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 are able to contact your organization via phone.

Once all updates have been applied to the **Manage Business** section, select **Next: Manage Providers** →

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 or delete the provider's location
- ▶ Identifiers – updates in this section are NOT currently accepted by BCBSMT
- ▶ Specialties – updates in this section are NOT currently accepted by BCBSMT
- ▶ Hospital Privileges – updates in this section are NOT currently accepted by BCBSMT

Quick Tip:

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

Note: The service locations available in the **Manage Provider** section are based on the service locations set up under the **Manage Business** section.

← Previous: Manage Business

Step 2 of 3

Next: Submit Verified Profile →

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

PRIMARY
123 Anywhere St., Beach City, Texas, 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 **Next: 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 4](#).

Core PDM

The full PDM workflow allows you to update your organization's business demographic data and provider directory. Users will be automatically directed to this workflow if the organization selected has already been verified that quarter.

- ▶ On the PDM page, select your business in the **Select a Business** field
- ▶ Expand **Show all options**
- ▶ Complete the **Manage Business** and **Manage Providers** sections, then **Submit Verified Profile**

You have 1 business that needs to be verified this quarter.
Why should I do this? Once and done. Complete your provider profile and we will send it to participating payers. You can print and send a PDF to any other payer.
Don't see your business in the list below? [Add a business to the list.](#)

Select a Business

Verify Now 123456789 - ABC Clinic

REMINDER: You can save your work anywhere in the process and come back at any time to submit your profile to payers

Cancel Continue

Complete the full set of data with the tasks below..

What will I need to complete each task?

 Add and edit your business & location information. 7 Errors Manage Business	 Add, edit, and delete providers in your provider directory. 3 Errors Manage Providers	 When you've updated your profile or verified that it's correct, we'll send it to the payers you do business with. Review History of Updates Submit Verified Profile
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[Hide additional options](#)

Quick Tip:

→ If you do not see your business listed, click **Add a business to this list.**

Note: Throughout PDM, you may see red and gray request 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 Business

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

- ▶ General Information – *manage existing or delete the business location*
- ▶ Service Locations – *edit or delete non-primary locations*
- ▶ Mailing Addresses – *edit or delete non-primary locations*
- ▶ Payment Addresses – *edit or delete non-primary locations*
- ▶ Certifications – *updates in this section are NOT currently accepted by BCBSMT*
- ▶ Licenses – *updates in this section are NOT currently accepted by BCBSMT*
- ▶ Identifiers – *updates in this section are NOT currently accepted by BCBSMT*
- ▶ Specialties – *updates in this section are NOT currently accepted by BCBSMT*
- ▶ Hospital Affiliations – *updates in this section are NOT currently accepted by BCBSMT*
- ▶ Key Staff – *manage existing, add or delete key staff*

Quick Tips:

- Review each sections even if there are no errors listed to ensure all of the organization's information is correct.
- The data you enter in the **Manage Business** section will populate the options can you 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 the **Go To** menu and click **Manage Providers** to proceed to the next section

PDM Manage Business ABC Clinic Give Feedback Go To

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.
- The **Key Staff** section requires a medical director and an owner to be listed.

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 – edit or delete non-primary locations
- ▶ Mailing Addresses – edit or delete non-primary locations
- ▶ Payment Addresses – edit or delete non-primary locations
- ▶ Certifications – manage existing, add or delete certifications
- ▶ Degrees – manage existing, add or delete degrees
- ▶ Licenses – updates in this section are NOT currently accepted by BCBSMT
- ▶ Identifiers – updates in this section are NOT currently accepted by BCBSMT
- ▶ Specialties – updates in this section are NOT currently accepted by BCBSMT
- ▶ Hospital Privileges – updates in this section are NOT currently accepted by BCBSMT

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.
- If the provider's office hours are different from the business, uncheck **This provider has the same office hours as the business at this location** in the **Service Locations** section.

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

Core PDM – Manage Providers continued

Once you have verified and/or corrected all errors in the **Manage Providers** section, select the **Go To** menu and click **Submit Verified Profile**

PDM **Manage Providers** ABC Clinic

Give Feedback

Go To

Search...



+ 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

PRIMARY
123 Anywhere St., Beach City, Texas, 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 **Review History of Updates**, or click **Reporting** from the **Go To** menu



Add and edit your business & location information.

Manage Business



Add, edit, and delete providers in your provider directory.

Manage Providers



When you've updated your profile or verified that it's correct, we'll send it to the payers you do business with.

Review History of Updates

Submit Verified Profile

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

PDM Reporting ABC Clinic
Give Feedback [Go To](#)

Successful Attestations			
Application	Date & Time Submitted	Submitter	Report Links
Core PDM	08/22/2017 at 1:53PM	Larisa Tester	Download Report
Directory Verification	08/18/2017 at 12:40PM	Larisa Tester	Download Report
Core PDM	08/16/2017 at 8:54AM	Larisa Tester	Download Report
Core PDM	08/15/2017 at 7:15PM	Hanman Hale	Download Report
Core PDM	08/14/2017 at 4:35PM	Hanman Hale	Download Report

Have questions or need additional education? Email the Provider Education Consultants at PECS@bcbsmt.com
Be sure to include your name, direct contact information & Tax ID or billing NPI.

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