

How to Attest or Update Your Provider Directory Information

Blue Shield of California and Blue Shield Promise of California Health Plan (Blue Shield) established the following process to meet federal Consolidated Appropriations Act (CAA) and California Senate (SB) 137 mandates:

- Attestation to the accuracy of your provider directory information on Provider Connection every 90 days.
- Updates to your provider directory information on Provider Connection either by the:
 1. *Provider & Practitioner Profiles* section on Provider Connection.
 2. *Blue Shield Provider Demographics Update Excel Spreadsheet* download form and uploaded to Provider Connection.

To access Provider Connection

See step-by-step instructions with screenshots for how to register for the Provider Connection account type most appropriate to your business: 1) [Provider](#); 2) [MSO](#); and 3) [Billing Service](#).

- **Note**, only providers with a “Provider” or “MSO” account validate provider information. “Billing” providers have “view only” access to provider data connected to their account.

See [Update your Provider Connection password](#) for help changing your password or if your account is locked or disabled. Additionally, view the [Provider Connection Account FAQ](#) if you are experiencing website access issues.

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Overview of key steps

1. **(If needed)** Provider Connection “Provider” and “MSO” Account Managers automatically have access to view and edit provider directory data. If desired, the Account Manager can assign data access privileges to one or more users who can then engage in this process. (See [Step 1](#) for instructions.)
2. **(If needed)** Account Managers can edit, add, and delete provider demographic validation contacts and contact preferences so that attestation notifications are sent to appropriate staff in their preferred manner. (See [Step 2](#) for instructions.)
3. **(Mandatory)** Every 90 days, the Account Manager or assigned user attests to the accuracy of provider directory information for each Tax ID (TIN) or Social Security Number (SSN). Provider Connection displays an alert on the home page and sends a series of automated notifications on a rolling 90-day schedule when it is time to attest. (See [Step 3](#) for instructions.)
 - In this document, “TIN” refers to both Tax ID and SSN.
4. **(Mandatory)** When it is necessary to make updates to provider directory information, the Account Manager or assigned user does so either directly on Provider Connection or by downloading their *Provider Data Validation Spreadsheet* from Provider Connection, editing as necessary, and uploading the file back to the website. (See [Step 4](#) for instructions.)

Blue Shield sends “attest now” and reminder notifications on a rolling 90-day cadence.

Providers who do not respond to these notifications may be suppressed from Blue Shield’s Find a Doctor online directory. If your data is suppressed, log in to Provider Connection and attest/update your data. This will reinstate your information in our online directory.

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Step 1: (If needed) Assign provider/practitioner data access privileges to a user(s)

A Provider Connection Account Manager can assign provider demographic information access privileges to one or more of their users. A user(s) can then attest to the accuracy of provider directory information every 90 days and/or make updates as needed.

Instructions

| <ol style="list-style-type: none">1. Log in to Provider Connection (Account Manager *).2. Click Account management in the upper right corner.3. Click Manage your user accounts under <i>Manage user accounts</i>. | |
|---|---|
| Assign access to EXISTING user | Assign access to NEW user |
| <ol style="list-style-type: none">4. Click the View link next to the user's name to give access.5. Slide the Provider & practitioner data button to the right. It turns blue.6. Select Tax ID(s) if not already selected.7. Click Save. | <ol style="list-style-type: none">4. Click Create user account and complete the fields to establish the account.5. Slide the Provider & practitioner data button to the right. It turns blue.6. Click Continue.7. Select at least one TIN. Click Save. |
| <ol style="list-style-type: none">8. A link to the <i>Provider & Practitioner Profiles</i> section appears in the user's top navigation bar. | |
| <p>* Only Provider and MSO Account Managers can update provider directory information and/or assign privileges.</p> | |

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Step 2: (If needed) Update validation contact(s) and contact preference(s)

From their Account Management page, Account Managers can edit, add and/or delete provider demographic validation contacts and contact preferences. Preference options are email, fax, and/or postal mail. Email is preferred.

Instructions

1. [Log in](#) to Provider Connection (Account Manager).
2. Click **Account management** in the upper right corner.
3. Click **View validation contacts** under *Validation contacts*.
4. The *Validation contacts* pop-up window displays. If necessary, select a TIN.
5. The pop-up window provides the following options:
 - Click **Edit** to edit existing contacts/contact preferences.
 - Click **any linked number** to view individuals in your organization currently receiving provider demographic notifications either by email, fax and/or postal mail.
 - Contacts can be deleted from these screens.
 - Click **Add** to add a new contact and indicate contact preference(s).

Step 3: Attest to provider directory information accuracy every 90 days

The Provider Connection Account Manager(s) – or designated user(s)– receives an alert when it is time to attest. A banner appears at the top of the home page with an “Attest now” link, and Blue Shield sends a series of automated notifications on a rolling 90-day schedule.

Note: Account Managers can now attest to the accuracy of their provider data at any time via the *Attestation: Continue to attestation* link from their Account Management page. This option is not available to designated users.

Instructions

| <ol style="list-style-type: none">1. Log in to Provider Connection.2. Click Attest now in the banner at the top of the home page.3. The attestation window displays all TINs associated with your provider account. | |
|---|---|
| If your provider data is accurate (i.e., no changes needed) | If your provider data is NOT accurate (i.e., changes needed) |
| <ol style="list-style-type: none">4. Click the checkbox next to each TIN after validating that provider directory information on file is accurate.<ul style="list-style-type: none">• Click the <i>TIN</i> checkbox if you are attesting to the accuracy of all TINs.5. Click Submit.6. An <i>Attestation Statement</i> pop-up presents. Click I attest to continue.7. A green banner displays when the attestation process is complete. If the email address referenced in the confirmation is incorrect, please update your profile information. | <ol style="list-style-type: none">4. Do not click the checkbox next to a TIN if data is not accurate and/or if you want to view the data prior to attesting.5. Download the XLSX file for a TIN from the <i>Attestation</i> window. If changes are needed, Step 4 instructions explain how to make them. If changes are not needed, return to the attestation screen, and complete the process. |

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Step 4: Update provider directory information when needed

Blue Shield offers two options for updating provider directory information. **The links below take you to step-by-step instructions for each.**

| | Options | Unavailable transactions |
|---|--|---|
| A | Make single updates directly on Provider Connection in <i>Provider & Practitioner Profiles</i> . | Some single edits cannot yet be made online, depending on provider type. When this is the case, the edit(s) must be submitted via the bulk template. |
| B | Make bulk updates via the pre-populated Provider Data Validation Spreadsheet downloaded from Provider Connection and upload back to the website. | All transactions are available via the bulk template. |

Make single updates directly on Provider Connection

1. [Log in](#) to Provider Connection and navigate to the *Provider & Practitioner Profiles* section. For Account Managers, the link is located on your *Account Management* page. For users granted access, the link is in your top navigation bar.
2. If you have more than one TIN linked to your Provider Connection account, select the Tax ID (TIN) you wish to update and click **Search**.
3. Click the **view** link for the provider record you wish to update. The *View providers* screen presents.
 - Search functionality and navigation are located on the left.
 - Based on your organization's type and structure, there are up to three levels of provider demographic information.*

| Non-capitated levels | What you can do |
|----------------------|---|
| Provider | <ul style="list-style-type: none"> • Edit website • View locations |
| Location | <ul style="list-style-type: none"> • Assign a practitioner • Edit location details • Delete a service location • View practitioners |
| Practitioner | <ul style="list-style-type: none"> • Edit: <ul style="list-style-type: none"> ▪ Personal details ▪ Practice details ▪ License ▪ DEA registration ▪ Affiliations • Unassign practitioner |
| Capitated levels | What you can do |
| Provider | <ul style="list-style-type: none"> • Assign practitioner • Edit admin office data • View practitioners |
| Practitioner | <ul style="list-style-type: none"> • Edit: <ul style="list-style-type: none"> ▪ Personal details ▪ License ▪ DEA registration ▪ Affiliations • View service locations |
| Service location | <ul style="list-style-type: none"> • Edit: <ul style="list-style-type: none"> ▪ Location details ▪ Practice details • Unassign service location |

4. Some IPAs may also see a "View clinics" level.

(Instructions continued on next page)

- To navigate between levels, use the breadcrumb.
(Example: View providers > XYZ HEALTH NETWORK PHYSICIAN GROUP > 1 SECOND ST, CA 90000 > JO Z DOCTOR)
 - Click **Edit** to make changes and the **Save** button when it presents to save them.
5. When you have completed entering all updates and if it is time for you to attest, return to the *Provider & practitioner profiles* section and click **Attest now**. If needed, see [Step 3](#) for detailed instructions on attestation.

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Make bulk updates via the Provider Data Validation Spreadsheet from Provider Connection

See the [Provider Data Validation Companion Guide](#) for detailed instructions on how to complete each field in the spreadsheet. The steps below are high-level.

1. [Log in](#) to Provider Connection and navigate to the *Provider & Practitioner Profiles* section. For Account Managers, it is located on your *Account Management* page. For users granted access, the link is in your top navigation bar.
2. If you have more than one TIN linked to your Provider Connection account, select the Tax ID (TIN) you wish to update and click **Search**.
3. Click the **Bulk Updates** tab.
4. Click **Download XLSX**.
5. A pop-up box displays. Click **Continue**.
6. The *Provider Data Validation Spreadsheet*, pre-populated with your data, downloads as *ProvDataVal_TIN#_0000000001.xlsx*. Note that every subsequent download of the file changes the last number in the file name. Save this file.
8. Tab 1 is where you make PROVIDER demographic changes and Tab 2 is for PRACTITIONER changes. See the [Provider Data Validation Companion Guide](#) to ensure you submit data correctly.
 - Be sure to populate the *Service Location Add/Term/Update* and *Service Location Term Date* fields for each entry (row).
9. Navigate back to the *Provider & Practitioner Profiles* section, drag/drop, or select your saved file. Once the file name displays, click **Upload**.
 - Note, close the Excel file or it will not upload.
 - An error message will display if you try to upload more than one file at a time or if you submit an incorrect file type.
10. A pop-up box displays for you to confirm that your uploaded file is correct. Click **Yes**.
 - A green banner displays when the upload process is finished.
11. When you have completed uploading the updated spreadsheet, it is time for you to attest. Click **Continue to attestation** from the *Attestation* section on the *Account Management* page. If needed, see [Step 3](#) for detailed instructions on attestation.
12. You will receive an automated email in three business days to notify you if your data was successfully loaded in the *Find a Doctor* online directory.
 - **Successful** = Loaded to Find a Doctor as you submitted
 - **Partially successful** = Some data must be manually updated by Blue Shield. It will take longer to see all changes in Find a Doctor.
 - **Rejected** = Blue Shield could not process the file. Please review the bulk spreadsheet instructions on Tab 1 and resubmit. If issue continues, contact the Provider Information and Enrollment team.

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Need help?

For questions regarding Provider Connection access or website assistance, please contact Provider Customer Service at **(800) 541-6652**, from 6 a.m. to 6:30 p.m., Monday through Friday. See [Update your Provider Connection password](#) for help changing your password or if your account is locked or disabled.

For help updating your information in Provider Connection or questions about the information shared in the Blue Shield directory, contact Provider Information and Enrollment at **(800) 258-3091**, from 6 a.m. to 6:30 p.m., Monday through Friday.

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