SympliSend

USER MANUAL
Blue Shield of California
SympliSend Digital Paper Submission Portal

(02-06-24)

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T13889 (12/2023)

1 About this manual

This manual serves as a comprehensive guide for using the Blue Shield of California (Blue Shield) SympliSend Digital Paper Submission Portal (SympliSend) to submit claims and/or correspondence for Blue Shield members.

2 Accessing SympliSend

Blue Shield provides access to the SympliSend portal via single sign-on[i] (SSO) from the Blue Shield Provider Connection website after login. Consequently, you do not need to establish a username or login for SympliSend when you access it through Provider Connection. To access SympliSend, log in to your Provider Connection account. After log in, click Claims then click the Claims tools link located under the page title. Click the blue tile: **Submit via SympliSend** in the *Claims tools* section.

3 Submission History (home page)

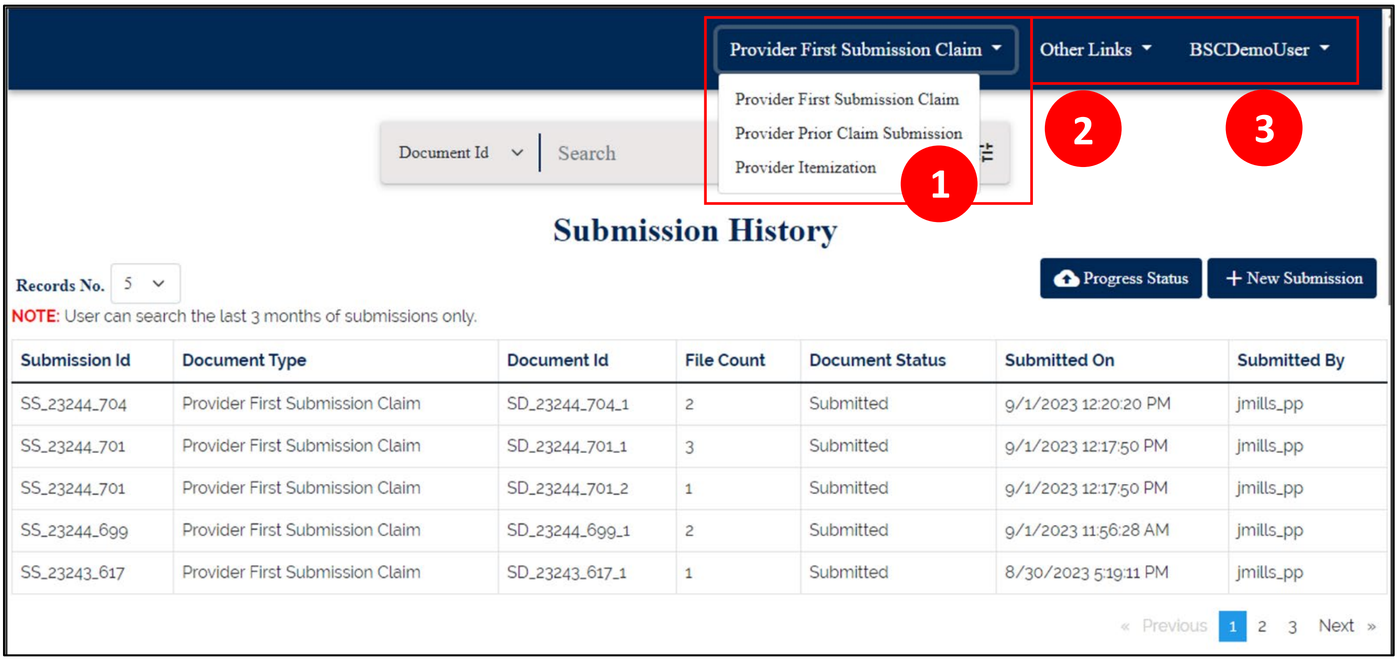
The *Provider First Submission Claim Submission History* page (Fig 1) is the home page for the portal. There are three drop-down menus in the top right corner of the screen.

Under drop-down menu 1, *Provider First Submission Claim* is the default option. This menu contains two additional submission options: *Provider Prior Claim Submission* and *Provider Itemization*. Each submission option will have its own submission history page.

Drop-down menu 2, *Other Links*, provides access to this user manual.

Drop-down menu 3 displays your name as the logged-in user. It contains two options: *Contact Us* and *Log out*.

Fig 1: Provider First Submission Claim – Submission History (home page)

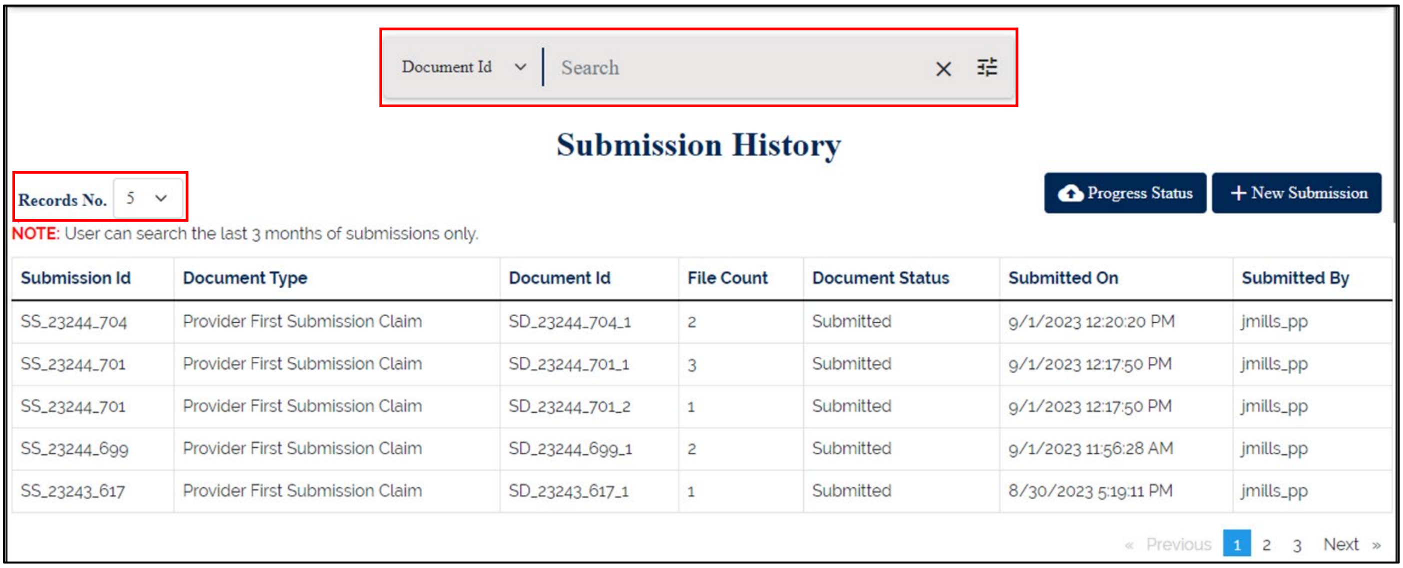


Each *submission history* page – First, Prior, and Itemization – displays a comprehensive record of your submissions in table format. (Fig 2).

Column	Description
Submission Id	Unique submission Id
Document Type	Internal Claim Submission (default) such as Provider First Submission Claim, etc.
Document Id	Unique document Id
File Count	Number of attachments for the submission
Document Status	The status of documents submitted: 1. **Submitted:** Document(s) successfully uploaded from provider. 2. **Work In Progress (WIP):** Document(s) with SympliSend and in process. 3. **Completed:** Document(s) processed and sent to Blue Shield.
Submitted On	Date/time of submission
Submitted By	Name of user who submitted the document

Use the *Records No.* box to select the number of submissions viewable on the screen. You can retrieve specific records through targeted searches using the *Search* field located at the top of the page. Use the drop-down menu to select your desired search category, either *Document Id*, *Submitted By,* or *Submission Status*. Type in your search criteria and then press enter. Note, clicking the X will clear your search.

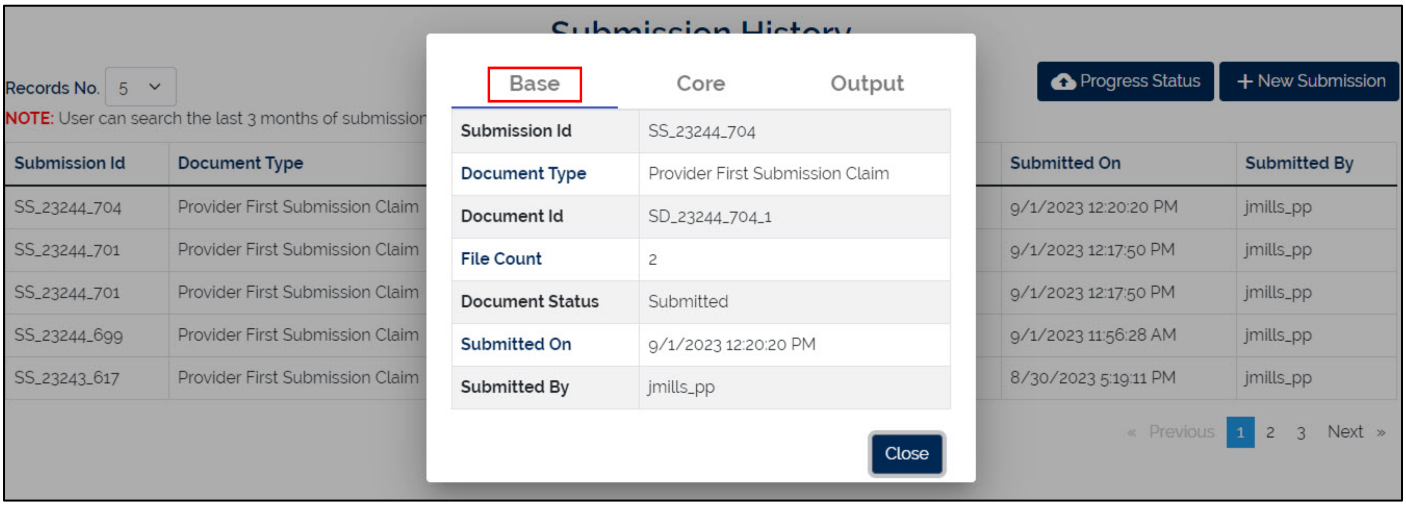
Fig 2: Submission History navigation



Submission Id	Document Type	Document Id	File Count	Document Status	Submitted On	Submitted By
SS_23244_704	Provider First Submission Claim	SD_23244_704_1	2	Submitted	9/1/2023 12:20:20 PM	jmills_pp
SS_23244_701	Provider First Submission Claim	SD_23244_701_1	3	Submitted	9/1/2023 12:17:50 PM	jmills_pp
SS_23244_701	Provider First Submission Claim	SD_23244_701_2	1	Submitted	9/1/2023 12:17:50 PM	jmills_pp
SS_23244_699	Provider First Submission Claim	SD_23244_699_1	2	Submitted	9/1/2023 11:56:28 AM	jmills_pp
SS_23243_617	Provider First Submission Claim	SD_23243_617_1	1	Submitted	8/30/2023 5:19:11 PM	jmills_pp

To see attributes of a specific record, click the record. A pop-up table (Fig 3a) displays three views: *Base*, *Core*, and *Output*. The *Base* view contains the data items displayed in the table. The *Core* view displays the details you entered when creating the submission. (Fig 3b). The *Output* view displays the FLN number assigned to the submission after it is processed and sent to Blue Shield. **The FLN number is the reference number you would use when calling Blue Shield with a question about the submission.** (Fig 3c)

Fig 3a: Specific record attributes



In the *Core* pop-up (Fig 3b), 0 = a NO answer and 1 = a YES answer.

Fig 3b: Core

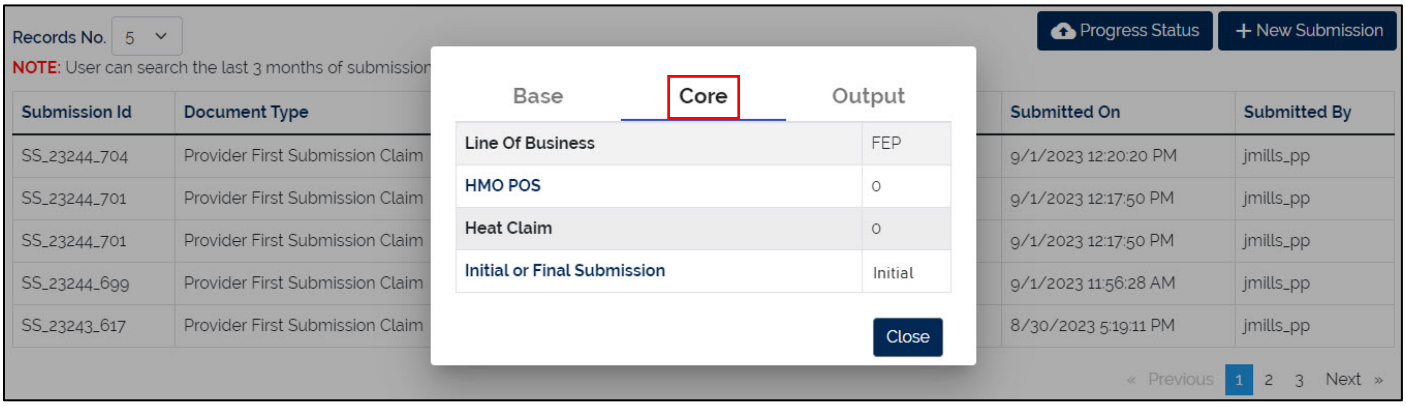
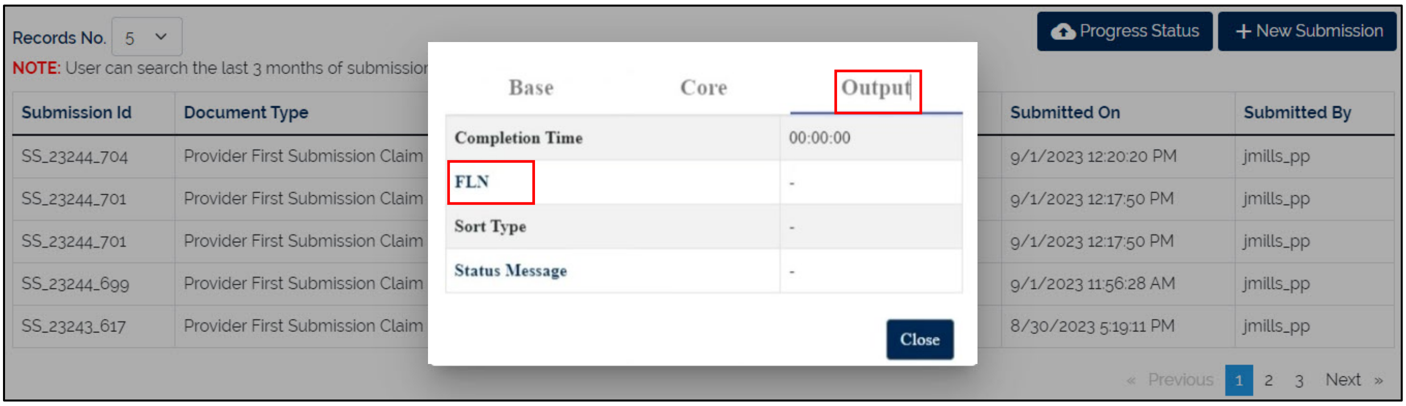
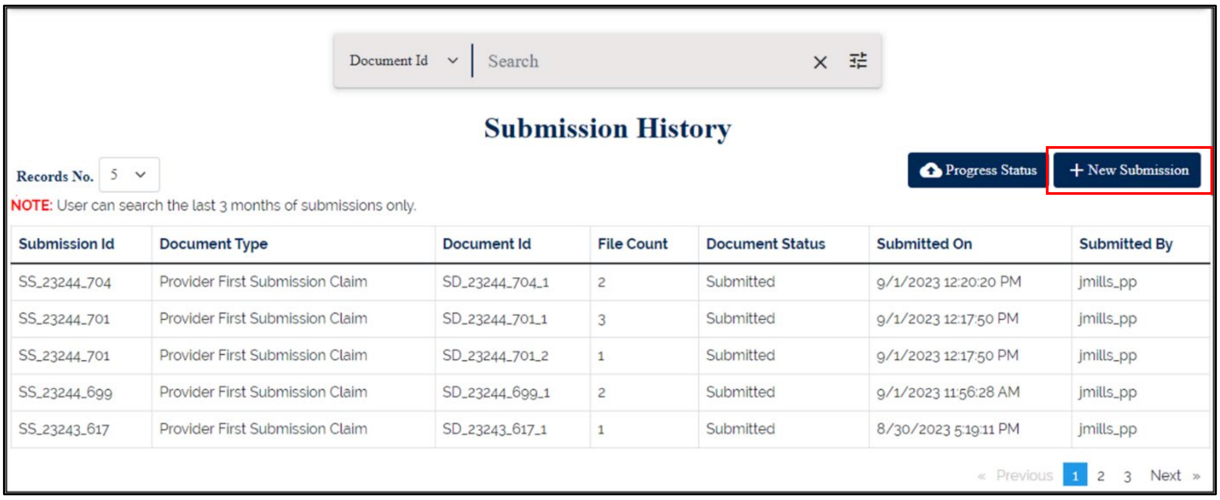


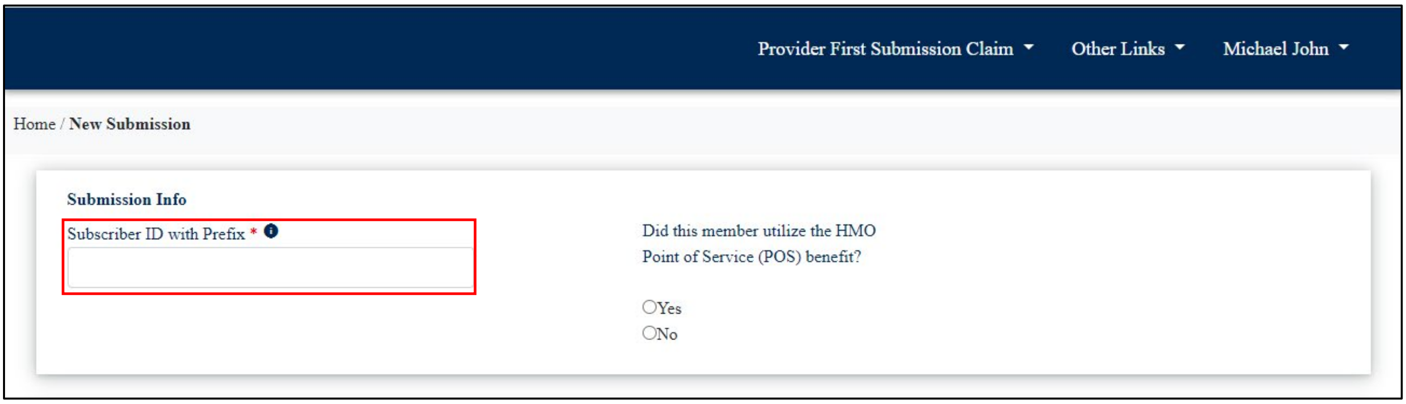
Fig 3c: Output





A *New Submission* window displays the *Submission Info* fields (Fig 5a). Fields and questions are displayed based on information you enter or select. *Subscriber ID with Prefix* is the first selection you will make (Fig 5b).

Fig 5a: New Submission window



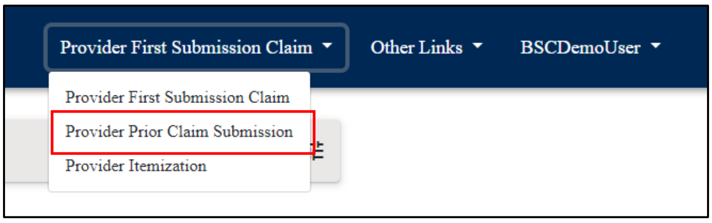
A Yes/No question displays with the LOB drop-down: *Did the member utilize the HMO Point of Service (POS) benefit?*

YES	NO
• No additional questions will be asked. You can begin adding documentation.	• You will be prompted to answer this question: ***Is this a HEAT claim for an initial submission or final submission?*** • After answering, no additional questions will be asked. You can begin adding documentation.

Provider Prior Claim Submission

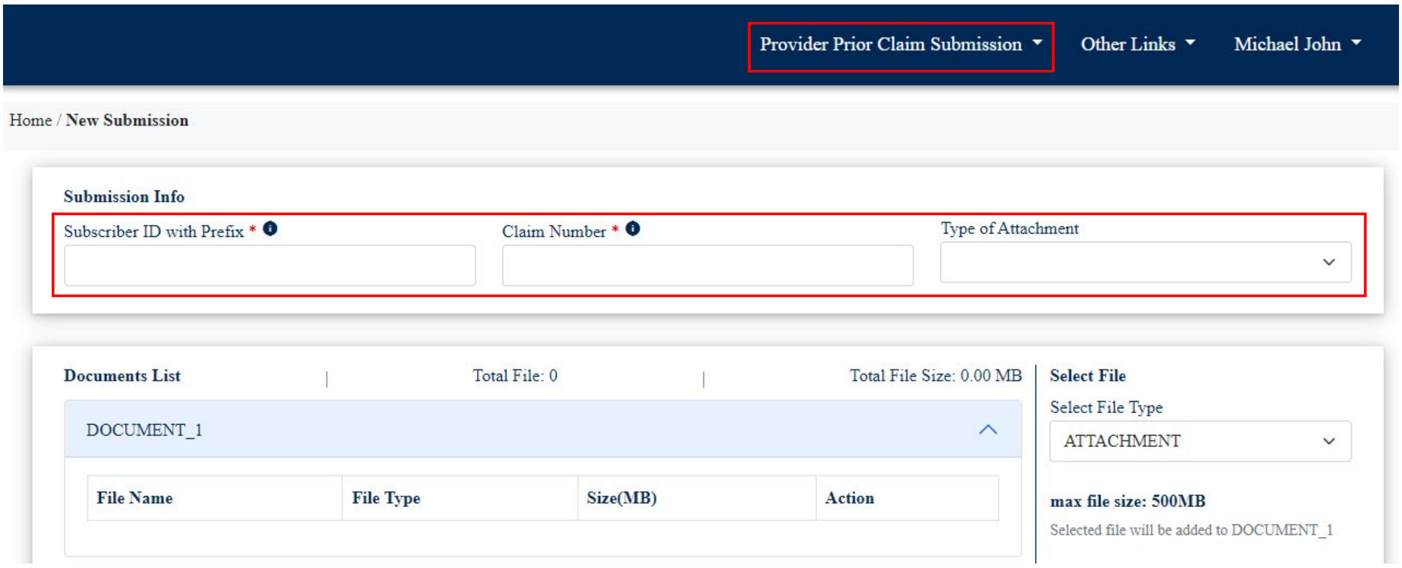
Click the **Provider Prior Claim Submission** menu option from the drop-down menu (Fig 6). The *Provider Prior Claim Submission History* page displays a list of previously submitted documents (attachments). To add a new attachment, click **+ New Submission**.

Fig 6: Provider Prior Claim Submission



The *New Submission* screen displays (Fig. 7). Enter **Subscriber ID with Prefix** and the **Claim Number** (both are mandatory) and select the *Type of Attachment* from the drop-down menu. Select either the **Corrected Claim** or **Blue Shield of California Requested** option. IMPORTANT: If the *Appeal* option displays, do not select it. Please visit Blue Shield's Provider Connection website for claim disputes.

Fig 7: New Submission screen



4.1 Provider Prior Claim Submission: Corrected Claim

A Yes/No question displays after selecting *Corrected Claim* from the *Type of Attachment* drop-down menu: *Is this a Medicare Claim?*

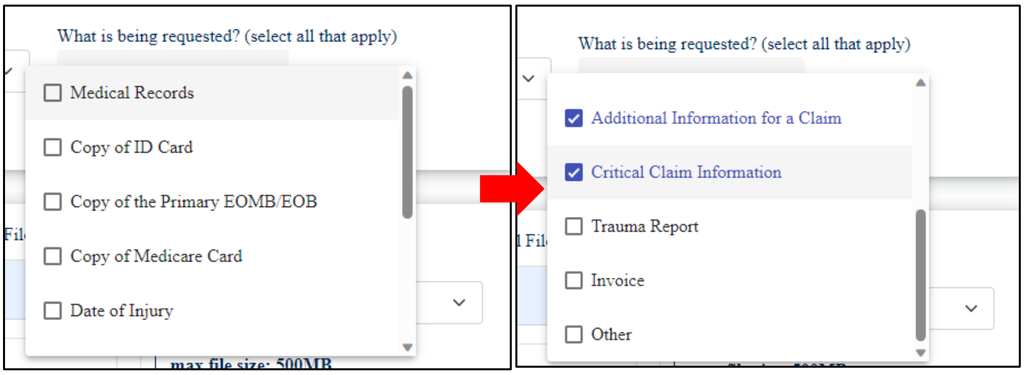
YES	NO
• No additional questions will be asked. You can begin adding documentation.	• You will be prompted to answer this question: *Is this a HEAT claim (Trauma, Burn, Implants, Stoploss, Transplant, and other)?* • After answering, no additional questions will be asked. You can begin adding documentation.

4.2 Provider Prior Claim Submission: Blue Shield of California Requested

A question displays after selecting *Blue Shield of California Requested* from the *Type of Attachment* drop-down menu: *What is being requested? (select all that apply.)* (Fig 9a). Select the options from the drop-down menu. (Fig 9b)

Fig 8a: BSC Requested

Fig 8b: What is being requested?

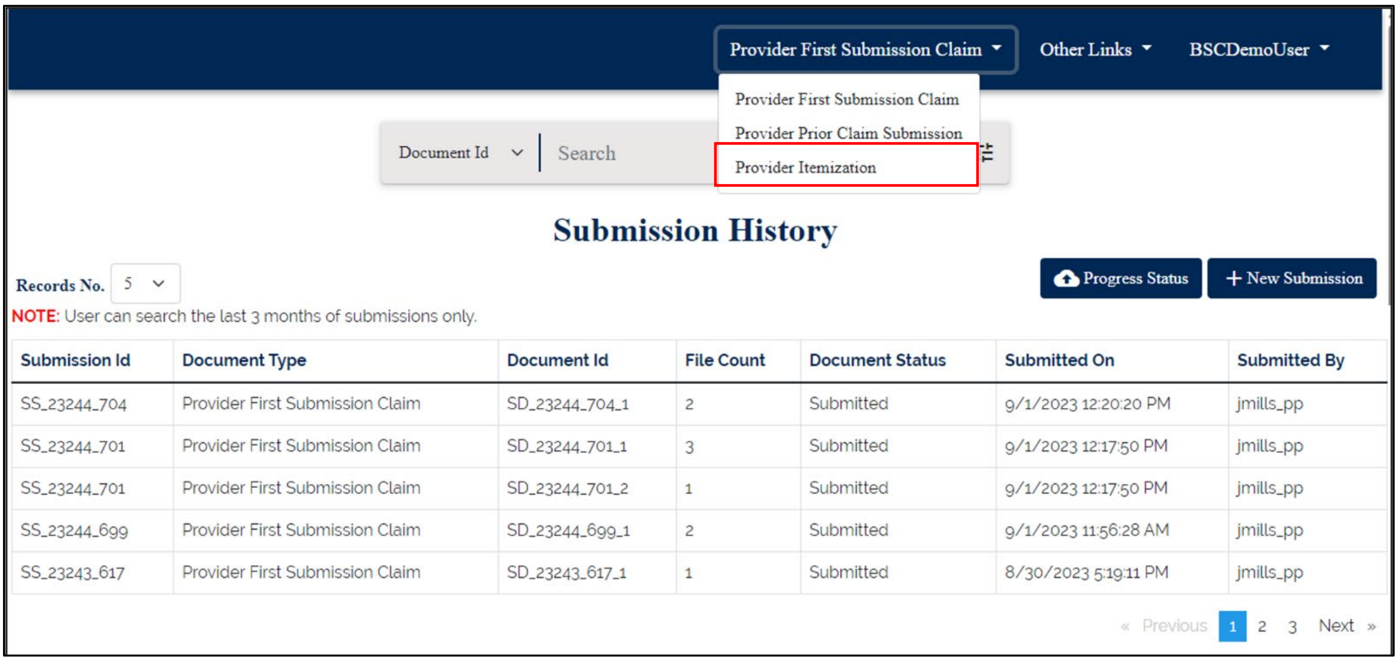


No additional questions will be asked. You can begin adding documentation.

5 Provider Itemization

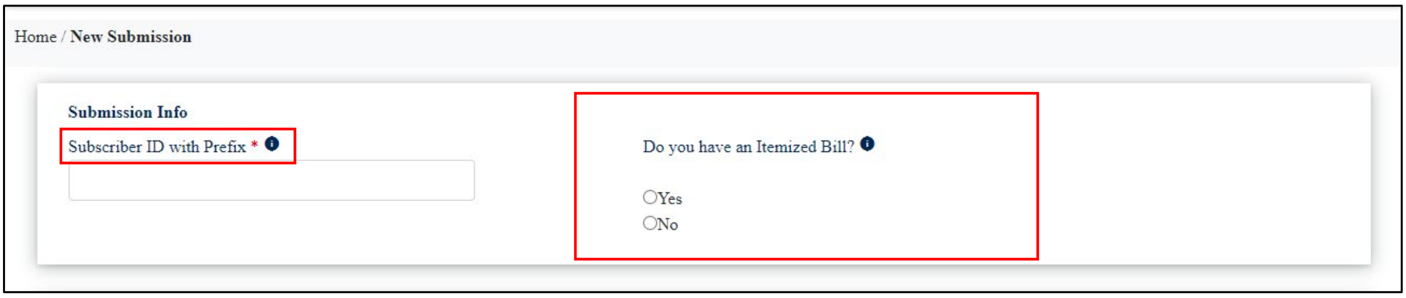
Click the **Provider Itemization** menu option from the drop-down menu (Fig 9).

Fig 9: Submission History (Itemization)



To add a new submission, click **+ New Submission**. The *New Submission* page displays (Fig 10) with the **Subscriber ID with Prefix** mandatory text field and a Yes/No question: *Do you have an Itemized Bill?*

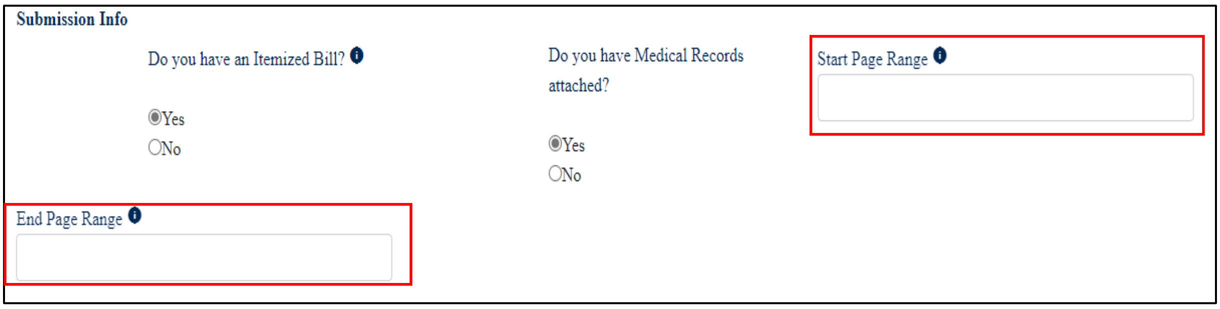
Fig 10: Provider Itemization > New Submission



YES	NO
• Move to next screen.	• Error message: *Without an itemized bill an itemization cannot be provided. Please submit with valid itemized bill to continue.*

You will be prompted to answer this question: *Do you have Medical Records attached?* (Fig 11)

Fig 11: Submission Info / Medical records



YES	NO
• Enter the **Start Page Range** and the **End Page Range**. • After answering, no additional questions will be asked. [You can begin adding documentation]().	• After answering, no additional questions will be asked. [You can begin adding documentation]().

6 Add Documentation

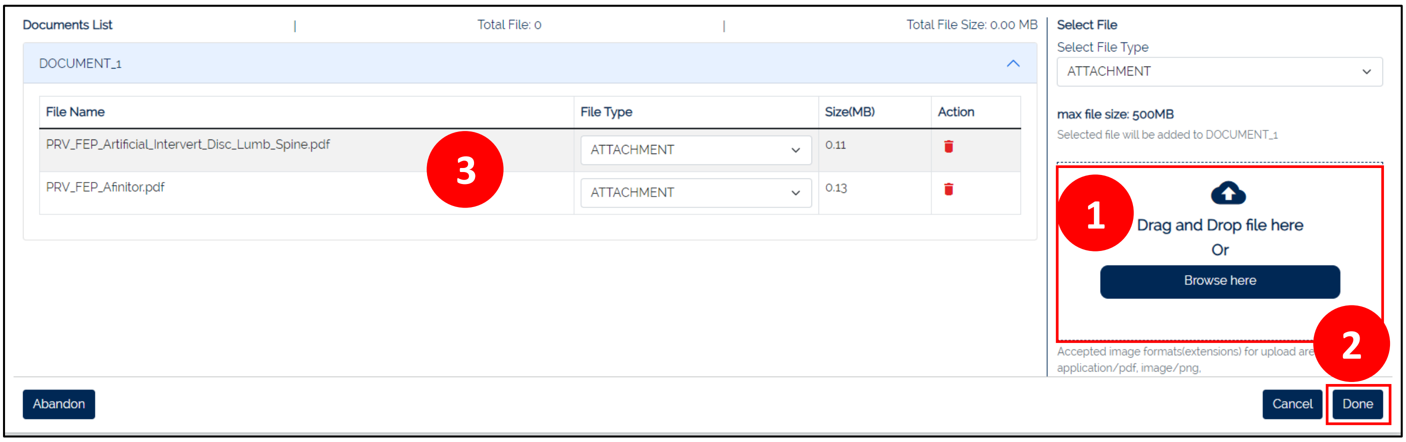
After completing all appropriate fields, scroll to *Select File*. You can upload multiple files in a single submission.

- The maximum file size per attachment is 500MB.
- Accepted attachment types are TIFF, PDF, PNG and JPEG.

The *Select File Type* will always be *Attachment*. Upload attachments by either selecting (*Browse here*) or by *Drag and Drop*. (Fig 12). Click **Done** after all files are selected. The *Documents List* screen populates with all uploaded files.

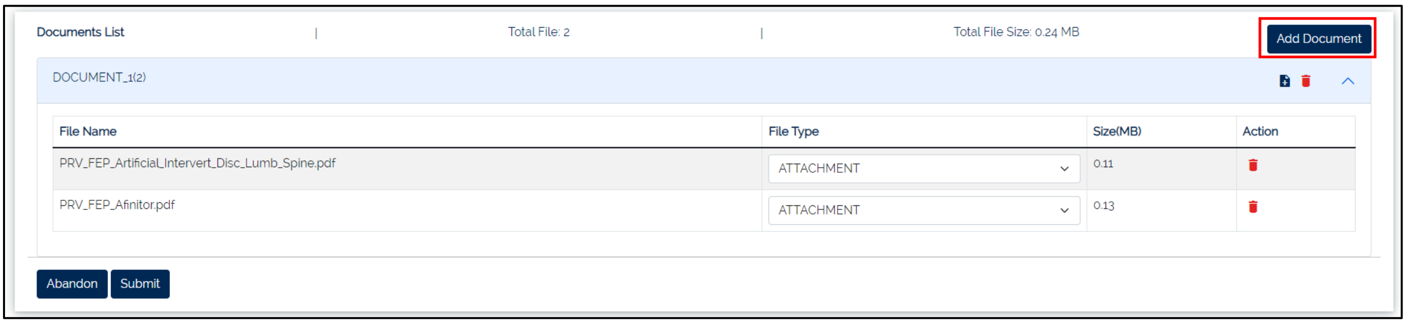
- Other options: Click **Cancel** to remove the attachments. Click **Abandon** to cancel the submission in total and return to the submission history page.

Fig 12: Documents List/Select File



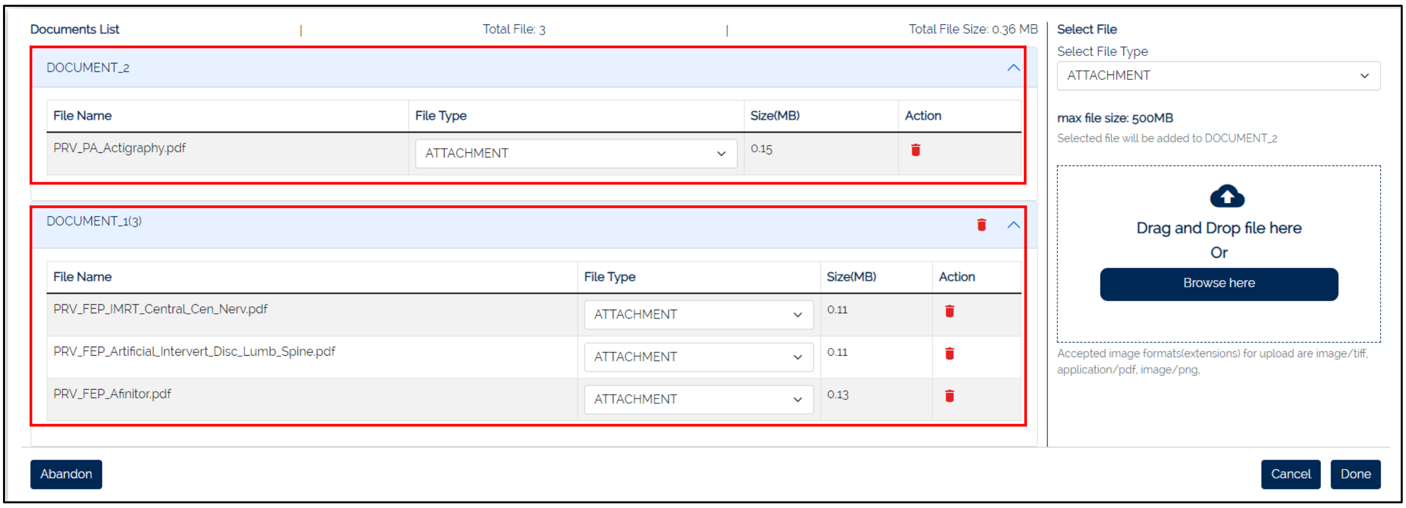
The **Add Document** button will display after you click *Done* and before you click *Submit*. (Fig 13a). Click to add additional attachments prior to submitting.

Fig 13a: Documents List / Add Document



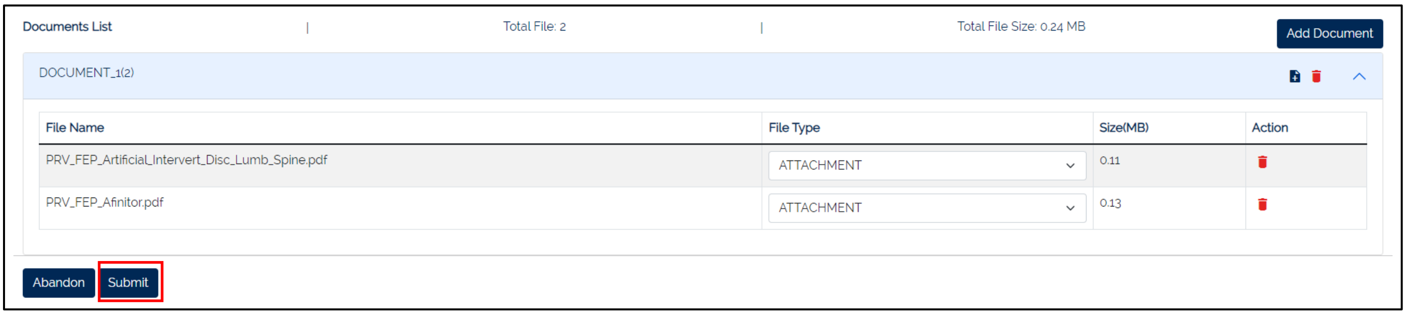
When adding additional attachments, note that files upload in document sets. For example, "DOCUMENT_1(3)" = the order of the upload (1) and the number of attachments uploaded (3). Use the drop-down arrow to expand/collapse the list of uploaded files in each document set. (Fig 13b).

Fig 13b: Documents List/Upload documents



Click **Submit** to finalize the submission. (Fig 14a).

Fig 14a: Documents List > Submit

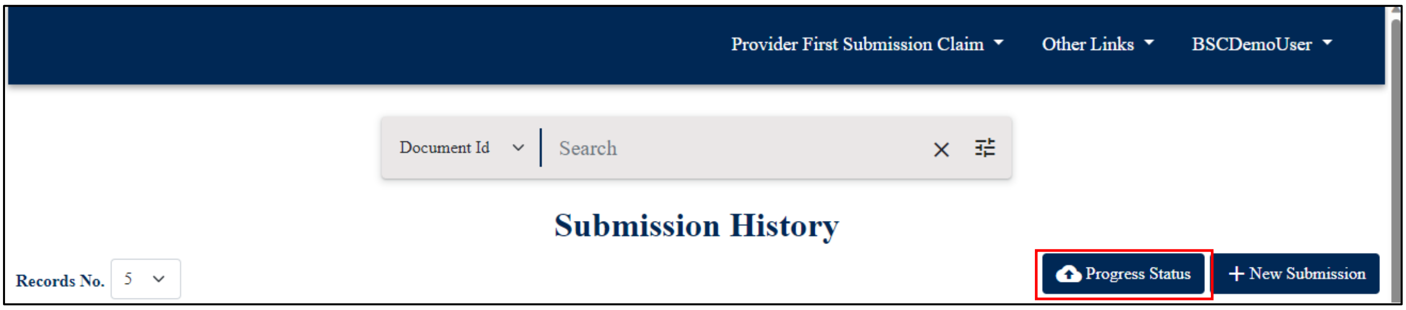


A pop-up box displays at the right corner of the screen when a document(s) successfully uploads (Fig 14b).

Fig 14b: Upload successful

7 Progress Status button

Most files load quickly but larger files may take additional time. The *Progress Status* button on the displays upload status for large files.



[i] Single sign-on systems are employed within an enterprise like Blue Shield to allow registered users to access all authorized resources using the username/password they have established with the enterprise.