

Provider Connection Reference Guide

The Provider Connection website gives you easy access to the tools and information you need to serve Blue Shield and Blue Shield Promise members as well as to support your practice.

Use this reference guide to learn more.



If you are viewing this guide online, the linked page numbers take you to instructions for key activities you can do on Provider Connection. Use the *Directory* button at the bottom of each page to return to this table of contents.

Page	Action
3	Registration & account management for Account Managers and Users
4	Website navigation
5	Provider directory online validation and update process <ul style="list-style-type: none">• Assign user access to provider demographic information
7	Verify member eligibility, deductibles/OOP maximums, benefits, and view member's ID card <ul style="list-style-type: none">• Track specialty visits via the <i>Visit Accumulator</i> – Blue Shield Commercial plans only
12	Create member rosters
13	Locate authorization tools and resources
14	Use the <i>Claims Routing Tool</i> to determine where to send paper claims
15	Use <i>Check Claim Status</i> to search claims and find EOBs
17	Attach documentation to a finalized claim
18	Submit a dispute online or by mail
19	Use <i>View My Disputes</i> to track disputes and access determination letters
20	Enroll in Electronic Data Interchange (EDI)
21	Quick links



Background: If your organization is new to [Provider Connection](#), you must establish an account.

Establishing an account:

The person executing the initial Provider Connection registration is considered an Account Manager. When the maximum allowed number of Account Managers register, Provider Connection will display a message. Most organizations can have at least two Account Managers. There are three types of provider accounts. The links below take you to step-by-step instructions with screenshots for how to register for the account type most appropriate to your business.

1. [Provider](#)
2. [MSO](#)
3. [Billing Service](#)

Account Managers:

Once registered, the Account Manager(s) will see an *Account management* link in their top-level navigation after log in. It provides direct access to all activities falling within the role.

Once established, the Account Manager(s) – not Blue Shield – sets up user profiles. Blue Shield will email each user a temporary password. Users have 30 days to visit the site and change their password or the account will be deleted.

Users:

All users have a *Manage my profile* page where they can do things like update their username/password, change their email, set their email preferences, and locate their Account Manager. After log in, a “badge” with the user’s initials appears in the white menu bar. Click this badge to access the *Manage my profile* page.

Additional support:

- This [Provider Connection Account FAQ](#) provides answers to the most frequently asked questions about establishing and maintaining a Provider Connection account as an Account Manager or User.
- Password must be updated every 365 days. See [Update your Provider Connection password](#) if you need help changing your password or if your account is locked or disabled.
- The [Provider Connection training page](#) includes links to the above resources and more. No log in is required.



Background: Below is a high-level snapshot of how to navigate the [Provider Connection](#)* website. Authenticated tools require log in, but there are many resources on Provider Connection that do not.

Instructions:

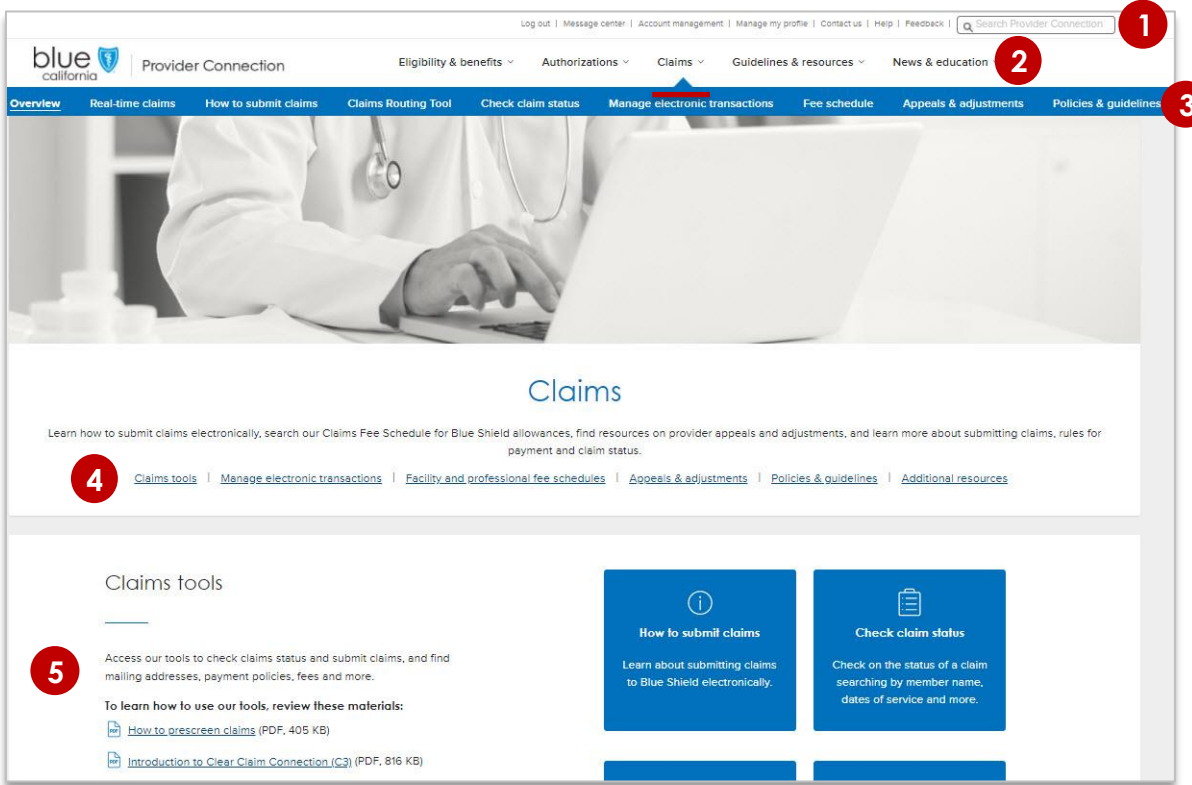
- 1. **Top level navigation:** General site actions like *Login/register*, *Help*, and *Search*.
 - Blue Shield uses two-step authentication. To verify your identity each time you login, enter your username/ password plus the code Blue Shield sends to your email.

- 2. **White menu bar:** Navigational links to the five site sections and the home page. The arrow indicates the section you are in.

- 3. **Blue sub-menu bar:** Direct navigational links for the most-used content and tools within the specific section.

- 4. **Category headings:** High-level table of contents for information on the page. Clicking a category heading takes you to a category.

- 5. **Categories:** Contain quick links to tools and resources when appropriate, and clickable boxes that take you to your desired information.



* Blue Shield Promise resources that do not require log in are integrated throughout Provider Connection. They are also available from the [Blue Shield Promise Provider Portal](#). Links in the footer of each page allow you to move between the two websites.

Background: Blue Shield has designed our provider directory accuracy processes to be compliant with both the 2021 Consolidated Appropriations Act (CAA) and California Senate Bill (SB) 137 requirements.

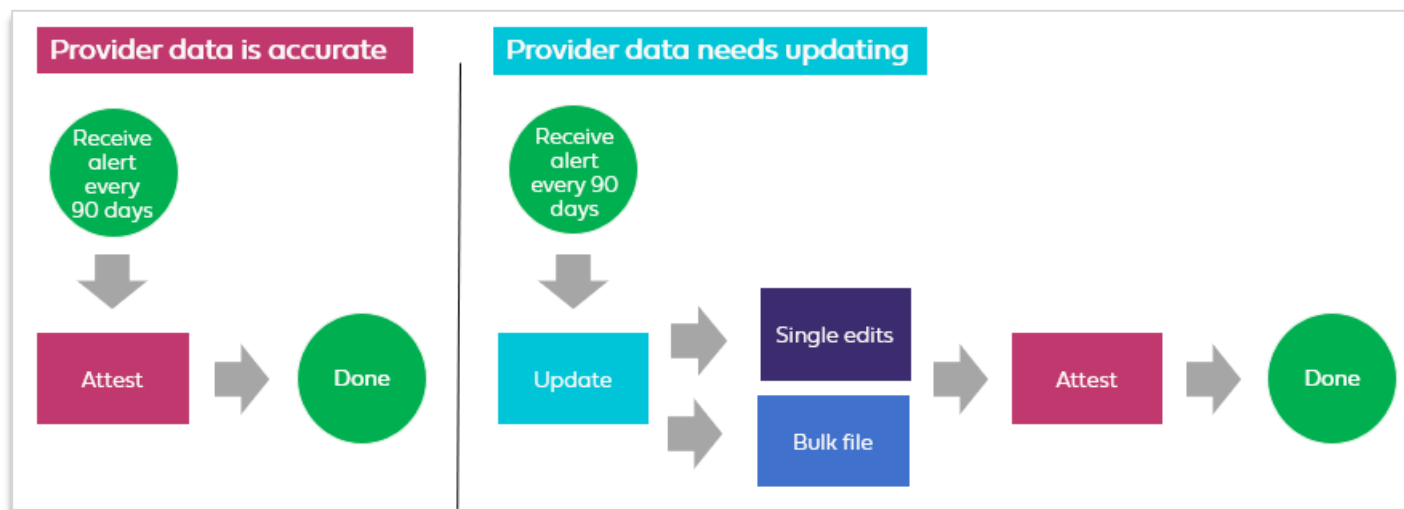
Process:

- Online attestation to data accuracy every 90 days. Blue Shield will alert a provider when it is time to attest.
- Directory updates at any time either by:
 - Single edits on the Provider Connection *Provider & Practitioner Profiles* page.
 - Blue Shield's bulk data file – the *Provider Data Validation Spreadsheet* – downloaded from *Provider & Practitioner Profiles*, then uploaded back to the page.

Who can execute this process:

- Provider Connection Provider and MSO Account Managers and users to which they give provider demographic information access. See next page for how to assign user access.
 - Billing Managers have view-only access.

Visit [Provider data management](#) for step-by-step instructions on how to attest and update provider directory information in compliance with federal and state mandates.



Background: Account Managers can assign provider demographic data access to designated users so that the most appropriate staff members validate/update/attest to provider directory information.

Instructions:

1. From the *Account management* page, click **Manage your user accounts** located under the *Manage user accounts* section.
2. Click the **View** link for a specific user.
3. That user's *Account information* will display.
4. Move the *Provider & practitioner data* toggle to the right.
5. When the user logs in after access is granted, they will see a link to *Provider & practitioner profiles* in their top navigation bar.

Manage user accounts

The tables below show any pending user accounts followed by all other accounts. Select a user to update their tax IDs, claims access, and account status.

Create user account Help

Active and disabled accounts Filter results Transfer selected accounts Delete selected accounts Print Download

NAME	USERNAME	CLAIMS	REAL-TIME CLAIMS	PROVIDER & PRACTITIONER DATA	CREATED	STATUS
Person, User	user123	Yes	No	No	10/07/2019	Active View

Account information

Contact information

Name: Person, User Username: Person, User Phone: 999-999-9999

Main St.: City, State, goooo Username: personuser@comcast.net

User permissions Help

Claims: Real-time claims: **Provider & practitioner data:**

Account administration

Account status: Active Deactivated

Reset password

Logout | Messages | **Provider & practitioner profiles** | Manage my profile | Contact us | Help | Feedback | Search Provider Connection

blue shield of california | Provider Connection

Eligibility & benefits | Authorizations | Claims | Guidelines & resources | News & education

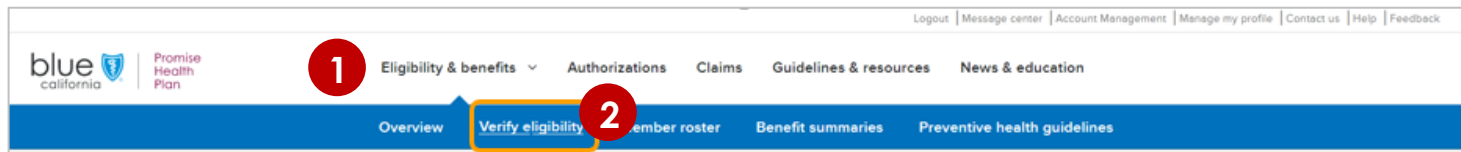


Verify member eligibility

Background: *Verify eligibility* lets you confirm that a patient is a Blue Shield, Blue Shield Promise or Other Blue Plan member. The tool contains up to two years of data at any one time. It is updated daily.

Instructions:

1. After log in, click **Eligibility & benefits** from the white navigation bar.
2. Click **Verify eligibility** from the blue navigation bar.



3. *Verify eligibility* opens and defaults to **SEARCH SINGLE MEMBER**. To search for up to 10 subscriber IDs at one time, click **SEARCH MULTIPLE MEMBERS**.

4. For single member search, enter member data using one of the following:

- Subscriber ID (9-16 alpha numeric characters)
- Member name and date of birth
- Last four (4) digits of SSN
- MBI and date of birth (Medicare only)
- First nine (9) characters of CIN

5. Click the active **Search** button.



Member name MEMBER, G	Status Eligible 1	2 Details ID Card Benefits Claims	
Subscriber ID 91911	Date of birth 02/02/1958	Gender Male	Member address 332WP, Los Angeles, CA, 90001
Plan name Palo Alto Networks Inc Blue Shield Platinum PPO	Plan type Commercial PPO	Coverage effective / start date 02/01/2022	Coverage end / redetermination date Present
Coordination of benefits EMPIRE BCBS 3	COB Order Primary	COB effective / start date ⓘ 01/01/2022	
PCP name N/A	Office visit copay In-network-\$20		

1. **Status:** Eligibility is **green** if active.
2. Upper right navigation provides links to eligibility details, a PDF of the member ID card, benefits, and *Check claims status*. See [next page](#) to learn more about the benefits search.
3. **Blue Shield only:** When Blue Shield is not primary, Coordination of Benefits (COB) information will display for Commercial members if the data is in our system.

Note: When verifying eligibility for Blue Shield TotalDual (HMOD-SNP) members with matching Medi-Cal through Blue Shield Promise ("full duals"), two of the above results panels will present, one for Medicare (primary) and one for Medi-Cal (secondary). When this is the case, the member ID card will be active on the Medicare results screen and inactive on the Medi-Cal.

Tip: For additional information about benefits, go to [Benefit summaries](#) to download/view a spreadsheet with detailed benefits for the Blue Shield and Blue Shield Promise plans.



1. General member information

2. Special programs eligibility

Click the + sign to expand these sections:

3. Current coverage information, plus future and historical if applicable.

4. Current deductibles and out-of-pocket maximums – see next page for details.

5. Current PCP and IPA/medical group

Member eligibility details

Last updated at 01:08 pm, 04/08/2022

1

Member name	Member, Our			Status	Eligible	ID Card Benefits Claims	
Subscriber ID	Date of birth	Gender	Member address				
XEA90	09/30/1959	Female	000 First Ave, Oakland, CA 90000				
Plan name	Plan type	Coverage effective / start date	Coverage end / redetermination date				
Blue Shield of CA ASO PSP	Commercial PPO	01/01/2022	Present				
Relationship to subscriber	Subscriber name	PCP name	Office visit copay				
Subscriber/Insured	Our Member	N/A	In-network-20%				

2 Member information

Member phone	Language	Subscriber dues paid to
555-555-5555	Not Selected	N/A

3 Special Programs

[Maven maternity](#) status
Eligible

4 Member coverage details

- Future coverage
- Current coverage
- Historical coverage
- Historical coordination of benefits

5 Deductibles and out-of-pocket maximums

- Future deductibles and out-of-pocket maximums
- Current deductibles and out-of-pocket maximums
- Historical deductibles and out-of-pocket maximums

PCP and IPA / Physician group



1 Current deductibles and out-of-pocket maximums

Annual deductibles

Combined Participating and Non-Participating Providers
Year to date 2024

Individual: **\$1,750**

\$40.33 spent \$1,709.67 remaining

Applies to annual out-of-pocket maximum: Yes

Family: **\$3,500**

\$40.33 spent \$3,459.67 remaining

Applies to annual out-of-pocket maximum: Yes

Annual copayments/out-of-pocket maximums

Combined Participating and Non-Participating Providers
From 01/01/2024 to 01/29/2024

Individual: **\$4,500**

\$40.33 spent \$4,459.67 remaining

Family: **\$9,000**

\$40.33 spent \$8,959.67 remaining

2 Visits Accumulator

Description	Visits Maximum	Visits Used	Visits Remaining
Chiropractic Visit	0	0	0
Acupuncture Visit	0	0	0
O/P PT, RT, OT and Chiro Combined Visit	0	0	0

For visits administered by third party vendors, please contact the vendor for more information.

1. Deductibles and co-payments/out-of-pocket maximums display by individual and family categories.

Accumulations are based on claims received and processed as of the current date. Year-to-date values are calculated over 12 months, beginning 1/1.

2. The *Visits Accumulator* presents as part of this screen for **Commercial** members only. It tracks visits to specialty providers when their plan covers a set number of visits per plan year.

- Specialty visits covered by third parties such as American Specialty Health (ASH) are not tracked by the tool.

Background: If a Promise Health Plan member, the link from the check eligibility results will take you to the Medical Member Handbook EOC.

Member name: MEMBER, G Status: Eligible

[Details](#) [ID Card](#) [Benefits](#) [Claims](#)

1. Benefit summary view is the default – lists in alpha order.
2. *Benefit categories* view expands in left navigation pane.
3. The *Search* field activates when *Benefit categories* view is clicked.
 - Benefits are not listed by ICD-10 codes.
4. *Benefits download* (if logged in) or go to [Benefit summaries](#) if not logged in, to download/ view a spreadsheet with detailed benefits for the all plans.

1 Benefit summary

Chiropractic and Acupuncture		
Benefit	Network	Copay
Chiropractic/Acupuncture		
Chiropractic	Participating Providers	20% per Visit
Chiropractic	Non-Participating Providers	40% per Visit

3 Search categories

4 Benefit download

2 Benefit categories

General - General Subcategory - Benefit Maximums

Annual Medical Deductible		
	MILLS, JANET L	Applies to Annual Out of Pocket Maximum
Preferred & Non Preferred Provider	\$1750	Yes
Maximum	\$0	

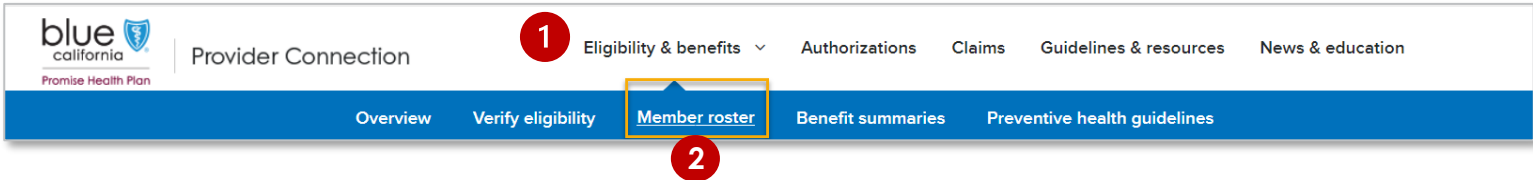
calculated over 12 months beginning January 1
For additional information about plan deductibles see Custom Benefits

Annual Out of Pocket Maximum	
	MILLS, JANET L
Preferred & Non Preferred Provider	\$4500
Maximum	\$0

For additional information about out-of-pocket maximums see Custom Benefits



Background: Member rosters are lists of Blue Shield and Blue Shield Promise members who have selected a provider as their PCP or medical group. This list shows all providers associated with your account by Provider ID (PIN).

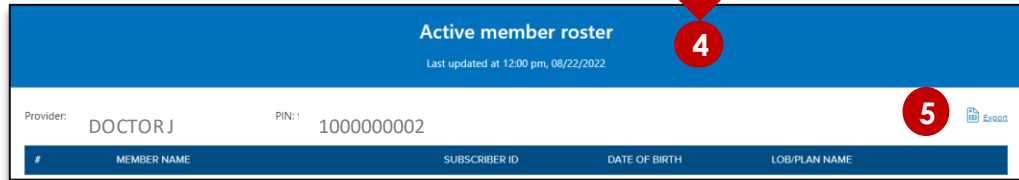
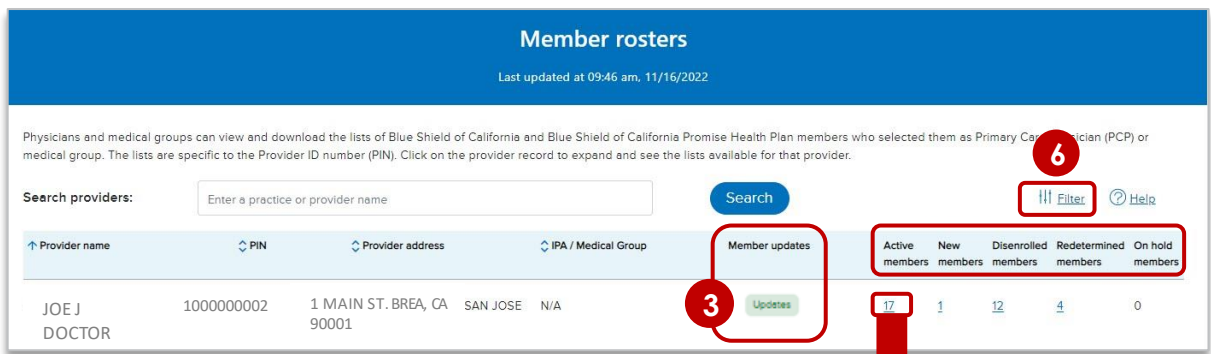


Instructions:

1. After log in, click **Eligibility & benefits** from the white navigation bar.
2. Click **Member roster** from the blue sub-menu bar.
3. The member updates column displays either *New* or *Updates*(member disenrolled or moved to another PCP).
4. Click the linked number to view and/or export data.
5. Click **Export** to download an Excel spreadsheet with full member details.

- Disenrolled Members Roster includes disenrollment dates.
- Redetermined Members Roster displays members with upcoming redetermination dates within the next 90 days.
- On Hold Members Roster displays members who missed their redetermination date and are within the 90-day grace period.

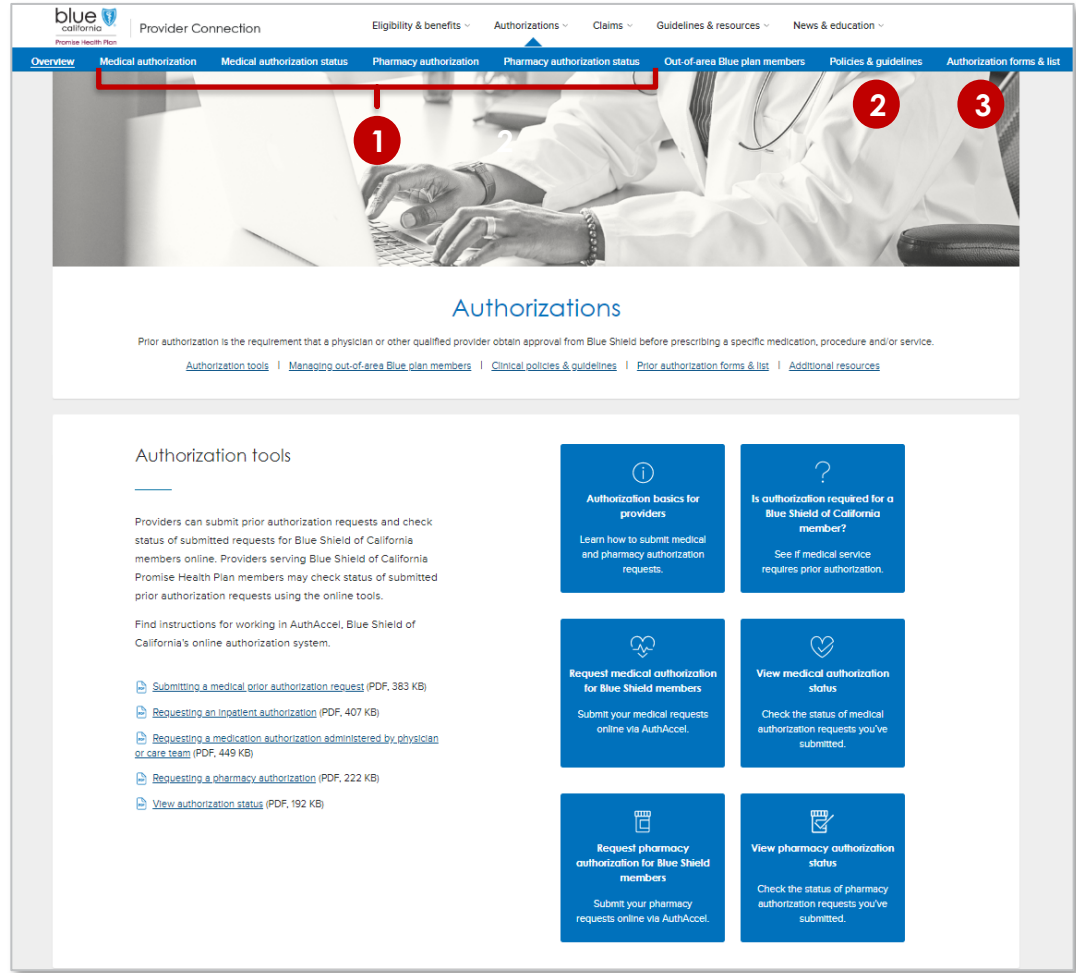
6. Click **Filter** to view/download by provider name, address, PIN or IPA/medical group.



Background: Medical authorizations can be submitted online or fax. Rx requests can be submitted online, by fax, or via the Surescripts® or CoverMyMeds® EHR platforms. Authorization status for all requests can be viewed online via AuthAccel. See [Authorization basics for providers](#) for an overview of the authorization process at Blue Shield/Blue Shield Promise.

Orientation:

1. The [Authorizations](#) section houses the AuthAccel online authorization tool, available after log in.
 - **Blue Shield:** Submit and view medical and Rx requests via AuthAccel for Commercial/FEP and Medicare members.
 - **Blue Shield Promise:** Submit medical requests and view medical and Rx requests via AuthAccel for Medi-Cal members.
 - AuthAccel instructions are linked to each launch page as well as to the [AuthAccel Online Authorization System Training](#) page.
2. Click [Clinical policies and guidelines](#) to search medical and medication policies and requirements. No log in required
3. Click Prior [authorization lists and fax forms](#), and to learn about services requiring third-party authorization (e.g., National Imaging Associates [NIA]). No log in required.
 - For Commercial/FEP, AuthAccel can tell you if a medical authorization is/is not required by Blue Shield or if it is delegated.

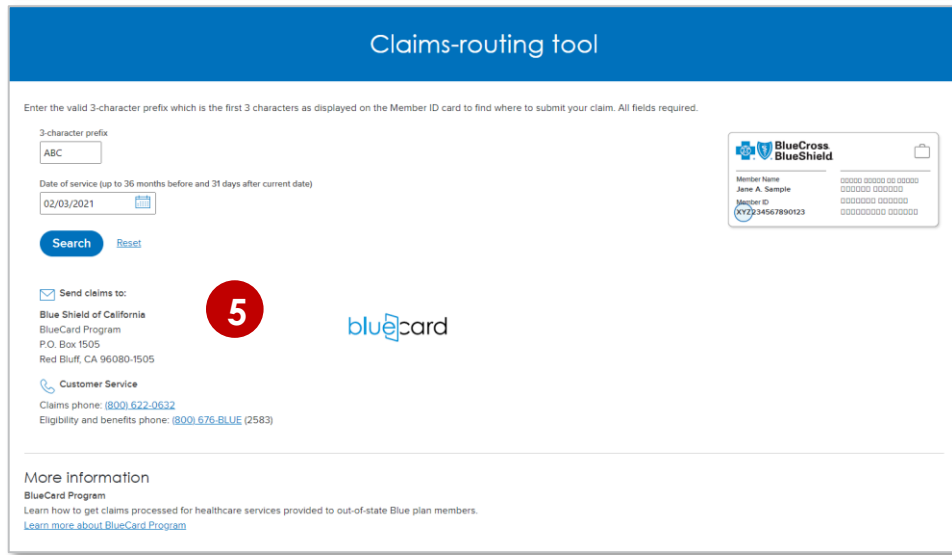
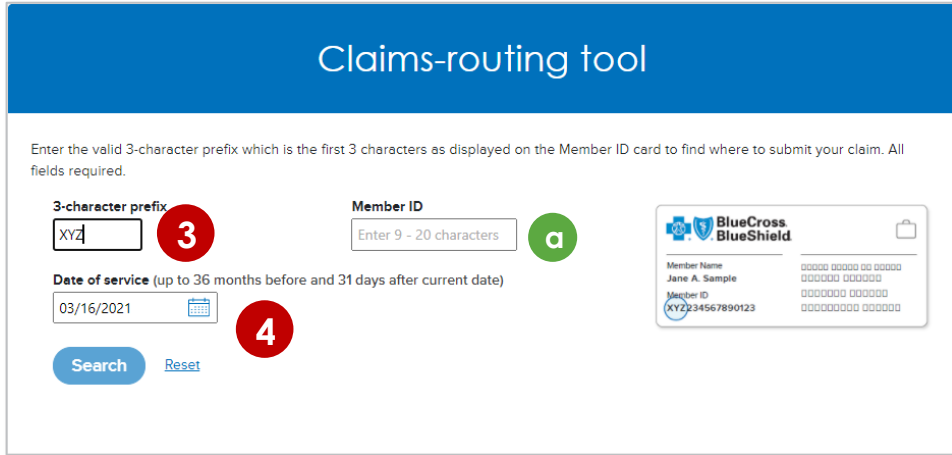


Use the Claims Routing Tool to determine where to send paper claims

Background: The *Claims Routing Tool* tells you where to submit **paper** claims for Blue Shield/Blue Shield Promise. It can also be used to determine where to send BlueCard claims for out-of-state Blue plan members. No log in is required to use this tool.

Instructions:

1. No log in is required to use this tool. Go to [Provider Connection](#) and click [Claims](#) from the white navigation bar.
2. Click **Claims Routing Tool** from the blue navigation bar.
3. Enter the first three characters of the member's ID.
4. Enter the date of service and click **Search**.
 - a) If requested, enter the rest of the member ID and click **Search**.
5. The "send to" address will display. In most cases, so will a phone number for customer service should you need assistance.
6. Click **Start over** to conduct a new search.



Check Claims Status – Search claims and find EOBs

Background: *Check claim status* is available from the home page and from the *Claims* section after log in. It contains a *Search* and *Other Blue plans* tabs. The *Appeal status* tab links to *Submitted disputes* on the *Claim issues & disputes* page.

Instructions: You must be linked to the **Tax ID and Provider ID (TIN/PIN)** of the claim for which you are searching.

1. Click **Check claim status**. The *Search* tab displays with claims from the last three year. The most recent will be at the top.
2. Enter data into one or more search fields and click **Search**.
3. Results will display below the blue header row. To sort results in alphabetical or ascending/descending order, click the desired column header and the up/down arrow once it presents.
4. Click the blue text links to see more detailed information about the member or claim or to view/download the EOB.
5. To clear the search and conduct a one, click **Start over**.

Showing 1–50 of 47,734 claims: Dates of service 10/06/2018–10/06/2021

Claim status Updated	Claim number	Claim type	Dates of service	EOB	Member name	Member ID/ Subscriber ID	Provider name	Amount billed	Amount paid	Patient responsibility	Check/EFT number
IN PROCESS 03/01/2021	000342	Medical	07/07/2020– 07/07/2020	N/A	ROBERTS, [Progress indicator]	910219805-02	QUEST DIAGNOSTICS	\$3,500.00	N/A	\$10.41	N/A

Tip: When using the *Other Blue plans* tab to conduct a search for member claims, all fields are required unless marked optional. Results will be sent to the user’s Message Center.

Check Claim Status – Claim details screen

Background: Clicking the claim number from the *Check claim status* search results opens the *Claim detail* page and provides access to the information below. Once a claim has been reviewed and finalized, the *EOB* will be available here. You will also see links to *Attach supporting documentation* (to a finalized claim) and *Resolve claim issue or dispute*.

The screenshot shows the 'Claim details' page for a finalized claim. The page is annotated with eight callouts:

- 1** Claim status: Located at the top left, indicating the claim is 'Finalized'.
- 2** Download EOB: A button at the top right to download the Explanation of Benefits.
- 3** File a dispute or attach documentation to finalized claim: A callout pointing to the 'Attach supporting documents' and 'Resolve claim issue or dispute' links.
- 4** View all claims for this member: A callout pointing to the 'View EOB' link.
- 5** Toggle between full and summary view: A callout pointing to a toggle switch in the 'Payment details' section.
- 6** View payment details: A callout pointing to the 'Check/EFT number' and 'Check/EFT date' fields.
- 7** This section presents when there is history such as claim adjustments and/or related claims: A callout pointing to the 'Claim history' table.
- 8** This section includes line-item detail as well as claim messages and notes: A callout pointing to the 'Service and charges' table.

Claims – Attach documentation to a finalized claim

Background: For all lines of business, documentation can be attached to a finalized claim.

To start the process for a finalized claim:

1. Click **Claims** then click **Check claim status** in the blue sub-menu bar.
2. Search for the finalized claim. (See [Check Claim Status](#) for instructions.)
3. Click the claim number to open the *Claim detail* page.
4. The *Claim detail* displays for that claim. Click **Attach supporting documents**.



5. The *Attach Documents to a Claim* screen displays with prepopulated claims data.
6. See the [Attach documentation to a finalized claim tutorial](#) for the remaining steps, with screenshots, for how to complete this process.



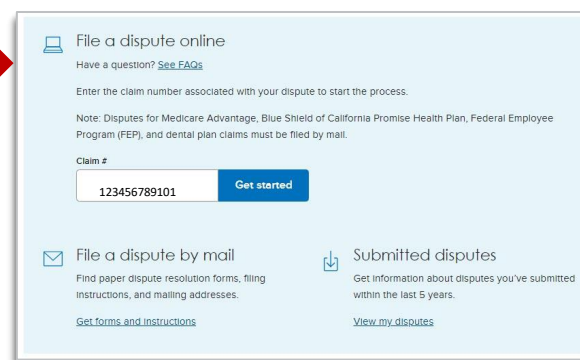
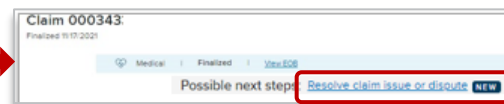
Claim issues & disputes – Submit a dispute online

Background: Disputes can be initiated from the 1) *Claim detail* screen once the claim has been finalized (see previous page) or from the 2) *Claim issues & disputes* section, if you know the claim number.

- Disputes can be filed online for finalized Commercial, Shared Advantage, FEP, Medicare, Blue Shield Promise Medi-Cal, and BlueCard claims.
- Disputes can also be filed by mail.
 - See [Learn more about the dispute process](#) for additional information.

To begin the process, log in and go to the *Claims* section:

1. Click **Check claim status** in the blue sub-menu bar.
2. Search for the finalized claim. (See [Check Claim Status](#) for instructions.)
3. Click the claim number to open the *Claim Detail* page.
4. Click the **Resolve claim issue or dispute** link. This link will be active only if the claim has been finalized.
5. If you know the claim number, you can also file a dispute online directly from *Claim issues & disputes*, after log in.



- Filing by mail: See [Get forms and instructions](#).



View My Disputes: Search disputes and access determination letters

Background: The *Submitted disputes* link is available from the *Claim issues & disputes* section after log in. It contains all disputes submitted by mail for Commercial, Shared Advantage, and Blue Shield Promise, as well as all disputes submitted online for all plan types. It may not display FEP, Medicare, Medicare Advantage or Dental claims, nor BlueCard claims submitted by mail.

File a dispute online
Have a question? [See FAQs](#)
Enter the claim number associated with your dispute to start the process.
Note: Disputes for Medicare Advantage, Blue Shield of California Promise Health Plan, Federal Employee Program (FEP), and dental plan claims must be filed by mail.
Claim # [Get started](#)

File a dispute by mail
Find paper dispute resolution forms, filing instructions, and mailing addresses.
[Get forms and instructions](#)

Submitted disputes
Get information about disputes you've submitted within the last 5 years.
[View my disputes](#)

1. Click **Claim issues & disputes** from the blue sub-menu bar.
2. Click **View my disputes**.
3. Select either the *Submitted online* or *Submitted by mail* tab.
4. Click **Filter** to search for a dispute.
5. Enter data related to the dispute(s) in one or more fields and click **Show results**.

6. Results display under the light blue banner.
 - Click links under the *Document* column to view acknowledgement and determination letters.

Submitted disputes

Submitted online **Submitted by mail**

Filter **Export**

Show disputes submitted online based on one or more search filters

Case # Member last name Dispute received Start date: 05/10/2022 End date: 12/08/2022
Claim # Provider Dates of service Start date: End date:
Tax ID Status: Show all

[Start over](#) [Show results](#)

Showing 1-100 of 251 disputes: Dispute received: 05/10/2022-12/08/2022

Case #	Claim number	Tax ID	Provider name	Member name	Dates of service	Date received	Date closed	Documents	Dispute status
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6

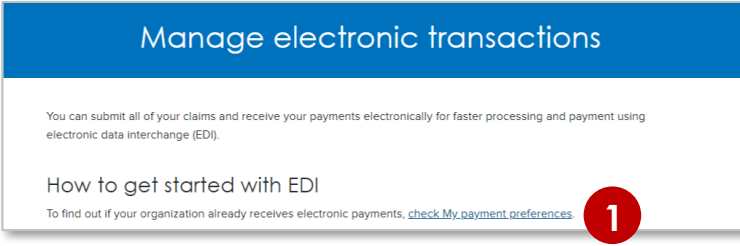


Determine if you are enrolled in Electronic Data Interchange (EDI)

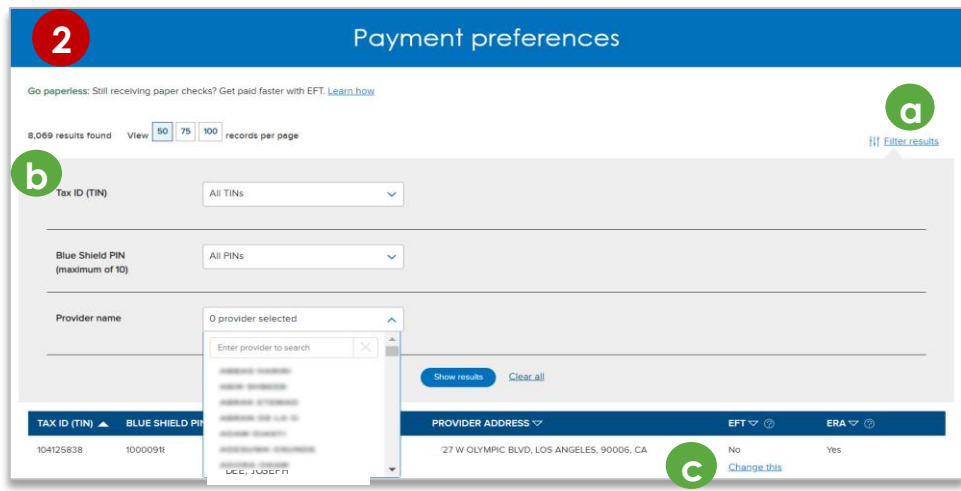
Background: EDI is the exchange of business transactions in a standardized format from one computer to another. Using EDI, you can receive claims payment information electronically (electronic remittance advice or ERA) and you can have claims payments deposited directly into your business account (electronic funds transfer or EFT).

Instructions:

- 1. Determine if your organization is already enrolled in EDI by clicking **Check My payment preferences** on the [Manage electronic transactions](#) page in the *Claims* section. You will need to be logged in to see the results.



- 2. To navigate...
 - a) Click **Filter results** to open filtering options.
 - b) Filtering can be done by one or more Tax IDs (TINs) **and/or** Provider IDs (PINs), **or** by individual provider name. Results will display below. Click **Clear all** to restore all data.
 - c) "No" in the EFT or ERA column means that the TIN/PIN is not enrolled in EDI. Click **Change this** to learn how to enroll.



Tip: • If you aren't currently enrolled in EDI, follow the instructions provided on the [Manage Electronic Transactions](#) page.

Background: Blue Shield Promise resources that do not require log in are integrated throughout Provider Connection. They are also available from the [Blue Shield Promise Provider Portal](#). The links below will take you to content on Provider Connection, and in some cases, to content on the [Blue Shield Promise Provider Portal](#).

For BlueShield providers
Ancillary provider listings
Behavioral health resources
Benefit plans/networks
Benefit summaries
BlueCard Program*
Claims policies & guidelines
Clinical policies and guidelines
Professional fee schedule search*
Drug formularies
Forms
Member ID card samples
Patient care resources
Provider manuals
Richman injectables policy
Spine surgery/pain management prior auth and Radiology and imaging prior auth <ul style="list-style-type: none"> National Imaging Associates (NIA) RadMD Sign In

For BlueShield Promise providers
Benefit summaries
Behavioral Health Services
Clinical policies and procedures
Complex Case Management
Drug formularies
Forms
Health education resources
Medi-Cal Provider Incentive Program
Member ID card samples
Patient care resources
Provider manuals
Quality improvement/HEDIS tip sheets

* Log in required.





Blue Shield of California and Blue Shield of California Promise Health Plan
are independent licensees of the Blue Shield Association