PROVIDER DATA MAINTENANCE - PDM

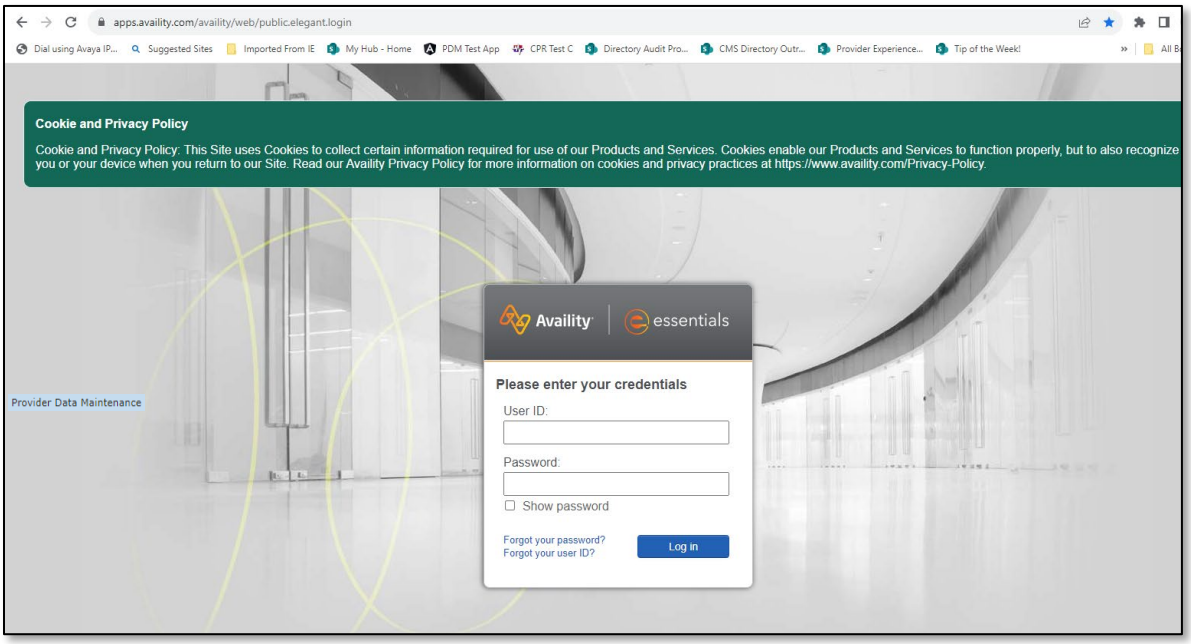
Application Guideline

May 2024

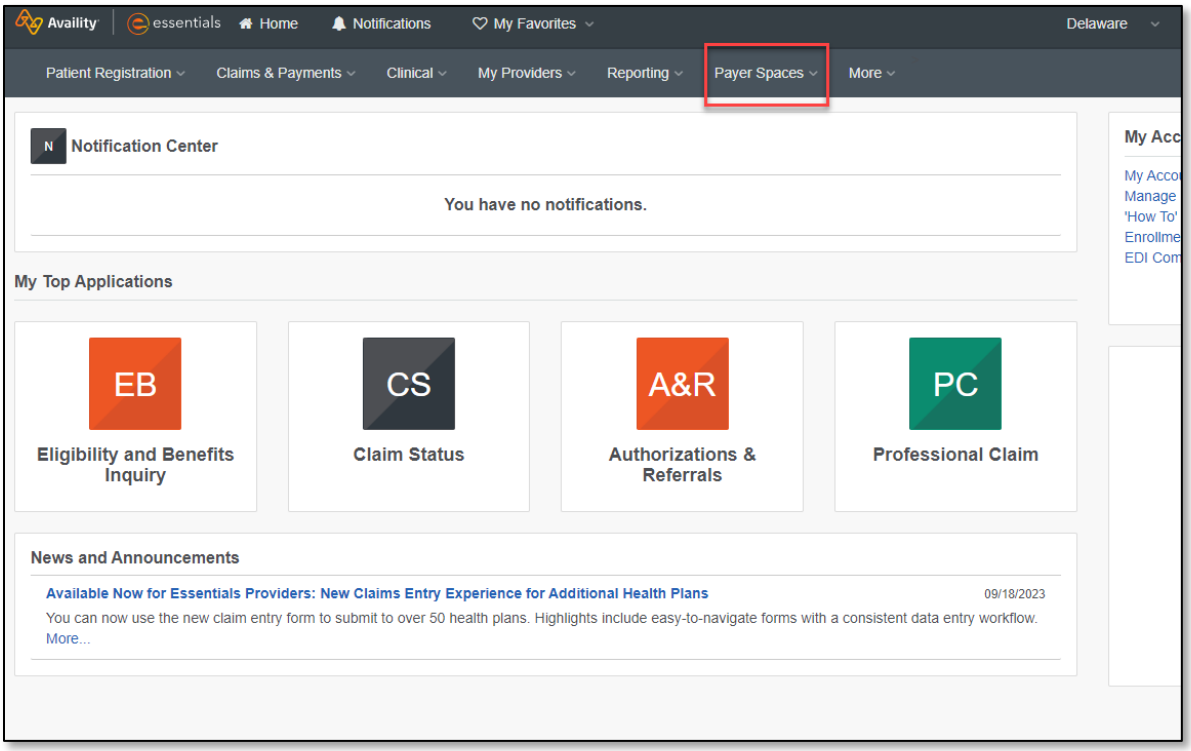
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Availity

Enter your credentials to log into Availity.

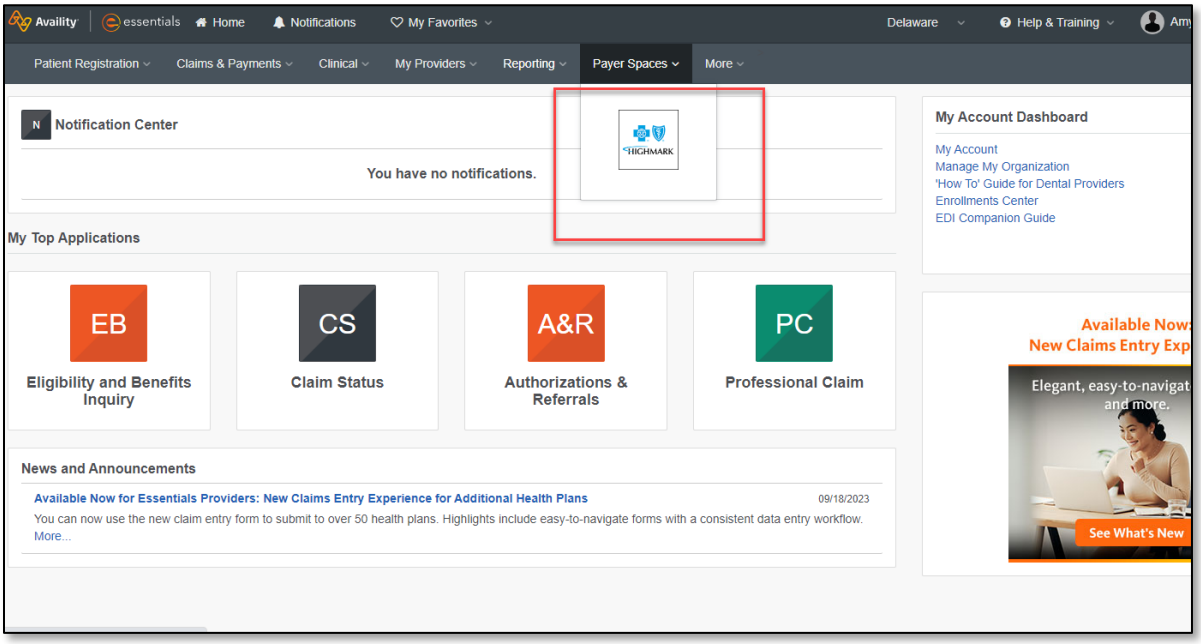


"Click" on Payer Spaces.

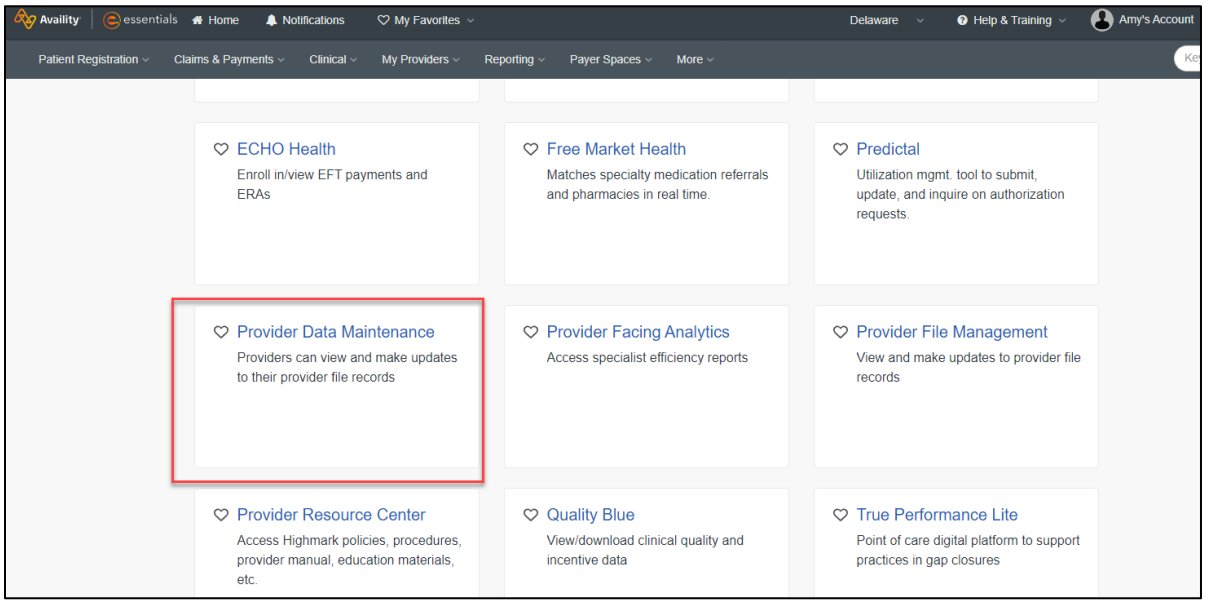


Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

“Select” the appropriate health plan.

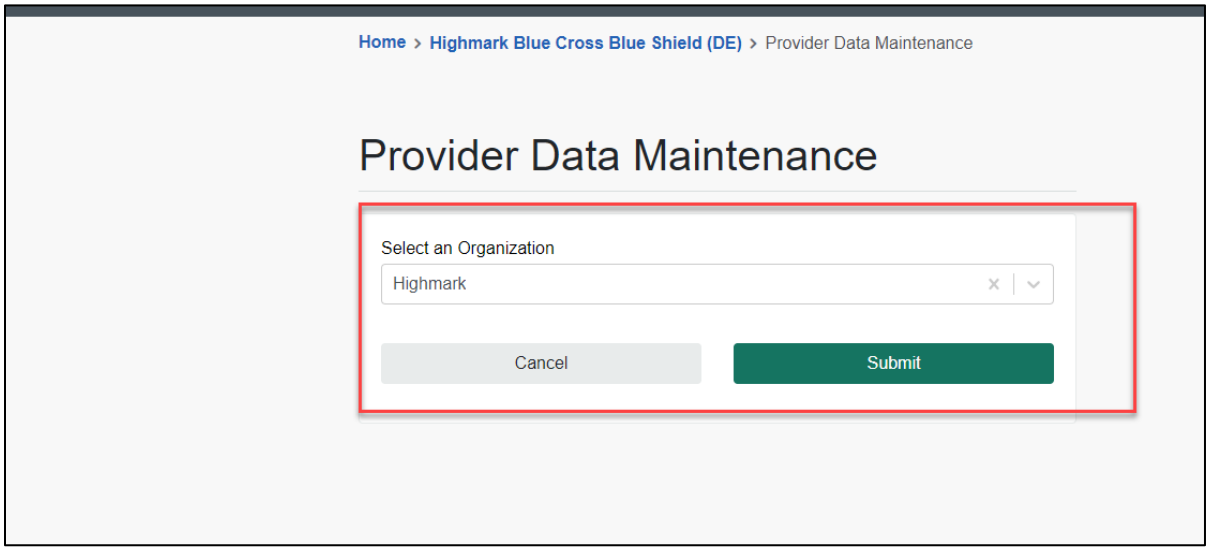


Scroll Down the page and “Click” on Provider Data Maintenance.



“Select” an Organization and “Click” **Submit**.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

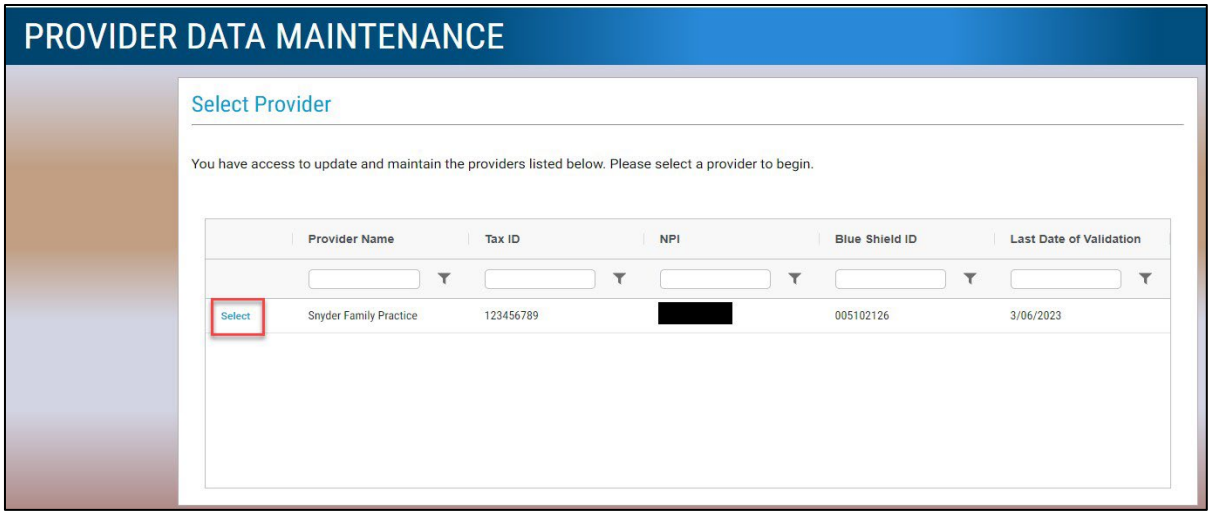


That will take you into the PDM platform.

Select Provider

This is the first page you will see when you sign into PDM from Availity.

For larger entities, more than one account will display on this page. Select the practice/provider you want to view/update by clicking on the **"Select"** button to the left of the practice/provider's name.



Once you log in, you will see the name of the practice, Blue Shield ID, NPI, and Group Effective Date. The message below the practice information contains important information regarding the due dates for your data validation. The No Surprises Act requires that you validate your data every 90 days. This message will tell you when you last validated your data and when the next validation is due.

There is a series of nine questions that you must answer throughout the application to enable the validate button at the top of the screen.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Snyder Family Practice
MEDICAL PRACTICE

Validate | Select Provider | Help

Blue Shield #: 005102126
NPI: [redacted]
Vendor Status: Active
Group Effective Date: 3/01/2023
Group Term Date:

Messages
To ensure your patients have the most up to date information, that claims are paid timely and correctly, and that our Provider Directory remains accurate, Highmark requires that you confirm the accuracy of your group and practitioner information every 90 days. The last validation date for Snyder Family Practice was on 3/06/2023. The next validation is due on or before 6/04/2023.

General Group Information

The question, "*Is this general group information listed below correct*," needs to be answered Yes to validate the record. If the information is incorrect, select No and click on the **"Edit General Group Information"** button.

General Group Information

Edit General Group Information

An update made in this section applies to the main location only. If updates are needed to other locations, please use the General Group Address section.

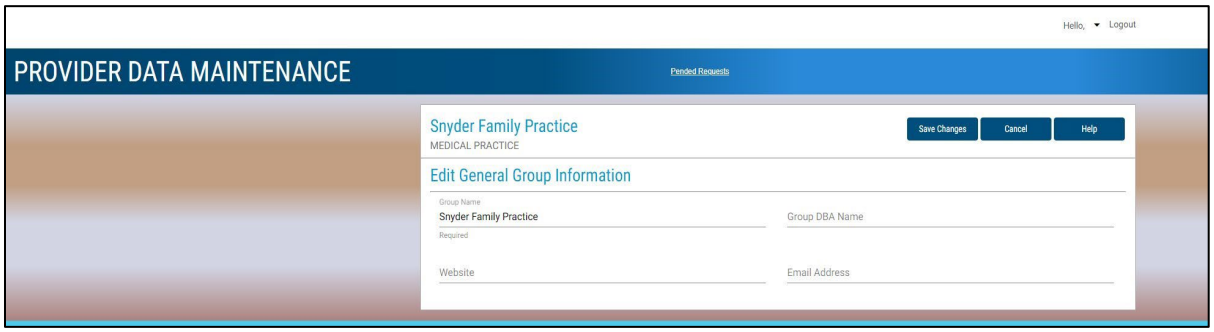
Is this general group Information listed below correct? ◯ Yes ◯ No

Group Name: Snyder Family Practice
Group DBA Name:
Patient Age Range: 0 YEAR - 125 YEAR
Website:
Email Address:

Once you click **"Edit General Group Information,"** you can update practice name, practice doing business as (DBA) name, website, and email address. The website and email address will update for the main location only. If email and website addresses for other locations need to be updated, you will need to update the contacts section within those addresses (*See Edit Contacts section of this guide for more details*.)

To update your information, simply type over the current information and click **"Save Changes."** You can cancel any updates prior to hitting the **"Save Changes"** button. If you click **"Cancel"** and confirm you want to abandon the changes, the application will take you back to the previous page.

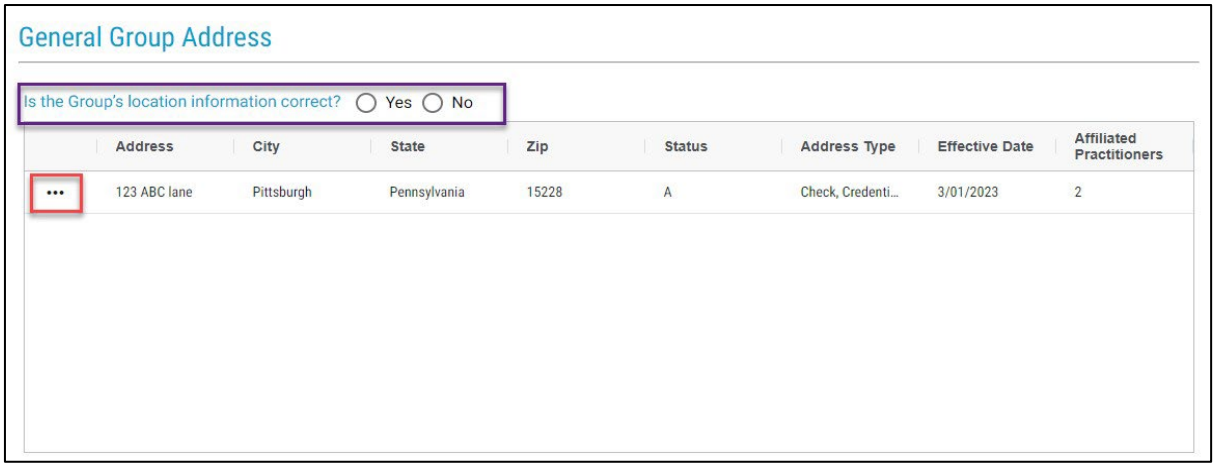
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.



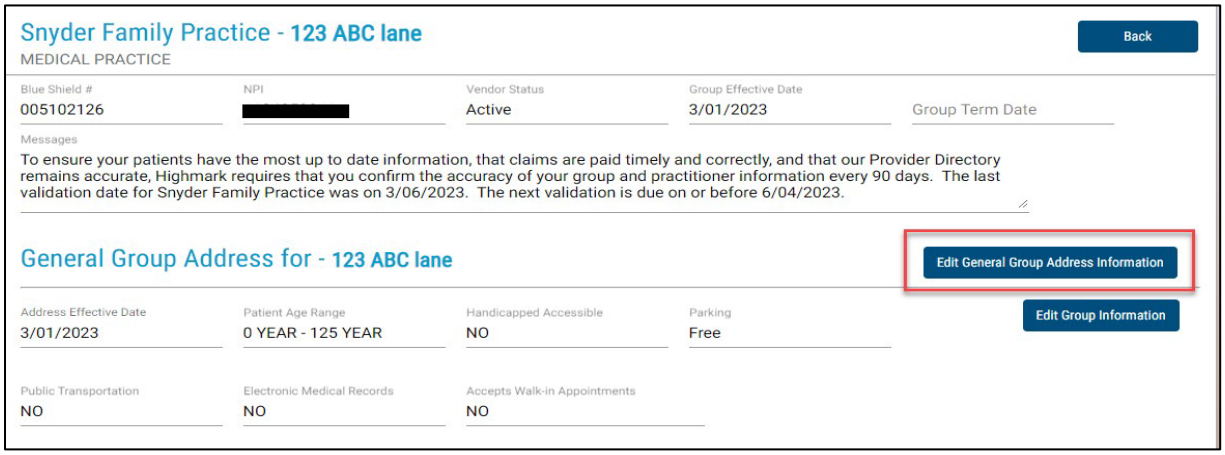
General Group Address

To edit address information, click on the ellipsis to the left of the address you want to update.

The question, "*Is the Group's location information correct,*" needs to be answered Yes to validate the record.



To edit the street address, suite, city, state, and ZIP code, click on the **"Edit General Group Address Information"** button.



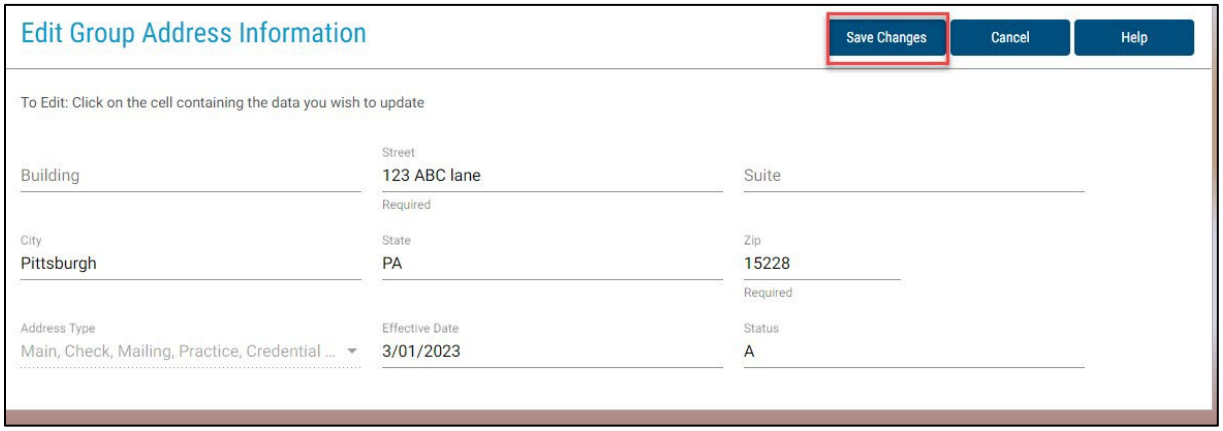
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

To edit this screen, type over the information you want to change. If you are adding a suite or room number, please type in the full word Suite or Room before the actual number. For instance, for Suite 302 you would enter Suite 302.

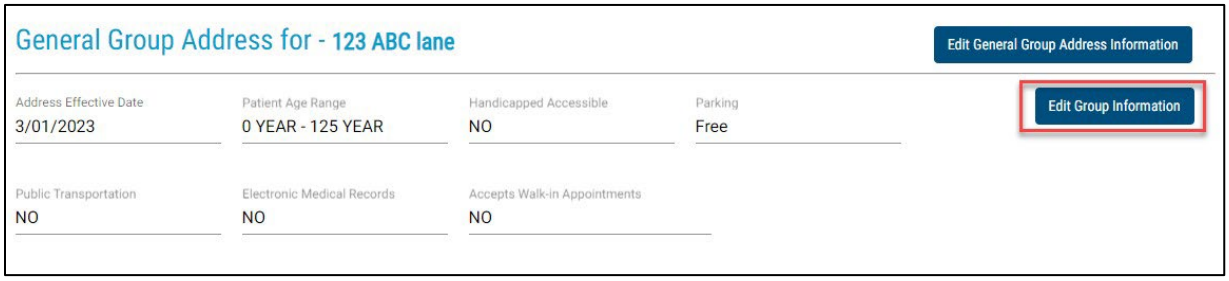
*Please do not abbreviate, spell everything out: Drive, Street, Court.

Click on **"Save Changes."**

Most address changes are real time updates. If you enter an address that is not in your current region or state, the update will pend for Highmark review.



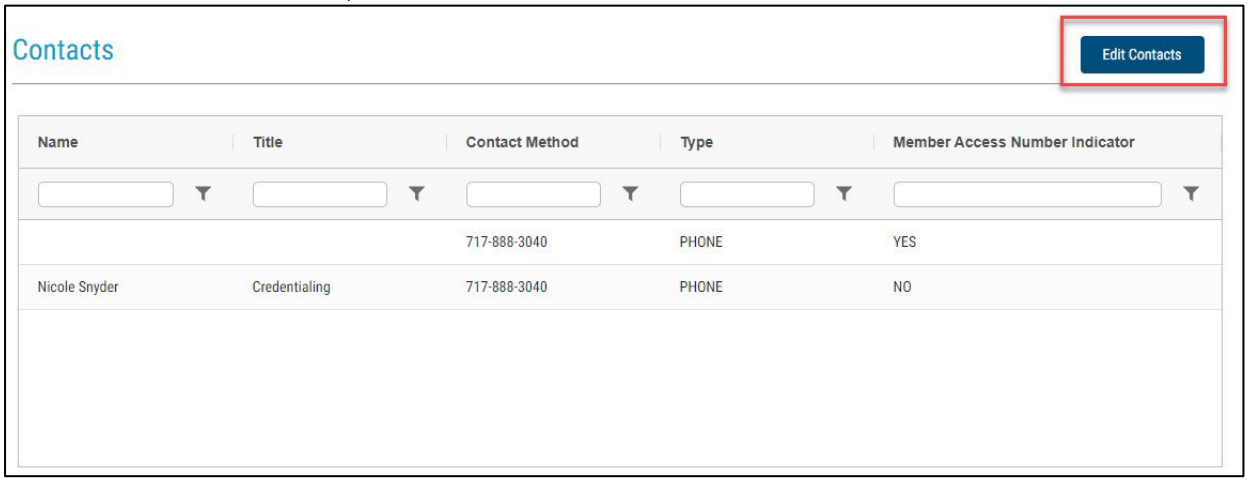
To edit practice patient age ranges, handicap accessibility, parking, public transportation, electronic medical records, and accepting walk-in appointments, please click on the **"Edit Group Information"** button.



Click **"Save Changes."**

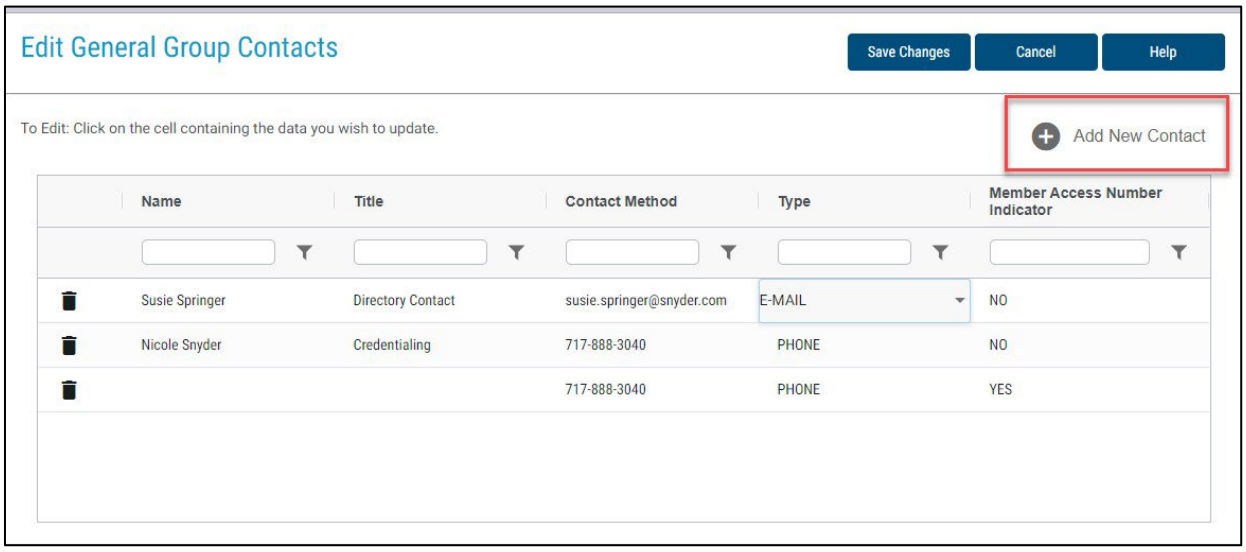
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

To edit contact information, click on **"Edit Contacts."**



Click **"Add New Contact"** and enter the individual's name, his or her title, the contact method (phone number, website, or email address), and type of contact (email, phone, fax, website address).

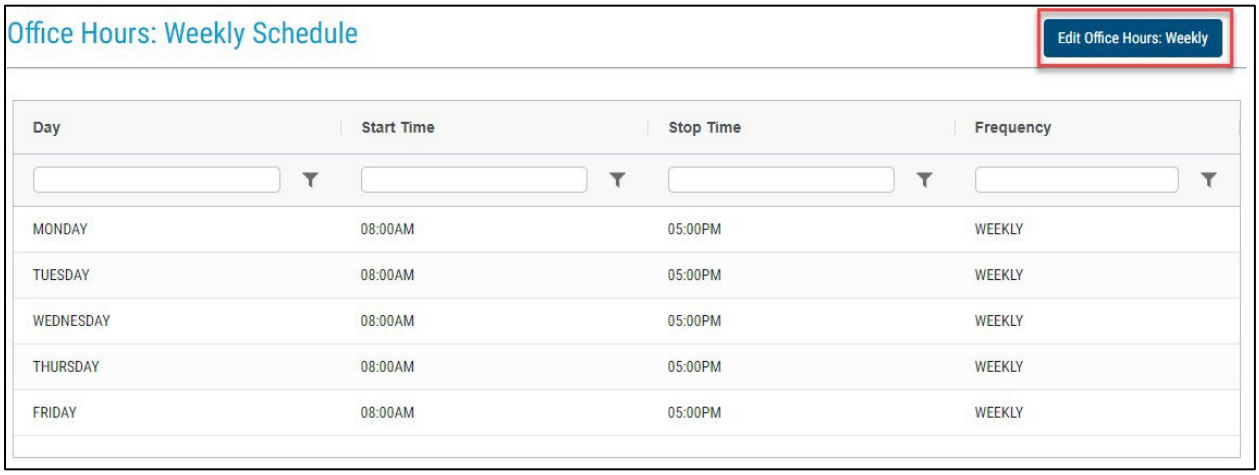
It is important that we receive email addresses so we can communicate more effectively with your group. It is especially important that we receive a directory contact name, phone, and email. Highmark does <u>not</u> publish provider email addresses.



Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Office Hours - Weekly

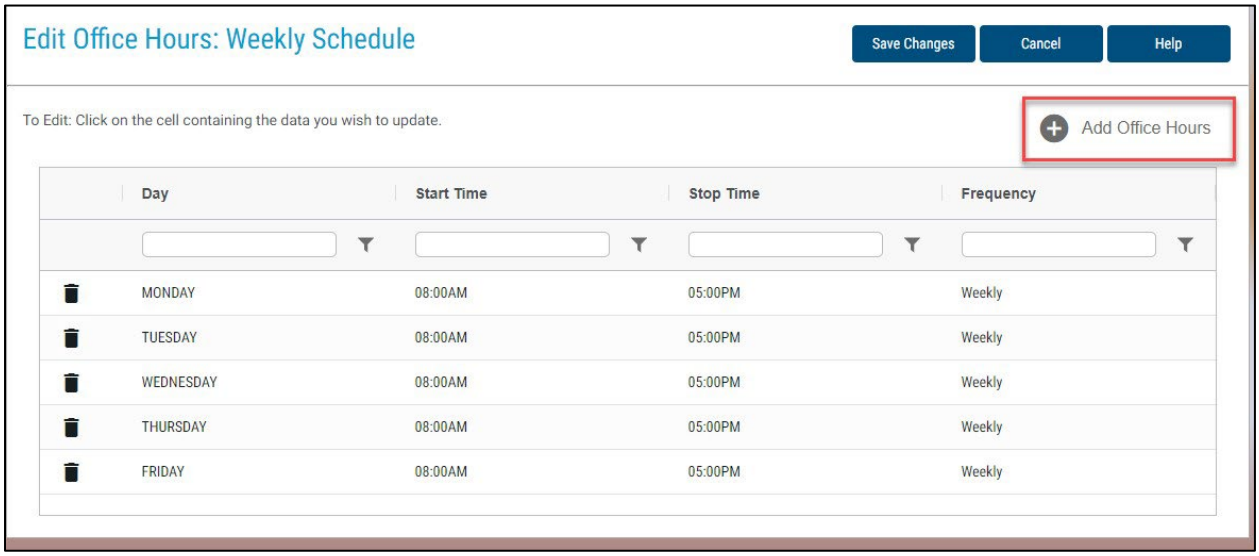
To edit office hours, click **"Edit Office Hours: Weekly."**



To remove office hours, click on the trash can symbol to the left of the row to be deleted, then click on **"Save Changes."**

To add office off hours, click **"Add Office Hours"** and fill in the day, start time, stop time, and frequency.

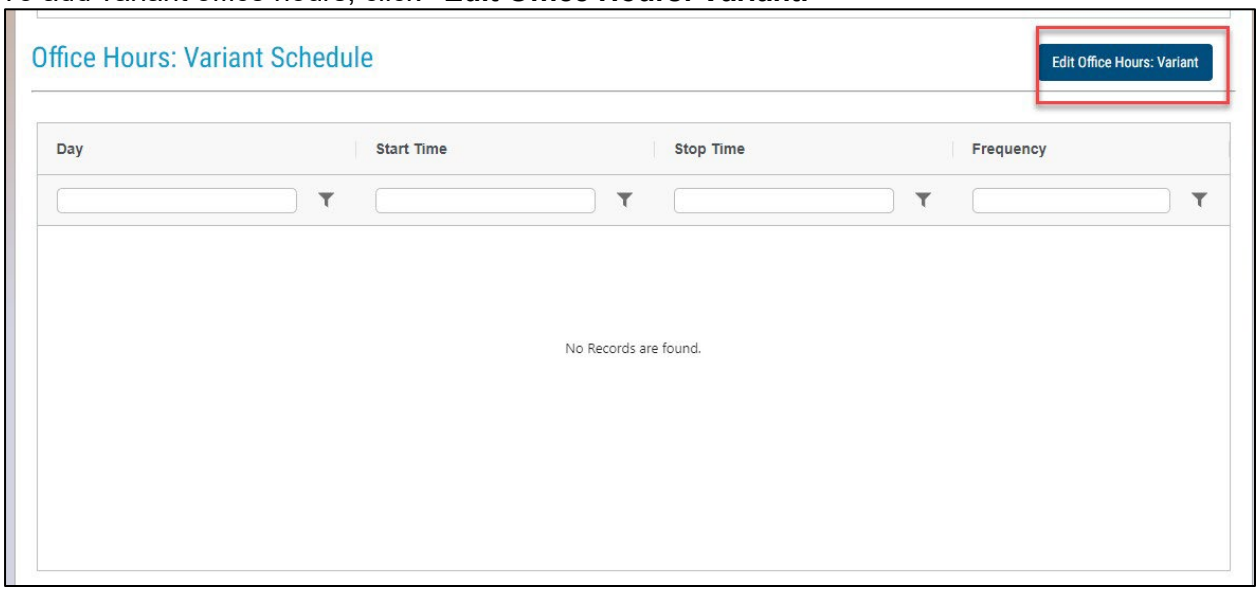
Click **"Save Changes."**



Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

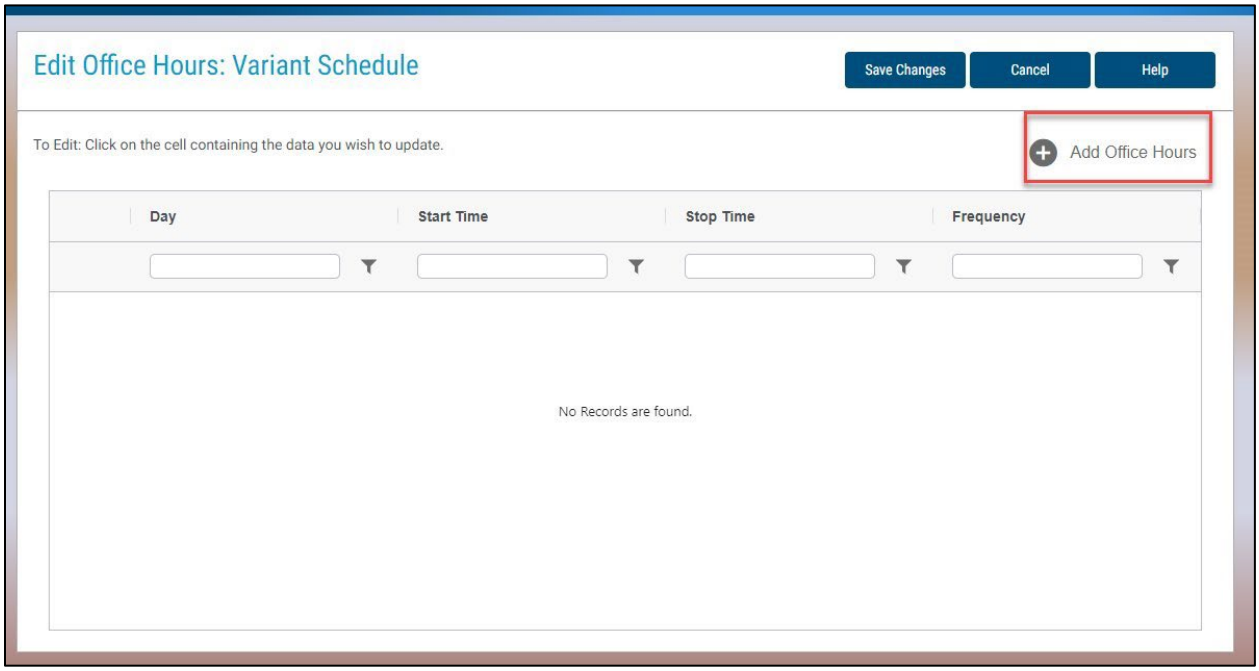
Office Hours - Variant

To add variant office hours, click **"Edit Office Hours: Variant."**



To add office off hours, click **"Add Office Hours"** and fill in the day, start time, stop time, and frequency.

Click **"Save Changes."**

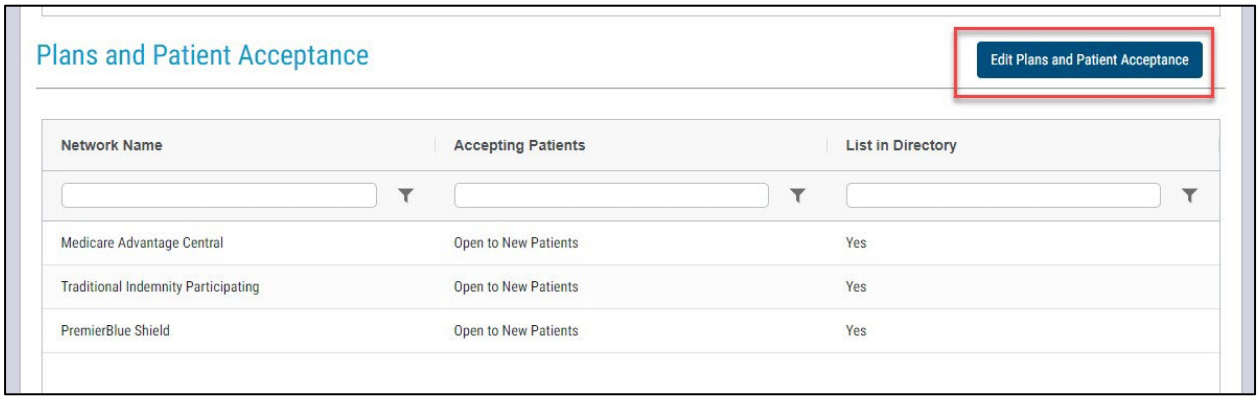


Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Plans and Patient Acceptance

To edit patient acceptance and which addresses are listed in directory, click **"Edit Plans and Patient Acceptance."**

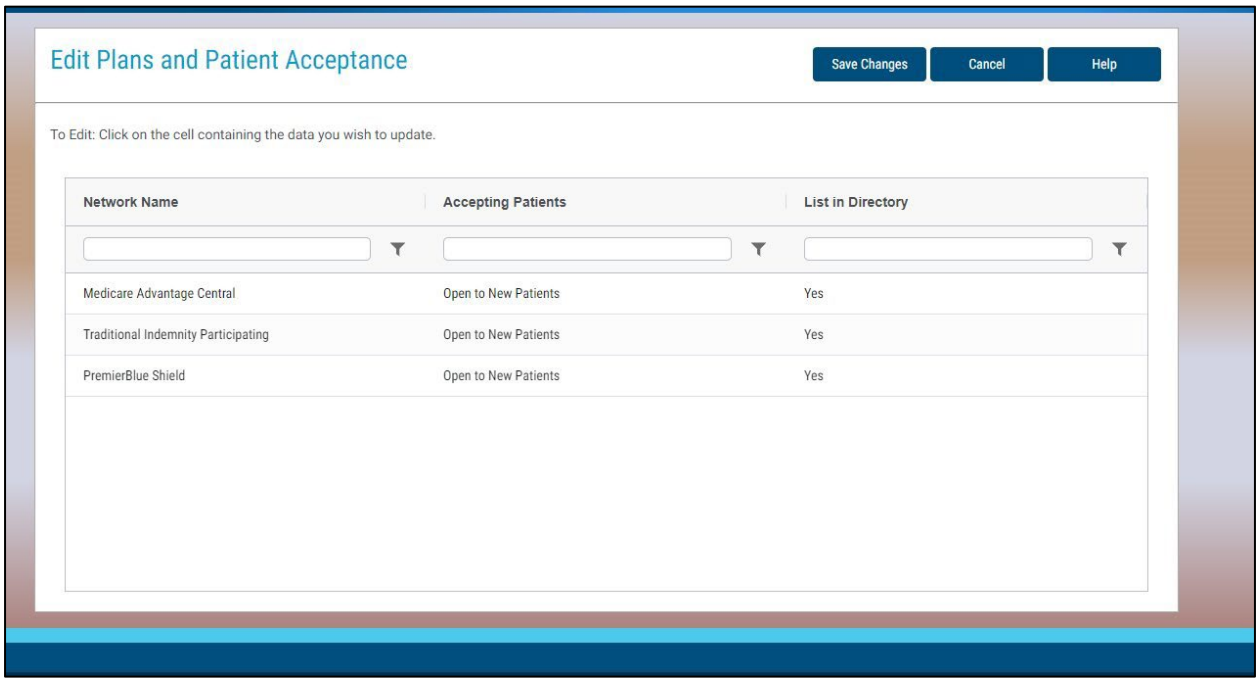
Network Name is a non-editable field.



To edit Accepting Patients or List in Directory, click on the field you want to change, and a dropdown arrow will appear on the right side of the box. Select the appropriate answer.

Click **"Save Changes."**

***NOTE**: Only list addresses to appear in the directory if the group is accepting appointments to see patients at the location.*

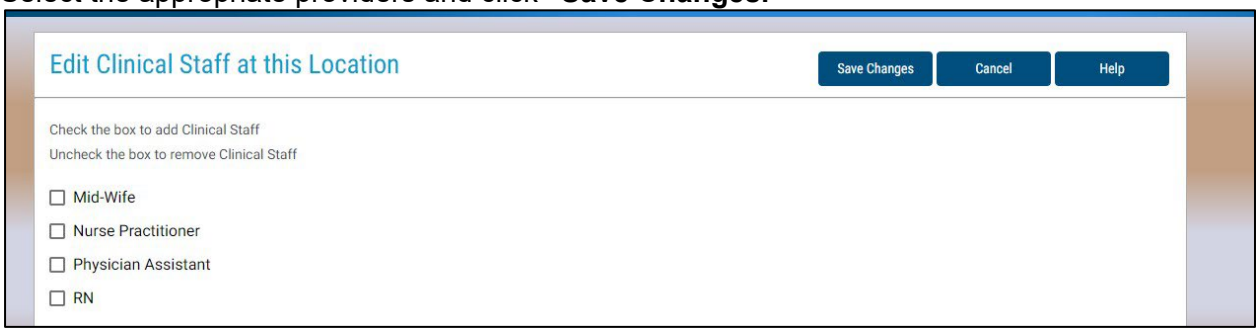


Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Other Clinical Staff at Location

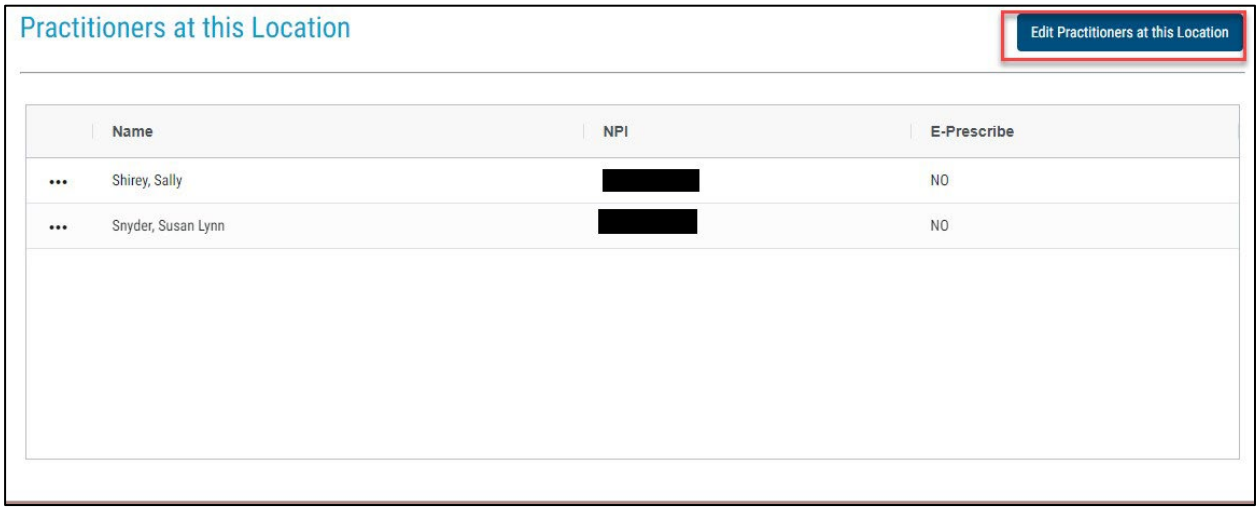
Click **"Edit Clinical Staff"** to update this section.

Select the appropriate providers and click **"Save Changes."**



Practitioners at Location

Click **"Edit Practitioners at this Location"** to edit E-Prescribe.



Practitioner name and NPI are not editable fields.

To change E-Prescribe, click on the field and a drop-down arrow will appear – allowing you to make a change.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Click **"Save Changes."**

Edit Practitioner at this Location

Save Changes | Cancel | Help

To Edit: Click on the cell containing the data you wish to update.

Name	NPI	E-Prescribe
Shirey, Sally	[redacted]	NO
Snyder, Susan Lynn	[redacted]	NO

Click **"Back"** to return to the main page.

Snyder Family Practice - 123 ABC Lane

MEDICAL PRACTICE

Back

Blue Shield #	NPI	Vendor Status	Group Effective Date	Group Term Date
005102126	[redacted]	Active	3/01/2023	

Messages

To ensure your patients have the most up to date information, that claims are paid timely and correctly, and that our Provider Directory remains accurate, Highmark requires that you confirm the accuracy of your group and practitioner information every 90 days. The last validation date for Snyder Family Practice was on 4/12/2023. The next validation is due on or before 7/11/2023.

General Group Address for - 123 ABC Lane

Edit General Group Address Information

Edit Group Information

Address Effective Date	Patient Age Range	Handicapped Accessible	Parking
3/01/2023	0 YEAR - 125 YEAR	NO	Free

Public Transportation	Electronic Medical Records	Accepts Walk-in Appointments
NO	NO	NO

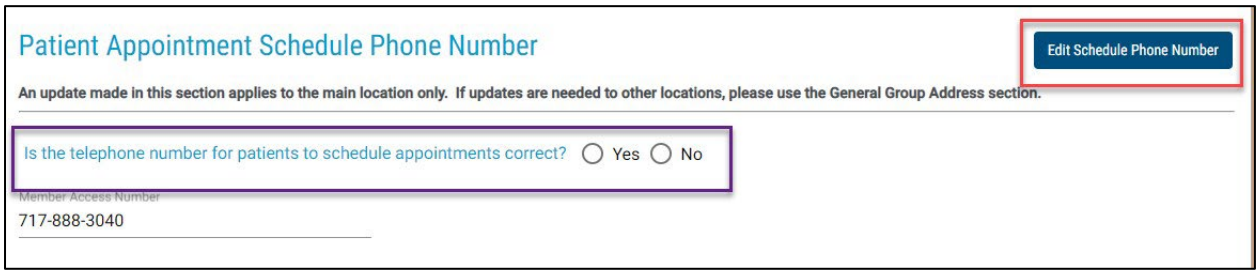
Patient Appointment Schedule Phone Number

To update the phone number for patients to call for appointments, click **"Edit Schedule Phone Number."**

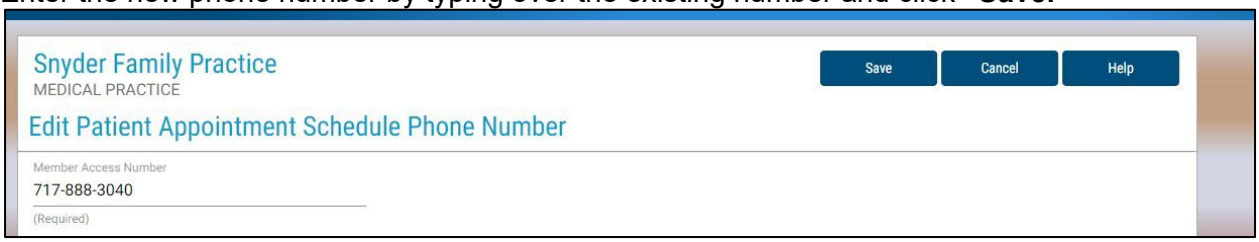
The question, "*Is the telephone number for patients to schedule appointments correct,*" needs to be answered Yes to validate the record.

When updating the member access number on the main page, only the main address will be updated. If phone numbers for other locations need to be updated, you will need to update the contacts section within those addresses.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.



Enter the new phone number by typing over the existing number and click **"Save."**

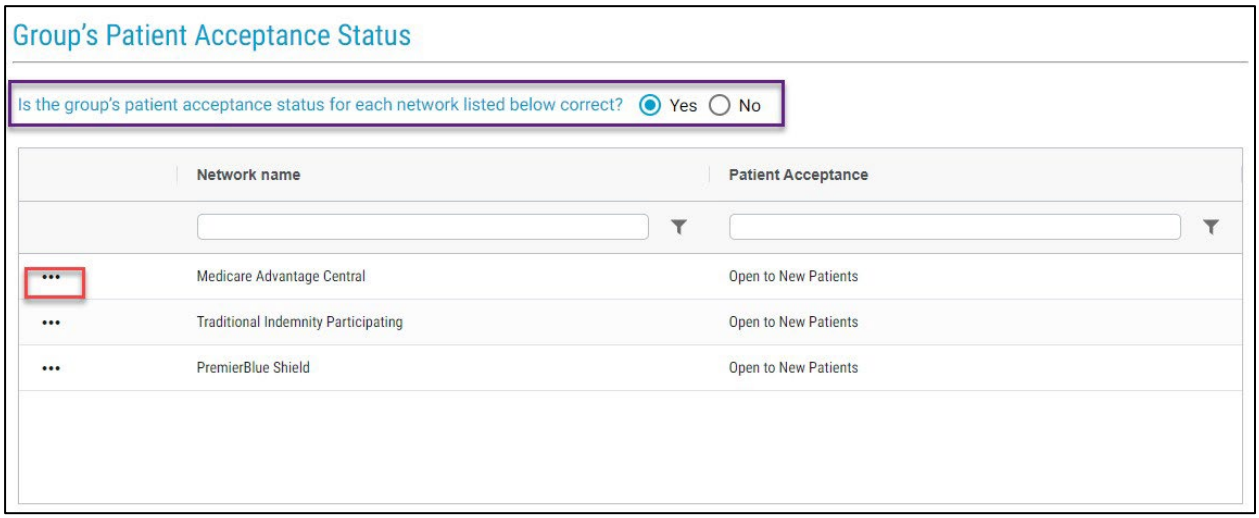


Groups Patient Acceptance Status

To view network details, click on the ellipsis to the left of the network.

If the practice patient acceptance status is not correct, edit it under the General Group Address section.

The question, "*Is the group's patient acceptance status for each network below correct*," needs to be answered Yes to validate the record.



Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

View Only – This information cannot be edited.

Snyder Family Practice

MEDICAL PRACTICE

Back

Blue Shield #	NPI	Vendor Status	Group Effective Date	Group Term Date
005102126	[redacted]	Active	3/01/2023	

Messages

To ensure your patients have the most up to date information, that claims are paid timely and correctly, and that our Provider Directory remains accurate, Highmark requires that you confirm the accuracy of your group and practitioner information every 90 days. The last validation date for Snyder Family Practice was on 3/06/2023. The next validation is due on or before 6/04/2023.

Network Details for - **Medicare Advantage Central**

Status	Specialty	Role	Taxonomy	List in Directory	Effective Date	Max Assign
A	Multi-Specialty Group	PCP , Specialist	Group - Multi-Specialty	Yes	3/01/2023	

Practitioners in this Network

Loaded 2/2

Status (PAR / Non-PAR)	Name	NPI	Practitioner Specialty	Role	List in Directory	Effective Date
	Shirey, Sally	[redacted]	Cardiology (Cardiova...	Specialist	Yes	3/01/2023
	Snyder, Susan Lynn	[redacted]	Family Practice	PCP	Yes	3/01/2023

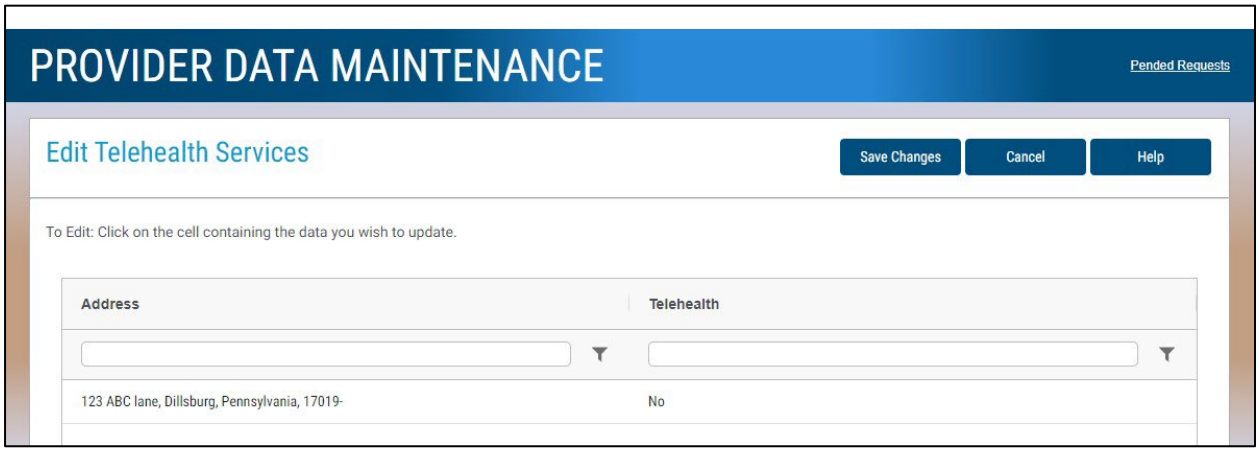
Telehealth Services

To edit Telehealth Services, click **"Edit Telehealth."**

The question, "*Is the group's telehealth information correct,*" needs to be answered Yes to validate the record.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

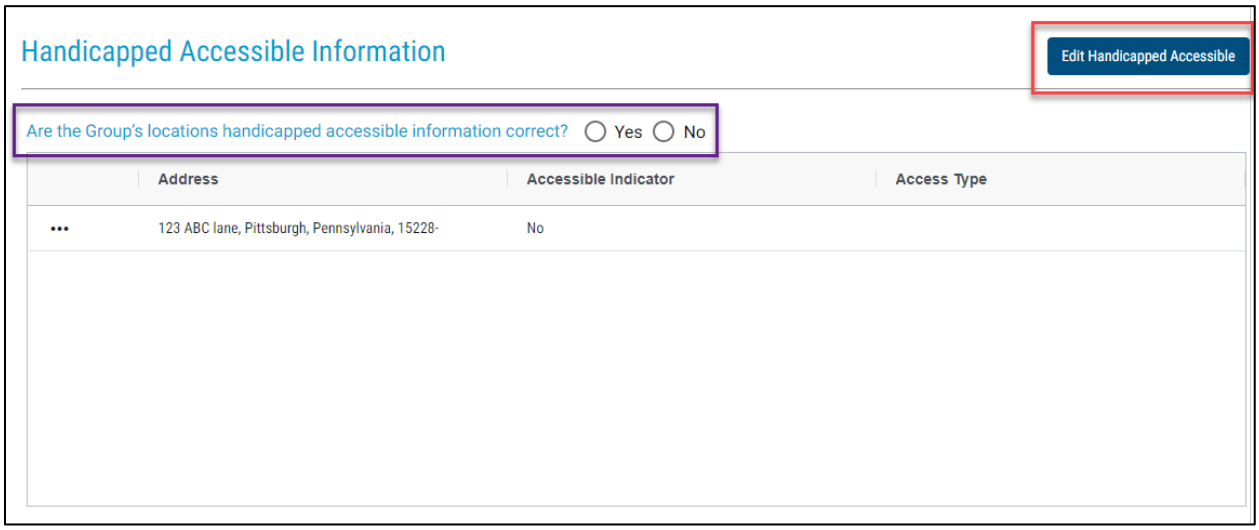
Click on the Telehealth field you want to edit, and a drop-down arrow will appear. Make the change and click **"Save Changes."**



Handicapped Accessible

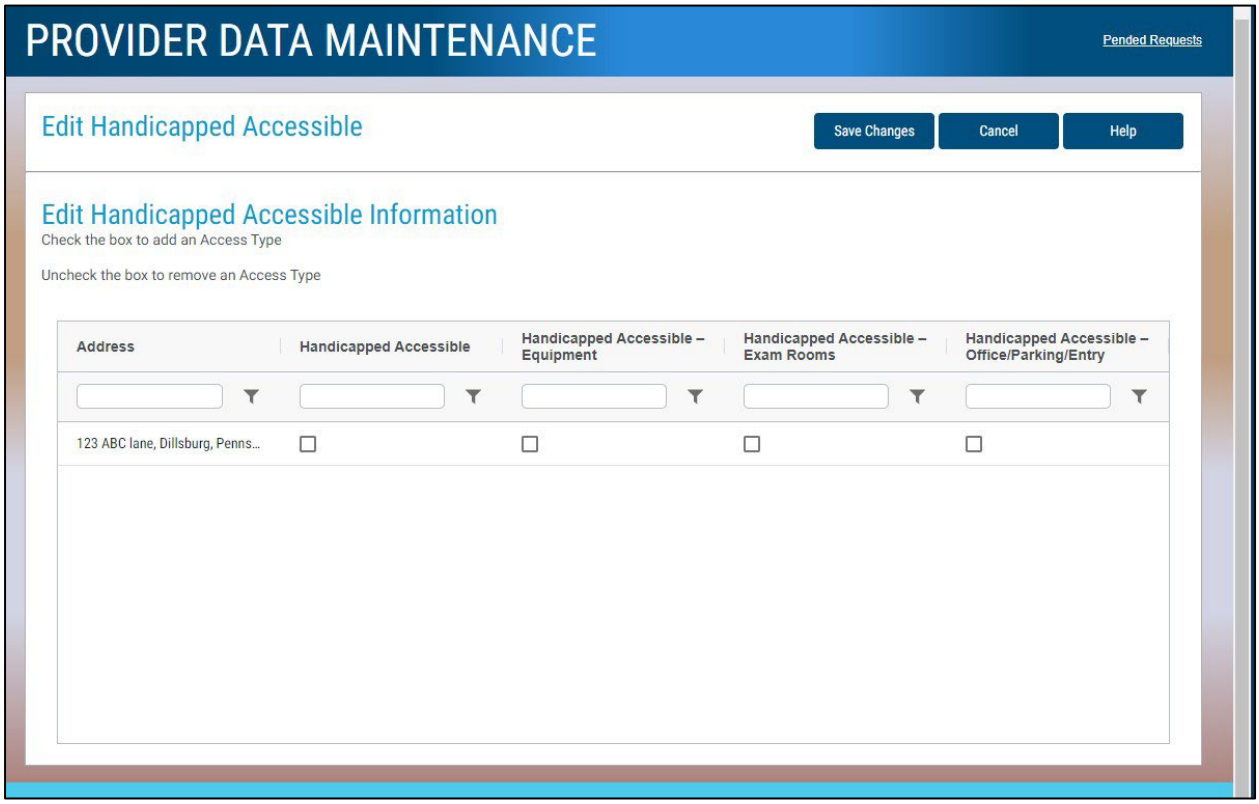
To edit Handicap Accessibility, click **"Edit Handicap Accessible."**

The question, "*Are the group's locations handicapped accessible information correct*," needs to be answered Yes to validate the record.



Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

To edit, check the boxes that apply to the location and click **"Save Changes."**



General Practitioner Information

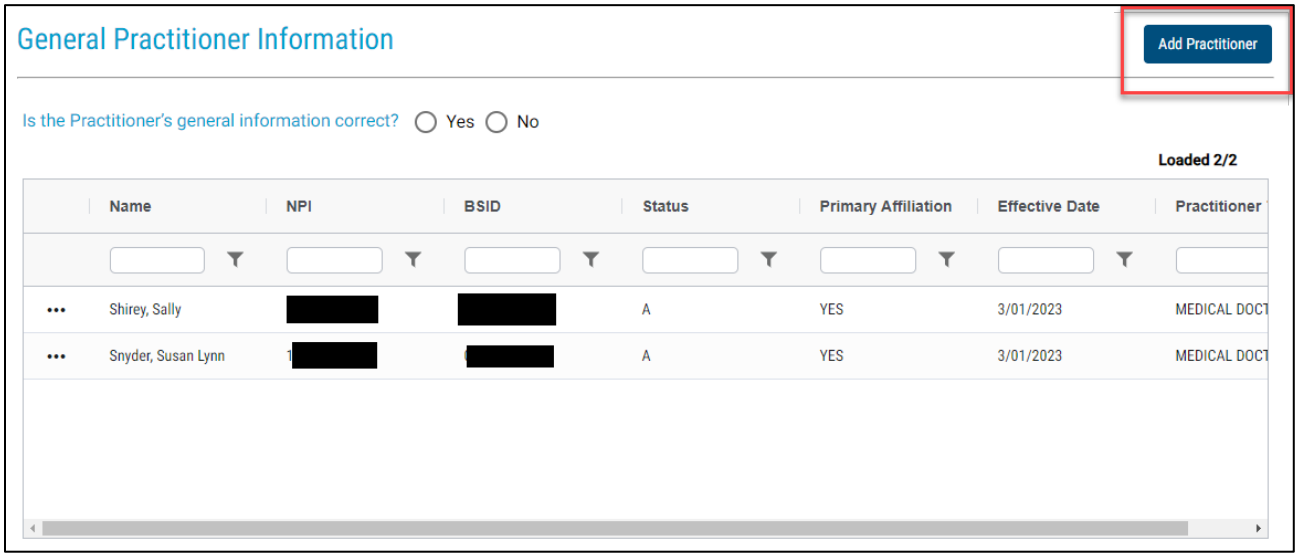
Add Practitioner (Not applicable for Highmark BCBSWNY and Highmark BSNENY.) NY Providers should use the addition form on the PRC to add practitioners to their groups.

To add a practitioner, click**" Add Practitioner."**

The question, "*Is the practitioner's general information correct*," needs to be answered Yes to validate the record.

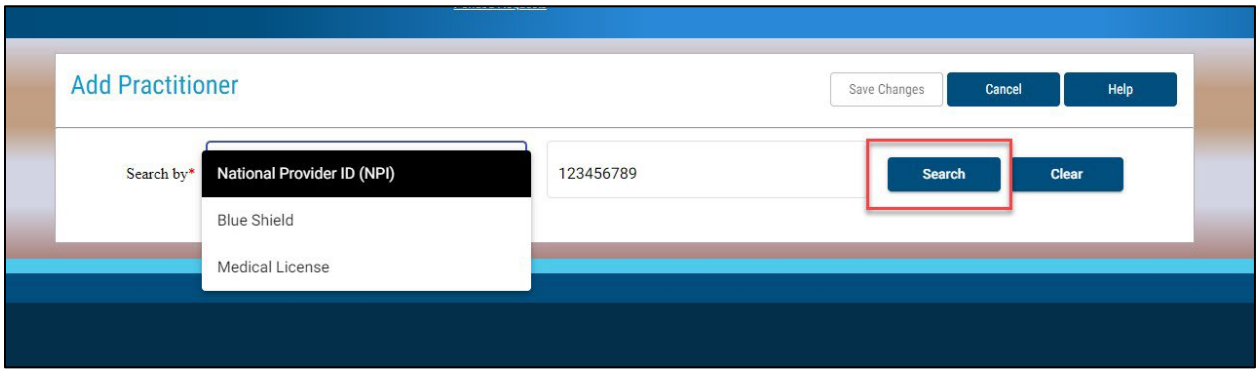
This section currently does not have a search by practitioner name function, but it is marked for a future enhancement. We will alert you when the new functionality is available. UPDATE: You can now search by name. To search by name, begin typing the practitioner's name in the cell below the name. Select the provider when the name is displayed.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.



After you click **"Add Practitioner,"** you can search for an existing Highmark practitioner by NPI or Blue Shield ID. Medical License will be released at a later date.

Click **"Search."**



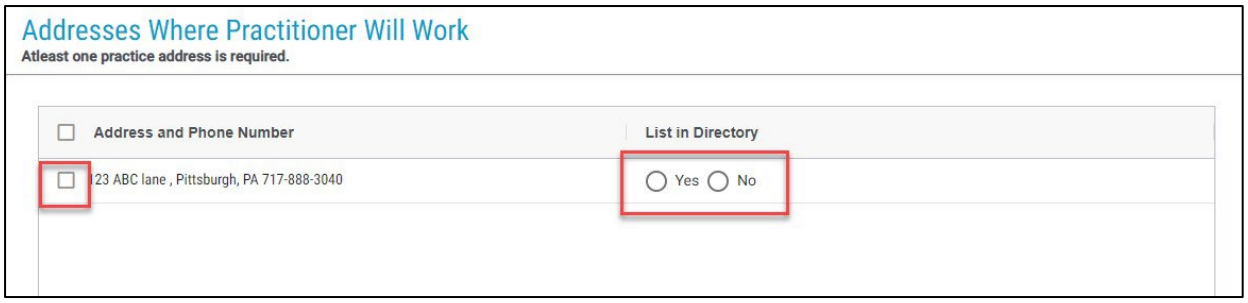
After your practitioner is displayed, click **"Add."**

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

The two screens below will display.

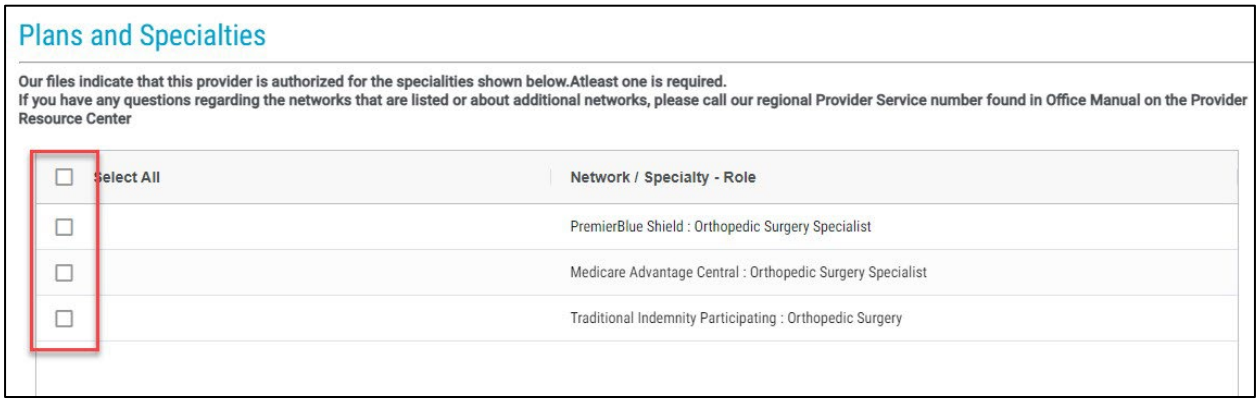
Select the location you want to affiliate the practitioner to and select the appropriate list in directory indicatory.

Note: For a practitioner to be listed in the directory, they should be accepting appointments to see patients at the location listed. If a practitioner does not directly schedule appointments with patients, the list in directory indicator should be **No**. Examples include covering practitioners, practitioners who read test results, practitioners who only see patients in nursing homes, practitioner who oversee residents, and hospitalists.



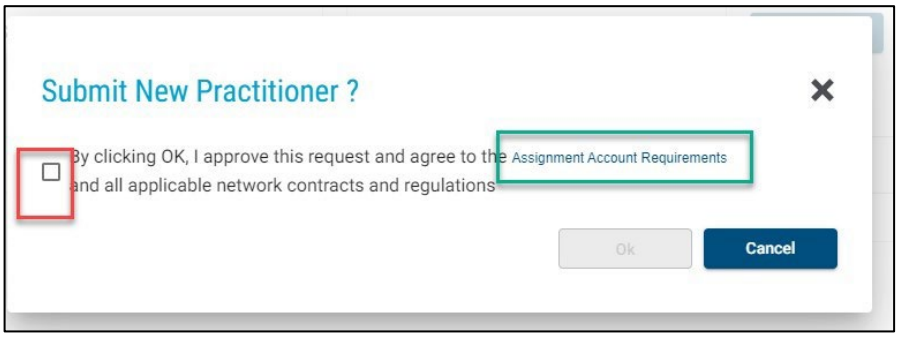
Check the appropriate box(es) to affiliate the practitioner to the networks they accept.

Click **"Save Changes."**



After clicking **Save**, this box will appear. By clicking the box, you are agreeing to the assignment account requirements. To review the requirements, click on the link called **"Assignment Account Requirements."**

Click **"OK"** after checking the box.

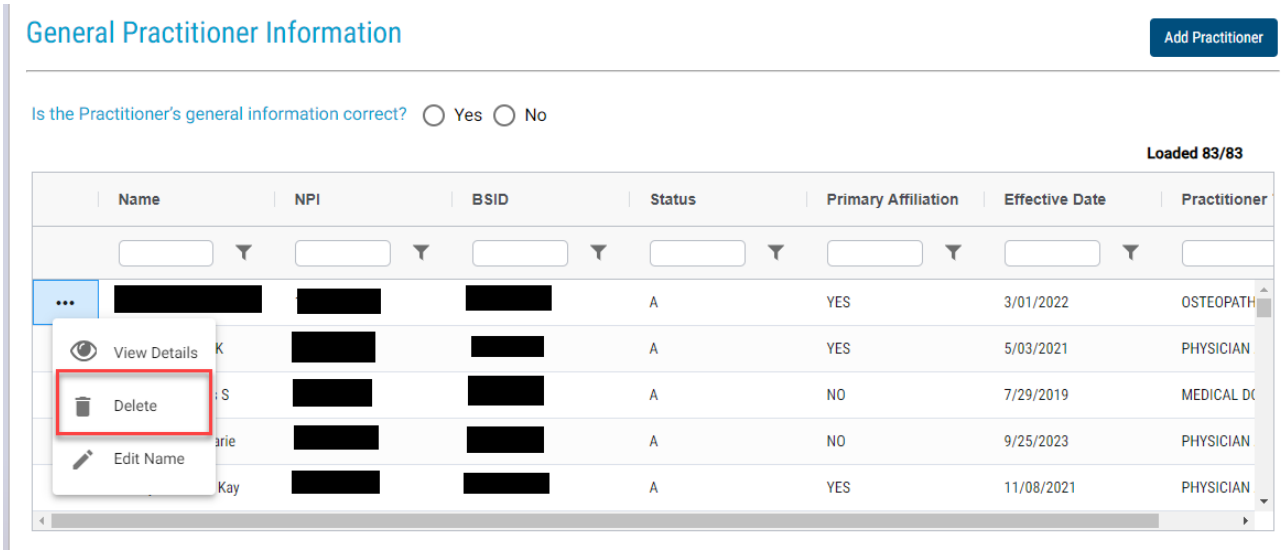


Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

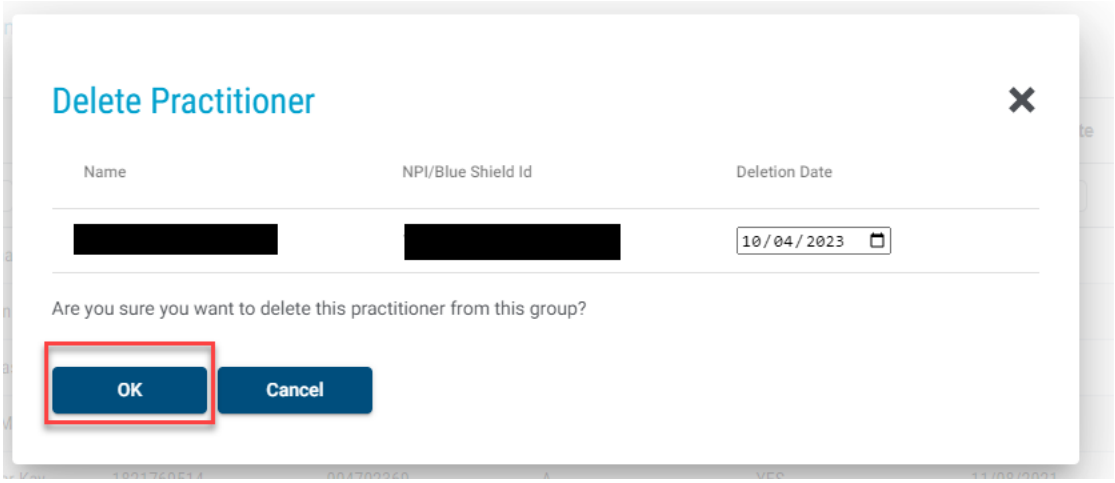
Delete Practitioner

To delete a practitioner from your group, click on the ellipsis to the left of the practitioner's name that you want to delete. Click **"Delete."**

IMPORTANT: If you decide to resign from the Highmark network(s), the resignation will trigger automatic letters to Highmark members, who are your patients, via U.S. Mail, notifying them you have terminated and are no longer in network. Please take this into an account before completing this action.



Click **"OK"** to proceed with the deletion.



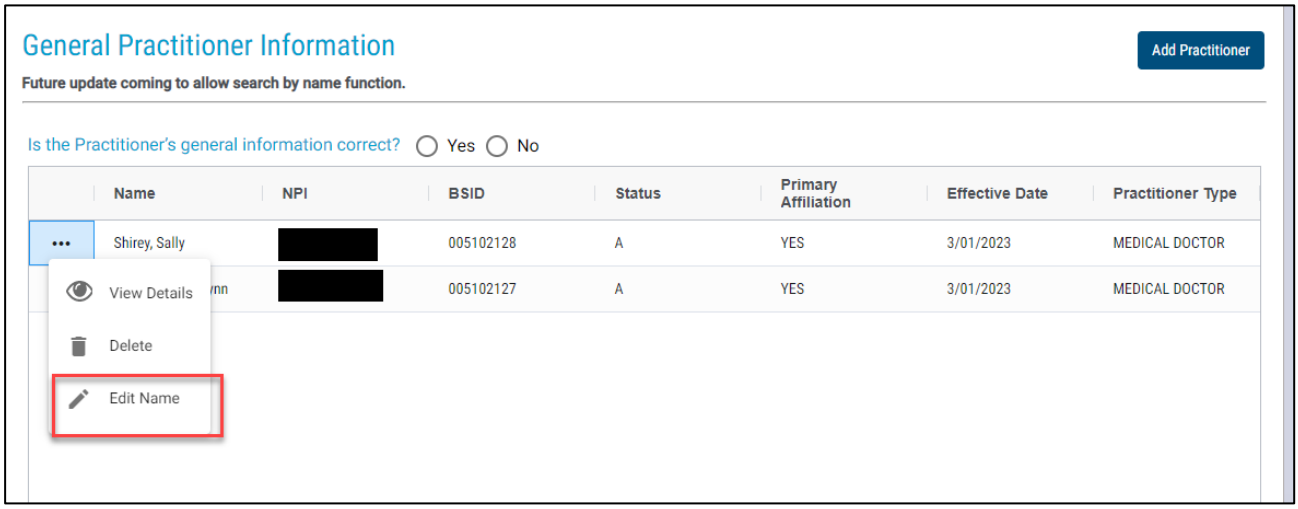
After clicking **"OK,"** you will receive a confirmation message stating that the practitioner has been removed from your group.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

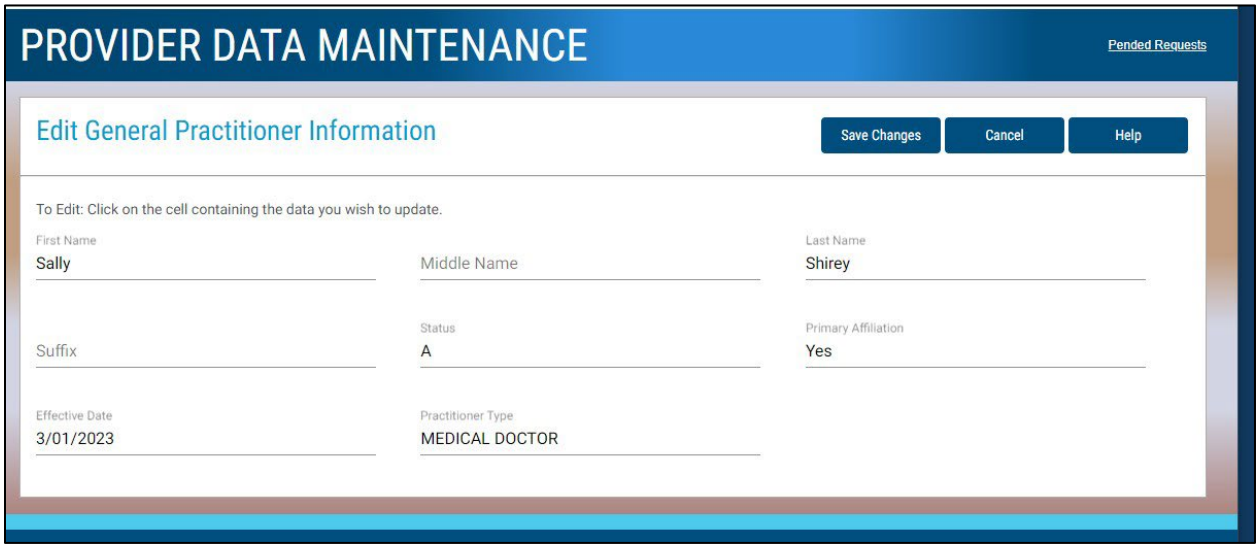
Edit General Practitioner Information

The fields that you are able to edit in this section are Name, Education, Hospital Affiliations, Locations Where the Practitioner Works, and Languages Spoken by the Practitioner.

To edit Practitioner Name, please click on the ellipsis to the left of the name, then select **Edit Name.**



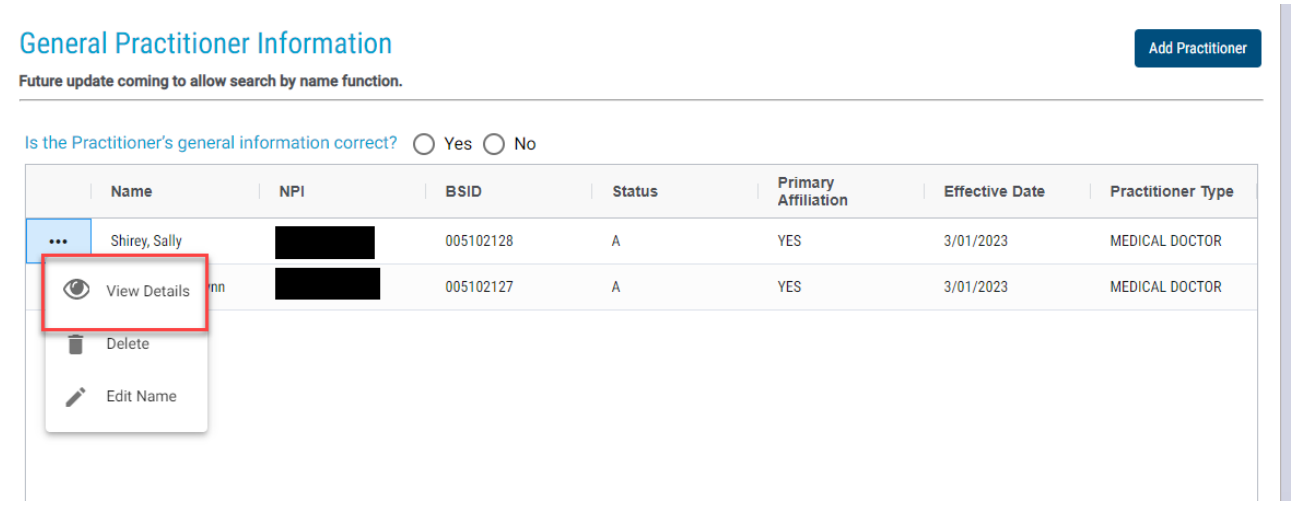
To edit the data, click on the cell you wish to change and type over the existing data. Name changes will pend for Highmark review.



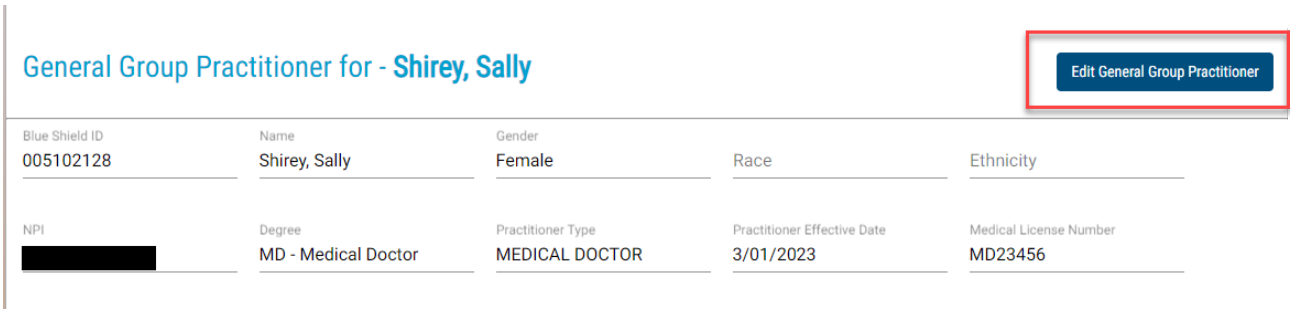
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

View Details General Practitioner Information

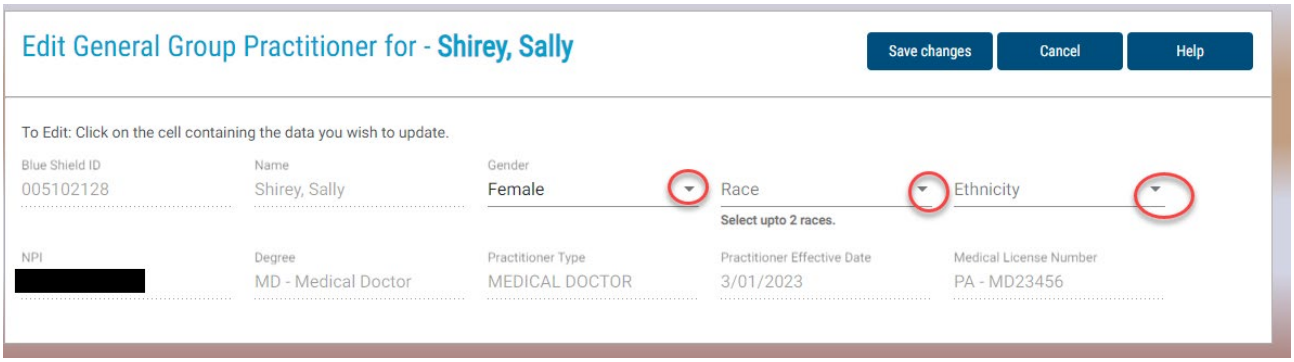
To view general practitioner information, click on the ellipsis to the left of the practitioner, then select **View Details.**



To edit Gender, Race and Ethnicity, click **"Edit General Group Practitione**r."



Click on the drop-down arrows to edit. Click **"Save Changes"** when completed. The other data elements on this screen are not editable.



Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Snyder Family Practice - **Shirey, Sally**

MEDICAL PRACTICE

Back

Blue Shield #	NPI	Vendor Status	Group Effective Date	Group Term Date
005102126	[redacted]	Active	3/01/2023	

Messages

To ensure your patients have the most up to date information, that claims are paid timely and correctly, and that our Provider Directory remains accurate, Highmark requires that you confirm the accuracy of your group and practitioner information every 90 days. The last validation date for Snyder Family Practice was on 3/06/2023. The next validation is due on or before 6/04/2023.

General Group Practitioner for - **Shirey, Sally**

Blue Shield ID	Name	Gender	Race	Ethnicity
005102128	Shirey, Sally	Female		

NPI	Degree	Practitioner Type	Practitioner Effective Date	Medical License Number
[redacted]	MD - Medical Doctor	MEDICAL DOCTOR	3/01/2023	MD23456

Tiered benefit levels will be displayed at a later date.

Tiered Benefit Level

Network Name	Effective Date

No Records are found.

The Network, Specialty, Role, and Effective Date in the Network are **view only.**

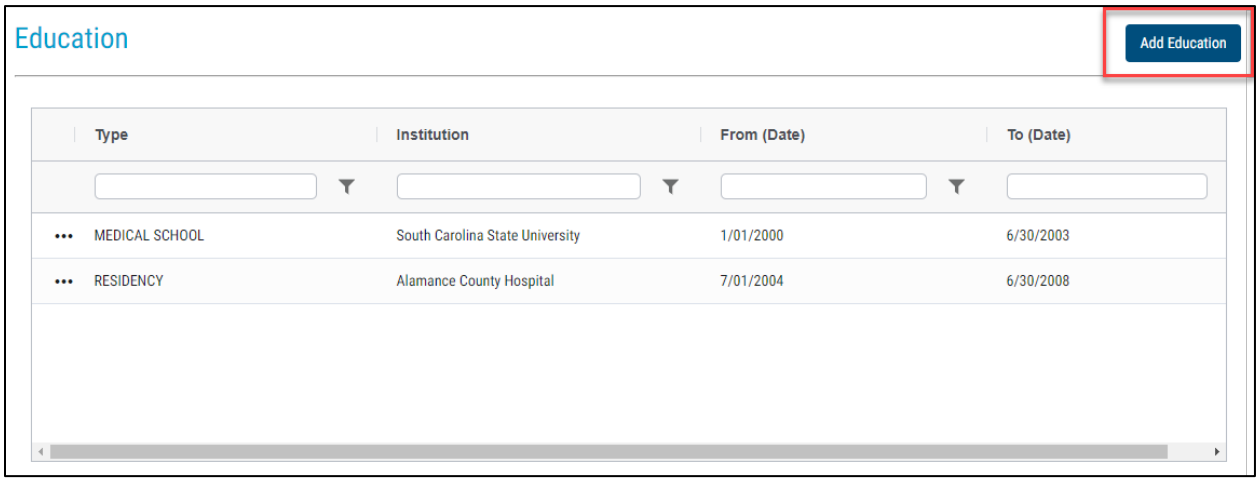
Network, Specialties and Roles

Network Name	Specialty	Role	Effective Date in Network
Medicare Advantage Central	Cardiology (Cardiovascular ...	Specialist	3/01/2023
Traditional Indemnity Participating	Cardiology (Cardiovascular ...		3/01/2023
PremierBlue Shield	Cardiology (Cardiovascular ...	Specialist	3/01/2023

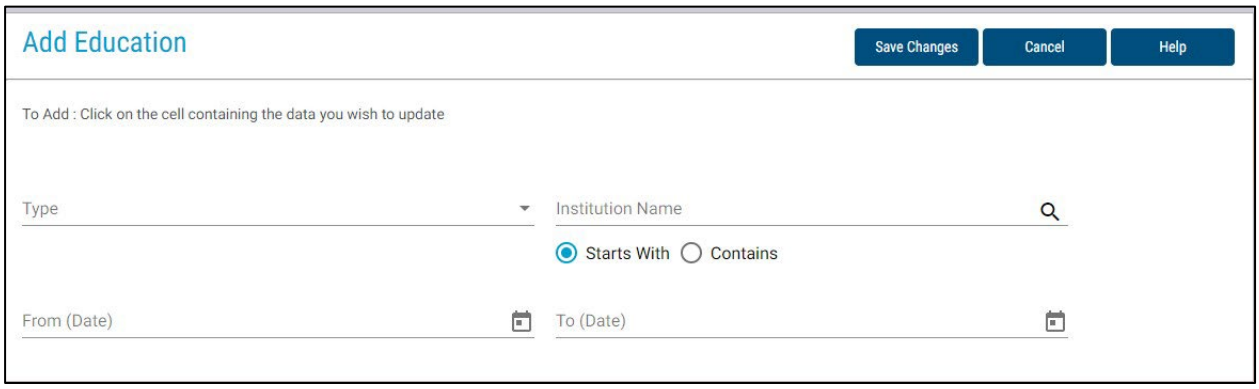
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Education

To add practitioner education, click **"Add Education."**

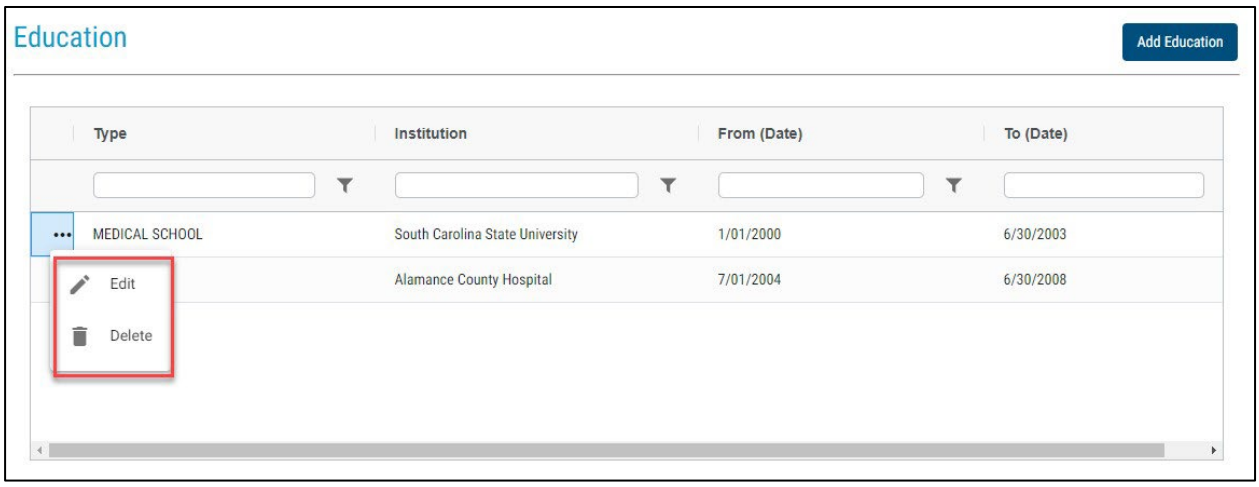


Enter the type of education by clicking on the down arrow and selecting the appropriate training. Enter the institution name by adding the name and clicking on the search button. This will bring up a list of institutions to choose from. Once you have selected an institution, enter the From and To dates of the program, and click **"Save Changes."**

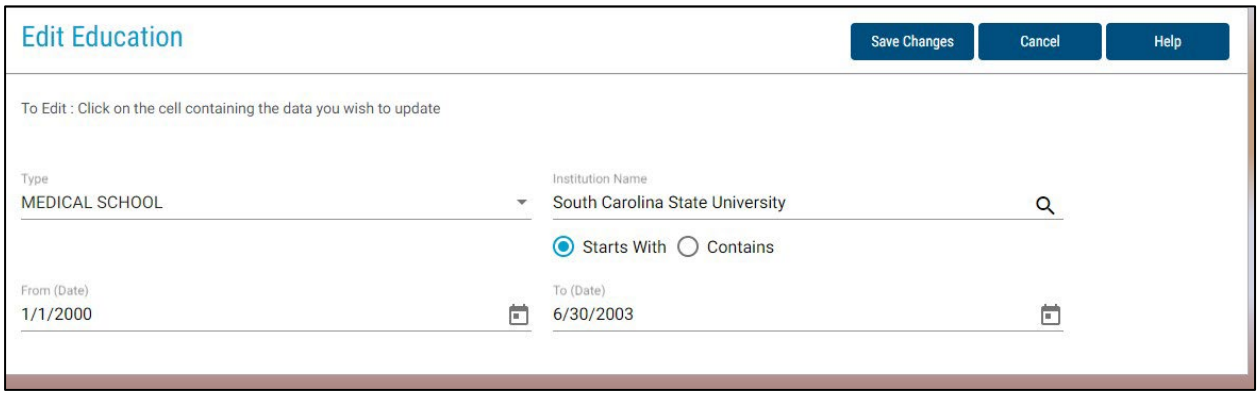


To edit or delete education, click on the ellipsis to the left of the training you wish to edit and select either **Edit** or **Delete**.

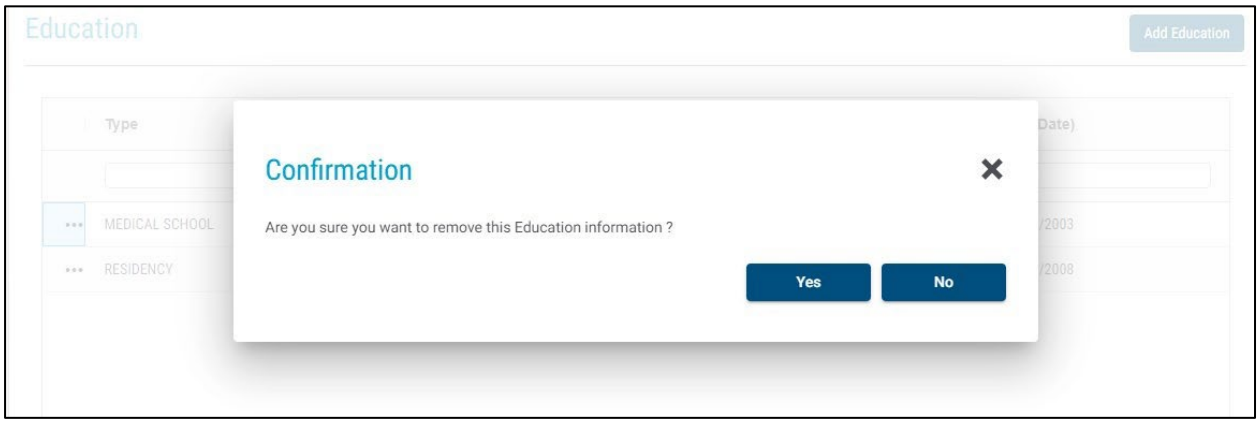
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.



To edit, change the fields that need to be updated and click **"Save Changes."**



To delete education, click on the ellipsis to the left of the training and click **"Delete."** You will need to confirm the deletion.

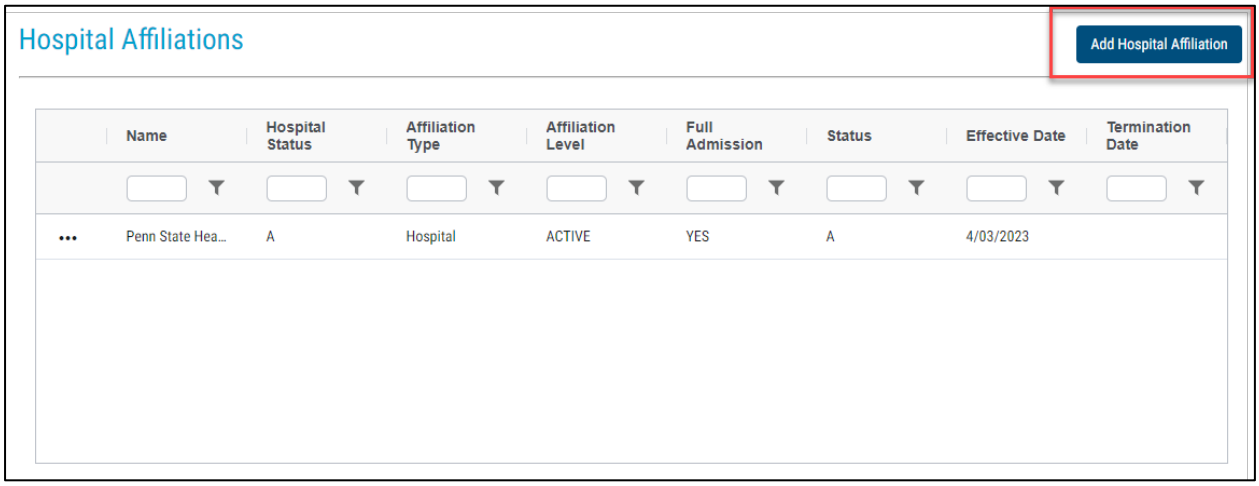


Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Hospital Affiliations

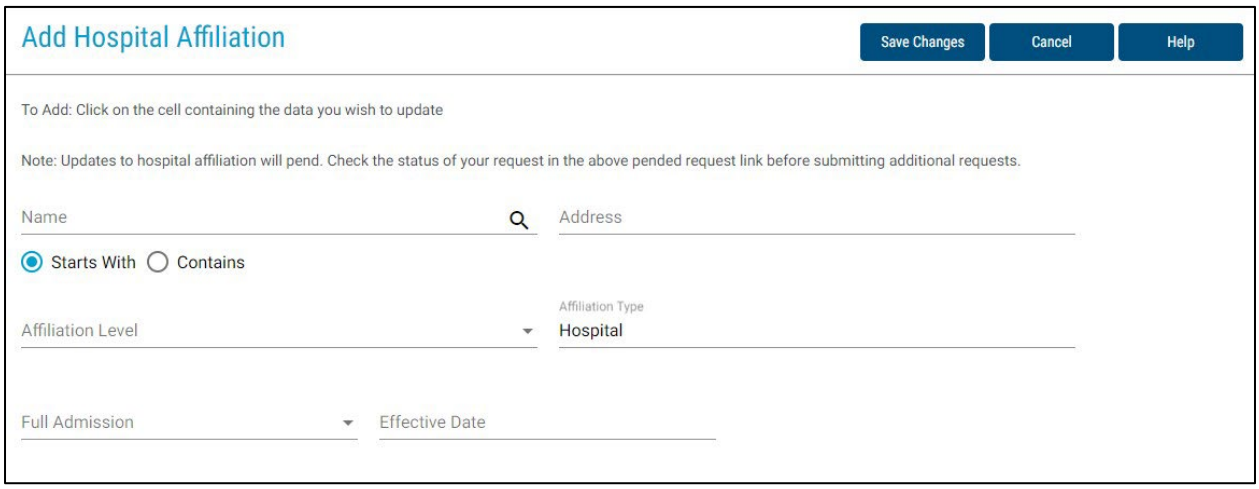
Any changes to hospital affiliations will pend for Highmark review.

Click **"Add Hospital Affiliation"** to add a hospital to a practitioner.



Enter the hospital information by adding the name and clicking on the search button (eyeglass icon). This will bring up a list of hospitals to choose from. Use the down arrows to choose the affiliation level and admission type.

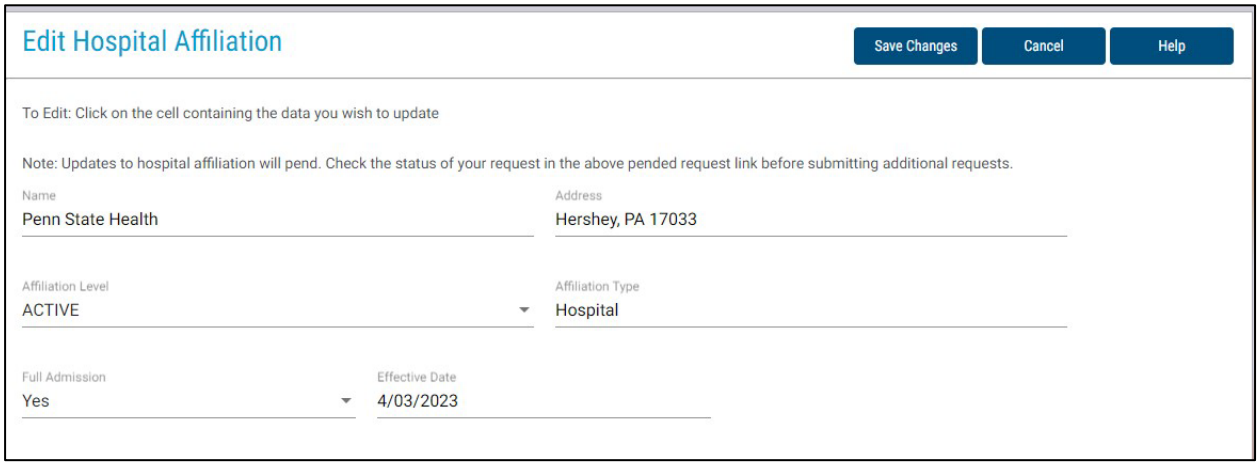
Click **"Save Changes."**



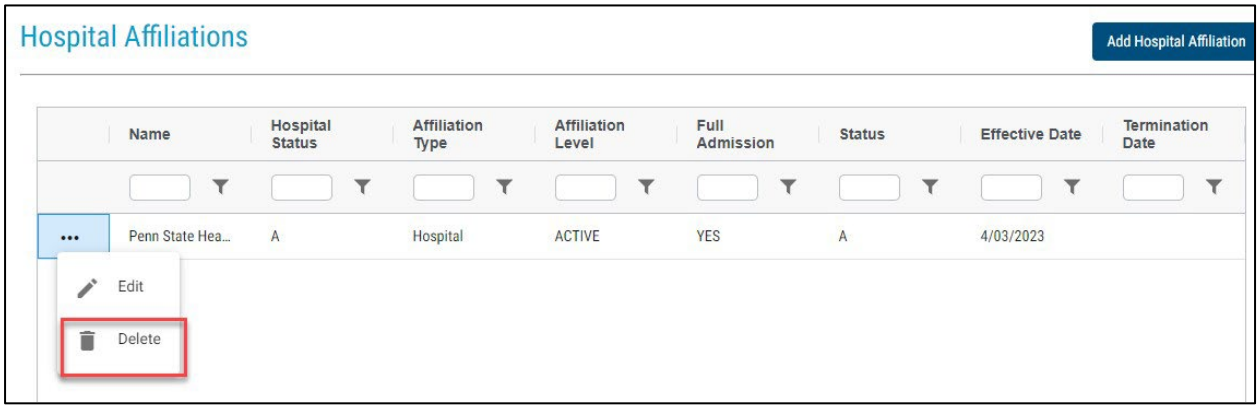
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

To edit an existing affiliation, click on the ellipsis to the left of the hospital that needs to be updated.

Update the fields that need to be changed and click **"Save Changes."**

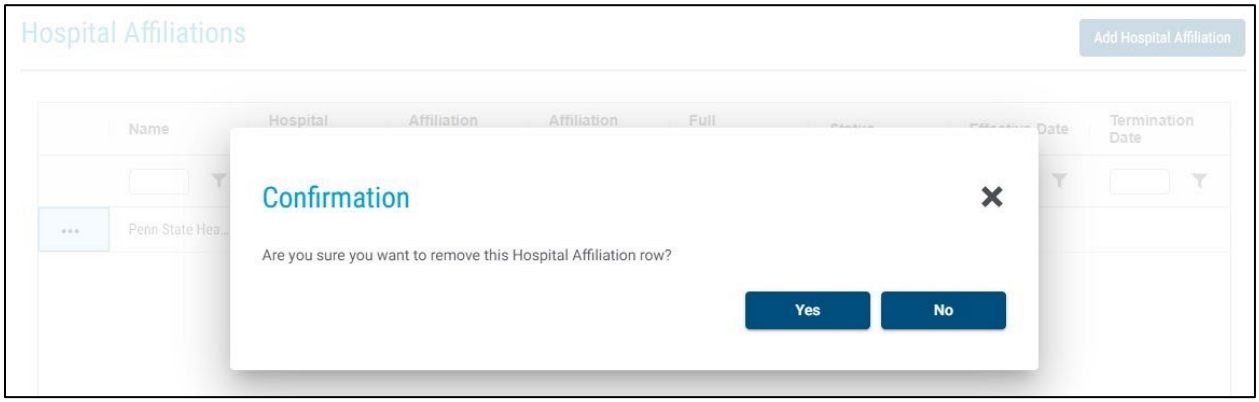


To delete a hospital affiliation, click on the ellipsis to the left of the hospital and select **"Delete."**



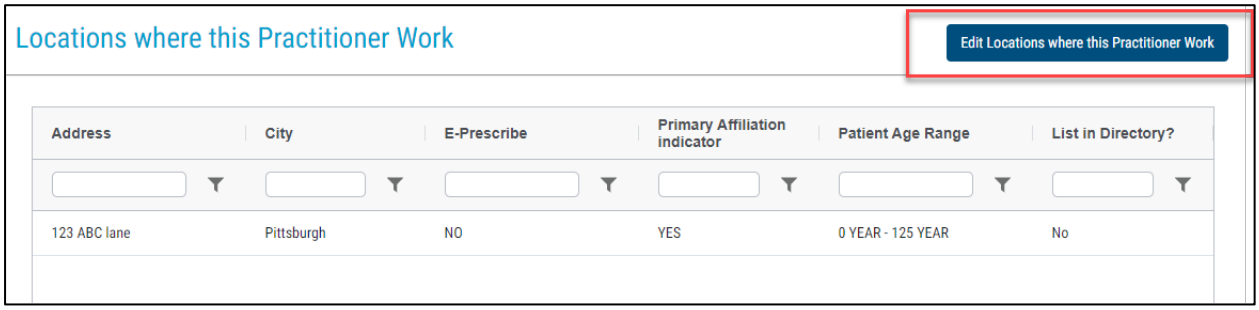
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

You will need to confirm the deletion.



Locations Where this Practitioner Works

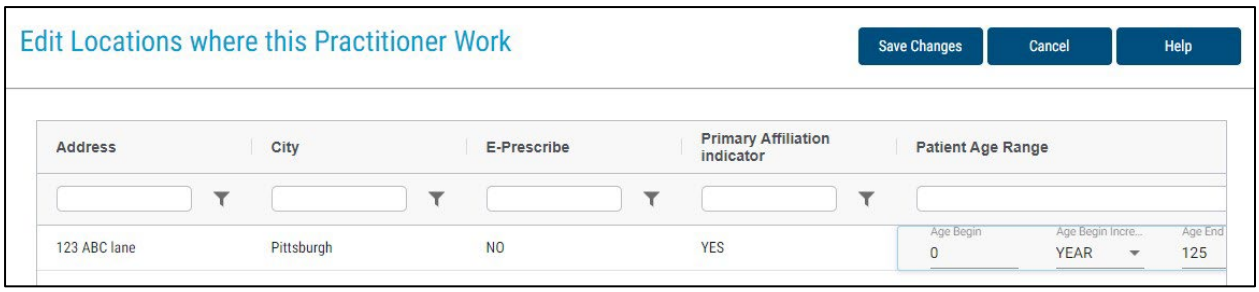
To edit a practitioner's E-Prescribe, patient age ranges, or list in directory indicator for a specific location, click **"Edit Locations Where This Practitioner Works."**



Click on the fields you want to edit and click **"Save Changes"** when you are finished updating.

Primary Affiliation is not an editable field. You will need to scroll to the right of the edit the list in directory indicator.

Note: For a practitioner to be listed in the directory, they should be accepting appointments to see patients at the location listed. If a practitioner does not directly schedule appointments with patients, the list in directory indicator should be **No**. Examples include covering practitioners, practitioners who read test results, practitioners who only see patients in nursing homes, practitioner who oversee residents, and hospitalists.



Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Languages Spoken

Click **"Edit Language"** to add or delete languages spoken by the practitioner.

To add a new language, click **"Add New Language."** Begin typing the language in the cell below the filter and select the language when it appears. If you want to delete a language, click on the trash can to the left of the language.

Click **"Save Changes"** when you are finished updating the languages.

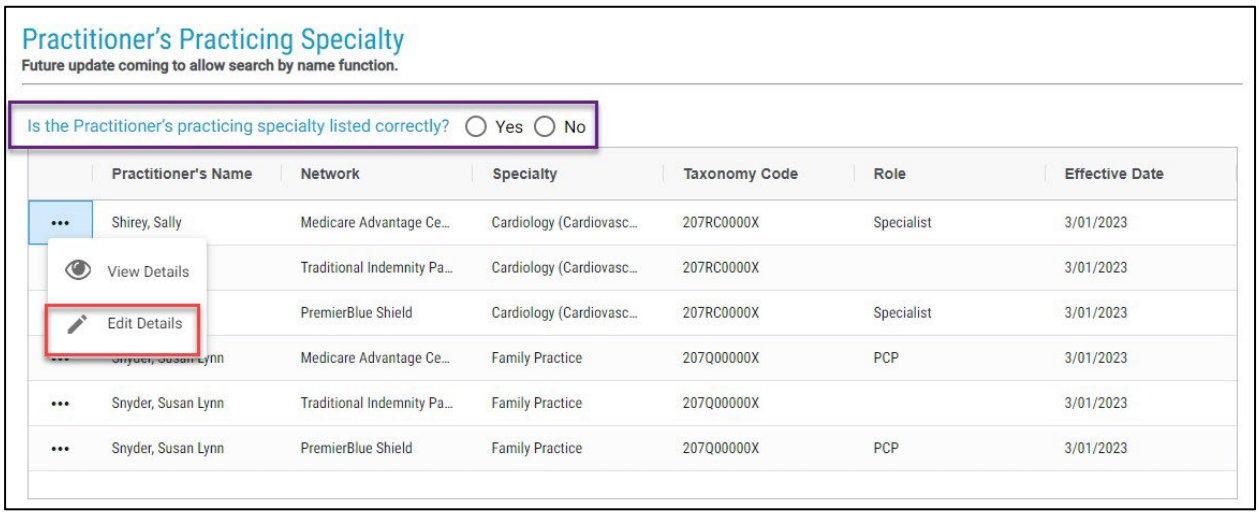
Practitioner's Practicing Specialty

To edit a practitioner's specialty information, click on the ellipsis to the left of the practitioner's name and network.

The question "*Is the Practitioner's practicing specialty listed correctly*," needs to be answered Yes to validate the record.

All specialty and role changes will pend for Highmark review.

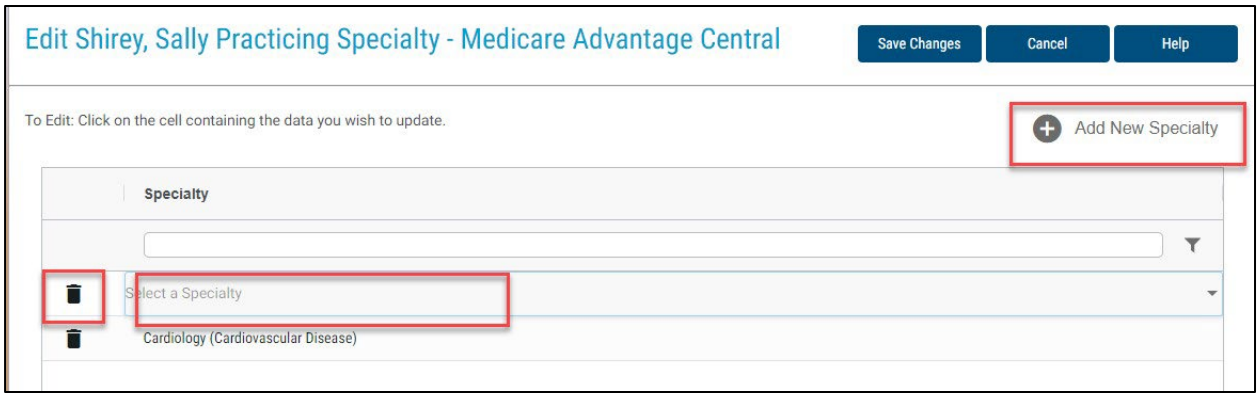
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.



To add a new specialty, click **"Add New Specialty."** Type in the first letter of the specialty you want to add, scroll down to find the correct specialty, and click **"Save Changes."**

To delete a specialty, click on the trash can to the left of the specialty you want to remove and click **"Save Changes."**

There must always be at least one specialty attached to a network.



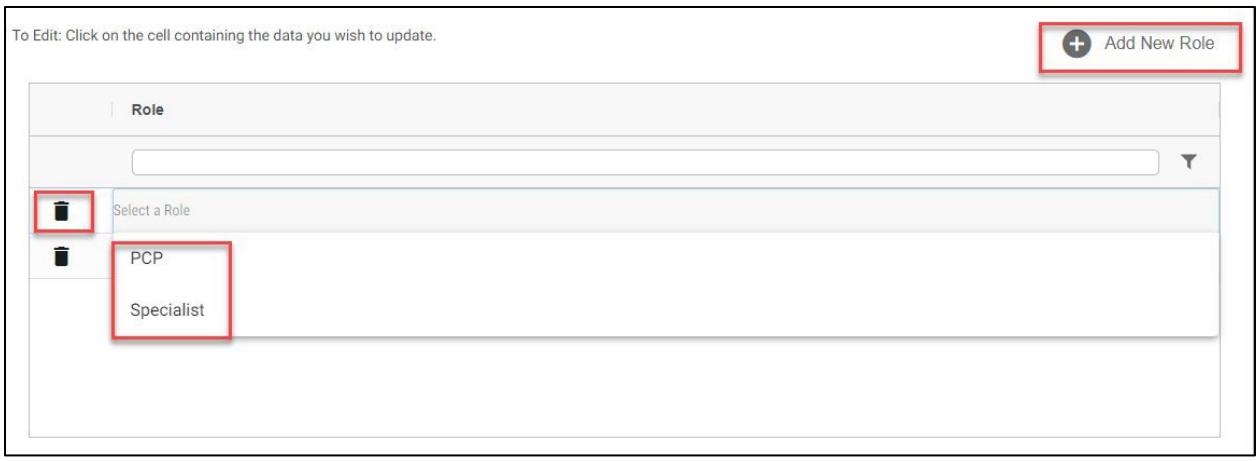
To add a new role, click **"Add New Role."** Click on the cell you want to edit and select Primary Care Physician (PCP) or specialist.

Click **"Save Changes."**

To delete a role, click on the trash can to the left of the role you want to delete and click **"Save Changes."**

There must always be at least one role attached to a network with the exception of the Indemnity Network.

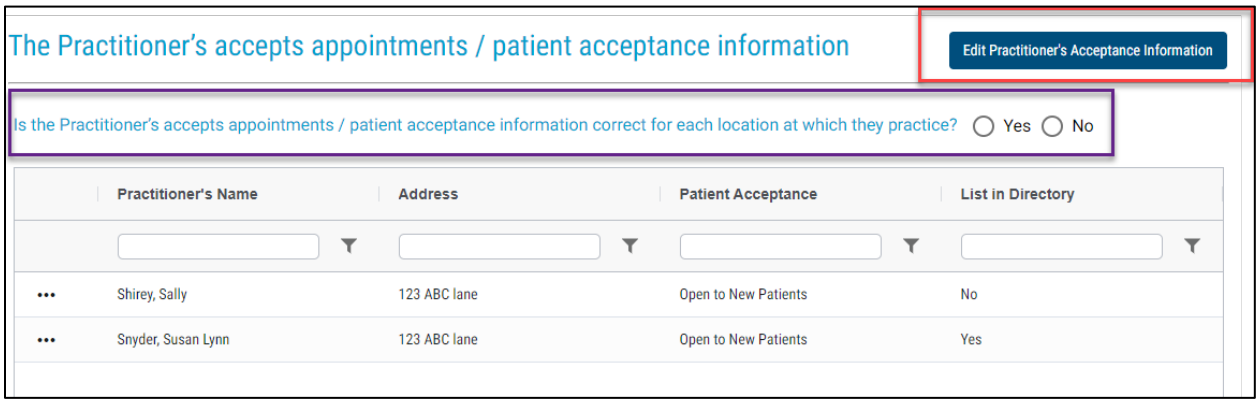
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.



Practitioner Accepts Appointments / Patient Acceptance Information

Click **"Edit Practitioner's Acceptance Information**" to edit patient acceptance and the list in directory indicator for a practitioner's location.

The question *"Is the practitioner's accepts appointments/patient acceptance information correct for each location in which they practice*," needs to be answered Yes to validate the record.



On this screen, you can edit the patient acceptance and list in directory. Click on the cell you want to update, make the change, and click **"Save Changes."**

NOTE: For a practitioner to be listed in the directory, they should be accepting appointments to see patients at the location listed. If a practitioner does not directly schedule appointments with patients, the list in directory indicator should be **No**. Examples include covering practitioners, practitioners who read test results, practitioners who only see patients in nursing homes, practitioner who oversee residents, and hospitalists.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

Snyder Family Practice
MEDICAL PRACTICE

Save Changes | Cancel | Help

Edit Practitioner's Accepts Appointments/Patient Acceptance Information

To Edit: Click on the cell containing the data you wish to update.

Practitioner's Name	Address	Patient Acceptance	List in Directory
Shirey, Sally	123 ABC lane	Open to New Patients	No
Snyder, Susan Lynn	123 ABC lane	Open to New Patients	Yes

Validation Process

After you have answered all nine required questions as Yes, the validation button at the top of the main page will be highlighted.

Click on the **"Validate"** button when you are ready to attest to your data.

Snyder Family Practice
MEDICAL PRACTICE

Validate | Select Provider | Help

Blue Shield #: 005102126

NPI: [redacted]

Vendor Status: Active

Group Effective Date: 3/01/2023

Group Term Date:

Messages

To ensure your patients have the most up to date information, that claims are paid timely and correctly, and that our Provider Directory remains accurate, Highmark requires that you confirm the accuracy of your group and practitioner information every 90 days. The last validation date for Snyder Family Practice was on 4/12/2023. The next validation is due on or before 7/11/2023.

The below screen will pop up after you click Validate asking you to attest to your information.

Click **"Attest"** to submit your attestation.

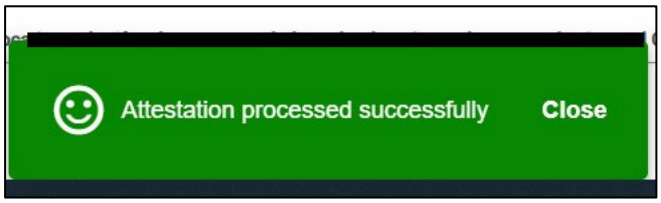
Attestation

I attest that all the information is correct as of 04/12/2023 2:15 PM

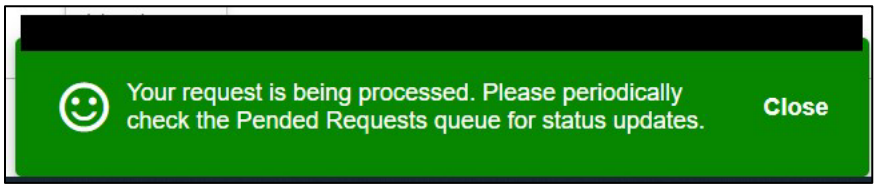
Attest | Cancel

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

You will receive this message after the attestation processes.

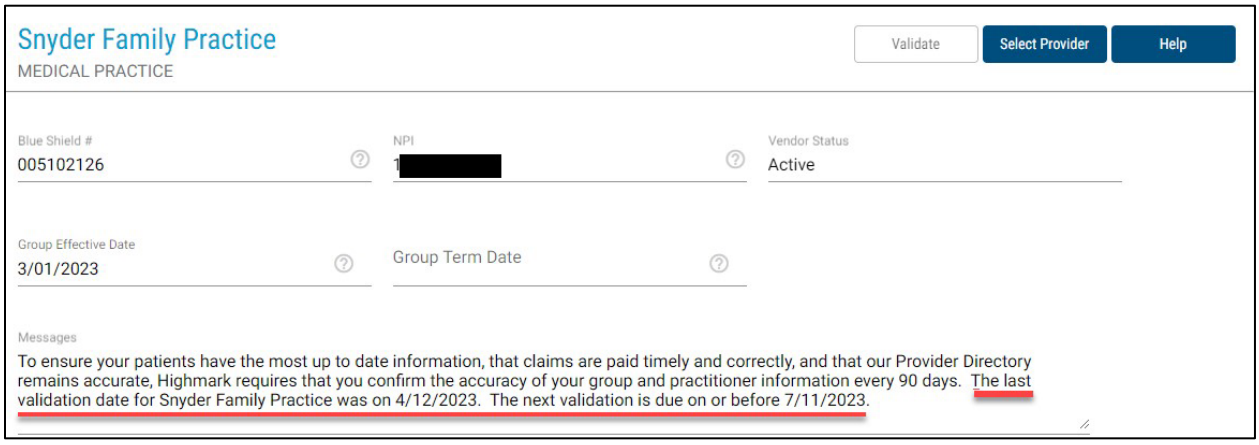


For large practices you may not get the above message right away. You may receive the below message.



If you receive the above message, monitor your pended requests queue. Once the attestation processes, it will show in this queue.

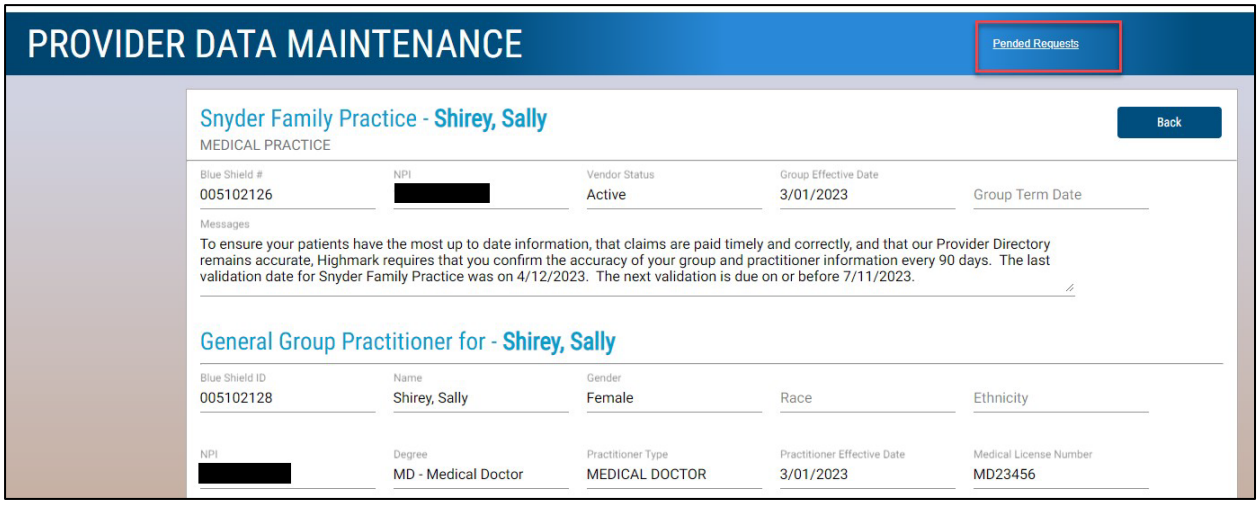
After you validate the record, you will see that the message below is updated to reflect when the next validation is due.



Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

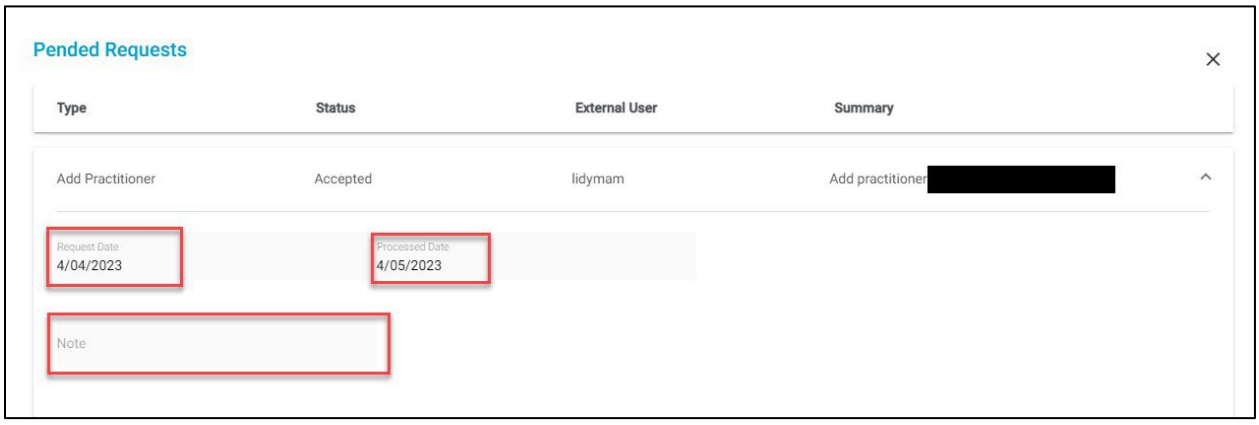
Pended Requests

To view the status of the updates that required Highmark review, click the **"Pended Requests"** link at the top of the page.



Below is an example of a pended request. You will see type of request, status, and summary.

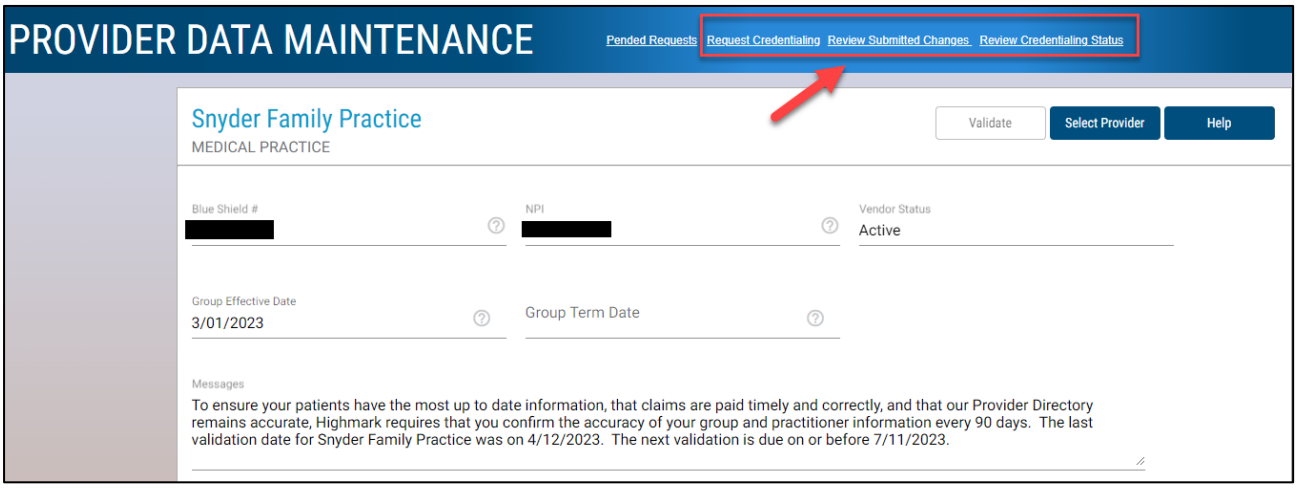
If you click on the down arrow in the summary, you will see the request date, the date processed, and any notes sent by Highmark.



Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

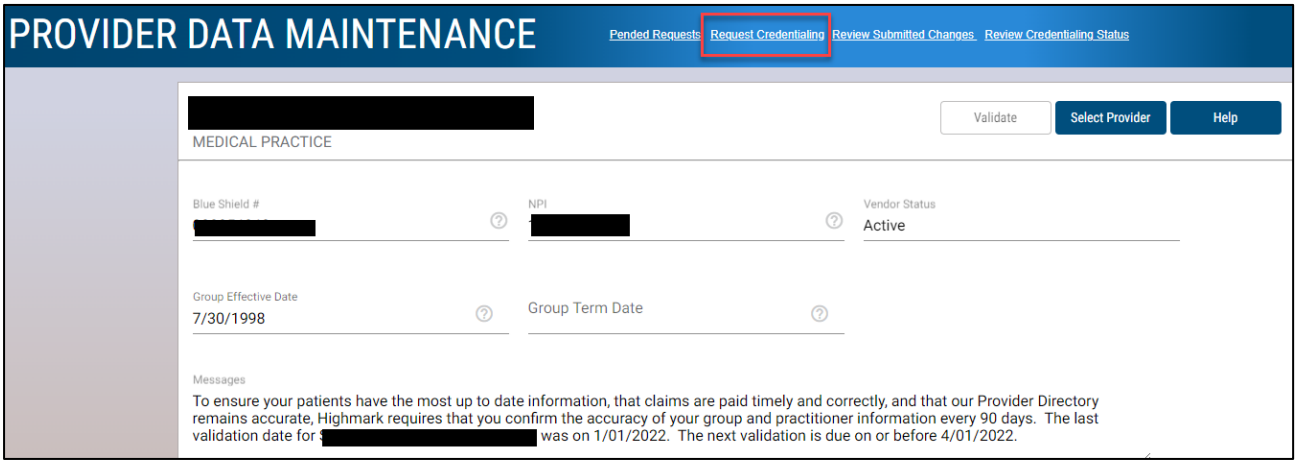
Credentialing Functions

At the top of the main page, three links have been added beside the Pended Requests: **"Request Credentialing," "Review Submitted Change," and "Review Credentialing Status."**



Request Credentialing

To request initial credentialing for a practitioner, Click on the **"Request Credentialing Link."**



On this page, all required fields need to be answered before you can submit the form.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

PROVIDER DATA MAINTENANCE

Pended Requests | Request Credentialing | Review Submitted Changes | Review Credentialing Status

Request Credentialing

Submit | Cancel

Plan to complete and submit any updates and new provider, address, and credentialing requests you start during the same session. You will not be able to save updates or requests and submit them at a later session.

Provider Demographic

First Name
Required

Middle Name

Last Name
Required

Suffix

Birth Date
Required

ID Numbers

Highmark ID
(Individual, not Group)

National Provider ID
(Individual, not Group) - Required

CAQH ID
Required

Type of Doctor and Degree

Practitioner Type
Required

Degree
Required

Specialties and Roles

Primary Specialty
Required

Primary Role
Required

Secondary Specialty

Secondary Role

Credentialing Contact

Contact name
Required

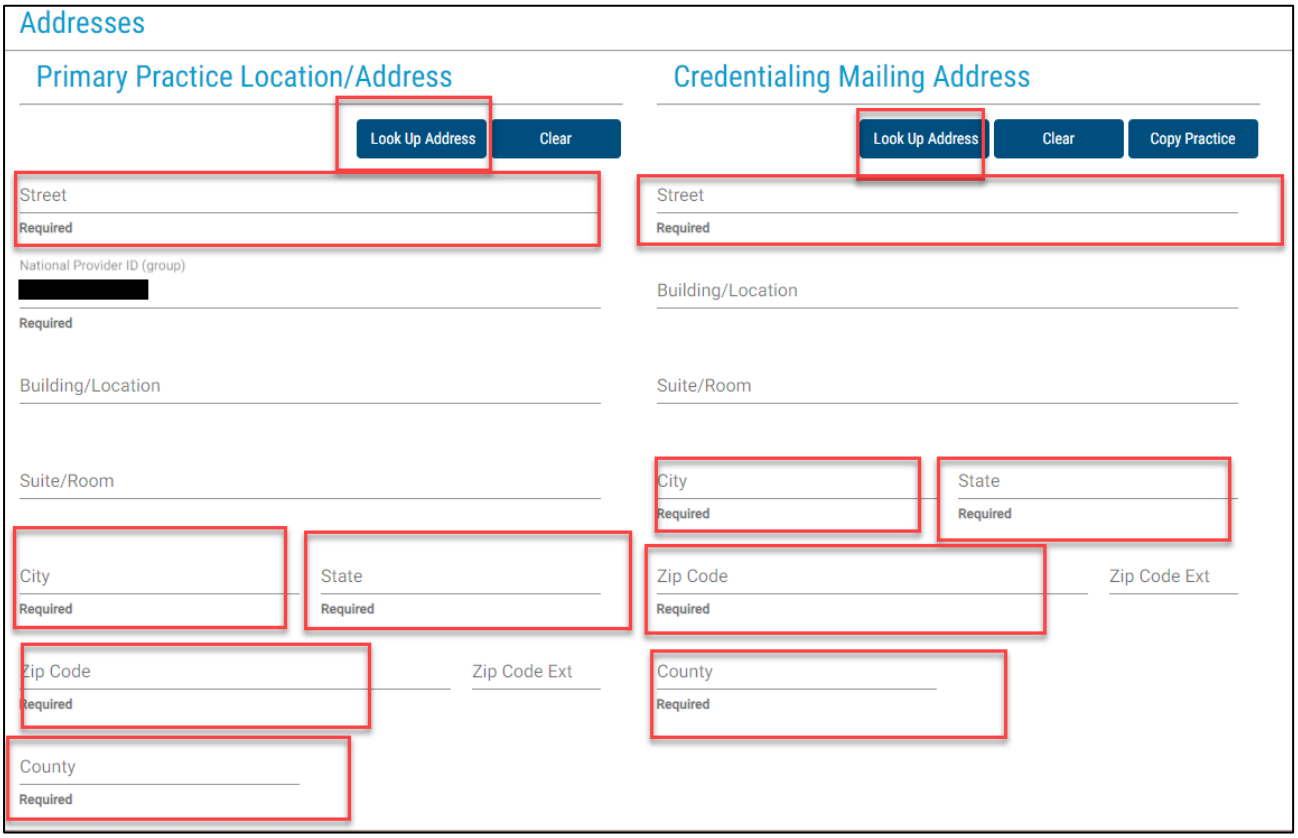
Contact email address
Required

Contact phone number
Required

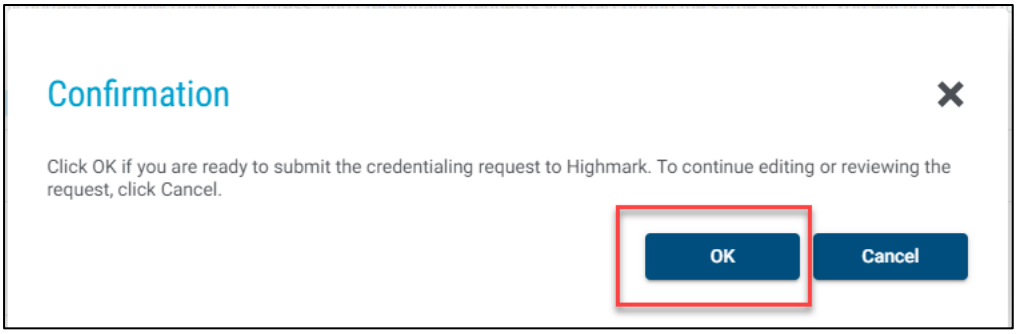
Ext

For the addresses, you can look up and existing address and select it. This will save time instead of typing the address over again. Also, the suite/room and building name are not required, however, you should add these fields if they are part of your address.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

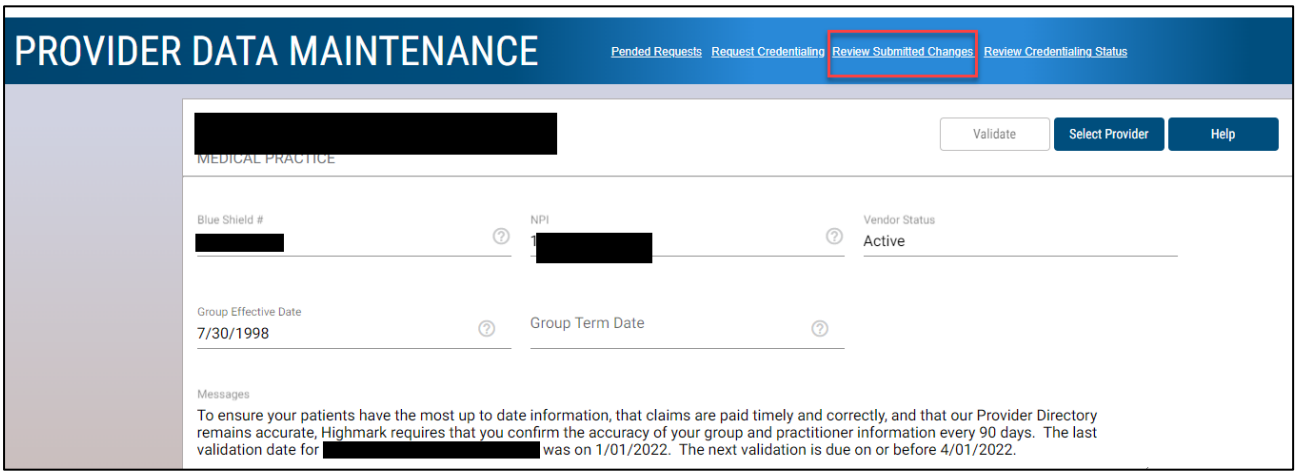


Once all required fields are completed, scroll to the top of the page, and click on **"Submit."** If you are ready to submit, click **"OK."**

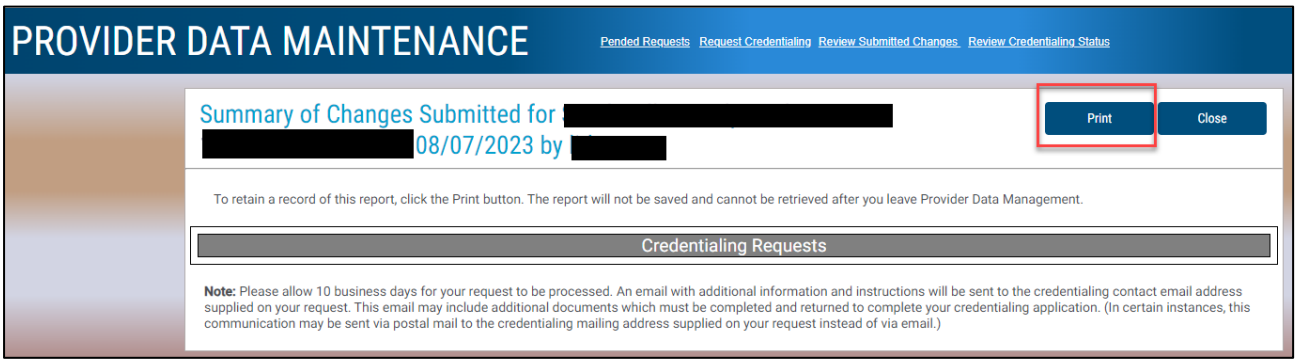


Once submitted, you can view the summary in the **"Review Submitted Changes"** Link.

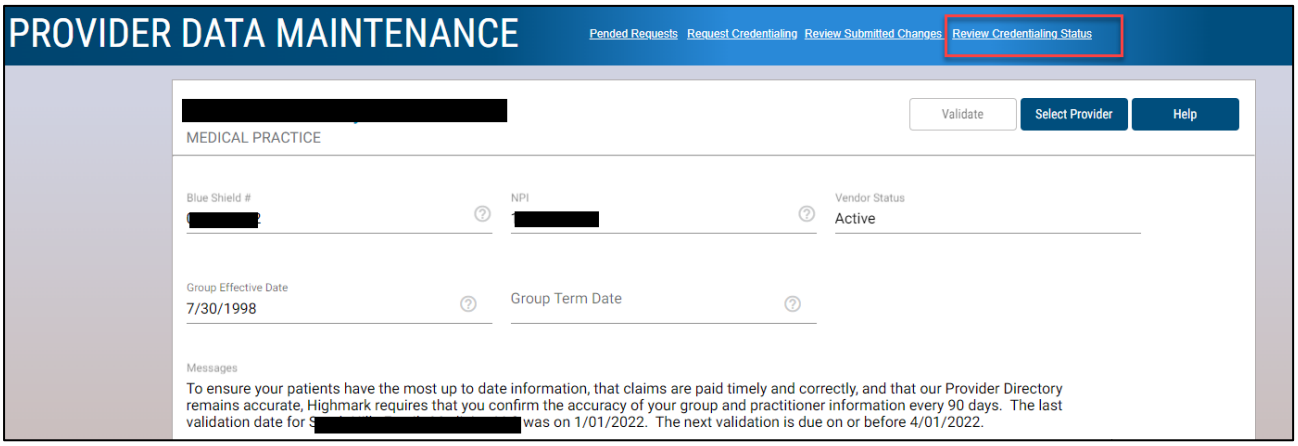
Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.



You can print the submitted request from this screen. This report is not saved, so you will need to print before you exit PDM.

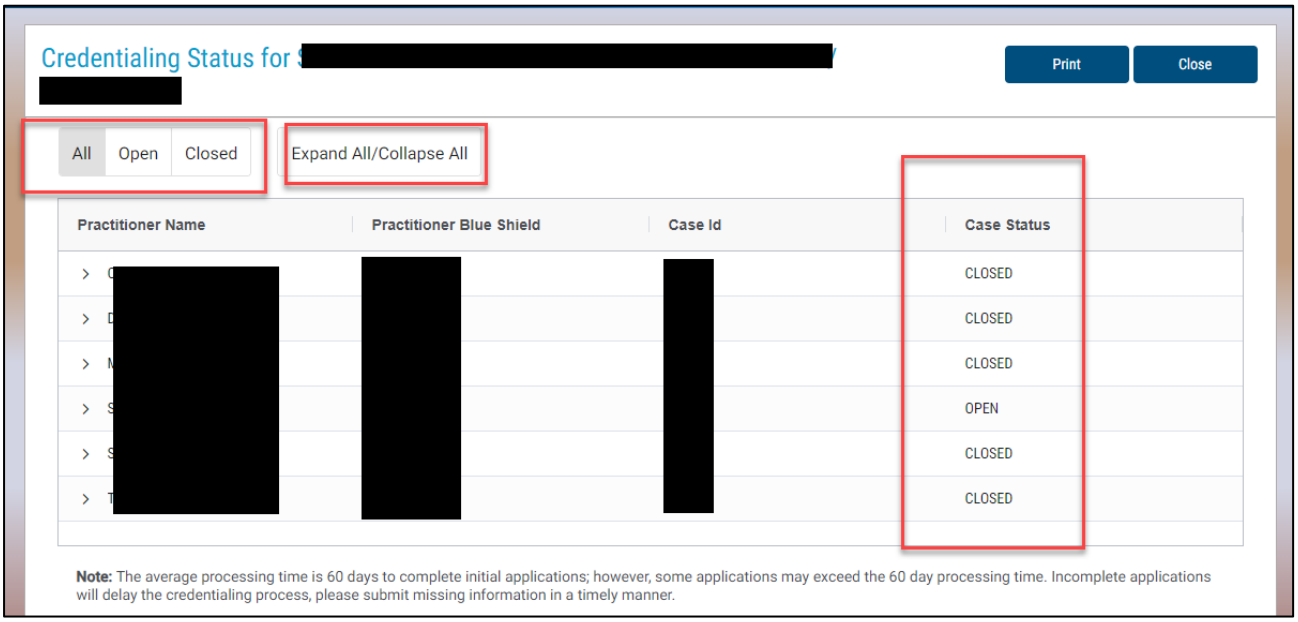


To view the status of practitioners in the credentialing process, click on the **"Review Credentialing Status"** link.



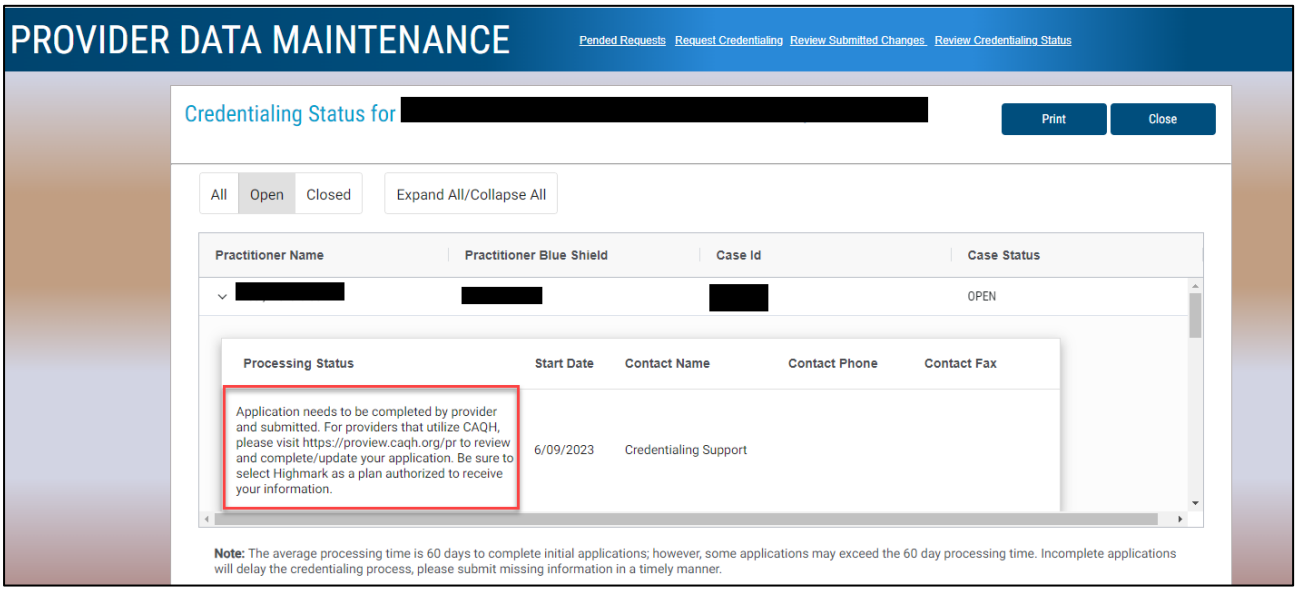
On this page, you can sort by All, Open, or Closed cases. You can also expand all cases or collapse them.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.



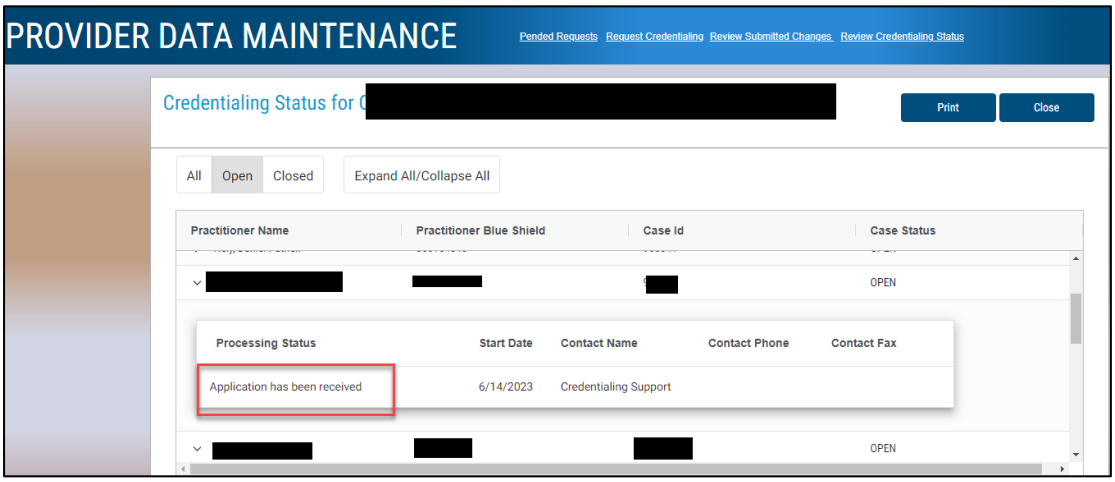
Below are examples of what you will see for open statuses.

The first example is a provider in the recredentialing process where the application has not been returned yet.

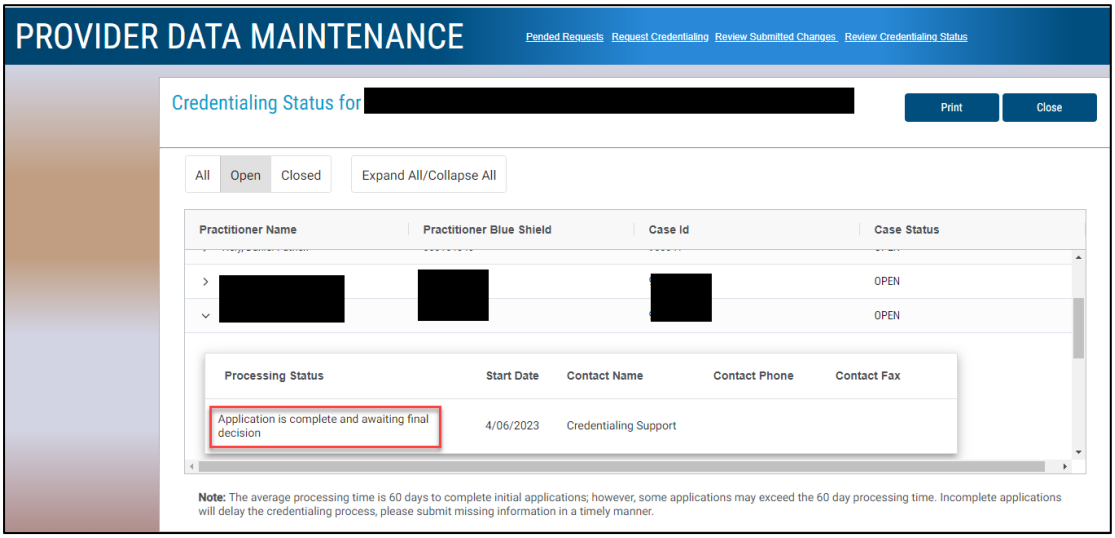


The next example shows where an application was received.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.

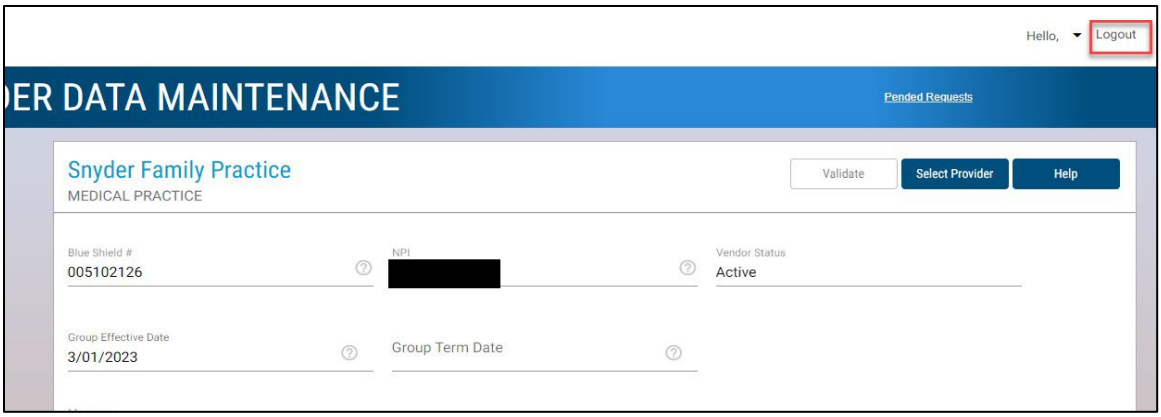


This example shows the application process is complete and is waiting for a final decision.



Logging Out of PDM

To logout of the application, click on “Logout” at the top of the page.



Availity is an independent company that contracts with Highmark to offer provider portal services.

Note: Any provider/practice information included in this guide is fictional and included for educational purposes only.