



Provider Education  
& Communication

# Blue Shield of California New IPA Validation Roster Update Process

April / May 2016

# Webinar agenda

The IPA Validation Roster update process is essential to increasing the accuracy of Blue Shield's provider database.

To support your role in the IPA Validation Roster update process, we'll cover the following in this webinar:

- Revisit the IPA Validation Roster update process at a high level
- Highlight changes made to the Excel spreadsheet collection tool
- Demo the new collection tool
- Share tips and important reminders
- Walk through support tools you will receive
- Review timeframes and next steps
- Answer your questions

# IPA Validation Update Roster Process and Spreadsheet Overview

# Five-step IPA Roster Validation update process

1

- Blue Shield sends email with IPA Validation Roster (Excel spreadsheet) plus instruction sheet and FAQ.

2

- You review and enter necessary updates directly into Excel spreadsheet within the appropriate tab and column, then save.

3

- You click “Reply” from Blue Shield’s **original request email**, attach completed spreadsheet, and click “Send.” Spreadsheet must be **returned to Blue Shield within 30 days** of initial receipt.

4

- Blue Shield will email a reminder if we have not received your roster. Blue Shield confirms roster receipt via automated email reply.

5

- Blue Shield makes changes to provider records within 15 days of roster receipt. Changes will be reflected on *Find a Provider* within 18-20 days of roster receipt.

# Four-step process if no changes are being submitted

1

- Blue Shield sends email with IPA Validation Roster (Excel spreadsheet) plus instruction sheet and FAQ.

2

- You review and determine that no updates are necessary to the Excel spreadsheet.

3

- You click “Reply” from Blue Shield’s **original request email that contains the original spreadsheet**, type “*No roster changes necessary*” in body of email and click “Send.” Spreadsheet must be **returned to Blue Shield within 30 days** of initial receipt.

4

- Blue Shield will email a reminder if we have not received your roster. Blue Shield confirms roster receipt via automated email reply.

# IPA validation roster: key changes

## Process has changed:

the spreadsheet is now for validation of existing data only. Adding new practitioners or facilities will be handled outside the roster.

Automation =  
quicker updates  
to *Find a Provider*

## Spreadsheet has changed:

the spreadsheet has been redesigned to support automated uploading of data into Blue Shield's systems.

# Redesigned look for IPA Validation Roster spreadsheet

**1** 7 tabs versus 2

**2** White fields open for data updates or adds

**3** Gray fields pre-populated and unchangeable

**4** New fields and field groups

**5** New pre-defined reference values

A1	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
	City	State	Zip	NetLoc_Start_Date	New_NetLoc_Start_Date	PCP_Specialty	PCP_DirectorySuppress	New_PCP_Specialty	New_PCP_DirectorySuppress	SPC_Specialty1	SPC_DirectorySuppress1	New_SPC_Specialty1	New_SPC_DirectorySuppress1	SPC_Specialty2
1	Fountain Valley	CA	92708	01/01/2016		Pediatrics	Y							
2	Irvine	CA	92603	04/01/2014		Pediatrics	N							
3	Cerritos	CA	90703	03/01/2005		Pediatrics	N							
4	Buena Park	CA	90620	03/01/2005		Pediatrics	N							
5	Lakewood	CA	90805	03/01/2008						Nephrology	N			
6	Los Alamitos	CA	90720	03/01/2008						Nephrology	N			
7	DYPRESS	CA	90630	03/01/2015		Internal Medicine	N							
8	Bellflower	CA	90706	10/01/2013		Internal Medicine	N							
9	Downey	CA	90241	01/01/2016										
10	Long Beach	CA	90806	02/01/2005										Nephrology
11	Lakewood	CA	90805	03/01/2008										
12	Long Beach	CA	90813	06/01/2001		Internal Medicine	N							
13	Long Beach	CA	90806	06/01/2001		Pediatrics	N							
14	Los Alamitos	CA	90720	06/01/2001		Pediatrics	N							
15	Santa Ana	CA	92703	06/01/2013		General Practice	N							
16	Costa Mesa	CA	92627	06/01/2013		General Practice	N							
17	Paramount	CA	90723	01/01/2002		Family Practice	N							
18	Long Beach	CA	90805	06/01/2001		Family Practice	N							
19	Long Beach	CA	90813	06/01/2001		Internal Medicine	N							
20	Los Alamitos	CA	90720	06/01/2001		Internal Medicine	N							
21	Lakewood	CA	90712	04/01/2002		Family Practice	N							
22	La Palma	CA	90623	07/01/2010		Family Practice	N							
23	Los Alamitos	CA	90720	06/01/2013						Surgery Orthopedic	N			
24	Lakewood	CA	90712	06/01/2013						Surgery Orthopedic	N			
25	Cerritos	CA	90703	06/01/2001		Internal Medicine	N							
26	Buena Park	CA	90620	06/01/2001		Internal Medicine	N							
27	Anaheim	CA	92805	03/01/2002		General Practice	Y							
28	HAWAIIAN GARDENS	CA	90716	10/01/2001		General Practice	N							
29	Anaheim	CA	92805	09/01/2001		General Practice	N							
30	Long Beach	CA	90805	03/01/2002		Internal Medicine	N							
31	Los Alamitos	CA	90720	06/01/2001		Internal Medicine	N							
32	Cerritos	CA	90703	06/01/2001		Internal Medicine	N							
33	Buena Park	CA	90620	06/01/2001		Internal Medicine	N							
34	Lakewood	CA	90805	03/01/2008						Ophthalmology	N			
35	Los Alamitos	CA	90720	06/01/2001						Ophthalmology	N			
36	Long Beach	CA	90805	03/01/2002		General Practice	N							
37	Los Alamitos	CA	90720	06/01/2001		General Practice	N							
38	Carson	CA	90745	03/01/2002		Pediatrics	N							
39	Long Beach	CA	90805	03/01/2002		Pediatrics	N							
40	Long Beach	CA	90807	03/01/2002		Family Practice	N							
41	Santa Ana	CA	92703	02/01/2013		Family Practice	N							
42	Costa Mesa	CA	92627	02/01/2013		Family Practice	N							
43	Downey	CA	90241	05/01/2014		Internal Medicine	N			Urology	N			
44	Lakewood	CA	90805	05/01/2014		Internal Medicine	N			Urology	N			
45	Artesia	CA	90701	03/01/2002		Family Practice	N							
46	Long Beach	CA	90807	03/01/2002		Family Practice	N							
47	Long Beach	CA	90813	02/01/2010		Internal Medicine	N							
48	Los Alamitos	CA	90720	02/01/2010		Internal Medicine	N							
49	Long Beach	CA	90806	07/01/2013						Surgery General	N			
50	Los Alamitos	CA	90720	07/01/2013						Surgery General	N			
51	Long Beach	CA	90813	07/01/2013		Internal Medicine	N							
52	Santa Ana	CA	92704	12/01/2012		Internal Medicine	N							
53	Anaheim	CA	92802	12/01/2012		Internal Medicine	N							
54	Lakewood	CA	90712	12/01/2003		Pediatrics	N							

# Predefined reference values

- Some fields must be completed with Blue Shield predefined values
- These values must be entered **exactly as provided**
- Instructions will indicate the fields where these are necessary, and you will be supplied with the values
- Incorrectly entered values will result in the spreadsheet being returned to you
- **The spreadsheet will not tell you if you have entered values incorrectly**

Field	Acceptable Value	Not Acceptable
New Panel Status (is closed)	<ul style="list-style-type: none"> <li>• CLO</li> </ul>	<ul style="list-style-type: none"> <li>• clo</li> <li>• Clo</li> </ul>
Suppress From Directory	<ul style="list-style-type: none"> <li>• Y</li> <li>• N</li> </ul>	<ul style="list-style-type: none"> <li>• YES or NO</li> <li>• Yes or No</li> <li>• y or n</li> </ul>
Specialty	<ul style="list-style-type: none"> <li>• Surgery Plastic</li> </ul>	<ul style="list-style-type: none"> <li>• SURGERY PLASTIC</li> <li>• Plastic Surgery</li> <li>• surgery plastic</li> </ul>
Language	<ul style="list-style-type: none"> <li>• Chinese</li> </ul>	<ul style="list-style-type: none"> <li>• CHINESE</li> <li>• chinese</li> <li>• China</li> </ul>

# Overview of IPA Validation Roster spreadsheet tabs

#	Tab Name	Tab Purpose
1	PRAC IPA	Terminate practitioner relationships, or termination of location, or update of panel information
2	PRAC IPA Role	Update existing PCP and SPC specialty information
3	PRAC Contact Info	Revise existing and/or add new phone, TDD, and fax, plus wheelchair accessibility
4	PRAC General	Update existing physician name, gender, email, license, and NPI
5	PRAC Language	Add new or delete existing non-English languages spoken
6	PRAC Location Hours	Update existing hours or addition of new hours of operation by day
7	PRAC Hospital	Add new or delete existing hospital affiliations

# IPA Validation Roster Spreadsheet Demonstration

# Tab 1: PRAC IPA

## Tab Purpose:

Terminate practitioner relationships, or termination of location, or update of panel information

## Tab Features:

- Physician termination
  - Network\_End\_Date = physician no longer with IPA at **any** location
  - NetLoc\_End\_Date = physician no longer with IPA at **specific** location
- Panel field group: 
  - New\_Panel\_Status
  - New\_Lowest\_Age
  - New\_Highest\_Age
  - New\_Gender\_Limit
- Require Blue Shield-predefined reference values:
  - New\_Panel\_Status
  - New\_Gender\_Limit

## Tab 2: PRAC IPA Role

### Tab Purpose

Update existing PCP and SPC specialty information

### Tab Features

- PCP field group:
  - PCP\_Specialty
  - PCP\_DirectorySuppress
- SPC field group:
  - SPC\_Specialty1
  - SPC\_DirectorySuppress1
- Require Blue Shield-predefined reference values:
  - New\_PCP\_Specialty
  - New\_SPC\_Specialty 1 (Non-MD)
  - New\_SPC\_Specialty 1, 2, and 3

New "Add  
Specialty" fields

# Tabs 3 & 4: PRAC Contact Info and PRAC General

**No new  
tab  
features**



#	Tab Name	Your Action
3	PRAC Contact Info	Revise existing and/or add new phone, TDD, and fax, plus wheelchair accessibility
4	PRAC General	Update existing physician name, gender, email, license, and NPI

## Tab 5: PRAC Language

### Tab Purpose:

Add new or delete existing non-English languages spoken

### Tab Features:

- Require Blue Shield-predefined reference values:
  - Language.

New "Add  
Language" fields

# Tab 6: PRAC Location Hours

## Tab Purpose:

Update existing hours or addition of new hours of operation by day

## Tab Features

- Optional second set of new open and close fields
- Require Blue Shield-predefined reference values:
  - Formatting for Open and Close hours

new fields

<u>Format</u>	<u>Rules</u>
<ul style="list-style-type: none"><li>• h:mm AM</li><li>• h:mm PM</li><li>• hh:mm AM</li><li>• hh:mm PM</li></ul>	<ul style="list-style-type: none"><li>• h must be between 0 and 9</li><li>• hh must be between 10 and 12</li><li>• mm must be number between 0-59</li><li>• the smallest time increment is 15 minutes</li><li>• If midnight, then use 11:59 PM</li></ul>

# Tab 7: PRAC Hospital

## Tab Purpose:

Add new or delete existing hospital affiliations

## Tab Features

- Add Hospital field group:
  - Hospital Name
  - Hospital NPI
  - New\_Primary
  - Start\_Date

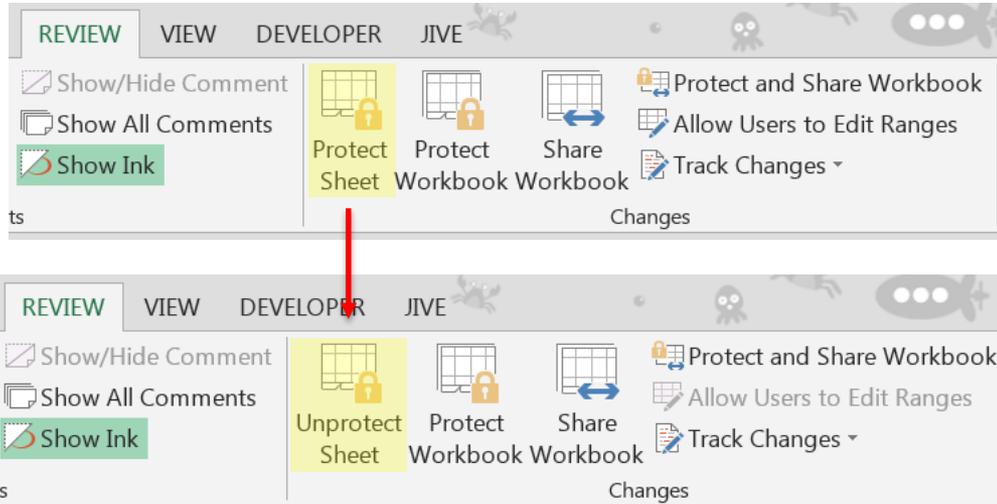
new  
fields

# Spreadsheet don'ts

- **The actions below are not allowed** when revising the IPA Validation Roster Excel spreadsheet:
  - Changing the IPA\_PRAC portion of the file name
  - Including any information that is not specifically requested
  - Altering the spreadsheet format such as:
    - Overwriting prepopulated data (gray fields)
    - Moving columns
    - Adding or deleting columns
    - Adding or deleting rows
    - Changing field color



# Unprotecting the spreadsheet



**The spreadsheet will come protected.** As long as it remains protected, you cannot make any unpermitted format changes.

**However, you can unprotect individual sheets in the spreadsheet.**

- Unprotecting a sheet allows use of the “hide columns” and “filter” functions
  - When you do this you lose formatting protection, so you must be vigilant against altering the spreadsheet in any unpermitted way
  - If you do alter the spreadsheet format in any unpermitted way, it will be returned to you

**You must clear all filters, unhide all columns, and re-protect all sheets before returning the spreadsheet to Blue Shield.**

# IPA Validation Roster Update Process Timelines & Support Tools

# 2016 cycle schedule

## Four times per year

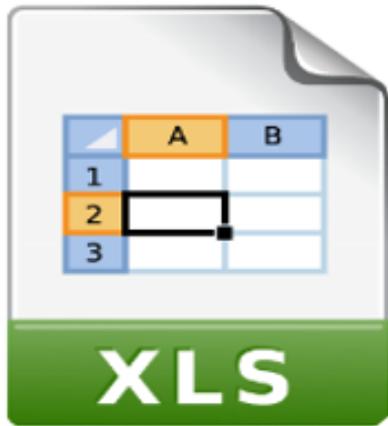
<b>Cycle 1</b>	Jan / April 15 <sup>th</sup> / July / Oct
<b>Cycle 2</b>	Feb / May 20 <sup>th</sup> / Aug / Nov
<b>Cycle 3</b>	March / June 17 <sup>th</sup> / Sept / Dec

If you don't know your cycle schedule,  
please contact your Provider Relations Representative

# Provider support tools

Follow these step-by-step instructions when completing the roster

## Email Packet



IPA Validation Roster  
Excel Spreadsheet



Spreadsheet  
Instructions



Frequently  
Asked  
Questions



Recording of  
this webinar



WebEx "how-to"  
demos by  
spreadsheet tab

# IPA Validation Update Process Spreadsheet Instructions

IPA Validation Roster Update Process Instructions  
April 2016

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IPA Validation Roster Update Process Instructions  
April 2016

**How these instructions are organized:**

These instructions start with important general overview information about the IPA Validation Roster Excel spreadsheet and then go into detail for each tab. **Tab detail is organized in the following way:**

- A table describing Blue Shield prepopulated data in order of appearance on the tab. These tables are shaded gray.
- A table providing definitions and instructions for making changes to the tab. These tables have a blue header and are organized in the spreadsheet.
- An Excel spreadsheet is embedded in this document to provide you with the values you must use for the following fields:
  - New SPC Specialty 1
  - New SPC Specialty 1, 2, and 3
  - Language

**Spreadsheet Overview**

The spreadsheet contains the following seven (7) tabs:

PRAC IPA | PRAC IPA Role | PRAC Contact Info | PRAC General | PRAC Language | PRAC Location Hours | PRAC Hospital

1. **PRAC IPA** = Termination or revisions of existing network and panel information, or additions of up to three new specialties for specialists
2. **PRAC IPA Role** = Updates of existing PCP and SPC specialty information
3. **PRAC Contact Info** = Revisions of existing and/or addition of new phone numbers, fax, plus wheelchair accessibility
4. **PRAC General** = Updates of existing physician name, gender, email, license number, and spoken language
5. **PRAC Language** = Addition of new or deletion of existing non-English languages spoken
6. **PRAC Location Hours** = Updates of existing hours of operation by day
7. **PRAC Hospital** = Addition or deletion of existing hospital affiliations

Each tab contains a small grouping of data and displays practitioner information that you can use to connect the practitioner to the associated values Blue Shield has on file for the IPA Validation Roster that was created for your IPA/Medical Group.

Each tab contains a series of fields that correspond to the information in the spreadsheet.

IPA Validation Roster Update Process Instructions  
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**Tab 7: PRAC Hospital**

Tab 7 – PRAC Hospital (Blue Shield Prepopulated Data)	
Field Name	Description (This data is not editable)
First	Practitioner's First Name
Last	Practitioner's Last Name
Hospital Name	The hospital's name plus non-shaded fields to add new hospital affiliations
Hospital NPI	The hospital's NPI plus non-shaded fields to add NPIs for new hospital affiliations
Primary	Hospital affiliation: Y = primary hospital affiliation or N = not the primary hospital affiliation
Start Date	Date on file to indicate the beginning of the practitioner's affiliation to the hospital

Tab 7 – PRAC Location Hours (IPA Entered Data)	
Field Name	Description (This data is editable)
New_Primary	For prepopulated hospital(s), use this field to change the primary indicator from N to Y or Y to N
End_Date	For prepopulated hospital(s), use this field to terminate the practitioner's affiliation with the hospital
<b>Add Hospital Field Group</b>	<b>Field groups are fields connected via relationship logic. In the Add Hospital Field Group, enter data to establish a practitioner's hospital affiliation.</b>
Hospital Name	Use the white shaded fields in this column to add up to three (3) hospital names
Hospital NPI	Use the white shaded fields in this column to add NPIs for each hospital added under the Hospital Name column. This field will be used to set the relationship of the practitioner to the correct hospital.
New_Primary	Use this to indicate if the new hospital affiliation is a primary affiliation by entering a Y. If not, enter N
Start_Date	Use this to indicate the start date of the practitioner's affiliation with the hospital

# Key contacts

	Action	Contact
1	Submit IPA Validation Roster updates (and no updates)	Email <a href="mailto:BSC_IPA_Rosters@blueshieldca.com">BSC_IPA_Rosters@blueshieldca.com</a>
2	Submit corrected IPA Validation Roster to replace one with errors	Email <a href="mailto:BSC_IPA_Rosters@blueshieldca.com">BSC_IPA_Rosters@blueshieldca.com</a>
3	Submit practitioner, facility, etc. additions with profiles	Email either address: <ul style="list-style-type: none"> <li>• <a href="mailto:BSCPrvdrInformationEnrollment@blueshieldca.com">BSCPrvdrInformationEnrollment@blueshieldca.com</a></li> <li>• <a href="mailto:bscproviderinfo@blueshieldca.com">bscproviderinfo@blueshieldca.com</a></li> </ul>
4	Change IPA Roster Validation contact person	Notify your Provider Relations Representative

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