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

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

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

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

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

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

Fig 1: Provider First Submission Claim – Submission History (home page)
Each submission history page—First, Prior, and Itemization—displays a comprehensive record of your submissions in table format. (Fig 2).

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

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

Fig 2: Submission History navigation

To see attributes of a specific record, click the record. A pop-up table (Fig 3a) displays three views: Base, Core, and Output. The Base view contains the data items displayed in the table. The Core view displays the details you entered when creating the submission. (Fig 3b). The Output view displays the FLN number assigned to the submission after it is processed and sent to Blue Shield. The FLN number is the reference number you would use when calling Blue Shield with a question about the submission. (Fig 3c)
In the Core pop-up (Fig 3b), 0 = a NO answer and 1 = a YES answer.

Fig 3b: Core

Fig 3c: Output
A New Submission window displays the Submission Info fields (Fig 5a). Fields and questions are displayed based on information you enter or select. Subscriber ID with Prefix is the first selection you will make (Fig 5b).

*Fig 5a: New Submission window*

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

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>
| • No additional questions will be asked. You can begin adding documentation. | • You will be prompted to answer this question: Is this a HEAT claim for an initial submission or final submission?  
• After answering, no additional questions will be asked. You can begin adding documentation. |
Provider Prior Claim Submission

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

**Fig 6: Provider Prior Claim Submission**

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

**Fig 7: New Submission screen**
4.1 Provider Prior Claim Submission: Corrected Claim

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

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>• No additional questions will be asked. You can begin adding documentation.</td>
<td>• You will be prompted to answer this question: Is this a HEAT claim (Trauma, Burn, Implants, Stoploss, Transplant, and other)?</td>
</tr>
<tr>
<td></td>
<td>• After answering, no additional questions will be asked. You can begin adding documentation.</td>
</tr>
</tbody>
</table>

4.2 Provider Prior Claim Submission: Blue Shield of California Requested

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

Fig 8a: BSC Requested

Fig 8b: What is being requested?

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

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

*Fig 9: Submission History (Itemization)*

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

*Fig 10: Provider Itemization > New Submission*

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Move to next screen.</td>
<td>• Error message: Without an itemized bill an itemization cannot be provided. Please submit with valid itemized bill to continue.</td>
</tr>
</tbody>
</table>
You will be prompted to answer this question: Do you have Medical Records attached? (Fig 11)

**Fig 11: Submission Info / Medical records**

<table>
<thead>
<tr>
<th>YES</th>
<th>NO</th>
</tr>
</thead>
</table>
| • Enter the **Start Page Range** and the **End Page Range**.  
• After answering, no additional questions will be asked. | • After answering, no additional questions will be asked. **You can begin adding documentation.** |

6 Add Documentation

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

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

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

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

**Fig 12: Documents List/Select File**
The **Add Document** button will display after you click *Done* and before you click *Submit*. (Fig 13a). Click to add additional attachments prior to submitting.

**Fig 13a: Documents List / Add Document**

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

**Fig 13b: Documents List/Upload documents**

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

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

**Fig 14b: Upload successful**

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

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