

Provider Updates via Salesforce Instructions

Adding/Editing a CBI Division

- a) If the division is within the same SOM Department: Using the edit function in Salesforce, make the change to the provider's CBI Divisions, click save, and then submit the profile to the Department DFA for approval.

Provider Miller A'Test

Provider Practices & Groups (1) | Provider Locations (2) | Provider Specialties (1) | Notes & Attachments

Provider Detail Edit Clone

Name Miller A'Test
UPI Provider Name

Primary SOM Department PATHOLOGY
Primary SOM Dept FPSC Specialty Pathology: Clinical - 14
CBI Primary Div MEDL, PEDs, SURG None
CBI Primary Div - Other 342 - PATH CLINICAL
Secondary SOM Department PATHOLOGY
Secondary SOM Dept FPSC Specialty Pathology: Anatomic - 07
CBI Additional Div MEDL, PEDs, SURG Available: 200 - MEDI ALLERGY/IM, 201 - MEDI BMT, 202 - MEDI CARD EP. Chosen: 342 - PATH CLINICAL
CBI Additional Div - Other Available: 100 - ANES ANES PED, 101 - ANES ANES, 102 - ANES CRITICAL CARE. Chosen: 340 - PATH CYTOGENETICS, 341 - PATH PATHOLOGY, 342 - PATH CLINICAL, 343 - PATH CYTOPATHOLOGY

Provider Edit Miller A'Test

Providers not associated with practices & groups are private and cannot be viewed by other users or included in reports.

Provider Edit Save Save & New Cancel

Provider Information

Approval History Submit for Approval

Action	Date	Status	Ass

- b) If the additional division is in a different SOM Department – **this requires an FRF/proof of dual Faculty Appointment**: Using the edit function in Salesforce, make the change to the provider for either Primary CBI Division or Secondary CBI Division, click save, attach FRF and then submit the profile to the Department DFA for approval.

Provider Miller A'Test

Provider Practices & Groups (1) | Provider Locations (2) | Provider Specialties (1) | Notes & Attachments

Provider Detail Edit Clone

Name Miller A'Test
UPI Provider Name

Primary SOM Department PATHOLOGY
Primary SOM Dept FPSC Specialty Pathology: Clinical - 14
CBI Primary Div MEDL, PEDs, SURG None
CBI Primary Div - Other 342 - PATH CLINICAL
Secondary SOM Department DERMATOLOGY
Secondary SOM Dept FPSC Specialty Dermatology - 17
CBI Additional Div MEDL, PEDs, SURG Available: 200 - MEDI ALLERGY/IM, 201 - MEDI BMT, 202 - MEDI CARD EP. Chosen: 200 - MEDI ALLERGY/IM, 201 - MEDI BMT, 202 - MEDI CARD EP
CBI Additional Div - Other Available: 130 - BDAV BDC, 151 - DERM DERM PATH, 152 - DERM PEDS, 153 - DERM MOHS. Chosen: 150 - DERM DERM

Notes & Attachments New Note Attach File View All

Action	Type	Title	Last Modified
Edit Del	Note	Test 5	8/11/2015 8:55 AM

Approval History Submit for Approval

Action	Date	Status	Assigned To
Approval Request Recalled			

Transfers (requires an FRF and approval by new and old SOM Departments):

- a) New SOM department (transferring into): Using the edit function in Salesforce, update all applicable provider information that is changing: Faculty Rank, SOM Department, FPSC Specialty, Divisions, Credentialing Requestor, Specialty, Location, Address/Phone number etc. and save the profile. Upload the transfer FRF and submit to DFA for approval.

1

Notes & Attachments [New Note](#) [Attach File](#) [View All](#)

Action	Type	Title	Last Modified
Edit Del	Note	Test 5	8/11/2015 8:55 AM

2

Approval History [Submit for Approval](#)

Action	Date	Status	Assigned To
Approval Request Recalled			

- b) Old SOM Department (transferring out of): The DFA will receive an approval request via Salesforce asking for verification that the provider is exiting the department. Approve this request ASAP to avoid any transfer delays.

[Submit for Approval](#)

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Division Change sent to QC&E	3/30/2016 8:36 AM	Approved	QC&E Credentialing	DEA	Please confirm/approve that provider has left SOM Department	Approved
	3/30/2016 8:33 AM	Reassigned	QC&E Credentialing	DEA		
Step: Division Change DFA Approval	3/16/2016 12:46 PM	Approved	Stephanie Farmer	Stephanie Farmer		Approved
Approval Request Submitted						

Of Note: CU Medicine Billing system (CBI) will retain the old SOM divisions on the provider's profile for 3 months to allow for follow-up billing.

Name Changes:

- The following documents are required to be uploaded in Salesforce to update Government Carriers
Documents must show new legal name:
 - Name change document (marriage license or divorce decree)
 - Social Security Card
 - Driver's License
 - Medical License
 - NPI number
 - APP's to provide certification with name change
- Using the edit function in Salesforce, update the provider's name and save the profile. Then, upload the required documents to the profile. This change will generate an email to ACE. The department/provider will be contacted by ACE to sign name update applications for government insurance carriers.

The image displays two screenshots of the Salesforce interface for a provider named 'Miller A'Test'.

The top screenshot shows the 'Provider Detail' page. At the top, there is a 'Show Feed' button. Below it, there are navigation tabs: 'Provider Practices & Groups (1)', 'Provider Locations (2)', 'Provider Specialties (1)', and 'Notes & Attachments'. The 'Provider Detail' section shows the 'Name' as 'Miller A'Test' and the 'UPI Provider Name' field. An arrow points to the 'Edit' button next to the name.

The bottom screenshot shows the 'Provider Edit' page. At the top, there is a warning: 'Providers not associated with practices & groups are private and cannot be viewed by other users or included in reports.' Below this, there are 'Save', 'Save & New', and 'Cancel' buttons. The 'Provider Information' section is visible. An arrow points to the 'Save' button. Below this, the 'Notes & Attachments' section is shown, with 'New Note', 'Attach File', and 'View All' buttons. An arrow points to the 'Attach File' button. A table below shows a note with the title 'Test 5' and a last modified date of '8/11/2015 8:55 AM'.

Action	Type	Title	Last Modified
Edit Del	Note	<u>Test 5</u>	8/11/2015 8:55 AM

Terminating a Provider

- a) Single faculty appointment: Using the edit function in Salesforce, check the “CU Termed” box, enter a termination date, and reason. Click save, and then submit the profile to the Department DFA for approval.

Provider Miller A'Test

Provider Practices & Groups (1) | Provider Locations (2) | Provider Specialties (1) | Notes & Attachments

Provider Detail

Name Miller A'Test

UPI Provider Name

Termination Information

HPD Termed

HPD Term Date

HPD Term Notes

CU Termed

CU Term Date [4/1/2016]

CU Term Reason

QCAE Term

QCAE Term Date [4/1/2016]

Provider Edit Miller A'Test

Providers not associated with practices & groups are private and cannot be viewed by other users or included in reports.

Provider Edit

Save Save & New Cancel

Approval History

Submit for Approval

Action	Date	Status	Assigned To	Actual Approver	Comments	Ass
--------	------	--------	-------------	-----------------	----------	-----

- b) Dual Faculty Appointment: Secondary SOM Department DFA will receive a termination approval request via Salesforce asking for verification that the provider is also terminating in their department. Approve this request ASAP to avoid any delays

Approval History

Submit for Approval

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Division Change sent to QCAE	3/30/2016 8:36 AM	Approved	QCAE Credentialing	DFA	Please confirm/approve that provider has left SOM Department	Approved
	3/30/2016 8:33 AM	Reassigned	QCAE Credentialing	DFA		
Step: Division Change DFA Approval	3/15/2016 12:46 PM	Approved	Stephanie Farmer	Stephanie Farmer		Approved
Approval Request Submitted						

Of Note: CU Medicine Billing system (CBI) will keep the provider's profile open and active for 4 months following termination date to allow for follow-up billing.