GET THE MOST OUT OF THE AVAILITY WEB PORTAL
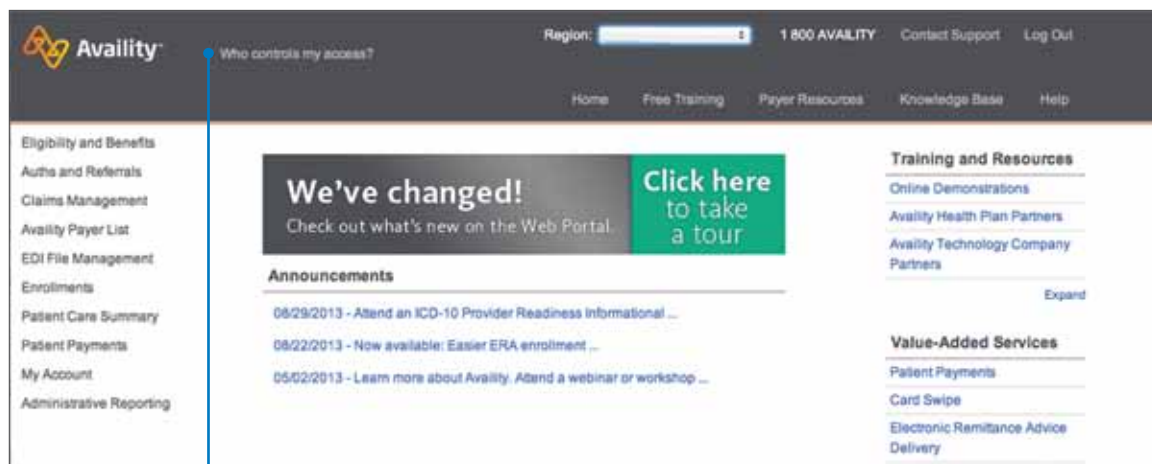
QUICK REFERENCE GUIDE

Availity's Web Portal gives you the tools you need to drive measurable and meaningful organizational improvements, to enjoy the vitality of a healthy business. Use this guide to help you get started.

Availity™

THE AVAILITY WEB PORTAL
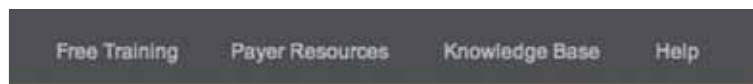## RESOURCES AND TRANSACTIONS

Your Web Portal Home Page

Who controls my access? — View the name of your PAA. Every Availity organization has a Primary Access Administrator (PAA) who sets up and maintains user accounts and organization information, and who performs other administrative tasks.

Your organization's PAA is responsible for assigning access to features in Availity. **Contact your PAA** if you believe you should have access to a specific feature but do not.

My PAA is:_____

Top Navigation, Detail View

Free Training — Access a variety of free learning options, including live and recorded webinars, interactive online demonstrations and in-person conferences.

Payer Resources — View payer-specific resources, such as payer companion guides, user manuals, directories, forms and links to payer-specific tools.

Knowledge Base — Access Availity's online community for the most current information about Availity products and services, including Web Portal and EDI updates and guidelines, known issues, newsletters, tips and other guidance.

Help — View Help topics about the Web Portal's services.

Left Navigation, Detail View

Eligibility and Benefits

Eligibility and Benefits Inquiry
Online Batch Management

Eligibility and Benefits Inquiry — Verify eligibility for patients and confirm the benefits covered under their member contracts.

Auths and Referrals

Referrals
Authorizations
Auth/Referral Inquiry
Current Admissions Report
Claims Missing Referral
Referral Report
Radiology Referral Submission
Online Batch Management

Referrals — Submit referral requests.

Authorizations — Submit authorization requests.

Auth/Referral Inquiry — View the results or status of authorization and referral requests.

Claims Management

Claim Status Inquiry
Professional Claim
Facility Claim
Claim Reconciliation Tool
Remittance Viewer
Remittance Review
Research Procedure Code Edits
Fee Schedules
Online Batch Management
Medical Records Management

Claim Status Inquiry — Check the status of a submitted claim.

Professional Claim — Submit an electronic claim for a professional encounter.

Facility Claim — Submit an electronic claim for a facility encounter.

Remittance Viewer — View, search, and reconcile 835 electronic remittance advice (ERA) files. Your organization must enroll with participating payers to receive ERAs through remittance viewer. Navigate to **Enrollments | ERA Enrollment** to get started.

Availity Payer List

Payer List

Payer List — View a comprehensive list of Availity's health plan partners—including payer IDs—and the Availity products and services each payer supports through the Web Portal.

EDI File Management

EDI Reporting Preferences
Send and Receive EDI Files

Send and Receive EDI Files — Submit EDI batch files and review response files for EDI batch files submitted. Also, view payer responses to claims submitted using the Availity Web-based claim forms.

My Account

My Profile
Manage Providers
Manage My Code List
View My Code List
My Favorite Codes
Availity Knowledge Base

My Profile — Maintain your own user account after login, including user password, security questions and answers, and contact information.

Manage Providers — Associate providers with your organization and pre-populate the Express Entry fields for quick data entry.

My Favorite Codes — Manage frequently used procedure and diagnosis codes for use in Express Entry fields.

Left navigation menu items:
Eligibility and Benefits
Auths and Referrals
Claims Management
Availity Payer List
EDI File Management
Enrollments
Patient Care Summary
Patient Payments
My Account
Administrative Reporting

WELCOME

YOUR FIRST LOGIN

When you log in for the first time as a new user, Availity prompts you to:

(a) accept an Availity Privacy and Security statement,
(b) accept a Confidentiality Agreement,
(c) choose three security questions and provide a response to each,
(d) create a new password, and
(e) verify your e-mail address.

It is important you do not share your user ID or password with others.

After you enter this information, Availity will send you an e-mail verification message. Within 24 hours of receiving the message, click the link in the message to complete your registration with Availity.

HELP LOGGING IN

If you forget your user ID or password, you can retrieve them from the login screen. Click **Help! I can't log in!** and answer your security questions to validate your identity.

To take advantage of this self-service feature, you must have verified your e-mail address the first time you logged in to the Web Portal or know the answers to your security questions.

If you call Availity Client Services for login assistance, an Availity representative will ask you your security questions to validate your identity.

To change your security questions at any time after initial setup, click **My Account | My Profile** in the left navigation menu.

CONFIGURE YOUR PC

SET UP POP-UP BLOCKERS

Pop-up blockers in your Internet browser (such as Windows® Internet Explorer®) can prevent some Web Portal windows and features from displaying properly. To ensure your browser is configured to allow full display of the Web Portal, follow these steps:

In Windows Internet Explorer, click **Tools | Pop-up Blocker | Pop-up Blocker Settings**. This menu item is only available if you have pop-up blockers turned on.

In the **Address of website to allow** field, type the following URLs and click **Add** after typing each one.

apps.availity.com
mc.availity.com
www.availity.com

SET YOUR SCREEN RESOLUTION

While a low resolution, like 800 x 600 pixels, makes everything on your screen large and easier to see, some objects might not fit the screen. The Web Portal is best viewed at higher resolutions, such as those between 1024 x 768 pixels and 1280 x 1024 pixels.

To change your screen resolution, see the Web Portal Help topic **Can't See Everything on the Screen**.

Help!

Get help when you need it
View **Help** topics, explore live and on-demand **Free Training** opportunities, or check out articles in the **Knowledge Base** — all located in the top navigation menu in the Web Portal.
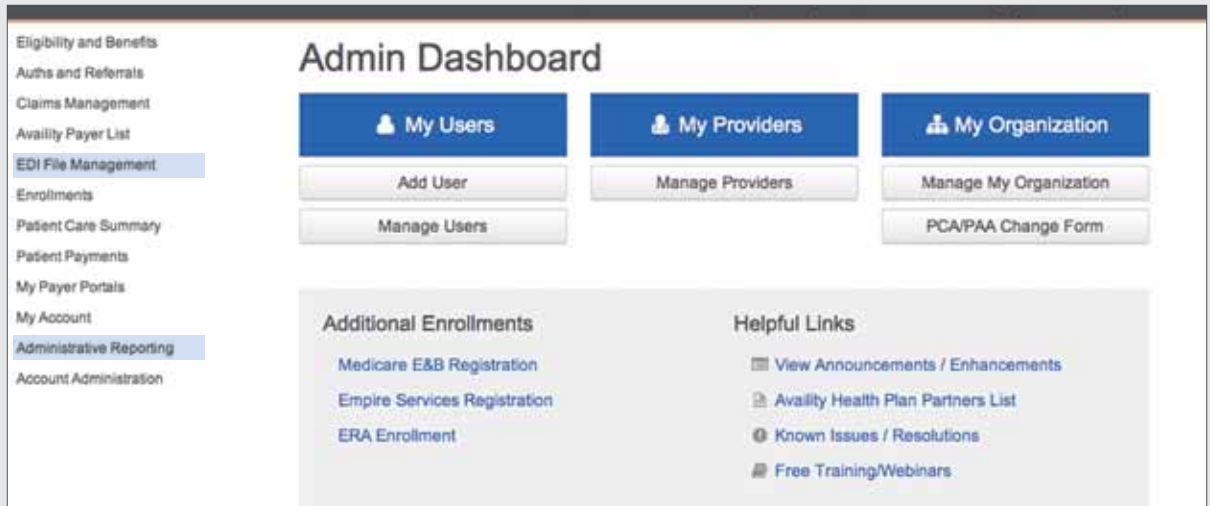
Contact Availity Client Services
E-mail support@availity.com

Call 1.800.AVAILITY (282.4548) toll free
M–F, 8 a.m. – 7 p.m. E.T. (excluding holidays)

PRIMARY ACCESS ADMINISTRATORS (PAAs)
YOUR ADMINISTRATIVE TOOLS

Your Web Portal Home Page and Admin Dashboard

Add User — Add new or existing Availity users to your organization(s)*. Before you begin, see the Availity Help topic **Understanding Availity Roles and Permissions** for guidance.

Availity assigns a temporary password to each new user account. The user must log in to Availity with his or her user ID and temporary password within 90 days. During login, Availity will prompt the user to create a new password.

Manage Users — Maintain existing user accounts, including:

- Unlock user accounts and reset passwords
- Assign or remove roles for existing users
- Revoke or reactivate user accounts

Manage Providers — Associate providers with your organization and pre-populate the Express Entry fields for quick data entry. You can add providers one-at-a-time or use a spreadsheet to upload multiple providers.

Manage My Organization — Change demographic information such as address, phone, fax and e-mail. Access forms to change the PAA, Primary Controlling Authority (PCA), tax ID, NPI and organization type.

Other PAA tools

EDI Reporting Preferences — Specify the EDI reports you want users at your organization to receive, along with associated file formats and other reporting preferences.

PAA Reports — Generate administrative reports for your organization, including User Status, User Login, User History, Roles and Permissions, and Organization History.

My Organization Reports — View detailed information about Web and EDI transactions submitted for the entire organization.

PRIMARY ACCESS ADMINISTRATORS (PAAs)
YOUR ROLE AND RESPONSIBILITIES

STAY INFORMED

It is important to ensure your contact information is always current so Availity may reach you with important information for your organization. The PAA is the primary contact person for Availity and relays timely information to the rest of their organization.

PAAs must provide their e-mail address, phone and fax numbers. To update your e-mail address, click **My Account | My Profile** in the left menu and then click **Change User Information**.

To update your name, phone, or fax—or to replace the PAA on record—submit a change request form to Availity. To access the form, click **PCA/PAA Change Request Form** on the Administrator Dashboard.

VALUE-ADDED SERVICES

Enroll or set up your organization with value-added services from Availity such as patient payments, electronic remittance advice (ERA) and more. View these in **My Account** in the left navigation menu.

PAA RESPONSIBILITIES

As the PAA for your organization, you should log in to the portal regularly to:

- Check for important notices and service updates
- Set up and manage user accounts
- Maintain your organization's information
- Perform other administrative tasks

Browse through the **PAA Tasks** collection of topics in Help, in the top navigation menu of the Web Portal, for more information.

Who's my PAA?

If you are not the PAA for your organization and want to find out who is, click **Who controls my access?** at the top of any page on the Availity portal.