



Amerigroup

An Anthem Company



Welcome to the Availity Portal — Provider Online Reporting overview

Presented by E-Solutions — Adoption,
Communication & Education

Welcome

This guide will assist in the Availity Portal* and Provider Online Reporting (POR) registration process for practice administrators to:

- Register and edit users in Availity.
- Register and edit users in POR.
- Access POR to launch the program's reporting application with appropriate user access.





Adding users in Availity

Administrator: Adding users in Availity

1. Once logged in to the Availity Portal, choose the **More** option from the top menu bar. Under *Account Administration*, select **Add User** and complete the required fields for access.

The screenshot shows the Availity portal interface. At the top, there is a navigation bar with links for Home, Notifications, My Favorites, and a dropdown menu labeled 'More'. Below this, there is a 'Notification Center' section. To the right, a 'More' dropdown menu is open, displaying options under 'Account Administration' (Add User, Maintain User, Maintain Organization), 'Availity Payer List' (Payer List), 'Patient Care Summary' (Access Audit Report), and 'My Account' (My Security). Below these, there are links for 'Availity Administration' (Payer Organization Search) and 'Online Batch Management' (Online Batch Management). A date and time stamp '1/28/2018 9:38 pm' is visible at the bottom right of the 'More' menu.

Below the 'More' menu, a 'User Roles' table is displayed. The table has three columns: 'Role(s)', 'Permissions', and 'What is this?'. The 'Role(s)' column lists various roles, including 'Base Role', 'Authorization and Referral Inquiry', 'Authorization and Referral Request', 'Claim Status', 'Claims', 'Claims Management', 'Clinician', 'EDI Management', 'Eligibility and Benefits', 'Express Entry', 'New Eligibility and Benefits', 'Physician', 'Provider Data Management', 'Provider Fee Schedule', 'Provider Online Reporting', and 'Referral Coordinator'. The 'Permissions' column contains links to 'More Info' for each role. The 'What is this?' column contains links to 'More Info' for each role. A red box highlights the 'Provider Online Reporting' role, and a red circle with the number '2' is next to it.

Role(s)	Permissions	What is this?
<input checked="" type="checkbox"/> Base Role		More Info
<input type="checkbox"/> Authorization and Referral Inquiry		More Info
<input type="checkbox"/> Authorization and Referral Request		More Info
<input type="checkbox"/> Claim Status		More Info
<input type="checkbox"/> Claims		More Info
<input type="checkbox"/> Claims Management		More Info
<input type="checkbox"/> Clinician		More Info
<input type="checkbox"/> EDI Management		More Info
<input type="checkbox"/> Eligibility and Benefits		More Info
<input type="checkbox"/> Express Entry		More Info
<input type="checkbox"/> New Eligibility and Benefits		More Info
<input type="checkbox"/> Physician		More Info
<input type="checkbox"/> Provider Data Management		More Info
<input type="checkbox"/> Provider Fee Schedule		More Info
<input type="checkbox"/> Provider Online Reporting		More Info
<input type="checkbox"/> Referral Coordinator		More Info

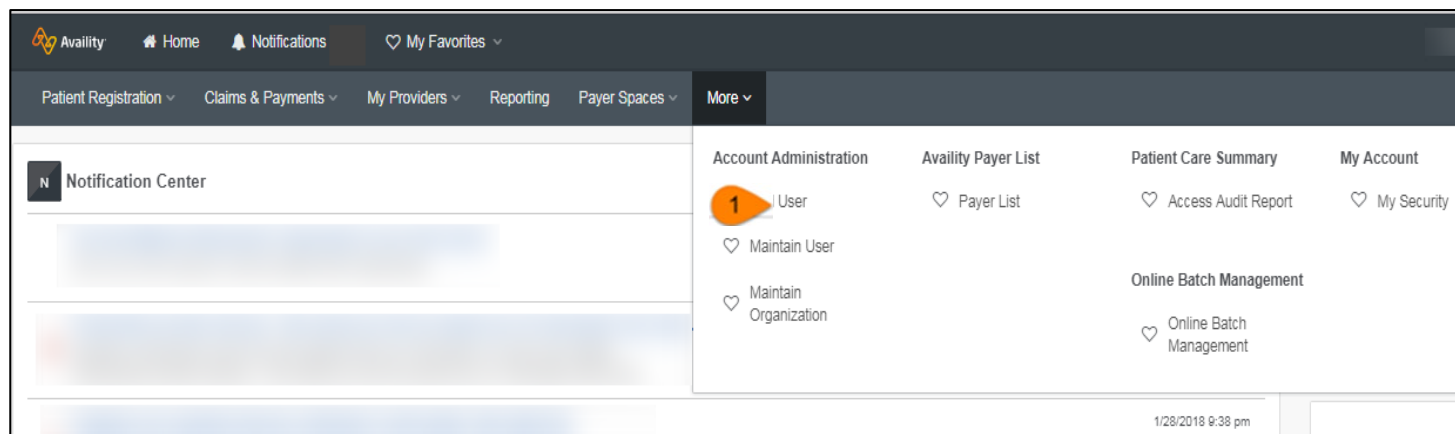
2. Select the Provider Online Reporting checkbox under User Roles, select Next and then Submit. A temporary password and user ID will be viewable to the administrator, who can then print or email the information to the end user.



Editing users in Availity

Administrator: Editing users in Availity

1. Once logged in to the Availity Portal, choose the **More** option from the top menu bar. Under *Account Administration*, select **Maintain User**. Locate the user's account and select the name of the user.



Administrator: Editing users in Availity (cont.)

2. In the *Roles* column, select **View/Edit**. A list of available roles displays.
3. Select the checkbox for **Provider Online Reporting** and then **Save**.

Choose the best option: ☒ This user needs a new set of roles. ☐ This user needs the same set of roles as an existing user.

	Role(s)	Permissions What is this?
User Roles		
<input checked="" type="checkbox"/>	Base Role	More Info
<input checked="" type="checkbox"/>	Claim Status	More Info
<input checked="" type="checkbox"/>	Claims	More Info
<input checked="" type="checkbox"/>	EDI Management	More Info
<input checked="" type="checkbox"/>	Eligibility and Benefits	More Info
<input checked="" type="checkbox"/>	Express Entry	More Info
<input type="checkbox"/>	New Eligibility and Benefits	More Info
<input type="checkbox"/>	Provider Data Management	More Info
<input type="checkbox"/>	Provider Fee Schedule	More Info
<input checked="" type="checkbox"/>	Provider Online Reporting	More Info

Name of user

* indicates a required field

[Revoke User](#) [Reset Password](#) [Search](#)

User ID: Demo123

* First Name:

* Last Name:

E-mail:

Phone: - - ext.

Notes:

[Save](#) [Cancel](#)

User is associated with the following organization(s):

Organization	Customer ID	Address	Tax ID	Status	Status Date	Roles
ABC	1111	111 Street Jacksonville, FL 11111	111111111	Active	03/24/2011	View/Edit

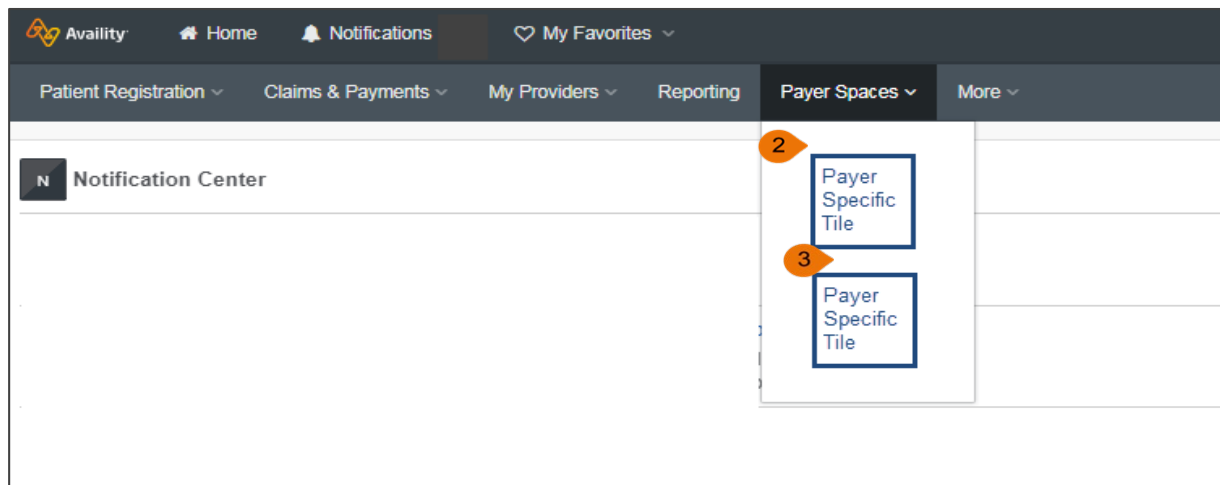




POR registration

Administrator: POR registration

1. Log in to <https://www.availity.com>.
2. Choose **Payer Spaces** in the top menu bar.
3. Select the **payer tile** that corresponds to your market.

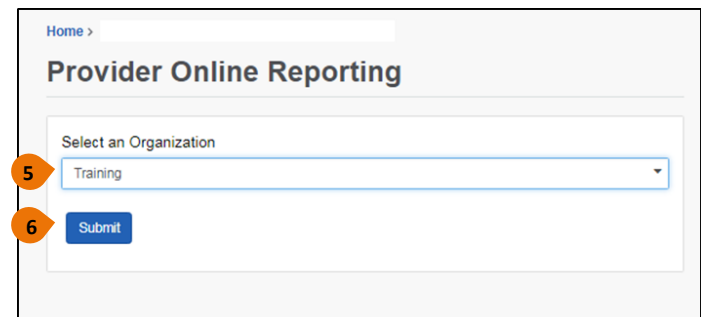
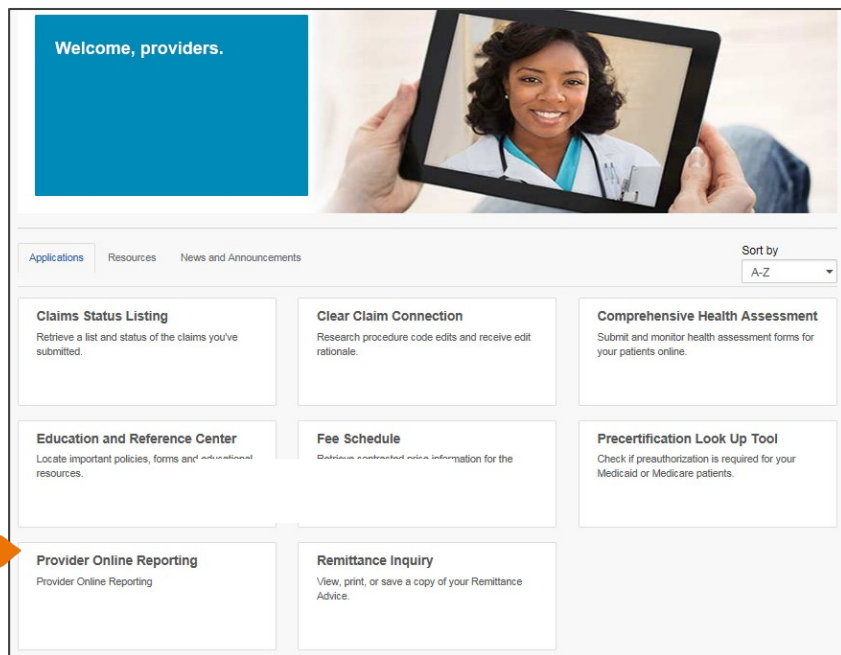


Note: First-time users accessing Payer Spaces will be asked to accept a *Terms of Use Agreement*. The agreement will appear for users once every 365 days.



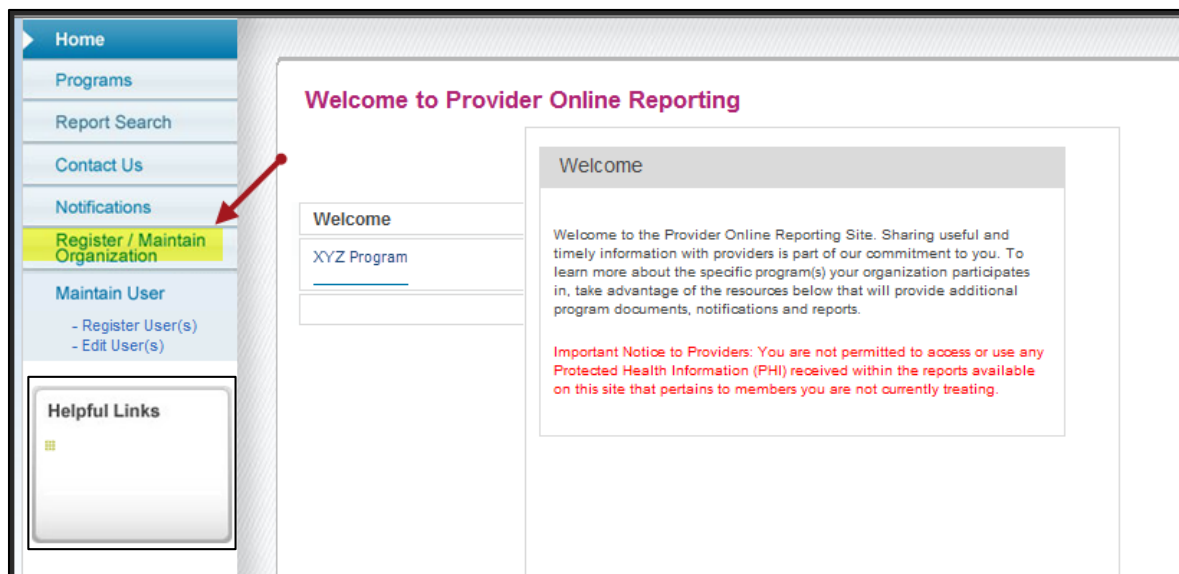
Administrator: POR registration (cont.)

4. On the *Applications* tab, select **Provider Online Reporting**.
5. Select **Organization**.
6. Choose **Submit**.



Administrator: POR registration (cont.)

On the *Welcome to Provider Online Reporting* page, select **Register/Maintain Organization**.



Administrator: POR registration (cont.)

- Select **Register Tax ID(s)** for the applicable program to register the tax IDs.

Home

Programs

Report Search

Contact Us

Notifications

Register / Maintain Organization

Maintain User

- Register User(s)
- Edit User(s)

Helpful Links

Maintain Organization - orgDemoBrand

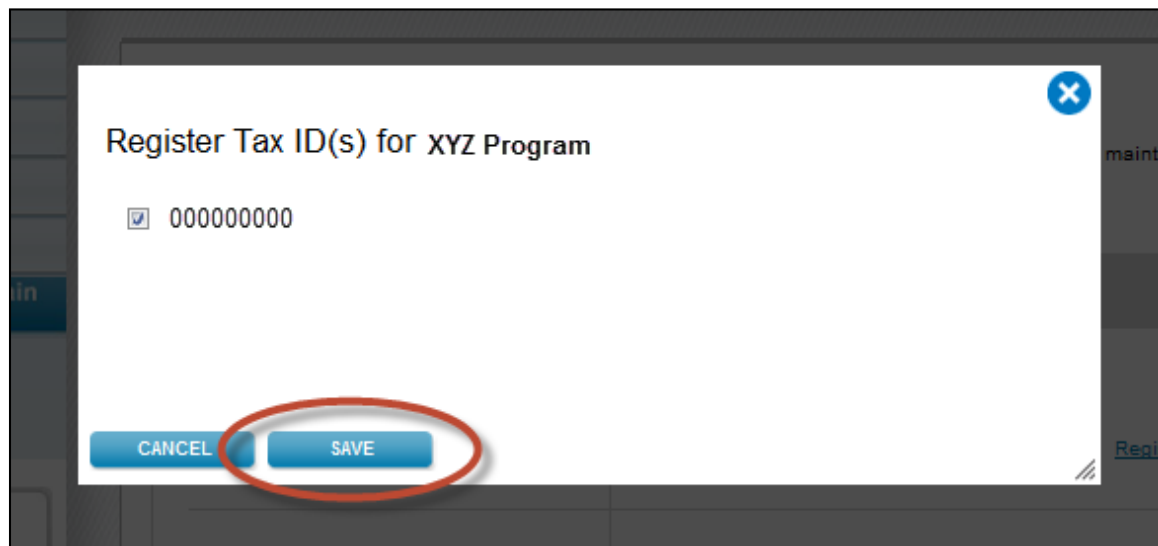
The following is a list of programs associated to the organization that are available for registration and maintenance.

Program and Tax ID Information	
Program Name	Registered Organization Tax ID(s)
XYZ Program	No Tax ID(s) registered Register Tax ID(s)



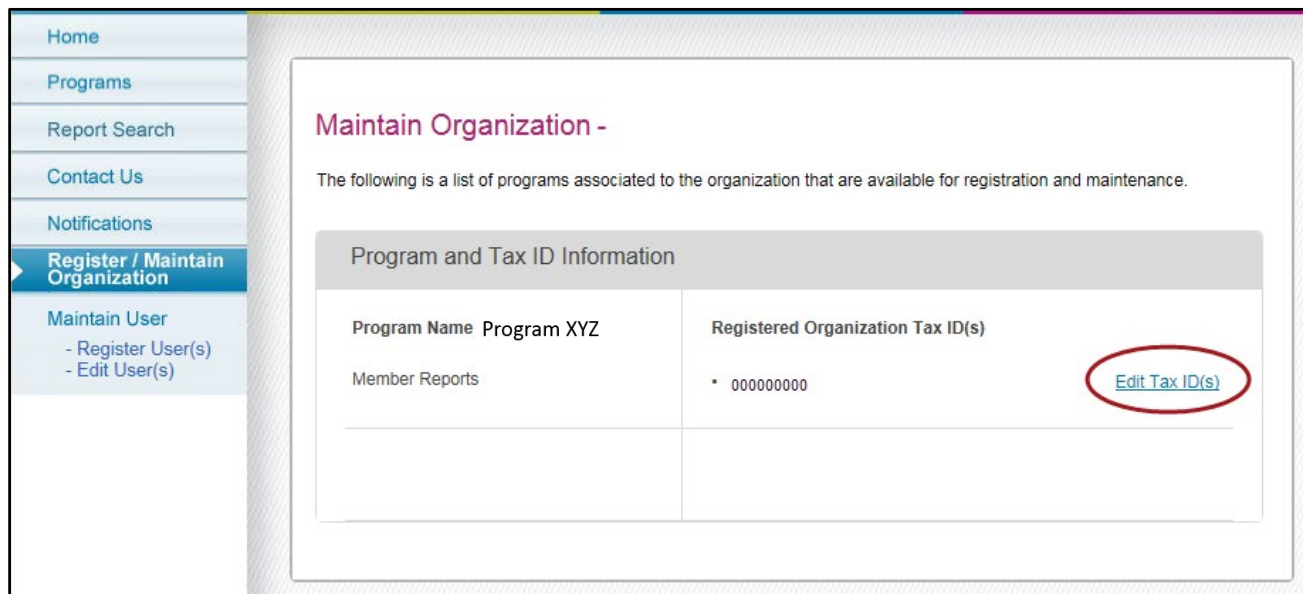
Administrator: POR registration (cont.)

- A pop-up window will display all tax ID(s) that need to be registered for the program.
- Check the box for each tax ID to be registered and select **Save**.



Administrator: POR registration (cont.)

- You now have successfully completed the tax ID registration.
- Notice after the registration has been completed, the status has changed from Register Tax ID(s) to Edit Tax ID(s).



The screenshot displays a web application interface for maintaining an organization. On the left is a vertical navigation menu with the following items: Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization (highlighted with a blue bar and a right-pointing arrow), and Maintain User (which includes sub-links for Register User(s) and Edit User(s)). The main content area is titled 'Maintain Organization -' in purple. Below the title is a descriptive sentence: 'The following is a list of programs associated to the organization that are available for registration and maintenance.' A table titled 'Program and Tax ID Information' contains two rows. The first row shows 'Program Name Program XYZ' and 'Registered Organization Tax ID(s)' with the value '000000000'. The second row shows 'Member Reports' and a red circle around the text 'Edit Tax ID(s)'. A small green heart icon is located at the bottom right of the page.

Program and Tax ID Information	
Program Name Program XYZ	Registered Organization Tax ID(s) 000000000
Member Reports	Edit Tax ID(s)

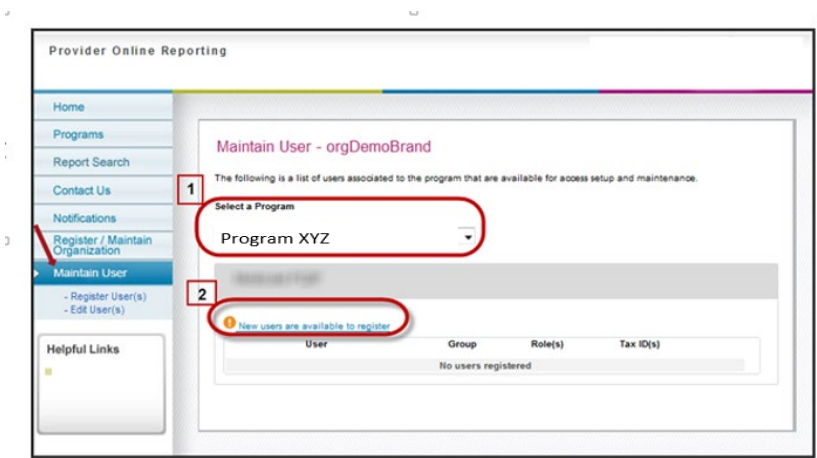


Administrator: Adding users in POR

Administrator: Adding users in POR

From the *Provider Online Reporting* home page, select **Maintain User**.

1. Choose the applicable program under *Select a Program*. If the organization is participating in more than one program, the administrator must register the user to access POR for each individual program as appropriate.
2. Select **New users are available to register**. The administrator will be taken to the *Register User* landing page (see next slide). This link will only display when the program has new users who have not been registered.



Administrator: Adding users in POR (cont.)

Register user(s):

- Select **Program**: If the organization is participating in more than one program, the administrator must register the user to access POR for each individual program as appropriate.
1. Select **Reports**: Choose from group names associated with the selected program.
 2. Select **User(s)**: The list of users will appear in alphabetical order by last name and will be unchecked by default. Select the appropriate user for access. (Only those users who are given the POR role in Availity will be listed here.)
 3. Select **Tax ID**.

Administrator: Adding users in POR (cont.)

Register user(s):

4. Preview

- Select **Add to Preview** to review the selections made prior to saving.
- Select **Save**.

The screenshot shows the 'Register User(s)' form with the 'Preview' step selected. The 'Select Report(s)' section lists various reports with checkboxes. The 'Preview' section on the right shows the selected reports. The 'Add to Preview' button is highlighted with a red circle.

The screenshot shows the 'Register User(s)' form with the 'Save' step selected. The 'Add to Preview' button is highlighted with a red circle. A red arrow points from the 'Add to Preview' button in the previous screenshot to the 'Add to Preview' button in this screenshot.

Note: If changes need to be made prior to saving, select **Remove** from the preview window and complete the fields on the screen.



Editing users in POR

Administrator: Editing user registration and setup in POR

From the *Provider Online Reporting* home page, select **Maintain User**.

- Once the user(s) have been successfully registered, the administrator can view the list of users, group information, role assignment given and tax ID that each user has access to.
- Select **Edit User** to modify existing access for the user. The *Edit User* screen will be prepopulated with the data for the selected user. (See next slide.)

Provider Online Reporting

Home
Programs
Report Search
Contact Us
Notifications
Register / Maintain Organization
▶ Maintain User
 - Register User(s)
 - Edit User(s)

Maintain User - orgDemoBrand

The following is a list of users associated to the program that are available for access setup and maintenance.

XYZ Program

! New users are available to register

User	Group	Role(s)	Tax ID(s)
Last name, First name	Name of practice	Clinical	- 000000000

[Edit User](#)



Administrator: Editing user registration and setup in POR (cont.)

Edit user(s):

Select **Edit User(s)** from the left navigation menu to modify access for an existing user. The *Edit User(s)* screen will be populated with the data for the selected user.

The screenshot displays the 'Edit User(s)' interface. On the left is a navigation menu with options: Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization, and Maintain User. Under 'Maintain User', 'Register User(s)' and 'Edit User(s)' are listed, with 'Edit User(s)' highlighted by a red arrow. The main content area is titled 'Edit User(s)' and contains the following elements:

- 'Select Program : Program XYZ' with a dropdown arrow.
- '1 Select Report(s) :' section with four checkboxes: 'Report 1', 'Report 2', 'Report 3' (checked, with 'tal Health Waiver' text next to it), and 'Report 4'.
- An unchecked checkbox for 'Value Based Purchasing'.
- '2 Select User(s) :' with a dropdown menu.
- '3 Select Tax ID :' with a dropdown menu.
- '5 Preview :' section with the text '< Add selections from the left to review. >' and a large empty box.
- Buttons at the bottom: 'ADD TO PREVIEW' (blue), 'CANCEL' (grey), and 'SAVE' (grey).

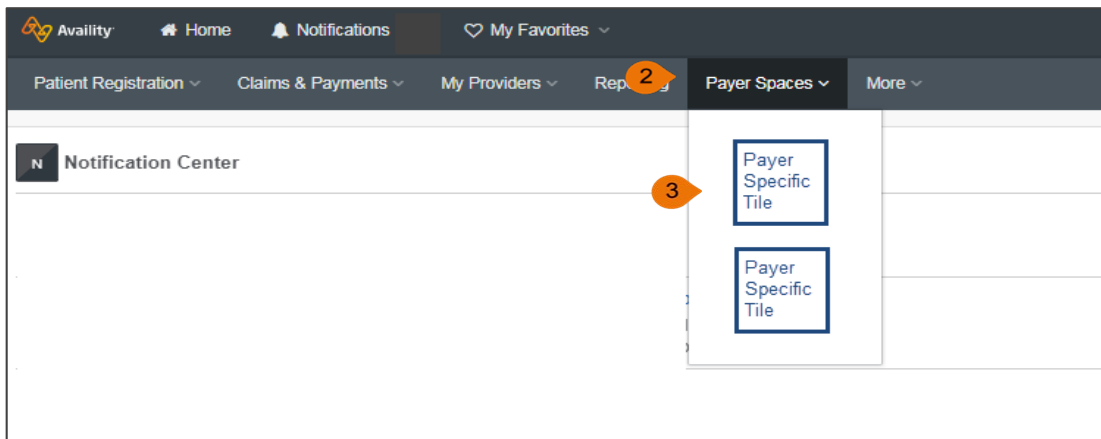




Accessing POR

Accessing POR

1. Log in to <https://www.availity.com>.
2. Choose **Payer Spaces** in the top menu bar.
3. Select the **payer tile** that corresponds to your market.

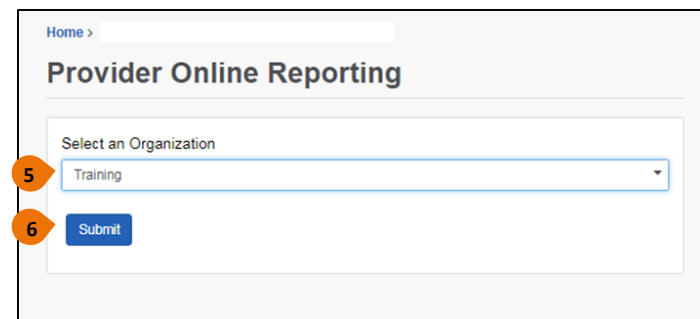
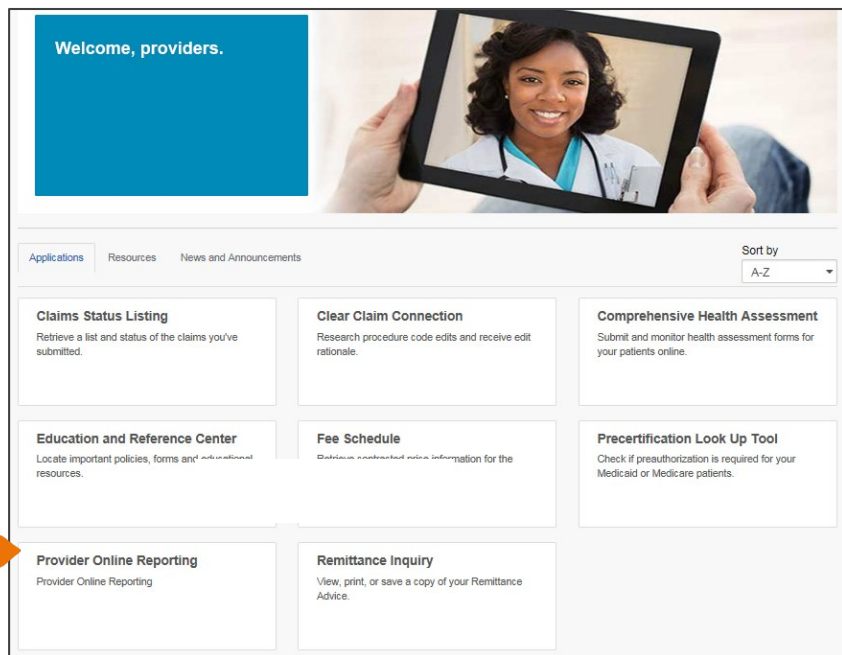


Note: First-time users accessing Payer Spaces will be asked to accept a *Terms of Use Agreement*. The agreement will appear for users once every 365 days.



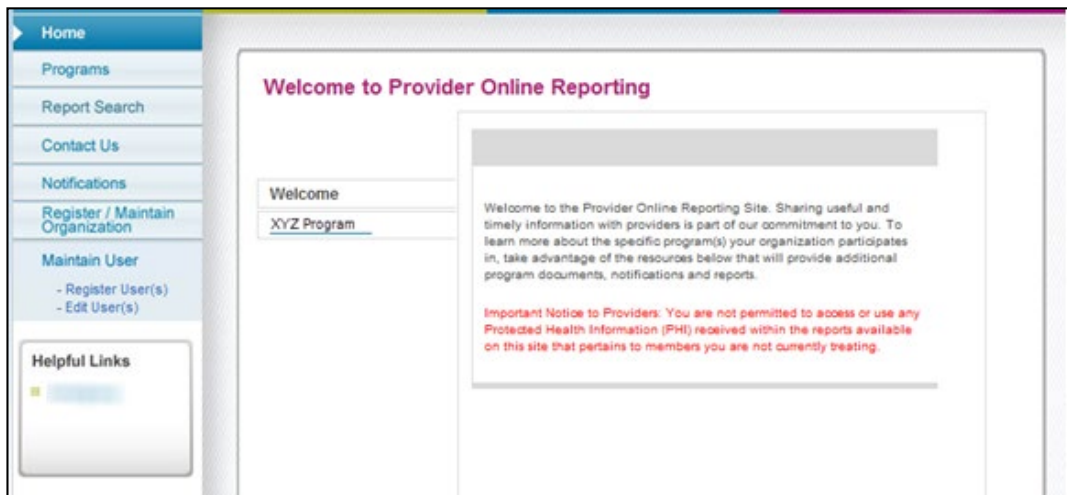
Accessing POR (cont.)

4. On the *Applications* tab, select **Provider Online Reporting**.
5. Select Organization.
6. Choose **Submit**.



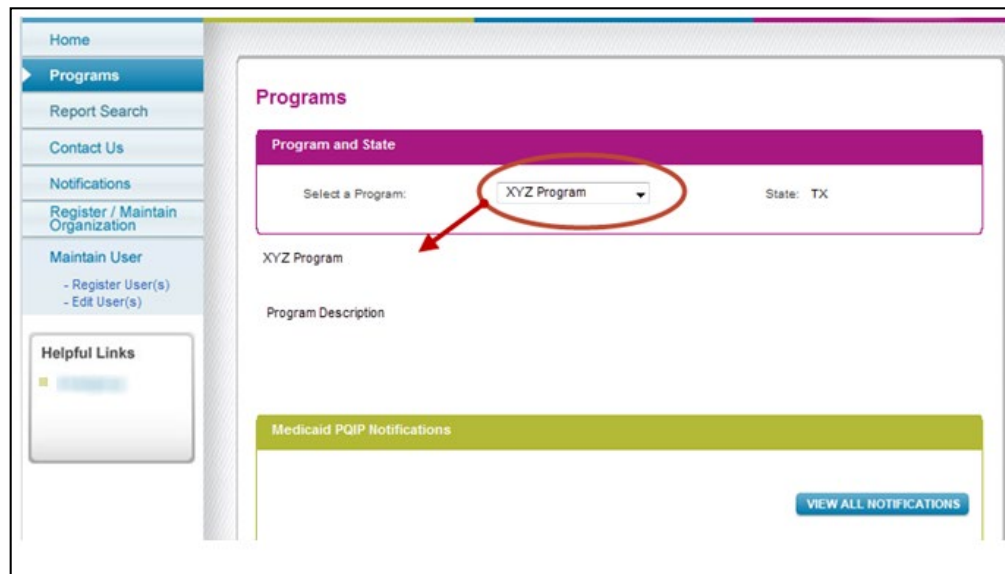
Accessing POR (cont.)

- The *Home* page in Provider Online Reporting will open. This page lists all programs the organization is eligible for.
- Use the navigation options on the left-hand side of the page to easily move around within the tool.



Accessing POR (cont.)

- The *Programs* page provides a description about the program your organization is participating in and includes helpful documents related to your program. Select a program using the drop down arrow.



The screenshot shows a web application interface for the 'Programs' page. On the left is a sidebar with navigation links: Home, Programs (selected), Report Search, Contact Us, Notifications, Register / Maintain Organization, and Maintain User (with sub-links for Register User(s) and Edit User(s)). Below the sidebar is a 'Helpful Links' section. The main content area is titled 'Programs' and features a 'Program and State' section with a purple header. Inside this section, there is a 'Select a Program:' label, a dropdown menu currently showing 'XYZ Program' (which is circled in red with a red arrow pointing to it), and a 'State: TX' label. Below the dropdown, the text 'XYZ Program' and 'Program Description' are visible. At the bottom of the main content area, there is a green bar labeled 'Medicaid PQIP Notifications' and a blue button labeled 'VIEW ALL NOTIFICATIONS'.

Accessing POR (cont.)

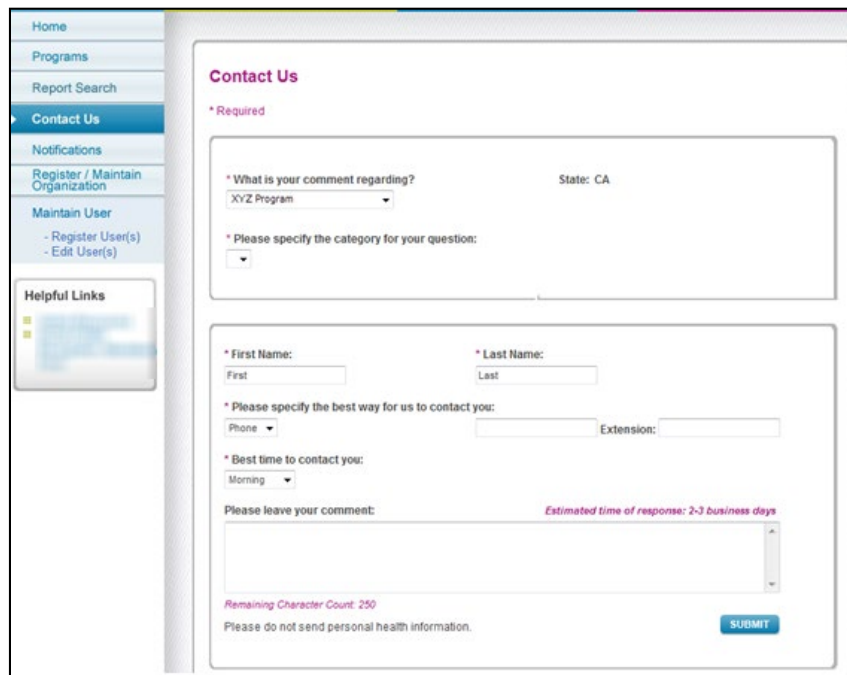
The *Report Search* page launches the corresponding reporting application for your program. Select the appropriate program from drop-down menu.

The screenshot shows a web application interface. On the left is a vertical navigation menu with the following items: Home, Programs, Report Search (highlighted with a red rectangle and a right-pointing arrow), Contact Us, Notifications, Register / Maintain Organization, and Maintain User (with sub-items: - Register User(s), - Edit User(s)). The main content area is titled 'Report Search' and includes a red asterisk and the text '* Required'. It contains two sections: 'Program & State' with a dropdown menu labeled '* Select a Program:' (showing 'Program XYZ') and a text field labeled 'State:'. Below this is a 'Search Criteria' section with two dropdown menus: '* Tax ID' (showing 'Select') and '* Select Report' (showing 'Select'). A red asterisk and the text '* Indicates a Required Field' are positioned below these dropdowns. A blue 'SEARCH' button is located at the bottom right of the 'Search Criteria' section. At the bottom of the main content area, there is a blue hyperlink that reads: 'Link, file or further instructions will display here, depending on program'.



Accessing POR (cont.)

- Use the **Contact Us** page to submit questions about the POR application.
- Your question will be routed to the proper market contact.



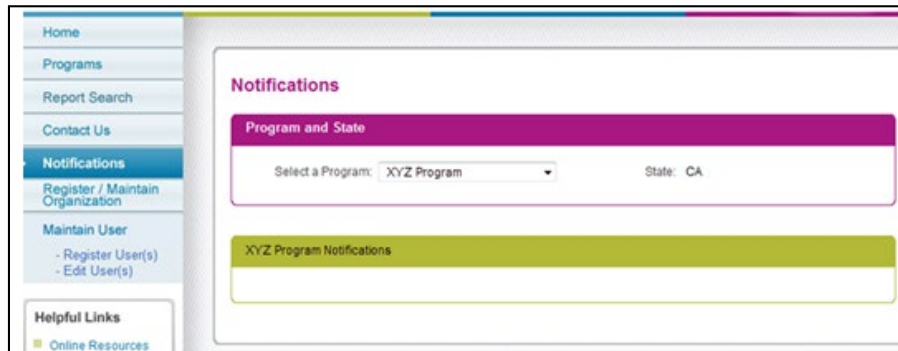
The screenshot displays a web application interface with a sidebar on the left and a main content area. The sidebar contains a navigation menu with the following items: Home, Programs, Report Search, **Contact Us** (highlighted), Notifications, Register / Maintain Organization, and Maintain User (with sub-links: - Register User(s), - Edit User(s)). Below the menu is a 'Helpful Links' section. The main content area is titled 'Contact Us' and contains a form with the following fields and sections:

- A red asterisk indicates required fields.
- A section for 'What is your comment regarding?' with a dropdown menu showing 'XYZ Program' and a 'State: CA' label.
- A section for 'Please specify the category for your question:' with a dropdown menu.
- A section for contact information with fields for 'First Name' (with a 'First' label), 'Last Name' (with a 'Last' label), 'Phone' (with a dropdown), and 'Extension'.
- A section for 'Best time to contact you:' with a dropdown menu showing 'Morning'.
- A large text area for 'Please leave your comment:' with a red note indicating 'Estimated time of response: 2-3 business days'.
- A 'Remaining Character Count: 250' indicator.
- A disclaimer: 'Please do not send personal health information.'
- A blue 'SUBMIT' button.



Accessing POR (cont.)

- Select the **Notifications** page to view updates for programs as applicable.
- Use **Online Resources** under *Helpful Links* to view external websites that may be useful to your organization.



The screenshot shows a web application interface. On the left is a vertical navigation menu with the following items: Home, Programs, Report Search, Contact Us, Notifications (highlighted in blue), Register / Maintain Organization, Maintain User (with sub-links: - Register User(s), - Edit User(s)), and Helpful Links (with sub-link: Online Resources). The main content area is titled "Notifications" in purple. Below this title is a section labeled "Program and State" with a purple header. It contains two input fields: "Select a Program:" with a dropdown menu showing "XYZ Program", and "State:" with a text input showing "CA". Below this is a green header section labeled "XYZ Program Notifications" with a large empty text area underneath.

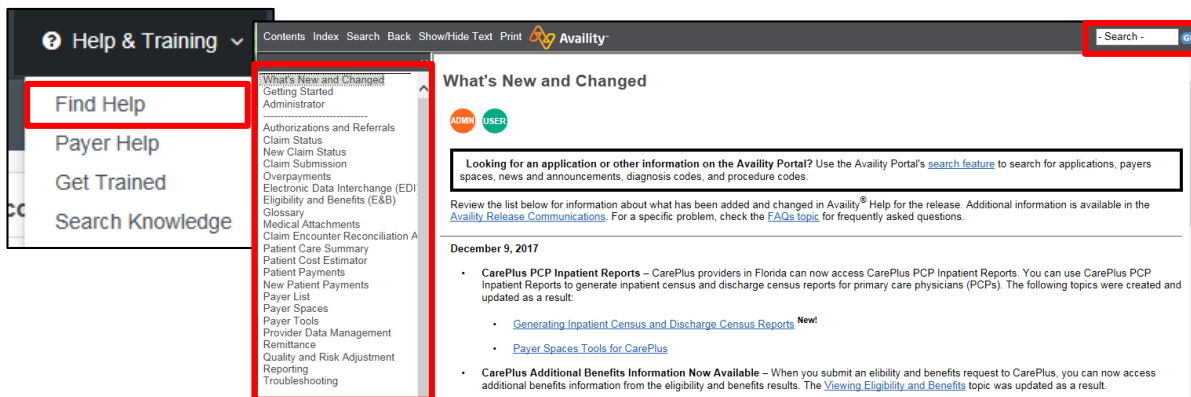


Help, tips and additional support

General Availity help and training

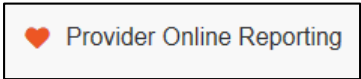
Find help with Availity registration by following the steps below:

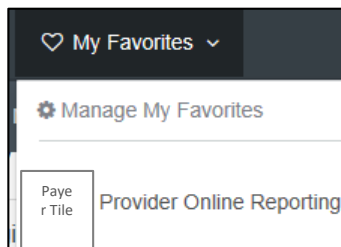
1. Log in to Availity at <https://www.availity.com>.
2. Select the **Help & Training** tab (upper right-hand side of the Availity screen).
3. Select **Find Help**.
4. Enter criteria in the search engine (upper right-hand side of screen) or make selections from the left-hand side of the screen.
5. Once you make your selections, the step-by-step instructions will be shown.



Helpful tip: Save Provider Online Reporting as a favorite

Save Provider Online Reporting as a favorite to be able to access it quickly from the Availity home page:

- Log in to Availity at <https://www.availity.com>.
- Choose **Payer Spaces** in the top menu bar.
- Select the **payer tile** that corresponds to your market.
- On the *Applications* tab, select the **heart icon** next to Provider Online Reporting so it fills in and turns red: 
- Now Provider Online Reporting will appear at the top under the *My Favorites* dropdown:



Additional support

- If you have questions regarding the Availity Portal, please contact Availity Client Services at **1-800-282-4548**.
- If you have questions about POR, use the *Contact Us* section of the application.
- If you have other questions, contact your local contract advisor, consultant or Provider Relations representative.





* Availity, LLC is an independent company providing administrative support services on behalf of Amerigroup Iowa, Inc.

Coverage provided by Amerigroup Inc.