

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 and to enjoy the vitality of a healthy business. Use this guide to help you get started.



THE AVAILITY WEB PORTAL RESOURCES AND TRANSACTIONS

Your Web Portal Home Page

The screenshot shows the Availity Web Portal Home Page. The top navigation bar includes the Availity logo, Home, Notifications, Florida, Payer Resources, Help, and Greg's Account. Below the navigation bar is a sidebar with a list of menu items including Eligibility and Benefits, Claims, Availity Payer List, EDI File Management, Enrollments, Patient Care Summary, Health Plan Clinician Tools, Patient Payments, My Payer Portals, My Account, Reporting, and Payer Support. The main content area features a green 'Check Eligibility & Benefits' button, an 'Availity Learning Center' section with a 'Take your performance to the next level with Availity's product and health industry expert training' message, and a 'News & Announcements' section with two news items: 'Help us streamline the overpayment process for you' and 'How often do payers ask for updated information?'. A blue line points from the 'Greg's Account' dropdown in the navigation bar to the 'Who controls my access?' text below.

Who controls my access? — View the name of your Web Portal Administrator in the Account menu. Every Availity organization has administrator who sets up and maintains user accounts and organization information, and who performs other administrative tasks. Your organization's administrator is responsible for assigning access to features in Availity.
Contact your Administrator if you believe you should have access to a specific feature but do not.

My Administrator is: _____

Top Navigation, Detail View

The screenshot shows the top navigation bar with the following items: Florida, Payer Resources, Help, and Greg's Account.

State — Select your region for the most accurate transaction availability.

Payer Spaces — Access payer-specific tools and information, such as companion guides, directories, forms, and much more.

Help — Access a drop-down menu and choose from the following options:

Find Help — view the help topic for the current Web Portal page.

Get Trained — check out additional learning opportunities based on your current Web Portal page.

Search Knowledge — access Availity's online community for the most current information about Availity products and services.

Account — Update your profile, find out who your administrator is, or log out of the Web Portal.



We're always working to improve your Web Portal experience. Some of the features you see here may look different in the actual Web interface. **Contact your Administrator** if you believe you should have access to a featured service.

Left Navigation, Detail View Click on an item in the top navigation pane to open a list or related commands.

 Home	
Eligibility and Benefits	
Auths and Referrals	
Claims	
Availity Payer List	
EDI File Management	
Enrollments	
Patient Care Summary	
Health Plan Clinician Tools	
Patient Payments	
My Payer Portals	
My Account	
Reporting	
Payer Support	
Account Administration	

Eligibility and Benefits
Eligibility and Benefits Inquiry

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

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

Availity Payer List
Payer List

EDI File Management
EDI Reporting Preferences
Send and Receive EDI Files

My Account
My Profile
Express Entry
Manage My Code List
View My Code List
My Favorite Codes

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

Referrals — Submit referral requests.

Authorizations — Submit authorization requests.

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

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.

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.

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

Express Entry — 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.

WELCOME

YOUR FIRST LOGIN

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

- accept an Availity Privacy and Security statement,
- accept a Confidentiality Agreement,
- choose three security questions and provide a response to each,
- create a new password, and
- 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 **Forgot your password?** or **Forgot your user ID?** 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)

ADMINISTRATORS

YOUR ADMINISTRATIVE TOOLS

Your Web Portal Home Page and Admin Dashboard

The screenshot shows the Admin Dashboard interface. On the left is a vertical navigation menu with the following items: Eligibility and Benefits, Auths and Referrals, Claims, Availity Payer List, EDI File Management (highlighted), Enrollments, Patient Care Summary, Health Plan Clinician Tools, Patient Payments, My Payer Portals, My Account, Reporting (highlighted), Payer Support, Account Administration, Availity Administration, and Client Services. The main dashboard area is titled 'Admin Dashboard' and contains a 'Quick Links' section with three primary buttons: 'My Users', 'My Providers', and 'My Organization'. Below these are secondary buttons: 'Add User' and 'Manage Users' under 'My Users'; 'Express Entry' under 'My Providers'; and 'Manage My Organization' under 'My Organization'. At the bottom of the dashboard is the 'Availity Learning Center' section with a message: 'Take your performance to the next level with Availity's product and health industry expert training'.

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

Express Entry — 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 tax ID, NPI, and organization type.

Payer Spaces — Access payer-specific functionality, like credentialing tools and risk assessment forms, without leaving the Web Portal.

Other Administrator Tools

The screenshot shows a vertical navigation menu for EDI File Management. The items are: EDI File Management (highlighted), EDI Reporting Preferences, and Send and Receive EDI Files.

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

Reporting

Administrator 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.

ADMINISTRATORS

YOUR ROLE AND RESPONSIBILITIES



ADMINISTRATOR RESPONSIBILITIES

As the administrator 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 **Administrator Tasks** collection of topics in Help, in the top navigation menu of the Web Portal, for more information.

STAY INFORMED

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

Administrators 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 administrator on record—contact Availity Client Services.

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.

Who's My Administrator?

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