

Welcome Primary Access Administrator (PAA)!

Quick Reference Card

Adding New Users

- 1. Ask user to choose a user ID and AKA name. *Rules:* Unique, 6 to 15 letters/numbers, no spaces.
- 2. Click Account Administration | Register New Users.



- 3. Select organization and click Next.
- **4.** Complete required fields (*) and click **Next**. *Tip:* Avoid specifying an end date unless temporary.

User ID:	johndoe	,	* (6 to 15	alphan	umeric chara	cters)
AKA Name:	johnnydo	е ,	* (6 to 15	alphan	umeric chara	cters)
Effective Date:	Month * /	* /	Year *	*	V Now Calendar Time	
End Date:	Month/ :	Day /	Year		Calendar Time	
Work Title:	Clerk	,	k			
First Name:	John		* MI:			
Last Name:	Doe		*			
		here to	copy orga	nizatio	on address in	to the fields below
	123 Any 9	street		_^ Դ		
Address:						
City:	Any City		*			
State:	Florida	•	*	_		
Zip:	32222 *	Zi	p+4:			
Telephone Number:	222 111	3333	* Ext:			
Fax Number:						
E-mail Address:						
Comments:					^	
					V	

- $\begin{tabular}{ll} \bf 5. & Write down user ID, password, AKA name. & Click \\ \bf Next. & \\ \end{tabular}$
- **6.** Click **Availity_Provider** to expand it.

Setting Up Providers for Express Entry

Set up providers to pre-populate the **Express Entry** field for quick data entry.

1. Click My Account | Maintain Provider.



- 2. If necessary, select organization and click Next.
- 3. Click Add New.
- **4.** Complete search criteria fields and click **Search**. Repeat search a few times, if necessary.

To search for individual	providers not filing claims with a group ID,				
First Name:					
Last Hame:					
OR to search for providers filing claims under a group ID, complete					
Organization Name:					
Completing the followin	g fields will narrow the search results:				
Primary Specialty:	Select one				
Provider ID: ?	(Enter ID Number)				
State:	Florida				
< <back search<="" th=""><th>į</th></back>	į				

(continued)

7. Click plus signs (+) to expand categories. Select check boxes to assign access to business functions based on user's role. Click **Save**.

Note: If you do not complete this step, the user cannot log into Availity.

John Doe at Availity Security (Security)					
└ 🖮 Availity_Provider					
⊢ 🖃 🗹 Claims Management					
F - ✓ AETNA Claim Status Inquiry					
F - ■ APG Claims-BCBSOK					
├ ─ ■ ASC Fee Schedule-BCBSOK					
F - ☑ BCBSF Claim Status Inquiry					
⊢ ─ ☑ BCBSF Facility Claim Submission					
F - BCBSF Professional Claim Submission					
F ─ CIGNA Claim Status Inquiry					
A CONTRACTOR OF THE CAMPANIA METCARDO					

(continued)

- **5.** If provider displays in results, click name and go to step 8. Otherwise, go to next step.
- 6. Click Enter Provider Info.
- 7. Complete required fields (*) and click **Next**.

* Type of Provider:	Individual
* First Name:	
Middle Name:	
^ Last Name:	
^ Title:	Select One
Date of Birth:	
* Provider Type:	Select One
* Required to have an HPI?	⊙Yes ○No
Next Cancel	

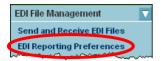
8. Complete **Provider Roles** tab for provider's role relative to organization. Click **Save** and **Next**.

Do you wa	nt to set up Expre	ss Entry for this	provider?	Yes	○ No
	ow are the provides s your provider m		r associate	ed transa	ctions.
Attending	Provider (Auths & R	eferrals and Facility	Claims)		
Billing Pro	vider (Claim Status, F	acility Claims and P	rofessional	Claims)	
Operating	Provider (Facility Cla	ims)			
Pay-To Pr	ovider (Facility Claim	s and Professional	Claims)		
Referred	To Facility (Auths & I	Referrals)			
Referred	To Provider (Auths 8	Referrals)			
Referring	Provider (Auths & Re	eferrals and Profes	sional Claims	s)	
Rendering	Provider (Professio	nal Claims)			
Requestir	g Provider (Auths &	Referrals and Eligib	ility & Benefi	ts)	
Service F	acility (Facility Claims	and Professional C	laims)		
Save C	ancel				

- Complete other tabs, clicking Next between them.
 Tip: Express Entry works best if the Provider Roles,
 Address(es), IDs, and Specialties tabs are accurate.
- 10. Click Finish. Repeat for next provider.

Setting EDI Reporting Preferences

1. Click EDI File Management | EDI Reporting Preferences.



- 2. Select the items you want. A grayed-out check box means the report is required and always delivered. *Tip:* Click? to display information about an option.
- 3. Click Submit.

Resetting Passwords

Users can change their own passwords. See the Welcome New User Quick Reference Card for details. Or, you can change a password on behalf of the user, as described here.

1. Click Account Administration | Change User Password



- 2. Select organization and user, and click Next.
- 3. Type temporary password in each field and click OK.
- **4.** Securely communicate the password to the user. The user must change it the first time he/she logs in.

Changing Access to Business Functions

1. Click Account Administration | Assign Access to Users.



- 2. Select organization and user, and click Next.
- **3.** Expand categories and change selections as necessary, based on the user's role.
- 4. Click Save.

Changing the PAA

To relinquish your PAA responsibilities to someone else, complete a change form.

1. Click Account Administration | Forms.



2. Click Change Request Form to Replace the Primary Access Administrator.



3. Print, complete, and submit the form as instructed.

The PAA should be able to:

- Check Availity regularly for notices and updates
- Commit time for adding users, granting access, resetting passwords, and other PAA tasks

The PAA can be-

- A staff member who has advanced responsibilities
- The office administrator or manager

Need Assistance?

Availity Help

For more information, see Availity Help:

- 1. In Availity, click **Help** at the top of the page.
- 2. Open these books: PAA Tasks | User Maintenance | Setting up New Users.

Show Me Demos

For an animated demonstration of many of these tasks:

- 1. In Availity, on the Home page under Availity Training and Resources, click Show Me Demos.
- 2. Click My Account or Account Administration.
- 3. Click a blue triangle to launch the demo.

FREE Live Webinar Training

Availity offers live training conducted by phone and teleconferencing tools. To see the schedule or enroll:

- 1. In Availity, click Free Training on any page.
- 2. Click Live webinar schedule.
- **3.** To enroll, click a webinar title and follow the instructions on the page that displays.

Still Need Help?

Contact Availity Client Services

Phone: 800.AVAILITY (800.282.4548)

E-mail: support@availity.com

Monday - Friday 8 am to 7 pm ET (excludes holidays)

Suspending and Revoking Users

Suspending is temporary. Revoking is permanent.

- 1. Click Account Administration | Manage User Status.
- 2. Select the organization and click **Next**.
- 3. Select the user.
- 4. To revoke permanently, click Revoke User.

To suspend temporarily, click **Add a status change** and select **Begin Suspend** in the **Reason** field on the next page.

- 5. Complete the comments and beginning date.
- 6. Click Submit New Action.

Reactivating and Reinstating Users

Reactivating is done for temporarily suspended users. Reinstating is done for permanently revoked users.

- 1. Click Account Administration | Manage User Status.
- 2. Select the organization and click **Next**.
- 3. To reactivate, select the user. Click **Not Set** or **As of Date** in the table, set the end date, and click **Submit Changes**.
- 4. To reinstate, click **View Revoked Users** below user list. Then select the user in the list, click **Reinstate User**, add a comment, set the beginning date, and click **Submit New Action**.