

My Profile

Maintain your own user account, including: user password, security questions and responses, title and e-mail address.

In the Availity menu, click **My Account | My Profile**.

Add User

Add new or existing Availity users to your organization(s). You can add users one at a time or use a spreadsheet to upload multiple users at once. Before you begin, see the Availity Help topic "Understanding Availity Roles and Permissions" for guidance.

In the Availity menu, click **Account Administration | Add User**.

Note: 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 14 days*. During login, Availity will prompt the user to create a new password.

Maintain User

Maintain existing user accounts, including:

- Unlocking user accounts and resetting passwords
- Assigning or removing roles for existing users
- Revoking or reactivating user accounts

In the Availity menu, click **Account Administration | Maintain User**.

Maintain 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.

In the Availity menu, click **Account Administration | Maintain Organization**.

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 at once.

In the Availity menu, click **My Account | Manage Providers**.



Availity Help

For more information on PAA tasks, see Availity Help:

- In the top navigation bar of the Availity portal, click **Help**.
- Open the **PAA Tasks** book and browse through the topics.

Availity Learning Options

Availity offers a variety of free learning options, including live webinars, recorded webinars, interactive online demonstrations and in-person conferences.

To view a complete listing, click **Free Training** in the top navigation bar of the Availity portal.



Still need help? Contact Availity Client Services

- Call 1.800.AVAILITY (282.4548) toll free
- E-mail support@availity.com



Hours of operation

Monday through Friday 8 a.m. to 7 p.m. Eastern time (excluding holidays)



Availity® Health Information Network Primary Access Administrator (PAA) Quick Reference Guide

Welcome to Availity, where we help you focus on patients, not paperwork.

A leader in health care technology and information exchange, Availity provides a secure, Web-based network to optimize the flow of business and clinical transactions among health care stakeholders.

The Availity Health Information Network helps providers, health plans and technology companies save time and money. Whether you work with one health plan or many, you can quickly and easily file claims, check eligibility and benefits, review clinical history, process payments and more using Availity.

This guide will help ensure you get the most out of your Availity experience as a Primary Access Administrator (PAA).



GETTING STARTED

Your Role as the PAA

The **Primary Access Administrator (PAA)** functions as the link between your organization and Availity. PAAs regularly interact with the Availity portal for important service communications, announcements and usage enhancements that affect their organizations.

As the PAA for your organization, you are responsible for setting up and maintaining user accounts, maintaining organization information and performing other administrative tasks in the portal. You will need to commit the time to log in to the portal regularly to check for notices and updates, assign access to users and perform other administrative tasks.

It is important to ensure your contact information is always current, since Availity relies on communications with the PAA to reach the entire organization.

Get help with PAA tasks by opening the **PAA Tasks** book in Availity Help and browsing through the topics.

Note: 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.

Your Contact Info

Availity communications

To keep your organization current and informed, Availity uses several communications channels including e-mail and the portal home page.

The PAA's role includes acting as the primary contact person for Availity and passing on timely information to the rest of the organization.

What we need

PAAs must provide their e-mail address, phone and fax numbers.

Updating your contact info

To update your e-mail address, click **My Account | My Profile** in the Availity 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 **Who controls my access?** at the top of any page on the Availity portal and follow the appropriate links.

Setting Pop-up Blockers to Allow Availity

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

1. In Windows Internet Explorer, click **Tools | Pop-up Blocker | Pop-up Blocker Settings**. **Note:** This menu option is available only if you have pop-up blockers turned on.
2. In the **Address of website to allow field**, type the following URLs, clicking **Add** after you type each one.

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

Setting Your Screen Resolution

While a low resolution, like 800x600 pixels, makes everything on your screen large and easier to see, objects may not fit well on the screen. Availity is best viewed at higher resolutions, such as those between 1024x768 pixels and 1280x1024 pixels. To change your screen resolution, see the Availity **Help** topic "Can't See Everything on the Screen."



USING AVAILITY

EDI Guide

View Availity-specific Electronic Data Interchange (EDI) requirements and other information, including report and response formats and examples.

In the top navigation bar of the Availity portal, click **Availity Resources**. Under **EDI Documents**, click **EDI Guidelines**. In the document that displays, click **EDI Guide**.

EDI Reporting Preferences

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

In the Availity menu, click **EDI File Management | EDI Reporting Preferences**.

Health Plan Partners

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

On the Availity Home page, under **Training and Resources**, click **Availity Health Plan Partners**.

My Availity Dashboard

View detailed information about Web and EDI transactions submitted for the entire organization.

In the Availity menu, click **Administrative Reporting | My Availity Dashboard**.

PAA Reports

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

In the Availity menu, click **Administrative Reporting | PAA Reports**.

Payer Resources

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

In the top navigation bar of the Availity portal, click **Payer Resources**. Click the link for the appropriate payer.

Value-Added Services

Enroll or set up your organization with value-added services from Availity such as **CareCollect®** payment collection, **CareRead®** card swipe data entry, electronic remittance advice (ERA) and more. View these at:

- **Value-Added Services** and **Training and Resources** on the Availity Home page
- **My Account** in the Availity menu



To register, visit www.availity.com