Adding a New User

Overview

As the Primary Access Administrator (PAA) for your organization, you are responsible for setting up new users in the Availity Web Portal and assigning user roles based on job function. You can quickly and easily set up as many user accounts for your organization as necessary. Review Understanding Availity Roles and Permissions for details around how roles and permissions work in the Availity Web Portal.

Adding a user

GETTING STARTED

1. Use one of these options to access the Add User page:
   a. In the Availity menu, click Account Administration | Add User.
   b. Click Add User on the Admin Dashboard that displays when you first log in.

2. Complete the required fields. E-mail and phone are optional but useful for managing the new user’s account. Select an organization, if you’re associated to more than one, and then click Next.

TIP – ADDITIONAL RESOURCES

- Adding Users online demo
- Uploading Multiple Users QRC

TIP: Click Help at the top right of the Web Portal page to learn how to use all the features on the Admin Dashboard.
Adding a user

ASSIGNING ROLES

3. Select the check boxes beside the roles that you want to assign to the user. Availity assigns the Base Role to all users.
   a. If applicable, select the top check box to assign the user all available roles.
   b. Click More info under Permissions to learn about the permissions associated to each role.

IMPORTANT: SOME ROLES HAVE LEGAL IMPLICATIONS RELATED TO HIPAA LAWS.

4. Click Next.

TIP: If you have more than one user in your organization, you can select this option to assign the same set of roles to all your users.
**Adding a New User**

**REVIEW AND SUBMIT**

5. Review all the information, and then click **Submit** to complete this process.

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### Review and Submit

<table>
<thead>
<tr>
<th>User ID: 111111</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name: Anya</td>
</tr>
<tr>
<td>Last Name: Wilson</td>
</tr>
<tr>
<td>E-mail Address: <a href="mailto:anya1son@yahoo.com">anya1son@yahoo.com</a></td>
</tr>
<tr>
<td>Phone: (904) 555-5555</td>
</tr>
<tr>
<td>Notes:</td>
</tr>
<tr>
<td>Effective Date: 01/23/2014</td>
</tr>
</tbody>
</table>

### Organization(s) and Roles

<table>
<thead>
<tr>
<th>Organization</th>
<th>Address</th>
<th>Tax ID</th>
<th>Role(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doctor Office of Jax</td>
<td>10752 Deerwood Pk Blvd S Jacksonville, FL 46545</td>
<td>123456780</td>
<td>Base Role, Authorization and Referral Inquiry, Authorization and Referral Request, Claim Status, Claims Management, EDI Management, Eligibility and Benefits, Manage Providers, PAA Assistant</td>
</tr>
</tbody>
</table>

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**TIP:** Click this link if you want to make any changes before submitting.
**Adding a New User**

**WHAT HAPPENS NEXT?**

Follow the directions on the User Information Saved page for any next steps you need to take.

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**User Information Saved**

Provide the information below to the Availity user you have added to your organization(s).

- If the user is new to Availity, a temporary password displays below. The user must log in to Availity within 90 days. You will not have access to the user's temporary password after you leave this page.
- If the user was already an Availity user, the user can log in to Availity at any time with his or her existing password.

**User Information**

<table>
<thead>
<tr>
<th>User ID:</th>
<th>111111</th>
</tr>
</thead>
<tbody>
<tr>
<td>Temporary Password:</td>
<td>vzd936</td>
</tr>
<tr>
<td>Temporary password expires in 90 days.</td>
<td></td>
</tr>
</tbody>
</table>

- **First Name:** Anya
- **Last Name:** Wilson
- **E-mail Address:** anya1con@yahoo.com
- **Phone:** (904) 555-5555
- **Effective Date:** 01/23/2014

**Organization(s) and Roles**

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</tr>
</tbody>
</table>

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**TIP:** Click **E-mail** to send the user ID and temporary password to the user.