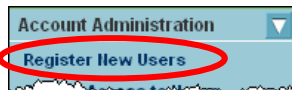


Quick Reference Card

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 alphanumeric characters)
 AKA Name: johnnydoe * (6 to 15 alphanumeric characters)

Effective Date: / / * Now

End Date: / /

Work Title: Clerk *
 First Name: John * MI:
 Last Name: Doe *
 Work Address
 Check here to copy organization address into the fields below
 Address: 123 Any Street *
 Address:
 City: Any City *
 State: Florida *
 Zip: 32222 * Zip+4:
 Telephone Number: 222 111 3333 * Ext:
 Fax Number:
 E-mail Address:
 Comments:

5. Write down user ID, password, AKA name. Click **Next**.
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.

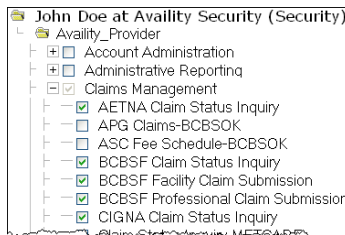
To search for individual providers not filing claims with a group ID,
 First Name:
 Last Name:

OR to search for providers filing claims under a group ID, complete
 Organization Name:

Completing the following fields will narrow the search results:
 Primary Specialty: -- Select one --
 Provider ID: (Enter ID Number)
 State: Florida

(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.



(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

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

Do you want to set up Express Entry for this provider? Yes No

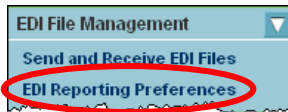
Listed below are the provider roles with their associated transactions. Use apply to roles your provider may fill.

Attending Provider (Auths & Referrals and Facility Claims)
 Billing Provider (Claim Status, Facility Claims and Professional Claims)
 Operating Provider (Facility Claims)
 Pay-To Provider (Facility Claims and Professional Claims)
 Referred-To Facility (Auths & Referrals)
 Referred-To Provider (Auths & Referrals)
 Referring Provider (Auths & Referrals and Professional Claims)
 Rendering Provider (Professional Claims)
 Requesting Provider (Auths & Referrals and Eligibility & Benefits)
 Service Facility (Facility Claims and Professional Claims)

9. 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**.

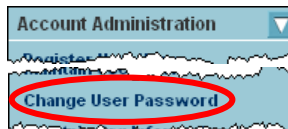


2. Select the items you want. A grayed-out check box means the report is required and always delivered.
Tip: Click ? to display information about an option.
3. Click **Submit**.

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.

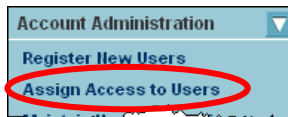
1. Click **Account Administration | Change User Password**.



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**.

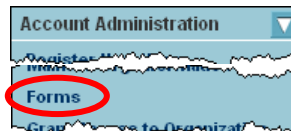


2. Select organization and user, and click **Next**.
3. Expand categories and change selections as necessary, based on the user's role.
4. Click **Save**.

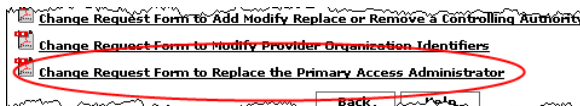
Changing the PAA

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

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**.

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)

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**.