Welcome Primary Access Administrator (PAA)!

Quick Reference Card

availity® Patients. Not paperwork.

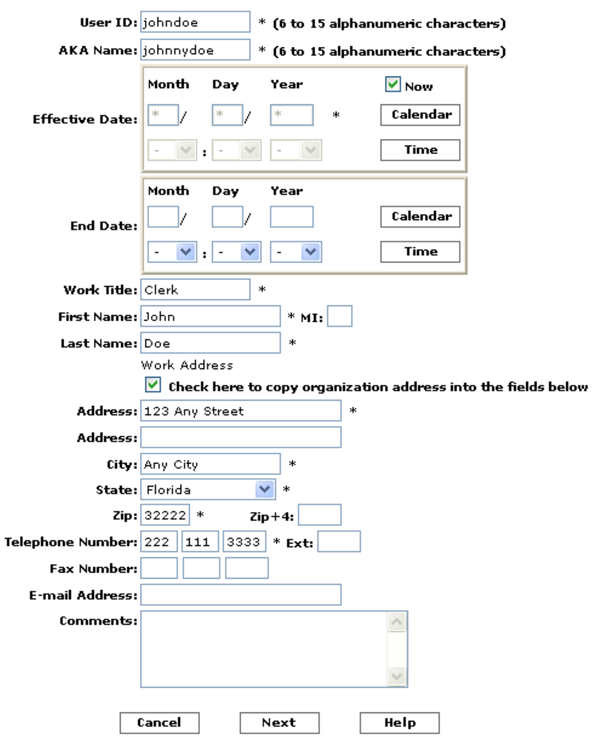
Adding New Users

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.



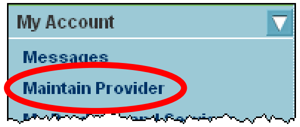
5. Write down user ID, password, AKA name. Click **Next**.

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.

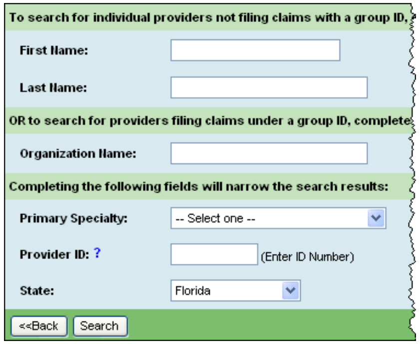
1. Click **My Account | Maintain Provider**.



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.



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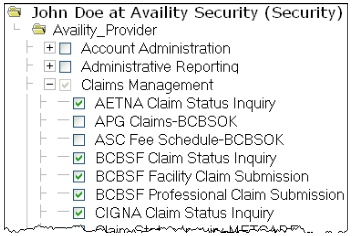
7. Click plus signs (+) to expand categories. Select check boxes to assign access to business functions based on user's role. Click **Save**.
Note: If you do not complete this step, the user cannot log into Availity.



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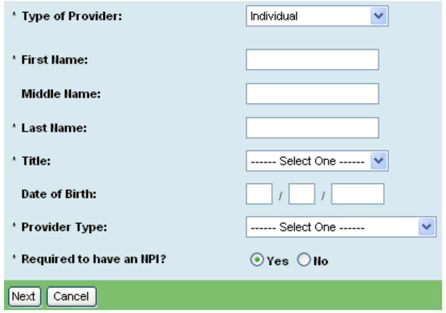
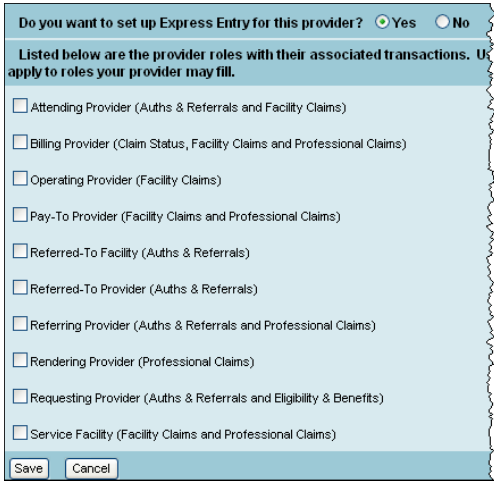
5. If provider displays in results, click name and go to step 8. Otherwise, go to next step.

6. Click **Enter Provider Info**.

7. Complete required fields (*) and click **Next**.



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

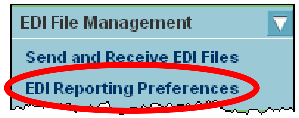


9. Complete other tabs, clicking **Next** between them.
Tip: Express Entry works best if the **Provider Roles**, **Address(es)**, **IDs**, and **Specialties** tabs are accurate.

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**.

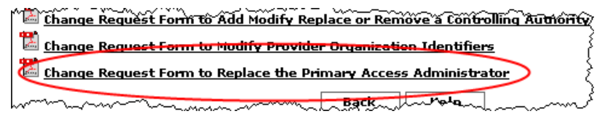
4. Securely communicate the password to the user. The user must change it the first time he/she logs in.

Changing 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)

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**.

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**.