



**AVAILITY PORTAL**  
REFERENCE GUIDE FOR USERS & ADMINISTRATORS

Streamline workflows  
with multi-payer access

# Users

## Getting started

Availity Portal is a secure, multi-payer platform where healthcare providers and health plans collaborate by exchanging administrative and clinical information. Your administrator should register your organization only once through the **Register** link on [www.Availity.com](http://www.Availity.com). Once the registration is approved and set up, the administrator can give other users access to the Availity Portal and assign roles to a user's account as necessary.

Users can log in to view patients' eligibility and benefits, submit claims, track remittances, and more.

When you log in for the first time, Availity prompts you to:

- Accept privacy and security statements
- Accept a confidentiality agreement
- Choose three security questions and answers
- Create a new password
- Verify your email address

Click the link in the email to complete your set-up with Availity.

**It's important that you not share your user ID or password with others.** Sharing accounts violates Availity's terms of service and gives others the means to act as you. We want (and require) users to have their own accounts; that's why we do not charge for user accounts. If you're currently sharing an account, ask your organization's Availity administrator for a user ID. In Availity Portal, go to My Account Dashboard, and click the My Administrators link to locate the name of your Availity administrator. You'll get a verification email after you enter this information.

## Getting set up

As part of the initial login process, you'll be prompted to verify your identity by providing or validating certain pieces of information about yourself when you access Availity Portal. This will allow us to better verify that our trusted users are who they say they are.

After login, you'll need to enroll in 2-step authentication through your choice of one of these options: text, voice call, Mobile Authenticator App (i.e., Google Authenticator), or an Open Authorization Token. This last option is best for users who do not have access to a phone or tablet.

The Availity Portal works best on the latest versions of Internet Explorer, Chrome, or Firefox browsers. For security reasons, the Portal does not support Internet Explorer

versions older than 11.

Popup blockers can prevent some Portal windows and features from displaying properly. If you need help turning your popup blocker off, consult the Help files for your browser or your organization's IT support staff. You'll need to allow the following web addresses to generate new windows (popups):

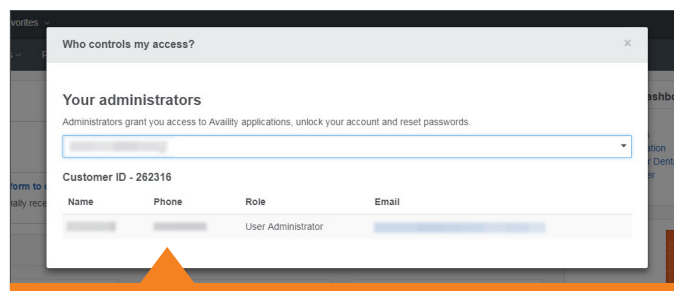
- [www.availity.com](http://www.availity.com)
- [apps.availity.com](http://apps.availity.com)
- [mc.availity.com](http://mc.availity.com)

## Getting to know you

You can edit your profile (including contact information, password, and security questions), or find out who manages your access. Access this page by clicking your name at the top of the Availity portal.

If you forget your User ID or password, you can retrieve them using the links on the Availity Portal login page. If you call Availity Client Services for login assistance, they'll ask you your security questions to validate your identity.

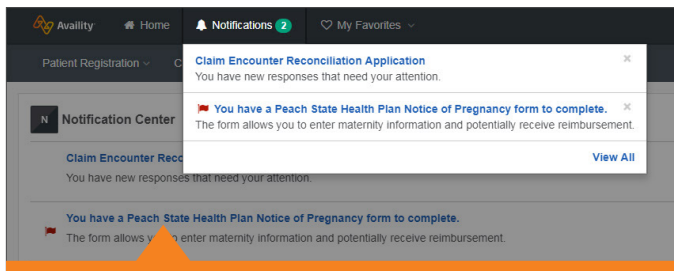
If you are not the administrator for your organization and want to find out who is, click **My Administrators** on the My Account page.



## Getting personal

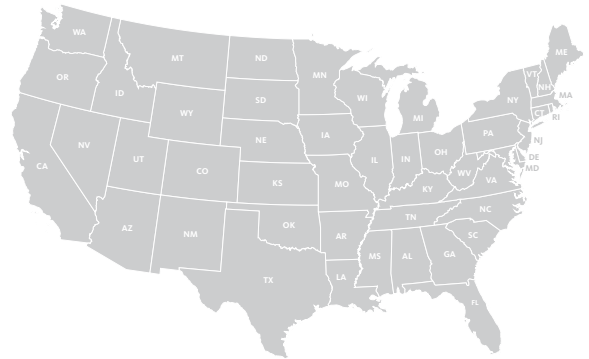
No one knows your job better than you do—that's why you can personalize many features of the Portal.

The **My Top Applications** section of the home page displays tiles for your four most frequently used applications. The tiles change based on the applications you use. You can also add applications or resources in Payer Spaces to your favorites. To mark an item as a favorite, simply select the heart icon next to the item. The heart turns from empty to filled. When you're ready to use that app or resource, select **My Favorites** and find the favorite in your list of favorites.



## Getting local

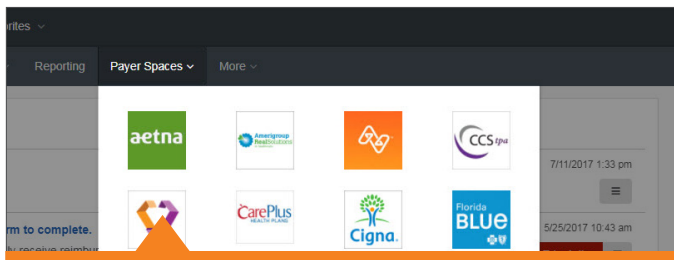
Portal features vary by health plan and by state.



For a complete list of payers and transactions, click **More (4)** or visit [Availity.com](http://Availity.com) and select **Web Portal Payer List** from the **Resources** menu.

## Getting to your payers

The **Payer Spaces** menu is where you'll find news, policy, and process updates, as well as payer-specific collaboration tools. Your list will vary based on your region and the payers who participate in your area.



## Getting around

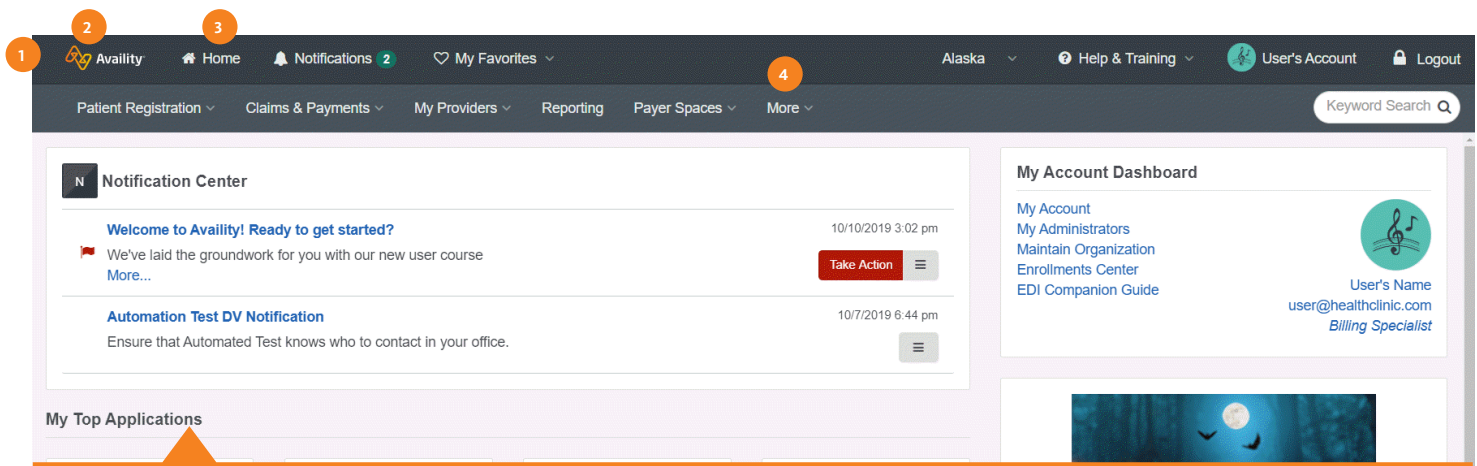
The top navigation bar (1) stays the same no matter where you go in the Portal. You can always get back to your home page by clicking the Availity logo (2), or Home (3).

The menus give you access to the tools you need to get your work done. You'll find payer-specific features in **Payer Spaces** and in other key and convenient locations as you're using the Portal.

## Getting help and training

The Availity Learning Center (ALC) has a large collection of recorded and live training opportunities and extensive online help. You can get to both by clicking **Help & Training** at the top of the page.

For further assistance, click **My Support Tickets** in the Help & Training menu to open a support ticket or browse articles in the support community.



# Administrators Hold the Key

Your organization's Availity administrator manages Availity Portal for your business. As an administrator for your organization, you should log into the Portal frequently to complete a variety of tasks:

Action Item	How-to Steps	More Information
<b>Allow pop-ups from Availity and set up your user account</b>	Follow steps to allow pop-ups for your system.  Select My Account in the My Account Dashboard section of the Home page.	For help with some operating systems, refer to the Availity Help topic called Pop-up Blocker Blocks Availity and Third-Party Pop-ups. On your My Account page, you'll pick an avatar, select your job title, and confirm your email and phone number information.
<b>Explore roles and permissions</b>	In Availity Help, select the Administrators topic to review it.	As the administrator for your organization, you are responsible for assigning roles to users in your organization based on each user's job function. Assigning roles is part of the process when you add a new user. You can also assign or remove roles to existing Availity users at any time.
<b>Add users</b>	Select Add Users in the My Account Dashboard section on the Availity Portal Home page.	You can add users one at a time, use a spreadsheet to upload multiple users at once, and copy a user from one organization to another.
<b>Assign a backup administrator</b>	While adding or managing users, assign an Admin role(s) to user(s).	Before assigning roles to users, it is important to understand Availity Roles and Permissions. Check out that topic in Availity Help.
<b>Set up provider express entry</b>	Select My Providers   Express Entry.	You can use the manage providers service to add providers one at a time, add multiple providers from a spreadsheet, edit provider information, delete providers, copy providers to other organizations, and configure Express Entry types.
<b>Enroll for additional features</b>	Select My Providers   Enrollments Center. Select an option and follow the wizard.	Some features--like ERA delivery and medical attachments-- require additional enrollment and set up. What you'll find in the Enrollments Center is based on your organization's region and participating payers.
<b>Add secondary tax IDs to your business' details, if applicable</b>	Select Maintain Organization in the My Account Dashboard section on your Availity Portal Home page.	Some payers require your secondary tax ID information be included when transacting with them through Availity. By adding the IDs in Maintain Organization, you'll ensure Availity sends them when needed.

Payer Spaces on Availity Portal make it easy for you to navigate to proprietary payer applications, resources and information.

Request a demo today and see how the Portal can help your organization streamline claims submission and get real-time access to multiple payers. [Availity.com](https://www.availity.com)

