



BRIDGEVIEW

Availity Essentials Organization Registration and Getting Started

WWW.AVAILITY.COM/ESSENTIALS

REGISTRATION AND GETTING STARTED

- Registering your organization
 - This document provides high level steps to complete the registration process on the Availity essentials portal
- Getting started after registration
 - This document shares some details on various steps available after your organization's registration has been completed

REGISTERING YOUR ORGANIZATION



First things first:

Internet browser compatibility

Availity Essentials is compatible with the following browsers:

- Microsoft Edge (version 79 and higher) – Visit the Microsoft website to [download Edge](#). To ensure you are using the Edge browser, look for this logo:



Important: Effective August 21, 2021, Availity is retiring support for Internet Explorer 11.

- Google Chrome (version 22 and higher) – Visit the Google website to [download Chrome](#).
- Mozilla Firefox (version 27 and higher) – Visit the Mozilla website to [download Firefox](#).
- Allow pop-up windows
 - [apps.availity.com](#)
 - [www.availity.com](#)
 - Any third-party websites accessed from the Availity Portal such as a payer's website.
- **Note:** Also allow JavaScript and allow images to load automatically.

REGISTERING YOUR ORGANIZATION, CONTINUED



To register your business:

- Follow these steps
 1. Go to www.Availity.com/essentials
 2. Click register
 3. Click the organization type
 4. Follow the registration wizard

REGISTRATION TIP

IF YOU DO NOT REQUIRE USE OF A NPI, THEN UNCHECK THIS BOX IN STEP 2 OF THE REGISTRATION PROCESS ABOUT ORGANIZATION INFO.

National Provider Identifier (NPI)

If you have an individual (entity type 1) and organization (entity type 2) NPI, use the organization's NPI.

This is a HIPAA covered healthcare provider that is required to have an NPI



Availity Essentials (Portal) [LOGIN](#) [REGISTER](#)

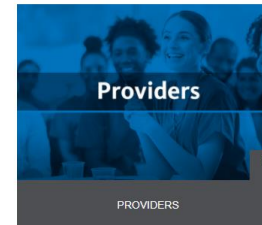
[Home](#) [Provider Solutions](#) [Healthplan Solutions](#) [Vendor Solutions](#) [Connect](#) [Resources](#) [About](#) [Q](#)

Register for access

To register, select your organization type below

Availity Essentials offers secure online access to multiple health plans, and the ability to manage business transactions through a single, easy-to-use site. Registering for Essentials will also allow you to set up EDI Gateway, batch, and FTP services (or transactions). All you need is basic information about your business, including your federal tax ID.

Locate your organization type below, then click the arrow to get started



*Note a user account will need to be setup prior to completing the registration of your organization

REGISTERING YOUR ORGANIZATION, CONTINUED



Availity 2-Step Authentication:

- Availity wants to protect the privacy and data that users have access to. To do that they have added a required 2-step authentication.
- Each user will need to have their own account. We will review how to do that later in the presentation.
- This 2-step authentication process ensures that you are the person you say you are at the keyboard.
- Only the primary Administrator of the organization is required to complete the identity verification steps. You will have to answer personal questions about yourself. Availity utilizes a vendor for this process, they do not know this information about you.
- All other users will only need to complete a few questions to obtain a code to complete the log in process.

2 STEP AUTHENTICATION PROVIDES ANOTHER CHECKPOINT TO MAKE SURE THE PERSON LOGGING IN TO THE AVAILITY ACCOUNT IS WHO THEY SAY THEY ARE

A screenshot of the Availity user interface for setting up 2-step authentication. At the top, the Availity logo is on the left, and a progress bar on the right shows four steps: "Start", "Verify your Identity", "Set up 2-step authentication" (which is the current step and highlighted with a green circle), and "Complete". Below the progress bar, there are two main content areas. The left area is titled "What's 2-step authentication?" and contains explanatory text about the security layer and a link to "Get answers to common questions". The right area is titled "Set up 2-step authentication" and contains instructions about receiving codes, followed by three radio button options: "Use the Google Authenticator app to generate the code", "Text me the code", and "Call me with the code". At the bottom of the right area, there is a link for "My organization requires a different authentication method."

REGISTERING YOUR ORGANIZATION, CONTINUED



The person who completes the registration process for the organization is automatically considered the Access Account Administrator.

- The Access Account Administrator has the security to perform the following function:
 - Add or maintain users
 - Assign required roles
 - Maintain your organizations information
 - ERA registration
 - Maintain the organization

** This list does not include all available functions used on the Availity Essentials portal*

GETTING STARTED



After the Access Account Administrator has completed the registration process for the organization, they will need to decide if additional users need to be added to support your organization. Here are some considerations:

- Is there an assistant administrator needed for back up?
- Who will maintain any changes to the organization?
- Do I need to access my remittance information through Availity?
- Will I submit claims using the Availity essentials portal?
- What training is available?

USER ACCESS



After you have decided who needs to be added as a user to your organization within Availity follow these steps:

- Go to My Account dashboard choose “Add User”
- Complete the required fields – User ID, First and Last name.
- Enter an email address – **this is not required but highly recommended** to allow the user to receive passwords and other email communication
- Choose the organization the user needs access to
- Choose the roles needed
- Review and submit

My Account Dashboard

- My Account
- My Administrators
- Maintain User
- Add User**
- Maintain Organization
- 'How To' Guide for Dental Providers
- Enrollments Center
- EDI Companion Guide
- Spaces Management Tool

Note: User ID's are free form, the ID is required to be 6-15 characters in length, containing only letters and numbers. Spaces are not allowed. If the User ID is already in use, an error message will be presented.

Add User

* indicates a required field

* User ID:
 This is an existing user ID

* First Name:

* Last Name:

E-mail:

Phone: - - ext.

Notes:

Have a lot of users?

Upload users from a spreadsheet in .csv format.
Copy users from one organization to another.

Add this user to the following organization(s):

<input type="checkbox"/>	Organization	Customer ID	Address	Tax ID	Organization Type
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USER ACCESS, CONTINUED

MAINTAIN A USER



To allow additional access to a user ID already setup, you will need to assign the appropriate role(s).

Follow these steps:

- Go to My Account dashboard choose “Maintain User”
- Select organization or search for a user by name or id
- Click on view/edit to open box to view roles.
- Check boxes for role(s) needed
- Click Save to keep changes – as needed use clear or cancel buttons.

My Account Dashboard

- [My Account](#)
- [My Administrators](#)
- [Maintain User](#)
- [Add User](#)
- [Maintain Organization](#)
- ['How To' Guide for Dental Providers](#)
- [Enrollments Center](#)
- [EDI Companion Guide](#)
- [Spaces Management Tool](#)

Roles

[View/Edit](#)

Note: Check the box next to the role needed. All users are automatically setup with the base role assigned.

<input type="checkbox"/>	Role(s)	Permissions What is this?
User Roles		
<input checked="" type="checkbox"/>	Base Role	More Info
<input type="checkbox"/>	Claims	More Info
<input type="checkbox"/>	EDI Management	More Info
<input type="checkbox"/>	Eligibility and Benefits	More Info
<input type="checkbox"/>	Express Entry	More Info
<input type="checkbox"/>	New Eligibility and Benefits	More Info
<input type="checkbox"/>	Provider Data Management	More Info
<input type="checkbox"/>	Provider Enrollment and Contracting	More Info
Administrator Roles		
<input type="checkbox"/>	Administrator Assistant	More Info
<input type="checkbox"/>	Administrator Reports	More Info
<input type="checkbox"/>	Transaction Enrollment - Advanced User	More Info
<input type="checkbox"/>	User Administration	More Info

FINDING YOUR AVAILITY CUSTOMER ID

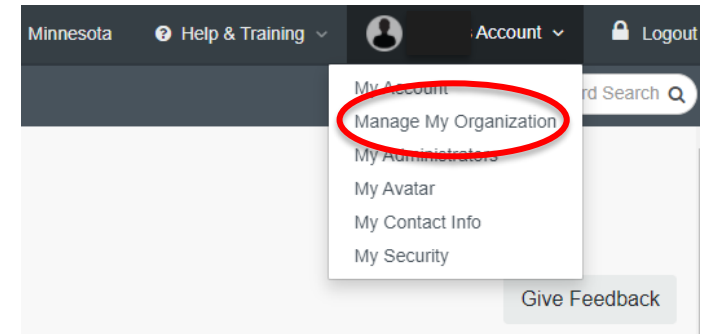
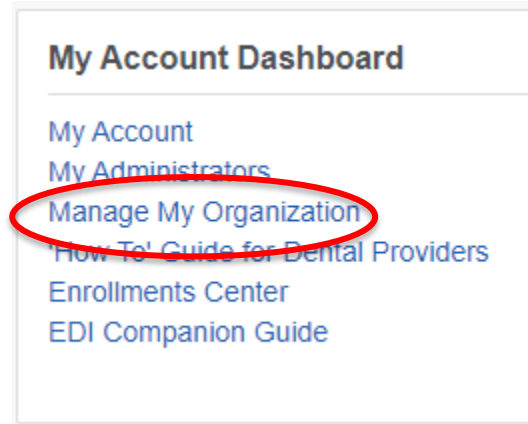
To find your Availity Customer ID you will want to view your Organization's information.

- From the home page on the “My Account Dashboard” tab, choose “Manage My Organization”

Or

- Under “Your name account” menu choose “Manage My Organization”

Your Customer ID is listed in two places



MO Manage My Organization

Give Feedback

Organizations

Register an Organization

Org Name Search...

Active Pending Rejected

Team	Customer ID

Tax ID	NPI	Regions	Primary Taxonomy	Primary Service Address
	N/A	MN	N/A	

Awesome. Your organization is live.

Here are some tips to help you manage your organization effectively.

- Access training for [new administrators](#) and [users](#) to get started quickly with Availity Portal.
- If you are an administrator, you can [add users](#) to your organization.
TIP: You'll want to designate a backup admin for when you are out of the office.
- Set up your providers in [express entry](#) to save time when submitting transactions.
- [Enroll for](#) or [set up](#) additional features (including [ERAs](#) or [EFTs](#)).
- Or, go to the [home page](#) and get to work right away with your new organization.

FINDING YOUR ORGANIZATION'S ADMINISTRATOR



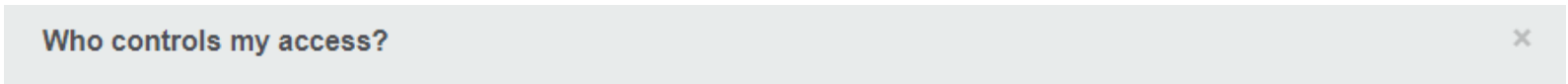
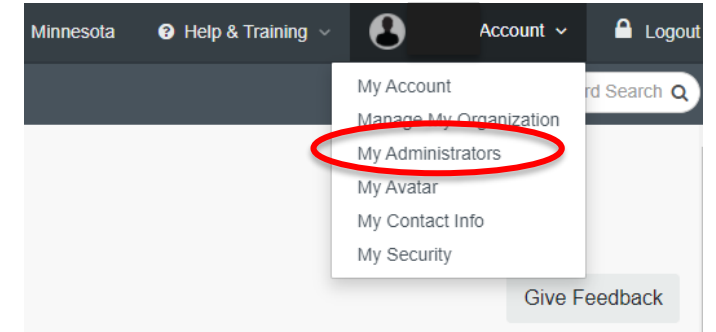
To find your organization's administrator you will want to look at "My Administrators"

- From the home page on the "My Account Dashboard" tab choose "My Administrators"

Or

- Under "Your name account" menu choose "My Administrators"

Your administrator's information will be listed in the pop-out window



Your administrators

Administrators grant you access to Availity applications, unlock your account and reset passwords.

Current Organization - Team

Customer ID -

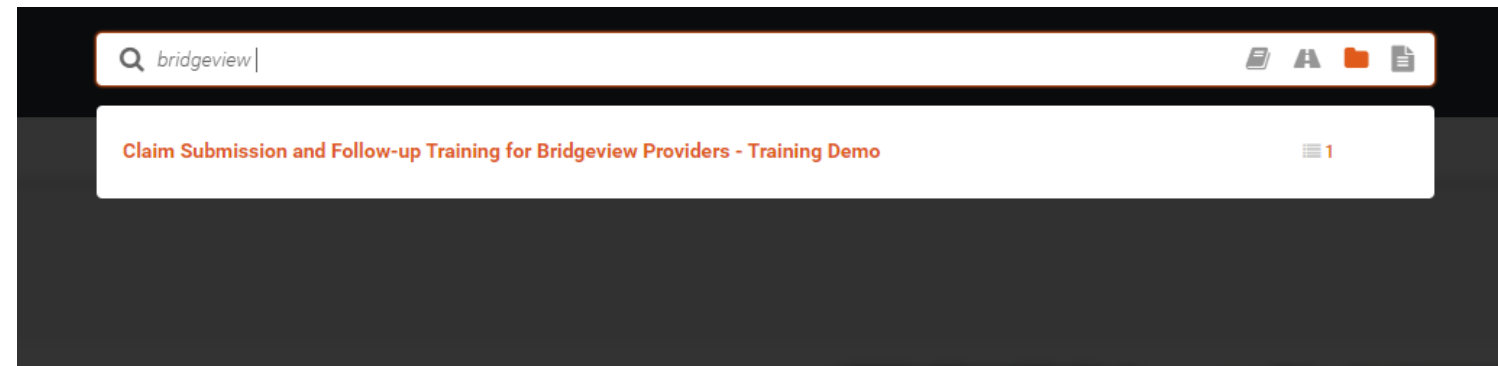
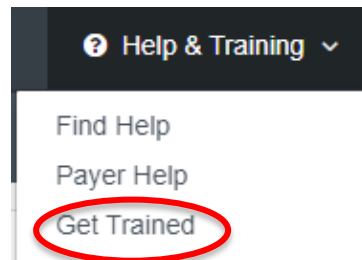
Name	Phone	Role	Email
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TRAINING OPPORTUNITIES



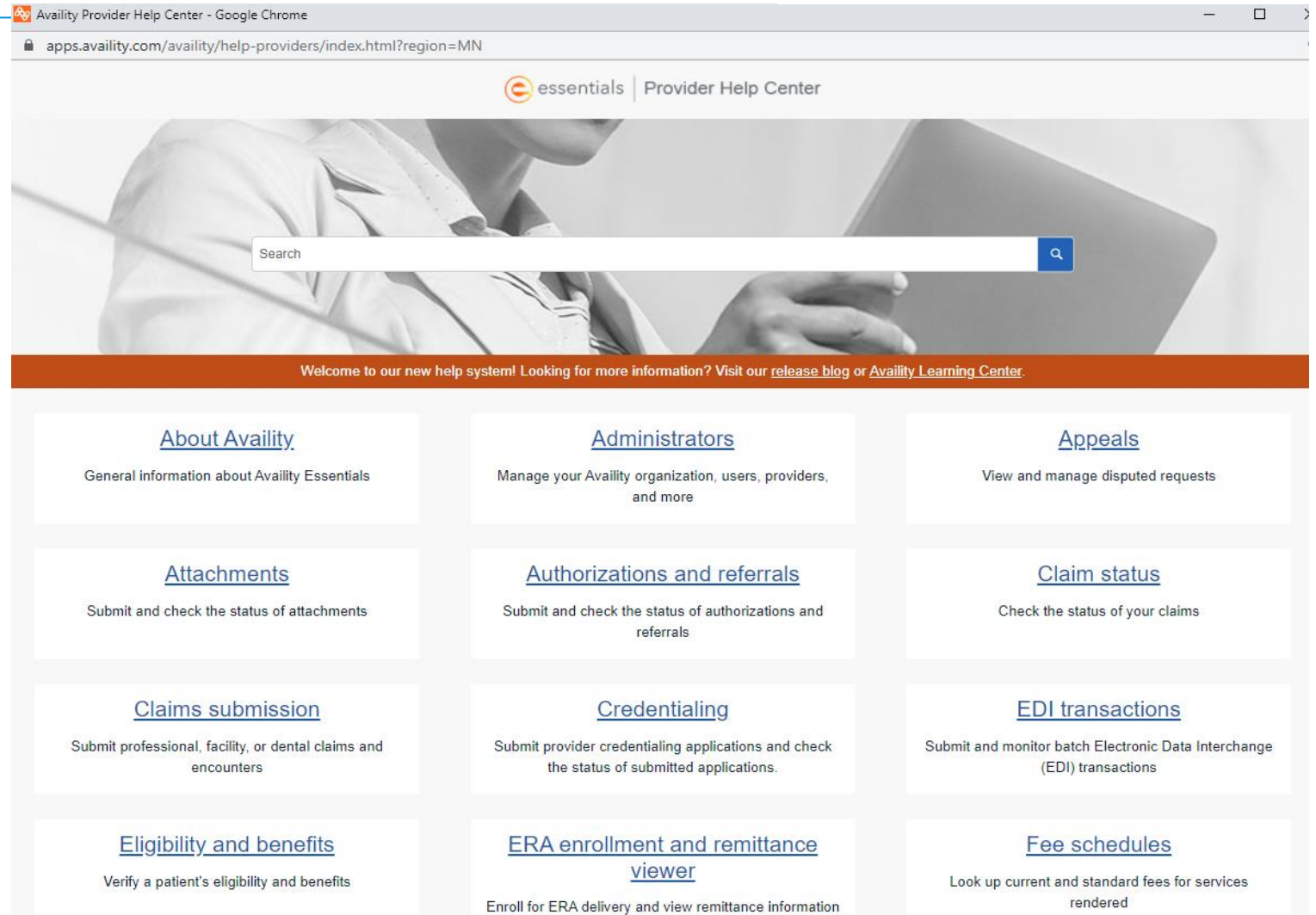
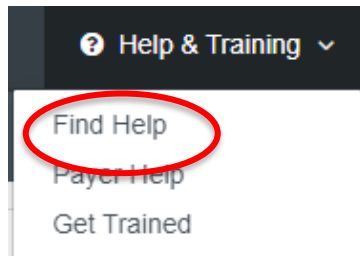
There are multiple opportunities to get access to various documents and training demos

- From Help & Training menu choose “Get Trained”
 - The Get Trained link will open the Availity Learning center (ALC)
 - In the search box type what you are looking for. This example shows what is found when searching on Bridgeview.



TRAINING OPPORTUNITIES, CONTINUED

- From Help & Training menu choose “Find Help”.
 - The Find Help link will open the provider help center
 - Click on the topic of choice for more information.




TRAINING OPPORTUNITIES, CONTINUED


- Within applications on the portal, links are available to go directly to demos
 - This example is from the claim submission form, next to the title you will see the link to “Watch a demo”.
- Explore options available

Professional Health Care Claim Need help? [Watch a demo](#) for submitting claims.

* indicates a required field

Choose “Explore Options”





Click **Explore Options** above to explore training demo options and information about submitting professional claims using **Claims & Payments > Professional Claim** in the Availity Portal.

Choose the “Professional Claim – Training Demo (legacy version of the form)”

Ready to start learning? We've organized the training based on four options so you can customize exactly what you need. Select a link below to launch the desired training demo or course in the Availity Learning Center (ALC).

- [Professional Claim - Training Demo \(new version of the form\)](#)
- [Professional Claim - Training Demo \(legacy version of the form\)](#)
- [Secondary and Tertiary Claims - Online Course](#)
- [Follow Up on Web-entered \(direct-entry\) Claims - Online Course](#)



THANK YOU

For technical support contact Availity 1-800-282-4548 or 1-800-AVAILITY. Or select **Help & Training | Availity Support** for additional Availity assistance.