



Availity Essentials

# Register your provider organization

*better information. better insights. better outcomes.*

# Table of contents

- Register an organization overview..... 3
  - Create a new user account..... 5
  - Set up 2-step authentication..... 11
- Register an organization..... 18
- Verify your identity..... 30
  - Verify your identity online..... 31
  - Verify your identity manually..... 35
- Add users overview..... 38
  - Add an existing user to additional businesses..... 38
- Roles and permissions overview..... 40
  - Assign roles..... 40



## Register an organization overview

If you are new to Availity and want to register your provider organization, you'll begin by creating your Availity user account. You'll start by clicking **Register** on the Availity home page to create your user account. Refer to the next page in this guide to get started.

We're excited that you're ready to begin the registration process with Availity!

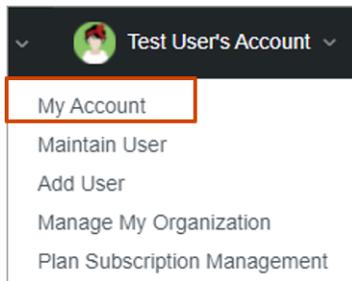
**Important:** Creating a new user account only applies to users who are brand new to Availity and need to register either their provider or billing services organization.

**Note:** If you need to register a health plan or vendor organization, [learn more](#) on how to register your organization.

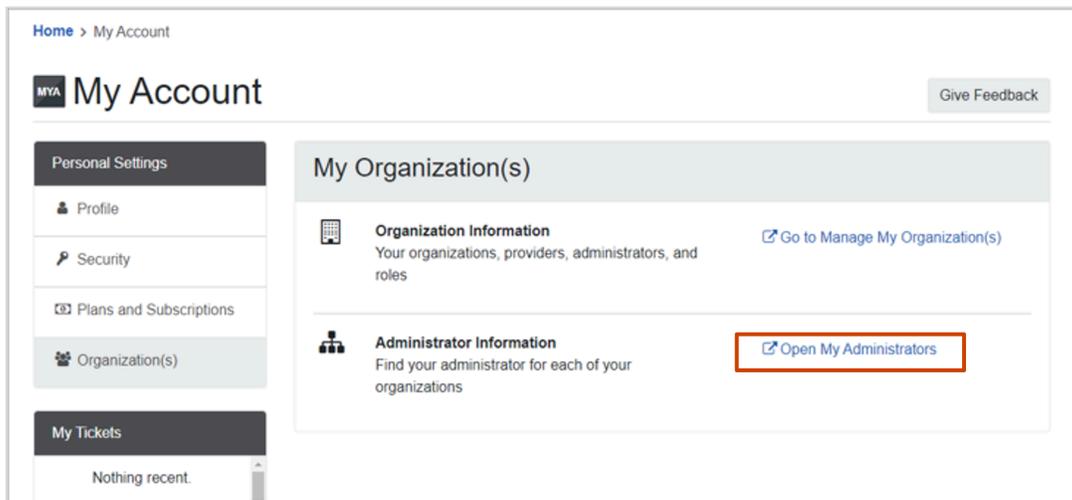
- If you are an existing user, an administrator or non-administrator, you already have an Availity user account and you can log in to Availity Essentials. There is no need to create a new user account.
- If you are an existing user, a non-administrator, and need to get added to another organization, contact your Availity administrator who manages the organization you wish to join. The administrator can add you to an organization by using the add user feature in Availity Essentials. Learn more about this feature later on in this guide.

If you do not know who your Availity administrator is, you can easily find out. Follow these steps to identify the administrator and administrator delegates for your Availity organization(s):

1. In the Availity Essentials menu bar, click **[Your Name's] Account > My Account**.



2. On the My Account page, click the **Organization(s)** tab, and then click **Open My Administrators**.



- If you are an existing user and would like to be the administrator of an organization, you can register an organization from the Manage My Organization page in Availity Essentials.

## Create a new user account

**Important:** Creating a new user account only applies to users who are brand new to Availity and need to register their provider organization.

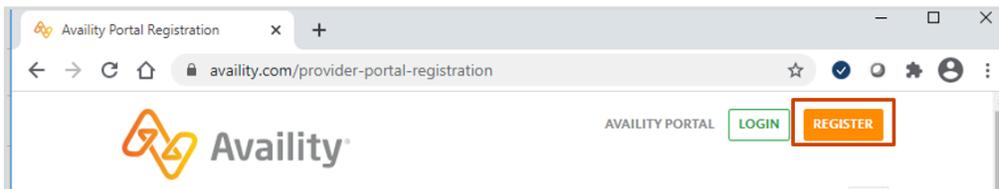
When you set up your new user account, you'll be asked to do the following tasks in the wizard:

- Add information about yourself
- Set up security questions
- Verify your information
- Confirm your email address

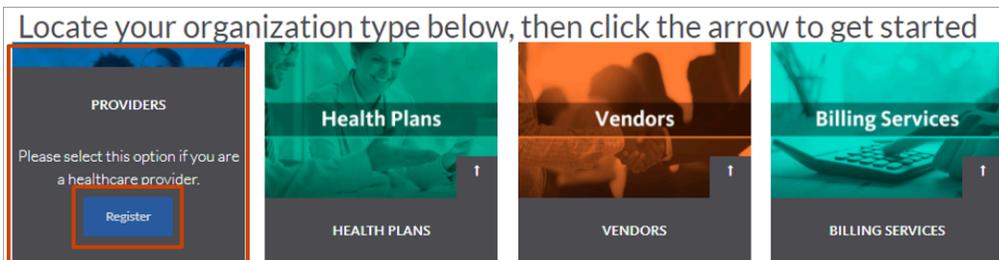
### Add information about yourself

To begin creating your user account, follow these steps:

1. Go to [availity.com](https://www.availity.com) and in the upper-right corner of the page, click **Register**.



2. Scroll down the page, hover over the **Providers** tile, and then click **Register**.



3. On the Create Account page, enter information in the following fields:

**Create Account**

First Name  
First Name

Last Name  
Last Name

Email Address  
Email Address

User ID  
User ID

Password  
Password

Choose a region where you do business  
Select one, don't worry, you can add more later  
Select U.S. region or territory

Continue

Avallity

Already have an account?  
Log In

- **First Name**
- **Last Name**
- **Email Address** – Enter a valid email address.
- **User ID** – Enter a valid user ID that contains 6 to 15 letters or numbers.
- **Password** – Enter a valid password. The password cannot contain your user ID or any spaces.  
**Tip:** Your new password must meet the following criteria:
  - 8 to 15 characters
  - At least one number
  - At least one uppercase letter
  - At least one lowercase letter
  - At least one special character, for example, -, @, #, \$, %, \*
- **Choose a region where you do business** – You can only select a region within the United States or a United States territory. If you do business in multiple regions, you can select more than one region when you register your organization on the Manage My Organization page after you complete this user registration.  
**Note:** You can always add additional regions later when you register your organization.

4. Click **Continue**.

- Next, in the screen that follows, click the appropriate number of squares to identify the image in question.

## Set up your security questions

On the Security Questions page, do the following:

**Tip:** When setting up your security questions, select questions and answers that will be easy for you to remember. You'll have to remember these security questions when you need to reset your password.

**Security Questions**

Question 1  
Select a Question | v  
Your Answer

Question 2  
Select a Question | v  
Your Answer

Question 3  
Select a Question | v  
Your Answer

Back Continue

Availity

Already have an account?  
Log In

- In each **Question** field, select a security question.
- In each **Question Answer** field, enter your answer to the security question.
- Click **Continue**.

## Verify your information

On the Your Information page, do the following:

**Your Information**

Verify the information below is correct, changing this later will be difficult.

**Name**  
Jane Tester

**Email Address**  
jtester@abcclinic.com

**User ID**  
janetester

By clicking Create Account, I agree to the [Availity Privacy and Security Statement](#) and [Confidentiality Agreement](#).

[Edit Information](#) [Create Account](#)

Availity

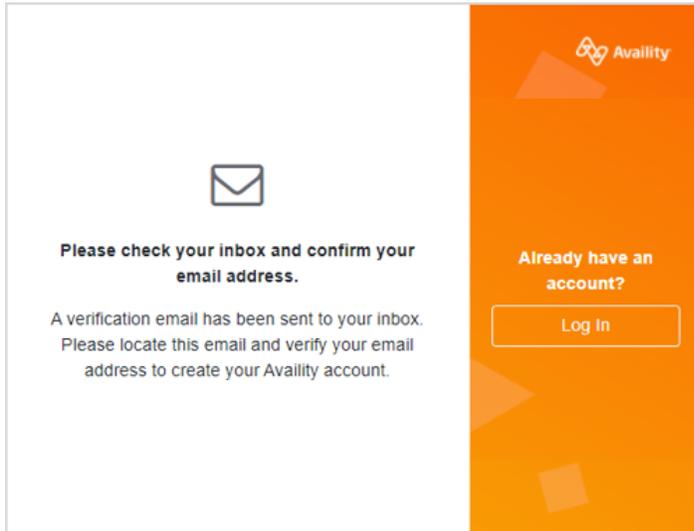
Already have an account?  
[Log In](#)

[Create Account](#)

1. Review your information and make sure it is correct.
2. Click **Edit Information** to make any changes.  
**Important:** Making changes to your information might be difficult later on.
3. Click **Create Account**.

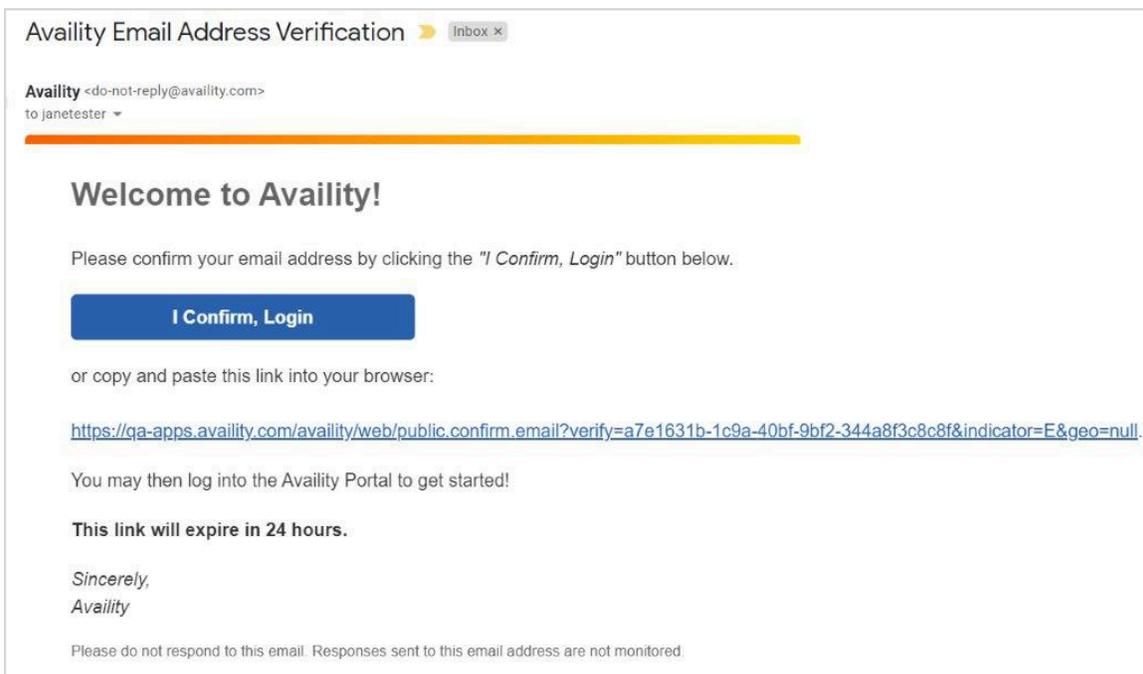
## Confirm your email address

Availity sends a verification email to your inbox.

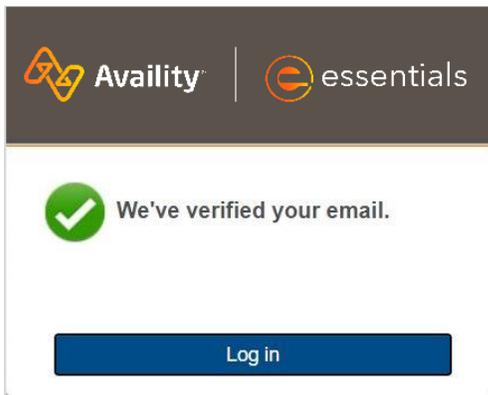


1. Check your email for the message, and locate the email that Availity has sent you.
2. In the email message, click the link to confirm your email address or click **I Confirm, Login**.

**Important:** The link to verify your email address expires after 24 hours.



3. Once you verify your email, you'll receive the following confirmation. Log in to Availity Essentials.



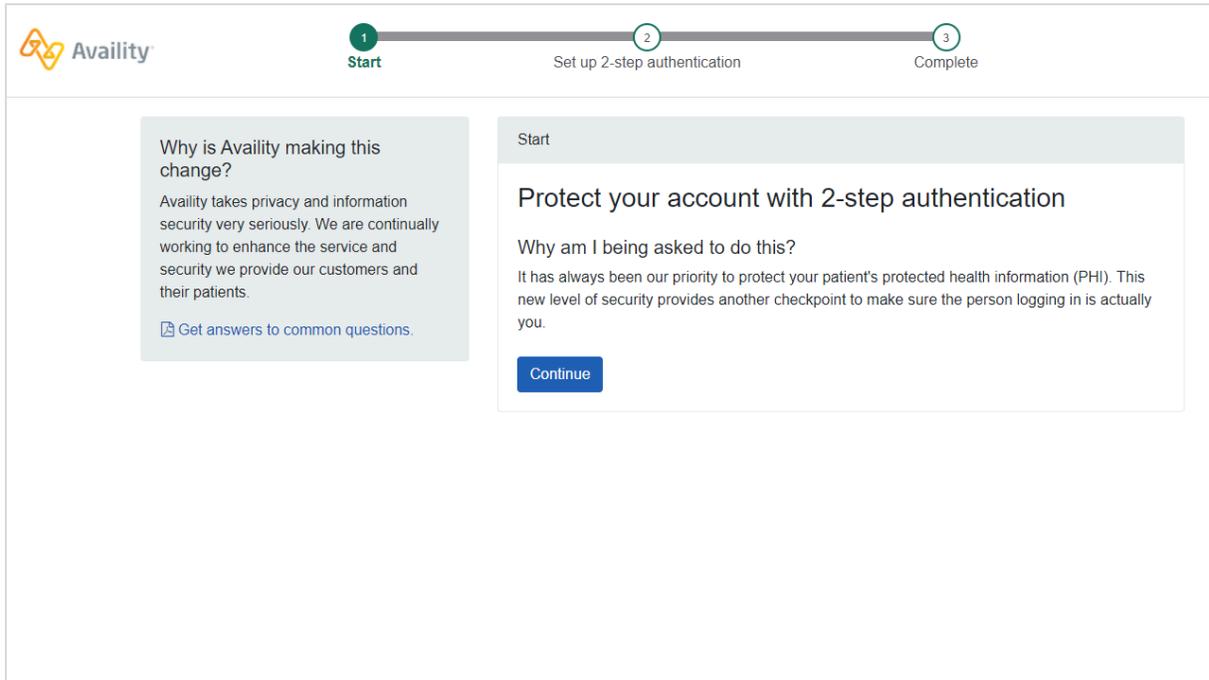
**What's next?**

After you log in to Availity Essentials, follow the steps to enroll and set up 2-step authentication.

## Set up 2-step authentication

After you create your Availity user account and log in to Availity Essentials, you'll be prompted to enroll and set up 2-step authentication.

1. The Start page explains the purpose of the 2-step authentication process and why you are being asked to enroll. Click **Continue** to begin the enrollment.



2. Select a method to receive the six-digit code:

- **Use the Google Authenticator app to generate the code** – You can download this app to your Android (phone or tablet), iPhone, or iPad. Once the app is installed and set up on your device, you can start receiving codes.

**Note:** You can only install the Google Authenticator app on a single device, for example, on an iPhone, and not on both an iPhone and iPad.

- **Text me the code** – You will enter your phone number for your mobile phone device.
- **Call me with the code** – You will enter your phone number. Currently, you cannot enter an extension number associated with your phone number.

**Note:** At this time, only phone number within the United States are accepted.

**Note:** You can register up to your devices on which to receive your six-digit, one-time code.

If you do not have access to a direct-line office phone, cell phone, or tablet, you can use a hard token device as a method to receive the code. Click **My organization requires a different authentication method** to begin setting up the hard token. See the sections later on in this guide for further

explanations on the different methods to receive your code and high-level instructions on setting up the hard token method.

The screenshot shows the Availity logo in the top left. A progress bar at the top indicates three steps: 1. Start (highlighted), 2. Set up 2-step authentication, and 3. Complete. The main content area is divided into two columns. The left column, titled 'What's 2-step authentication?', explains that 2-step authentication is an extra layer of security and that users will be asked for their username and password plus a six-digit code. It includes a link to 'Get answers to common questions'. The right column, titled '2-Step Authentication', has a sub-header 'Set up 2-step authentication' and a note: 'If we detect unusual activity with your account, we will send you a code.' Below this, it asks 'How would you like to receive your code?' with 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 column, there is a link: 'My organization requires a different authentication method.' with a help icon.

3. On the confirmation window, click **Confirm & Continue**.

4. In the **Code** field, enter the six-digit code you received on your device, and then click **Verify Code**. If the code has expired, then click **Resend Code** to have another code sent to your registered device.

The screenshot shows the Availity logo in the top left. A progress bar at the top indicates three steps: 1. Start, 2. Set up 2-step authentication (highlighted), and 3. Complete. The main content area is divided into two columns. The left column, titled 'Why is Availity making this change?', states that Availity takes privacy and information security very seriously and is continually working to enhance the service and security. It includes a link to 'Get answers to common questions'. The right column, titled '2-Step Authentication', has a sub-header 'Verify your account' and a note: 'We've sent a code to (\*\*\*\*) \*\*\* - 5594. For added security, we require that you enter this code to access your account.' Below this, it says 'You have 6 minutes to enter your code.' There is a text input field labeled 'Code' with a cursor. Below the input field is a checked checkbox: 'Trust this browser and device (Uncheck if on a public or untrusted device)'. At the bottom of the right column, there are three buttons: 'Go Back', 'Resend Code', and 'Verify Code'.

**Note:** The codes are time-sensitive. Expiration times vary for the codes, depending on which method you selected to receive your code. You will have six minutes to enter the code from an incoming phone

call and three minutes from a text message. The Google Authenticator app generates a new code every 30 seconds, and each code expires after one minute and 30 seconds.

5. On the Complete page, to manage the backup codes, review the following options.

- Click **Download** to save the text file that contains the backup codes to your computer, phone, or other device. Then search the **av-backup-codes-txt** file. You can rename the file to a name that is more familiar to you. Availity recommends that you move the file to a safe location on your device, which is accessible only to you. Never share your backup codes with your colleagues or anyone else.
- Click **Add Another Device** to register another device (for example, office phone, mobile phone, or tablet). As a best practice, we recommend that you enroll at least one other device on which to receive the six-digit code in case you lose or do not have access to the original device that you registered.
- Click **Continue** to access Availity Essentials.

**Important:** Keep your backup codes in a safe place. You will need to refer to these backup codes to authenticate your account in case you cannot find the device that you originally registered to receive the six-digit codes.

Availity

Start Set up 2-step authentication Complete

**Why is Availity making this change?**  
Availity takes privacy and information security very seriously. We are continually working to enhance the service and security we provide our customers and their patients.  
[Get answers to common questions.](#)

**Confirmation**

**You're all set!**

We've saved your 2-step authentication method. In the event that you don't have your phone or time-based authentication device, use backup codes to access your account. Thanks for protecting your account.

**Keep these backup codes in a safe place only you know about.**

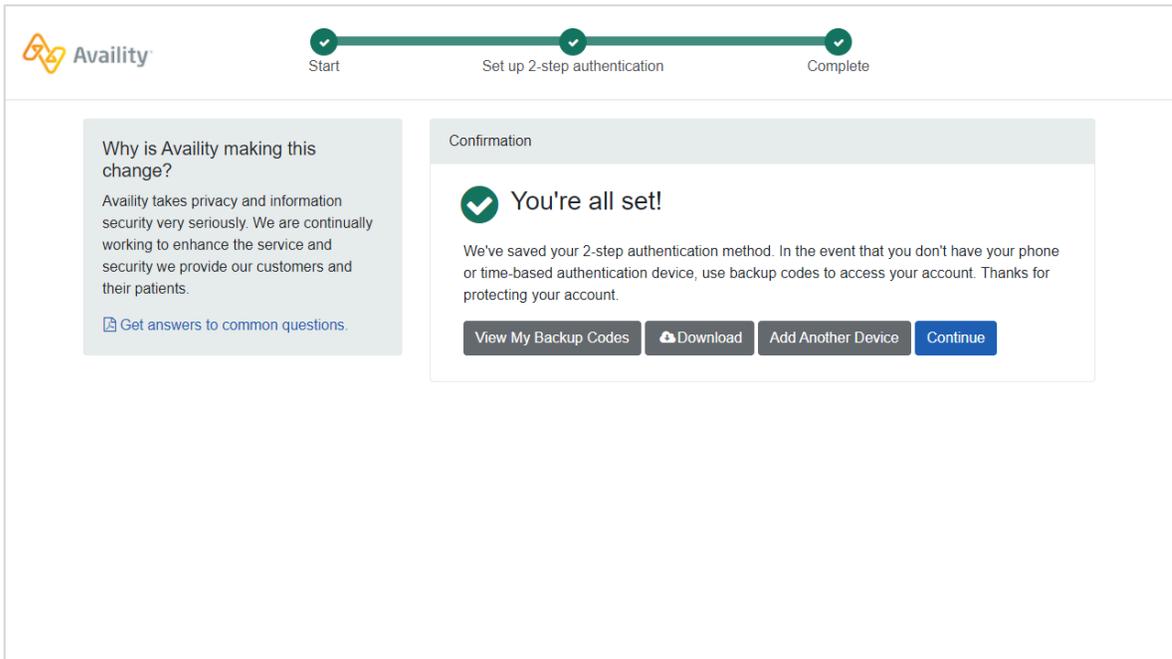
ABCDEFGHIJ	ABCDEFGHI2
ABCDEFGHIK	ABC3DEFGH3
ABCDEFGHIL	ABCD4FGHI4
ABCDEFGHIJ1	ABCDEFGHIIN
ABCDEFGHIP	ABCDEFGHIQ

NOTE: You can use each backup code only once.

[Hide My Backup Codes](#) [Download](#) [Add Another Device](#) [Continue](#)

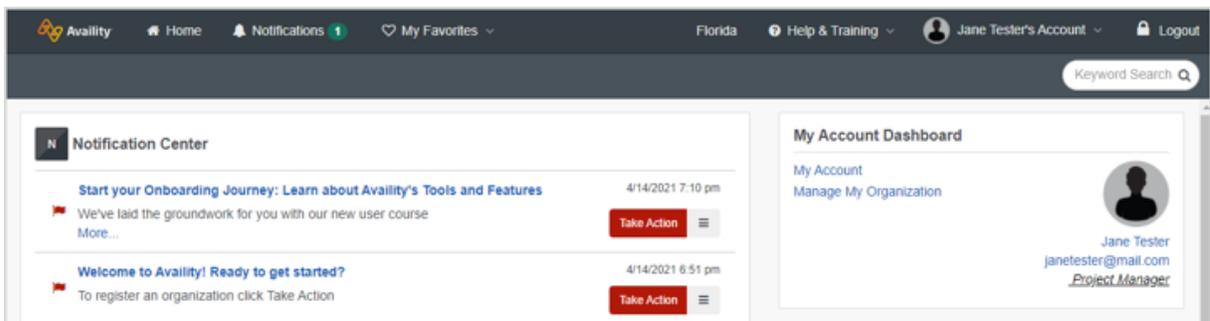
**Note:** The entire list of backup codes displays when you first enroll in 2-step authentication and also Availity generates another set of 10 backup codes after using your last code. When you log

back in to Availity Essentials after you have enrolled in 2-step authentication, the list of backup codes does not display. Click **View My Backup Codes** to display the entire list of codes.



### What's next?

After you have set up 2-step authentication, you are brought to the Availity Essentials home page. In the **Notification Center** section, you have messages waiting for you:



- Click **Start your Onboarding Journey: Learn about Availity's Tools and Features** to take a great introductory class and learn about the functions and applications in Availity Essentials. Or,
- Click **Welcome to Availity! Ready to get started?** to jump right in to registering your organization with Availity.

**Important:** If you are new to Availity and are attempting to become the primary administrator by registering an organization, you'll get prompted to verify your identity in the beginning of your registration journey. See [Verify your identity](#) later in this guide.

## Methods to receive your code

- [Google Authenticator](#)
- [Text](#)
- [Phone call](#)
- [Hard token](#)

### Google Authenticator

Google Authenticator is an app that you can install on your Android (phone or tablet), iPhone, or iPad. Once Google Authenticator is installed on your device, you'll use this app to receive your code. When you select the **Google Authenticator** option and then click the **Generate a Google Authenticator Key**, additional setup instructions display on the following page.

**Tip:** Availity accepts the usage of any authenticator application that supports the open-standard authorization protocol or framework (OAuth). Popular options include Google Authenticator or Microsoft Authenticator.

**Set up Google Authenticator by following the following steps:**

**NOTE:** We won't actually turn on multifactor authentication until we make sure you've got it set up properly. Download the **Google Authenticator Application**, then follow the instructions below.

- 1 Install Google Authenticator
- 2 Scan this QR code below



- 3 Enter this secret key into your Google Authenticator device:  
KEYGOOGLESCRT01

[Continue](#)

[Learn more](#) about how to install the Google Authenticator app on your device.

**Note:** You can only install the Google Authenticator app on a single device, for example, on your iPhone, and not on both your iPhone and iPad.

### Text

When you select text as the method to receive your code, you will enter your phone number, and then we'll send a text to your mobile phone that contains your six-digit code.

You can enroll up to three devices on which to receive your six-digit code.

## Phone call

When you select a phone call to receive your code, you will enter your phone number, and then we'll call you back. A recording gives you your six-digit code.

You can enroll up to three devices on which to receive your six-digit code.

**Note:** At this time, you cannot enter phone extensions that associate with your phone number.

## Hard token

A hard token, also known as a security token or authentication token, randomly generates and displays a one-time code. This code authenticates your Availity user account and permits log in to Availity Essentials.

### How to Set Up Hard Tokens

Organizations that do not allow employees access to their cellphone may utilize a hard token device as their 2-step authentication method.

This method may require assistance from your organization's IT administrator. The hard token devices are available from online retailers.

- 1 Follow the installations that come with your hard token device(may require assistance from your IT administrator).
- 2 Scan this QR code below:  


OR

- 3 Enter this secret key into your Google Authenticator device:  
OVMMF12LFKR5EURKN

[Back](#) [Continue](#)

## Hard tokens

The following questions and answer are designed to help you better understand hard tokens—what they are, when they are used as a method for 2-step authentication, and who can help you with the installation and setup.

### What is a hard token?

A hard token, also known as a security token or authentication token, randomly generates and displays a one-time code. This code authenticates your Availity user account and permits log in to Availity Essentials.

Depending on the type of hardware device that you purchase, the code can either display on the computer or on the panel of the token device.

### **Who would use a hard token for 2-step authentication?**

If you do not have access to a direct-line office phone, cell phone, or tablet at your organization, you can use a hard token as a method to enroll in 2-step authentication. Your organization might require that each employee authenticate using hard token devices instead of using a cell phone or tablet device.

### **Who will set up and install the hard token?**

If you need assistance in installing the hard token, ask your IT administrator, someone at your company's help desk department, or a representative from your third-party IT vendor. Once the hard token is installed on your computer, then refer to the How to Set Up Hard Tokens page. To finish setting up the hard token device, refer to the manufacturer's instructions on how to scan the QR code or enter the secret key.

### **Important:**

The hard token you use for Availity 2-step authentication must be based on the open authorization protocol also referred to as the OAuth framework. Please note that Availity Client Services cannot assist you with the installation, setup, or troubleshooting of hard token devices. Availity also does not cover the cost of purchasing a hard token device.

### **Can I have both google authenticator and a hard token device as 2-step authentication methods?**

No, you cannot install both Google Authenticator and a hard token device. You can have only one of these methods set up with Availity—either the Google Authenticator app or a hard token device—but not both.

### **What happens if I already have google authenticator or a hard token device already set up?**

If you have Google Authenticator or a hard token device set up and you try to add another open authorization device, a warning message displays that detects you already have one of these time-based devices:

**ⓘ Warning!** Looks like you've already set up a time-based security device (i.e. Google Authenticator or Hard Token) for your Availity account.

## Register an organization

In Availity Essentials, register your organization from the Manage My Organization page. At this time, new users who have recently created an account can only register an organization for a healthcare provider and a billing service from the Manage My Organization page. Existing administrator users who have an Availity user account can register an organization directly from the Manage My Organization page.

**Note:** If you are the person who registers your organization, you are automatically the primary administrator of the organization.

**Important:** Before you begin the registration process, here are few things that you need to gather about yourself and your organization:

### Healthcare Provider or Health Service Provider

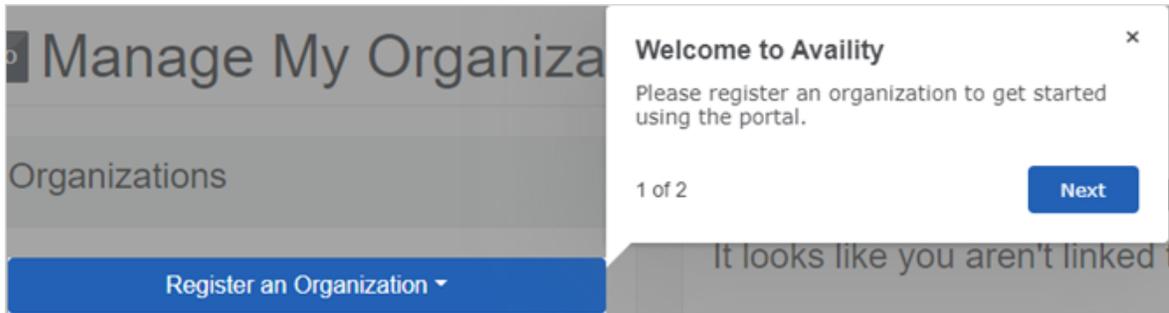
Healthcare providers need to provide:

- Tax ID (EIN or SSN)
- NPI (if you have one)
- Primary specialty/taxonomy
- Check or EFT information from a health plan that you submit to (recommended)

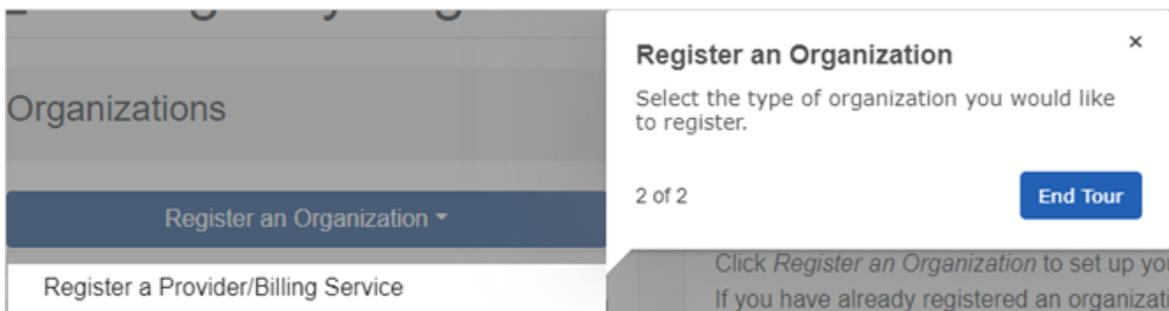
1. As a new user, you are not yet associated with an Availity organization. Existing users, go to step 2.

**As a new user, follow these informational prompts:**

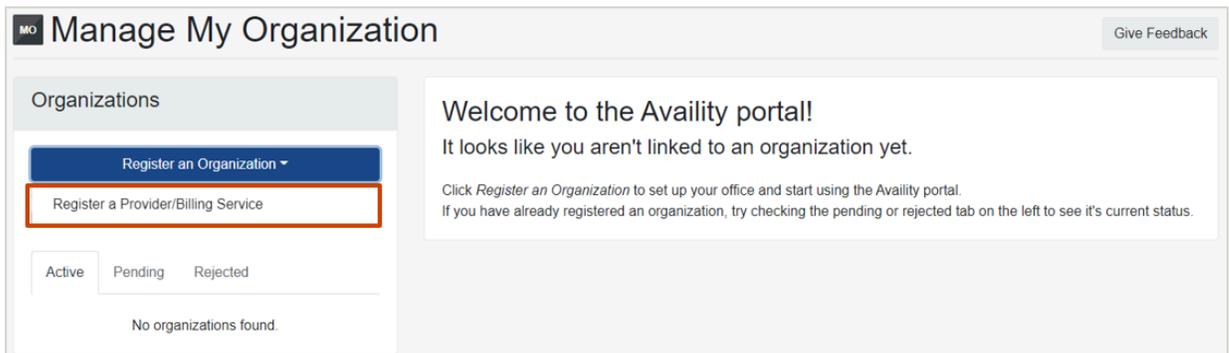
a. On the Welcome to Availity prompt, click **Next**.



b. On the Register an Organization prompt, click **End Tour**.



c. On the Manage My Organization page, click the **Register an Organization** menu, and then select **Register a Provider/Billing Service**.



d. Go to step 3 where you'll need to verify your identity.

2. As an existing user, you are already associated with an Availity organization.

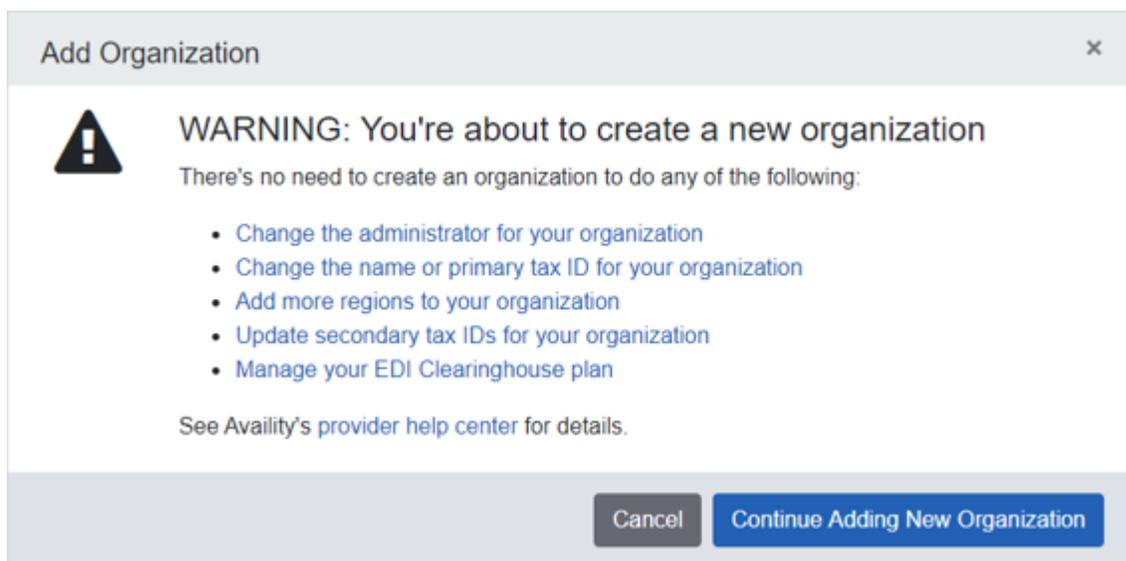
Follow these steps to register another organization:

- a. Click the **Register an Organization** menu, and then select **Register a Provider/Billing Service**.



**Note:** When you select **Register a Vendor** or **Register a Health Plan**, you leave Availity Essentials and are directed to either the vendor registration website or the health plan registration website to finish registering your organization.

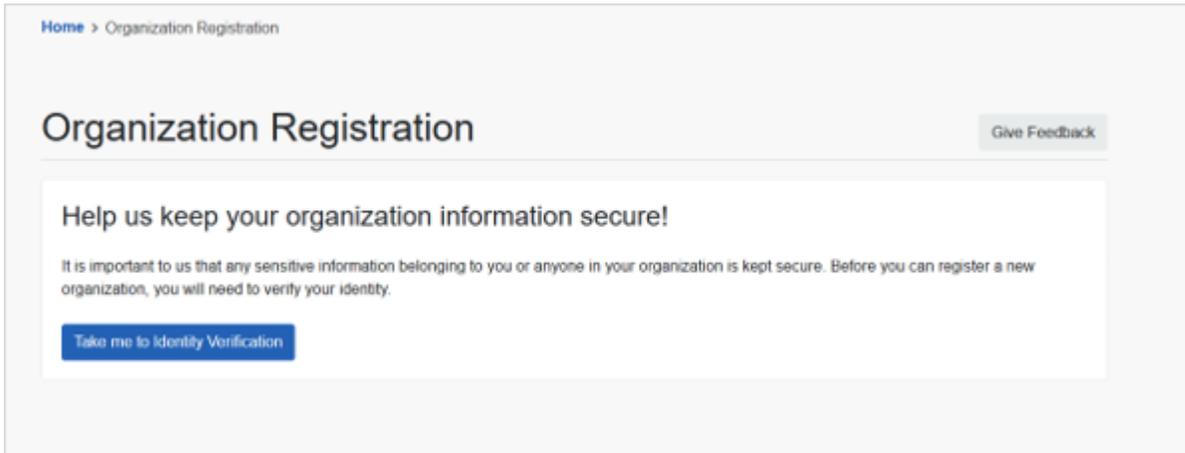
- b. Read the Warning message that displays. The message lists a few common functions where you do not need to create another organization. Click **Continue Adding New Organization**.



3. Click **Take me to Identity Verification**.

**Note:** When you register an organization, you automatically become the Availity administrator for that organization. You will be prompted to verify your identity if you are a first-time administrator. Refer to the procedures to Verify your identity online or Verify your identity manually in this guide. With manual

ID verification, you'll need to print out a form, complete the information, and then mail the form back to the designated address.



Home > Organization Registration

## Organization Registration

[Give Feedback](#)

### Help us keep your organization information secure!

It is important to us that any sensitive information belonging to you or anyone in your organization is kept secure. Before you can register a new organization, you will need to verify your identity.

[Take me to Identity Verification](#)

**Note:** For users whose identity has already been verified, you'll proceed to the next step and won't need to go through identity verification.

4. Verify or change any personal information and then click **Next**.

**Tip:** Select the check box to use a nickname for your organization account instead of your legal name. In the **Preferred Name field**, enter your nickname.

The screenshot displays the Avality Organization Registration interface. At the top, there is a navigation bar with the Avality logo, Home, Notifications (3), My Favorites, Pennsylvania, Help & Training, Jane Tester's Account, and Logout. Below the navigation bar, there are links for Patient Registration, Claims & Payments, My Providers, Reporting, Payer Spaces, More, and Avality Internal Links, along with a Keyword Search field. The main content area is titled 'Organization Registration' and includes a 'Give Feedback' button. A progress indicator shows 'MY REGISTRATION IS 1% COMPLETE'. The 'What's Next?' section indicates 'Organization Information'. A text box explains the importance of up-to-date contact information. The main form section, 'Let's keep in touch', prompts the user to 'Make sure your information is up-to-date' and includes fields for 'Legal First Name' (Jane), 'Legal Last Name' (Tester), a checkbox for using a nickname, a dropdown for 'What do you do the most?' (Advertising/Marketing Specialist), and fields for 'Personal Phone Number', 'Extension', and 'Phone Type'. A 'Next' button is located at the bottom right of the form.

**Note:** If you have previously verified your identity with Avality or if you have recently created your Avality account, your legal first and last names automatically display in the fields.

5. Select the organization type you are registering.

### Healthcare Provider or Health Service Provider

- a. Enter the name of your organization.
- b. For the tax ID, enter an employer identification number (EIN) or social security number (SSN), and select the appropriate type.
- c. Enter your organization's NPI or select the check box if your organization does not require an NPI. Optionally, enter an atypical NPI.
- d. Select the organization agreement check box, and then click **Next**.

Avality Home Notifications My Favorites Pennsylvania Help & Training Jane Tester Logout

Patient Registration Claims & Payments My Providers Reporting Payer Spaces More Avality Internal Links Keyword Search

Home > Organization Registration

## Organization Registration

Give Feedback

MY REGISTRATION IS

20%

COMPLETE

What's Next? Duplicate TIN Check

What's an Avality organization administrator?

As the administrator for your organization, you are responsible for creating a user account for each user in your organization. When creating a user account, you will assign it the appropriate roles based on that user's job function

Organization Information

### Tell us about your organization

What type of organization are you registering?  
Healthcare Provider or Health Service Provider

Organization Name  
Enter the name of the company you work for.  Providing a service on behalf of a provider?

Tax ID  Type

This organization is an atypical provider and does not provide healthcare, as defined under HIPAA in Federal regulations at 45 CFR section 160.103.

Organization's NPI  
If you have an both individual (entity type 1) and organization (entity type 2) NPIs, enter the organization's NPI.

I agree to be one of the administrators for this account, and I have the organization's authority to, and do, accept Avality's Organization Agreement

Back Next

6. Enter your organization's primary service location.

### Healthcare Provider or Health Service Provider

- Clear the check box if the billing and physical address are not the same, and then enter the organization's billing address.
- Select the taxonomy codes. You can select more than one code.
- Select your payers' regions. You can select more than one region.
- Select the check box if you need a secure FTP mailbox to share EDI files with your health plans, and then click **Next**.

The screenshot displays the 'Organization Registration' page in the Avality system. At the top, there is a navigation bar with the Avality logo, home, notifications, and favorites icons, along with user account information for 'Jane Tester'. Below the navigation bar, a search bar is visible. The main content area is titled 'Organization Registration' and features a progress indicator showing 'MY REGISTRATION IS 50% COMPLETE'. A 'What's Next? Check Verification' button is present. The form is divided into several sections: 'Organization Information' (with a sub-section for 'Organization's Primary Service Location' containing fields for Street Address, City, State, and ZIP/Postal Code), 'Taxonomy and Specialty' (with a dropdown for 'Primary Specialty/Taxonomy' and an optional dropdown for 'Additional Specialties/Taxonomies'), and 'Payers' Regions' (with a dropdown showing 'Florida' selected). A checkbox for 'Billing and primary service location address are the same' is checked. At the bottom right, there are 'Back' and 'Next' buttons.

7. To verify your organization and obtain faster approval, provide information from a valid check you have received from an available health plan in the last six months, and then click **Next**.

**Note:** Select **None of these** if you do not have a check or EFT from any of the available payers.

**Organization Registration** Give Feedback

MY REGISTRATION IS

75%

COMPLETE

**What's Next?** Review Organization

What might delay us in creating this organization account?

We can create most organization accounts in less than 24 hours. With check validation, it's even quicker. However, delays can occur if your organization's information matches another's on file, or if we have trouble verifying your identity.

**Time Saver Tip**

**Expedite your organization account's setup**

Did you know all organizations go through an extensive approval process that can take anywhere from 24 hours to a couple weeks?

One way to expedite approval is by providing check or EFT information from one of the listed payers. The check or EFT must have been issued between **04/09/2020** and **10/06/2020**.

**Payer**

Don't have a check or EFT from the payers listed? Select "None of these".

ABC Payer

**Primary Tax ID**

454200223

**Check/EFT Trace Number**

**Check/EFT Amount**

\$00.00

**Check/EFT Date (MM/DD/YYYY)**

mm/dd/yyyy

**Back** **Next**

- Review your information. Click the **Edit** link to update your personal or organization information, and then click **Submit**.

**Organization Registration** Give Feedback

MY REGISTRATION IS

**99%**

COMPLETE

What's Next? Next Steps

**Review**

**Review your application**

Please review the information and make sure we have it right before submitting your application for a new organization account.

**ACCOUNT INFORMATION**

**Email Address** jtester@availability.com

**User ID** janetester

**ABOUT ME**

**Name** Jane Tester (Advertising/Marketing Specialist)

**Phone Number** (000) 000-0000 (My mobile)

[Edit](#)

**ORGANIZATION INFO**

**Organization Name** ABC Test Clinic

**Organization NPI** 1234567890

**Organization Tax ID** 412345678

**Primary Taxonomy** (251S00000X) AGENCIES|COMMUNITY|BEHAVIORAL HEALTH|NOT APPLICABLE

**Primary Service Location** 4701 Test Drive East Ponte Vedra Beach, FL 32082

**Billing Address** 77 Jane Tester Avenue Ponte Vedra Beach, FL 32082

[Edit](#)

[Back](#) [Submit](#)

9. Review the next steps for your submitted registration.

- Click the **Organization Agreement** link to review and then print the agreement.
- If you selected to exchange EDI transactions through SFTP, go to the Availity home page for instructions on setting up your SFTP mailbox. A notification displays when the organization is approved.
- Click the **Manage My Organization** link to view the status of your registration.

The screenshot shows the 'Organization Registration' page. At the top left, there is a breadcrumb 'Home > Organization Registration'. The main heading is 'Organization Registration' with a 'Give Feedback' button to its right. On the left side, a card displays 'MY REGISTRATION IS' above a large orange circular progress indicator showing '100%' and the word 'COMPLETE' below it. A button labeled 'What's Next? Manage Organization' is at the bottom of this card. The right side features a 'Next Steps' section with the text 'Thanks for registering to create an organization account.' and 'Your application ID is 3177330.' Below this, a 'WHAT'S NEXT?' section lists three items: a printer icon for 'Print this page and the Organization Agreement for reference.', an envelope icon for 'Once approved, view your notifications on the Availity home page for instructions on setting up your SFTP mailbox', and a person icon for 'We are processing your application. Please visit Manage My Organization to view the status of your registration.' At the bottom right, there are three buttons: 'Print', 'Home', and 'Manage My Organization'.

## What's next?

Go to the Manage My Organization page to check the status of your organization's registration. On the Manage My Organization page, you'll see if your registration is either *Active*, *Pending*, or *Rejected*.

If your registration is automatically approved, the *Active* status and the color green are associated with the organization.

The screenshot shows the 'Manage My Organization' page with a green border around the 'Billing Test Org' card. The card displays the following information:

Tax ID	NPI	Regions	Primary Taxonomy	Primary Service Address
123123123	123123123	NY, CT, NJ, RI	282N00000X - Hospitals - General Acute Care Hospital	52nd Central Park West 10001

Below the card, a message reads: "Awesome. Your organization is live. Here are some tips to help you manage your organization effectively." The tips include:

- Access training for [new administrators](#) and [users](#) to get started quickly with Avality 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.

If your organization is not automatically approved, the status is either *Pending* or *Rejected*. Organizations in a *Pending* status are associated with the color yellow and have updates in the **Notes** section that let you know your application is currently under review.

The screenshot shows the 'Manage My Organization' page with a yellow border around the 'Billing Org Test' card. The card displays the following information:

Tax ID	NPI	Regions	Primary Taxonomy	Primary Service Address
1231231231	N/A	NY	N/A	52nd Central Park West

Below the card, there is an 'Administrator Information' table:

Admin Name	Email Address	Status	Notes
Jane Tester	janetester@email.com	N/A	N/A

Below that is an 'Application Information' table:

Application ID	Application Date	Status	Notes
3181084	March 04 2021	<b>PENDING</b>	Your application is being reviewed.

Organizations in a *Rejected* status are associated with the color red and have updates in the **Notes** section that let you know your application has been rejected. Rejected organizations might be missing certain forms and supporting documentation.

# Manage My Organization

Give Feedback

**Organizations**

Register an Organization

Org Name Search

Newest to oldest

Active Pending Rejected

Check Org QA		
Tax ID	NPI	<b>REJECTED</b>
125369874	1003830001	

Test Org		
Tax ID	NPI	<b>REJECTED</b>
222333444	N/A	

Check Org QA				
Tax ID	NPI	Regions	Primary Taxonomy	Primary Service Address
		WA	252Y00000X - Agencies - Early Intervention Provider Agency	456 check street check town, Washington 333334444

Administrator Information			
Admin Name	Email Address	Status	Notes
		N/A	N/A

Application Information			
Application ID	Application Date	Status	Notes
	April 12 2018	<b>REJECTED</b>	Your application has expired or has been rejected.

Application Activity



## Verify your identity

If you are the primary administrator for your organization, you need to verify your identity before you can register an organization.

You can verify your identity by entering information about yourself online. Or, you can verify your identity through a manual process. The manual process involves downloading and completing Availity's Identity Verification form, getting the form notarized, and then mailing it to the address indicated on the form.

The following page displays to begin the identity verification process. Click **Continue** to begin.

The screenshot displays the Availity identity verification process. At the top, the Availity logo is on the left, and a progress bar shows three steps: 1. Start (active), 2. Verify your Identity, and 3. Complete. Below the progress bar, the page is divided into two main sections. The left section, titled "What's Identity Verification?", explains that it's important to keep patients' health information safe by asking questions to verify identity. It includes a link to "Get answers to common questions." The right section, titled "Protect your account with ID Verification", explains that this is to protect patient health information (PHI) and includes a "Continue" button.

## Verify your identity online

You'll need to verify your identity when you register an organization with Availity.

1. To verify your information online, click **Verify Identity Online**.

**Availity**

1 Start 2 Verify your Identity 3 Complete

### What's Identity Verification?

It's important for us to keep your patients' health information safe. This means asking you some questions to make sure you are who you say you are before you can access certain areas of the portal.

[Get answers to common questions.](#)

### Identity Verification

#### How to verify your identity

Identity Verification can be handled online or on paper. None of the information filled out during this process will be used for any type of marketing campaign or communication.

#### Online Verification

Takes only minutes to complete

[Verify Identity Online](#)

This option is preferred by the majority of the users registering for our platform.

- ✔ Online verification is simple, safe, and secure.
- ✔ Real time processing allows you to be on your way in minutes.
- ✔ Paperless, eliminate unnecessary waste.
- ✔ Online verification will be digitally notarized.

#### Manual Verification

Takes days to weeks to complete

[Verify Identity Manually](#)

- By mail, items may be lost or stolen in the mail resulting in delays.
- Delayed processing; you will have to wait for your documents to reach their destination before processing can begin.
- Requires a printer; you will be required to print out your application.
- Requires a notary; you will be required to have your application notarized or it will be denied.

2. On the Identity Verification page, complete the required information, select the agreement of terms at the bottom of the page, and then click **Continue**.

**What's Identity Verification?**  
It's important for us to keep your patients' health information safe. This means asking you some questions to make sure you are who you say you are before you can access certain areas of the portal.  
[Get answers to common questions.](#)

**Identity Verification**

**Make sure your contact information is up to date.**

Please take a moment to enter in your information, not the provider's. It is important that we know how to contact you if there are any changes with the account or if you request our help with an issue.

Legal First Name  Legal Last Name

I'd like to use my nickname and not my legal name for this account.

Date of Birth [What's this used for?](#)

What do you do the most?

Personal Phone Number  Extension  Phone Type

Current Residency

Street Address

City  State  ZIP / Postal Code

I acknowledge and agree that (i) I am the individual identified above and (ii) the information that I have provided above is accurate and may be used and sent to a third party for identity verification purposes. Failure to submit the above requested information and to successfully complete the identity verification process may suspend or terminate registration for and access to Availity's services.

[Continue](#)

**Note:** If your identity is a potential match with the trusted third-party that we use, another form might display asking you for more information, such as your SSN, to confirm your identity.

Enter the additional information requested, and then click **Verify identity** online. If you choose not to enter the information, click **I want to verify manually**.

3. Review and confirm your information and then click **Next**.

**Important:** Make sure you review your information. Click **Back** to make changes. Later on, you might not get a chance to correct your personal information.

4. Click **Continue** to answer a series of questions about yourself.

Availity

Start    Verify your Identity    Complete

**What should I expect?**

When you take the verification quiz, you'll be asked a series of questions based on the information we could gather about you from public databases.

Each question should take 60 seconds or less to answer.

[Get answers to common questions.](#)

**Identity Verification**

**Verify your identity.**

For your security, we must verify your identity through a series of questions based on the information you previously provided.

**Important**

Please start your verification quiz when you won't be interrupted for 3 to 5 minutes. When you continue, You'll have a limited amount of time to finish.

Back   Continue

Here's an example question on the quiz:

Availity

Start    Verify your Identity    Complete

**What should I expect?**

When you take the verification quiz, you'll be asked a series of questions based on the information we could gather about you from public databases.

Each question should take 60 seconds or less to answer.

[Get answers to common questions.](#)

**Identity Verification**

**For your security, we need to verify your identity.**

You'll have 2 minutes to provide an answer to the question below:

**Which of the following vehicles have you recently owned or leased?**

- Example car #1
- Example car #2
- Example car #3
- Example car #4
- Example car #5

Next

5. Once you have answered the questions correctly, click **Continue** on the Confirmation page. You are directed back to the Organization Registration page to complete the registration of your organization.

**Note:** If you do not answer the questions correctly, then you are prompted to manually verify your identity.

## Verify your identity manually

You can verify your identity manually instead of online when you register an organization with Availity. You'll need to complete the following tasks for manual identity verification:

- Complete an initial online form
- Download the Identity Verification form
- Complete the form
- Get the form notarized
- Mail the form back to the address indicated on the form

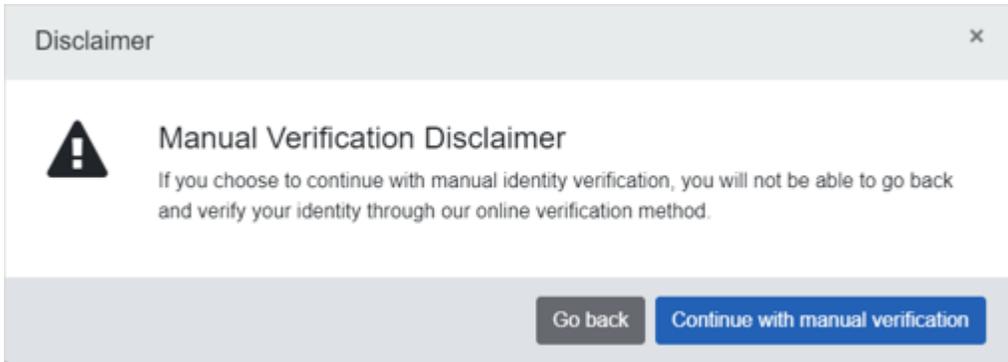
**Important:** Manually verifying your identity takes longer than verifying your identity online.

1. To manually verify your identity, click **Verify Identity Manually**.

The screenshot displays the Availity Identity Verification interface. At the top, a progress bar shows three steps: 1. Start, 2. Verify your Identity, and 3. Complete. The current step is 'Verify your Identity'. On the left, a box titled 'What's Identity Verification?' explains the importance of keeping patient health information safe and provides a link to 'Get answers to common questions.' The main content area is titled 'Identity Verification' and 'How to verify your identity'. It states that identity verification can be handled online or on paper and that information is not used for marketing. Two options are presented: 'Online Verification' (takes minutes) and 'Manual Verification' (takes days to weeks). The 'Manual Verification' option is highlighted with a blue button labeled 'Verify Identity Manually'. A list of disadvantages for manual verification is provided, including the risk of loss or theft in the mail, delayed processing, the need for a printer, and the requirement for a notary.

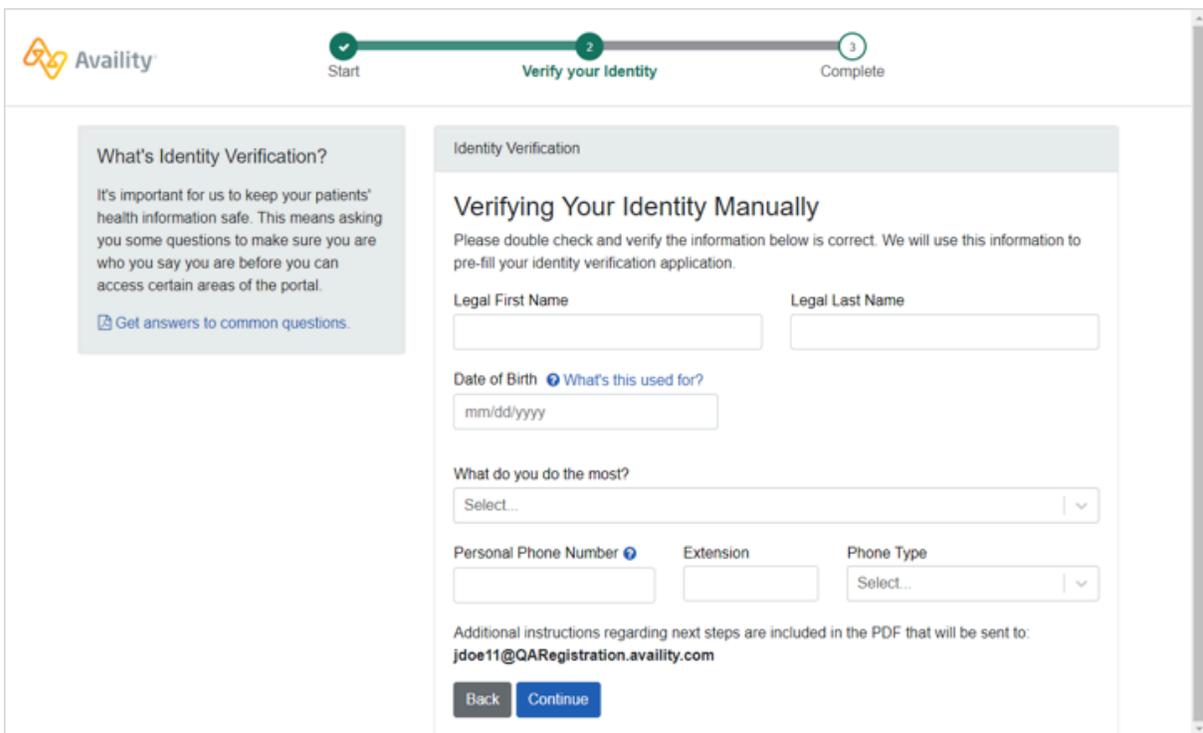
2. Click **Continue with manual verification** to begin the manual verification method for your identity. Click **Go back** to continue with the online verification process.

**Tip:** When you select the manual verification method, you'll be able to go back later and [change to the online verification method](#).



The image shows a 'Disclaimer' dialog box with a close button (X) in the top right corner. On the left is a warning icon (exclamation mark in a triangle). The title is 'Manual Verification Disclaimer'. The text reads: 'If you choose to continue with manual identity verification, you will not be able to go back and verify your identity through our online verification method.' At the bottom, there are two buttons: 'Go back' (grey) and 'Continue with manual verification' (blue).

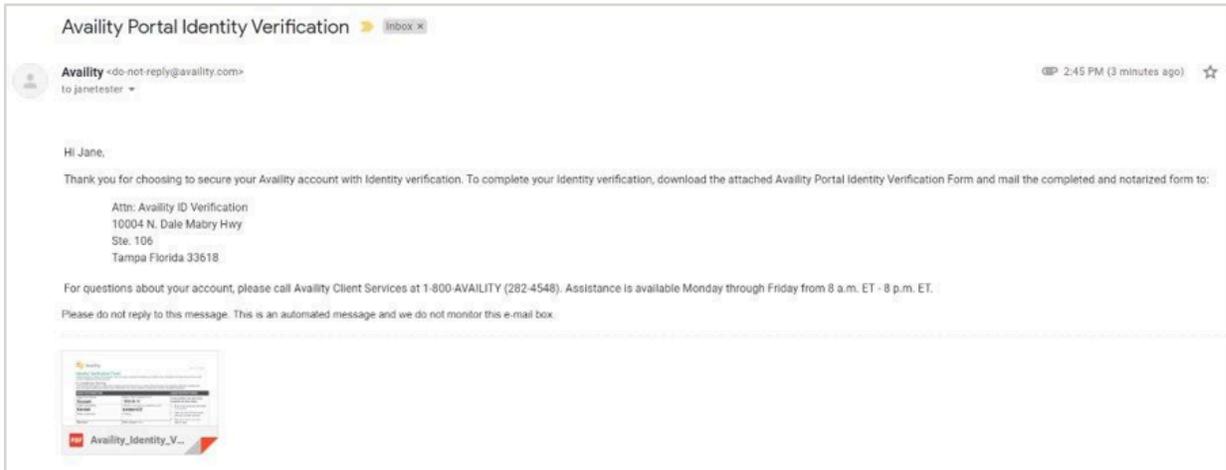
3. On the Verifying Your Identity Manually page, complete the required information, and then click **Continue**.



The image shows the 'Verifying Your Identity Manually' page. At the top left is the Availity logo. A progress bar at the top has three steps: 'Start' (checked), 'Verify your Identity' (current step), and 'Complete'. On the left is a sidebar titled 'What's Identity Verification?' with a link to 'Get answers to common questions.' The main content area is titled 'Identity Verification' and 'Verifying Your Identity Manually'. It contains a message: 'Please double check and verify the information below is correct. We will use this information to pre-fill your identity verification application.' The form includes fields for 'Legal First Name', 'Legal Last Name', 'Date of Birth' (with a 'What's this used for?' link and a 'mm/dd/yyyy' placeholder), a dropdown for 'What do you do the most?', 'Personal Phone Number', 'Extension', and 'Phone Type' (with a dropdown). At the bottom, it says 'Additional instructions regarding next steps are included in the PDF that will be sent to: jdoe11@QARegistration.availity.com' and has 'Back' and 'Continue' buttons.

4. On the confirmation page, click **Continue** to get directed back to the Organization Registration page to complete the registration of your organization.

5. In the meantime, check your email from Availity. In the email message, click the link to download and print the manual Identity Verification application form.



**Tip:** Remember, you'll need to get the form notarized, and then return the form by mail to the address that is on the form.

## Add users overview

As the administrator for your Availity Essentials organization, you are responsible for setting up new users. Due to regulations, each user must have his or her own user account with a unique user ID and password. *Users cannot share user IDs and passwords.*

You can quickly add users in any of the following ways:

- Add new users one at a time.
- Add existing users to additional organizations.
- Use a spreadsheet to upload multiple users at once.
- Copy a user from one organization to another.

Before adding users, familiarize yourself with the concept of Availity Essentials roles and permissions. Be sure to assign roles carefully based on each user's job function. Some roles have legal implications related to HIPAA laws.

## Add an existing user to additional businesses

The add user feature allows you to add an existing Availity Essentials user to your organization(s). This could be useful, for example, if a new employee in your business has an existing Availity Essentials user ID from a previous employer. Or, if you are the administrator for multiple Availity Essentials organizations, and you want to move some of your users between those organizations.

1. On the Add User page, select the **This is an existing user ID** check box.

**Tip:** If you are administrator for another business to which the user belongs, you can use the maintain user feature to determine the user's existing Availity Essentials user ID.

2. In the **User ID** field, type the user's existing user ID.

### Add User

\* indicates a required field

\* User ID:   
 This is an existing user ID

Add this user to the following organization(s):

	Organization	Customer ID	Address	Tax ID	Organization Type
<input checked="" type="checkbox"/>	TEST - Availity Training	89933	5555 Gate Parkway, Ste 110 Suite 110 Jacksonville, FL 32256	044704147	Non-Physician Provider

3. If you are the administrator for multiple organizations, select the check box next to each organization to which you want to add the user. To add the user to all of your organizations, select the check box at the top of the check box column.

4. Click **Next**.
5. If the system locates the correct user, select **Yes** to the question **Do you want to associate this user with your organization?**  
**Note:** If an error message displays indicating the user ID you entered is not in our records, check the user ID and try the search again, or enter the individual as a new user.
6. Assign roles to the new user based on the user's job function.
7. Perform final steps in the add user process.

## Roles and permissions overview

As the administrator for your Availity Essentials 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 Availity Essentials user with the add user feature. In addition, you can assign or remove roles for existing users at any time using the maintain user feature.

- A **role** is a group of job functions, or permissions. Each role consists of one or more permissions.
- A **permission** is a job function or, more specifically, access to a feature in Availity Essentials that allows the user to perform a job function. You cannot assign individual permissions. You must assign the role to which the permission belongs. However, some roles include only one permission.

### Note:

- The roles and permissions available to you and your users depend on your organization type and the region (state or geographic location) to which your organization belongs in Availity Essentials. For example, an organization registered as a hospital in Florida will have access to different roles and permissions than an organization registered as a physician practice in Oklahoma. The person who registered your organization with Availity specified your organization type and region(s) at the time of registration.
- Not all payers or vendors support all permissions. In fact, there are a number of permissions that only a single payer supports.
- Some roles have legal implications related to laws. Be sure to assign roles to each user carefully based on the user's job function.

## Assign roles

Assigning roles is part of the add user process for administrators. Roles determine which Availity Essentials features users can access. Before assigning roles to users, familiarize yourself with Availity Essentials roles and permissions. This will help you decide which roles are appropriate for each user. Some roles have legal implications related to HIPAA laws. Be sure to assign roles carefully based on each user's job function.

**Note:** When a business first registers with Availity, Availity creates a user account for the administrator of that business, and assigns to it all roles that are available to the business at the time of registration approval. As administrator, you can change the roles assigned to your user account at any time using the maintain user feature. However, you cannot remove the administrator role from your account. To change the administrator for your business, contact Availity Client Services at 800-282-4548 (800-AVAILITY).

1. After you complete the Add User page and click **Next**, the Role for [User Name] page displays. Choose an option for assigning roles to the user:

- If the user needs a unique set of roles, make sure **This user needs a new set of roles** is selected (this is the default). In the roles table, select the check box next to each role you want to assign to the user. To assign all available roles, select the check box at the top of the roles table.

Choose the best option:  This user needs a new set of roles.  
 This user needs the same set of roles as an existing user.

- Select **This user needs the same set of roles as an existing user**, if appropriate. In the **Assign the same role(s) currently assigned to** field, select the existing user who has the roles you want to assign to the new user.

Choose the best option:  This user needs a new set of roles.  
 This user needs the same set of roles as an existing user.

\* Assign the same role(s) currently assigned to:

**Note:** Click **More Info** in the roles table to view the permissions that are associated to a specific role, along with the payers and vendors that support those permissions.

2. If you are adding the user to multiple businesses, and you want the user to have the same set of roles in each of those businesses, select the check box labeled **Assign [User Name] the same roles in all organizations** at the bottom of the roles table. This will save you steps in the add user process.

Assign Test User the same roles in all organizations

**Note:** Leave this check box blank if you want the user to have different roles for each business. For example, for one business you may want the user to submit claims, run eligibility and benefits inquiries, and submit authorizations and referrals; for another business, you may want the same user only to submit claims. As administrator, you determine which roles the user can access for each of your businesses.

3. Click **Next**.

4. On the Review and Submit page, review the roles you selected for the user before you submit them. If you need to edit your selections, click **Edit Info**.

**Note:** You cannot edit user information such as name, email address, and phone number at this point in the process. Users can edit this information themselves later using the my account feature.

5. When you are satisfied with the roles you have selected for the user, click **Submit**.

- On the User Information Saved page, click **E-mail** or **Print** to provide the user with his or her user ID and temporary password.

## 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 60 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

---

User ID: **testusera**  
 Temporary Password: **7xDSqPCU**  
 Temporary password expires in 60 days.

First Name: Test  
 Last Name: UserA  
 E-mail Address: testusera@test.com  
 Phone:  
 Notes:  
 Effective Date: 07/28/2020

### Organization(s) and Roles

---

Organization	Address	Tax ID	Role(s)
ABC Clinic and Therapy, Inc.	10752 Deenwood Pk Blvd S Jacksonville, FL 32256	043712605	Base Role Authorization and Referral Inquiry Authorization and Referral Request Eligibility and Benefits
Urgent Care Clinic	123 Main Street PO Box 99 St. Augustine, FL 32095	654893214	Base Role Authorization and Referral Inquiry Authorization and Referral Request Medical Attachments

---

E-mail
Print
Add Another User

**Important:** You will not have access to the user's temporary password after you leave the User Information Saved page. The user must log in to Availity Essentials with his or her temporary password within 60 days.