AVAILITY ESSENTIALS
REFERENCE GUIDE FOR USERS

Streamline Workflows with Multi-Payer Access

Where healthcare **connects.**

GETTING STARTED

Availity Essentials is a secure, multi-payer platform where healthcare providers and health plans collaborate by exchanging administrative and clinical information. Your administrator has created a personal account and registered your organization on www.Availity.com. The administrator has given you access to Availity Essentials and assigned roles to your 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 within 24 hours 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 Essentials, go to **[Your Name's] Account** › **My Account**, click **Organization(s)** and then click the **Open My Administrators** link to locate the name of your Availity administrator.
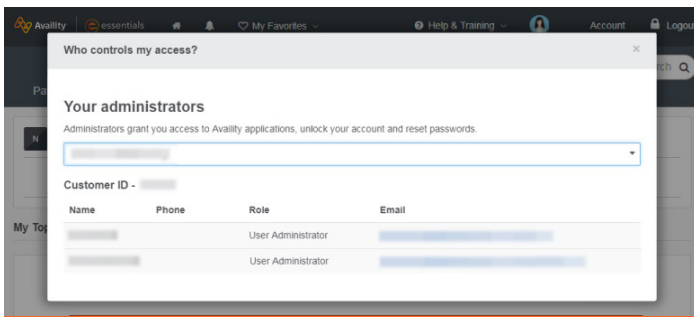
GETTING SET UP

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 token option is best for users who do not have access to a phone or tablet.

Availity Essentials works best on the latest versions of Chrome, Microsoft Edge, or Firefox browsers.

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
- apps.availity.com
- mc.availity.com

GETTING TO KNOW YOU

You can manage your Availity Essentials user account (including contact information, password, and security questions by clicking **[Your Name's] Account** › **My Account** in the Availity Essentials menu.

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

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 payer-specific applications or resources from payer spaces to your favorites. To mark an item as a favorite, click the heart icon next to the item. The heart turns from empty to filled. When you're ready to use that app or resource, click **My Favorites** and find it in your list of favorites.

GETTING TO YOUR PAYERS

Use the Payer Spaces menu to access health-plan specific information (such as news, policies, and process updates) and applications. Your list will vary based on your region and the payers who participate in your area.
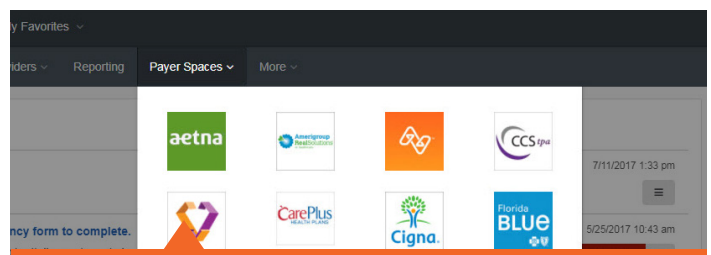
GETTING AROUND

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.

For a complete list of payers and transactions, click **More** › **Payer List** in the Availity Essentials menu bar, or visit Availity.com and click **Resources** › **Availity Payer List**.

GETTING HELP AND TRAINING

The Availity Learning Center (ALC) has a large collection of recorded and live training opportunities.

To access the ALC, click **Help & Training** › **Get Trained**.

Availity Help includes context-sensitive articles and field-level topics as well as Availity Essentials release enhancements and updates.

To access online help, click **Help & Training** › **Find Help**.

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

GETTING LOCAL

Portal features vary by health plan and by state.
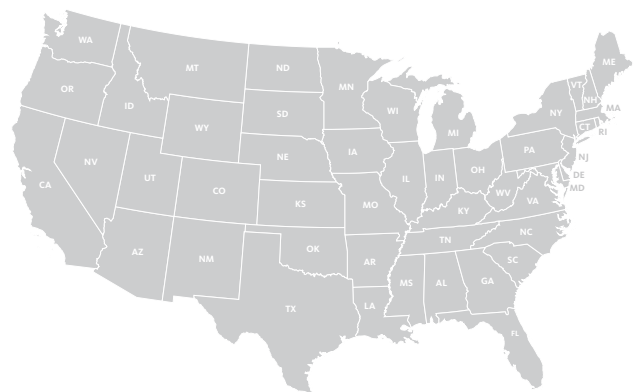
For a complete list of payers and transactions, click **More** in the top navigator bar or visit Availity.com and select **Payer Lists** from the **Resources** menu.

SETTING UP FOR SUCCESS

Once your administrator creates your account, log in to the portal to customize your experience.

Action Item	How-To Steps	More Information
Obtain your own account	Contact your administrator to create an account for you.	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.
Find your administrator	Click **[Your Name's] Account** › **My Account**, click **Organization(s)**, and then click the Open **My Administrators** link.	Your administrator can assist with account access and access to applications in Availity Essentials.
Allow pop-ups from Availity	Click **Help & Training** › **Find Help** in the Availity Essentials menu bar. Refer to the *Pop-up blockers and third-party pop-ups* help topic.	Allow pop-ups from: • www.availity.com • apps.availity.com • mc.availity.com
Manage your user account	Click **[Your Name's] Account** › **My Account** in the Availity Essentials menu bar. On the My Account page, access the items in the **Profile** section.	You can edit your profile (including contact information, job title, password, security questions, and avatar).
Change your password and security questions	Click **[Your Name's] Account** › **My Account** in the Availity Essentials menu bar. On the My Account page, access the items in the Security section. Confirm your identity to access your security settings.	If you forget your user ID or password, you can retrieve them using the links on the Availity Essentials login page. If you call Availity Client Services for login assistance, they'll ask you your security questions to validate your identity.
Personalize your favorites	To mark an item as a favorite, click the heart icon next to the item in the Availity Essentials menu. The heart turns from empty to filled. When you're ready to use that app or resource, click **My Favorites** and find the item in your list of favorites. You can also add applications or resources from payer spaces to your favorites.	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.

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