Availity™

EDI Connection Services Startup Guide

Availity Gateway and Availity Portal | Quick Start Guide

Welcome to Availity! This guide includes information to get you started with submitting Electronic Data Interchange (EDI) transactions to Availity, from registration to on-going support. We welcome your feedback. Please let us know what we can do to improve your experience and our documentation.

Availity is making healthcare better

Availity is an industry-leading, HITRUST-certified health care information technology company that serves an extensive network of health plans, providers, and technology partners nationwide through a suite of dynamic products built on a powerful, intelligent platform. We integrate and manage the clinical, administrative, and financial data our customers need to fuel real-time coordination and collaboration amongst providers, health plans, and patients in a growing value-based care environment.

Welcome

Choose how to submit transactions to Availity

Availity provides a variety of modes for submitting your transactions. You can choose to always submit your transactions through a single mode, such as through File Transfer Protocol (FTP), or you can submit some transactions through one mode and other transactions through a different mode. This guide describes the setup process for the following modes:

- ***Submit transaction files through FTP*** - If you work with a practice management system, health information system, or other automated system that supports an FTP connection, you can securely upload batch files of X12 EDI transactions to the Availity FTP site where they are automatically picked up by Availity and submitted to the appropriate health plans.

- ***Submit transaction files through Availity Portal*** - If you have batch files of X12 EDI transactions that you need to process and you choose not to use the Availity FTP site, you can manually upload the batch files through Availity Portal.

- ***Submit transactions through manual data entry in Availity Portal*** - Availity Portal makes it easy to submit transactions, such as eligibility and benefits inquiries or claims, by entering data into our user-friendly Web forms.

Note: If you want to submit real-time (B2B) transactions through Availity's Simple Object Access Protocol (SOAP) Web service, you'll need to contact Availity Client Services to request a B2B setup.

Submit transaction files through FTP

If you'll be submitting X12 EDI files through the Availity FTP site, you'll follow the setup process in the figure below. The lighter-colored tasks, such as enrolling for 835 delivery, are optional.

Get started by *registering your business with Availity*. If your business is already registered, then you're ready to *create your FTP account*.

Note: To complete the post-registration setup steps, you'll need an Availity Portal account. If you don't have an Availity Portal account, contact the Availity administrator for your business and ask them to create an account for you that includes the **EDI Management** role.
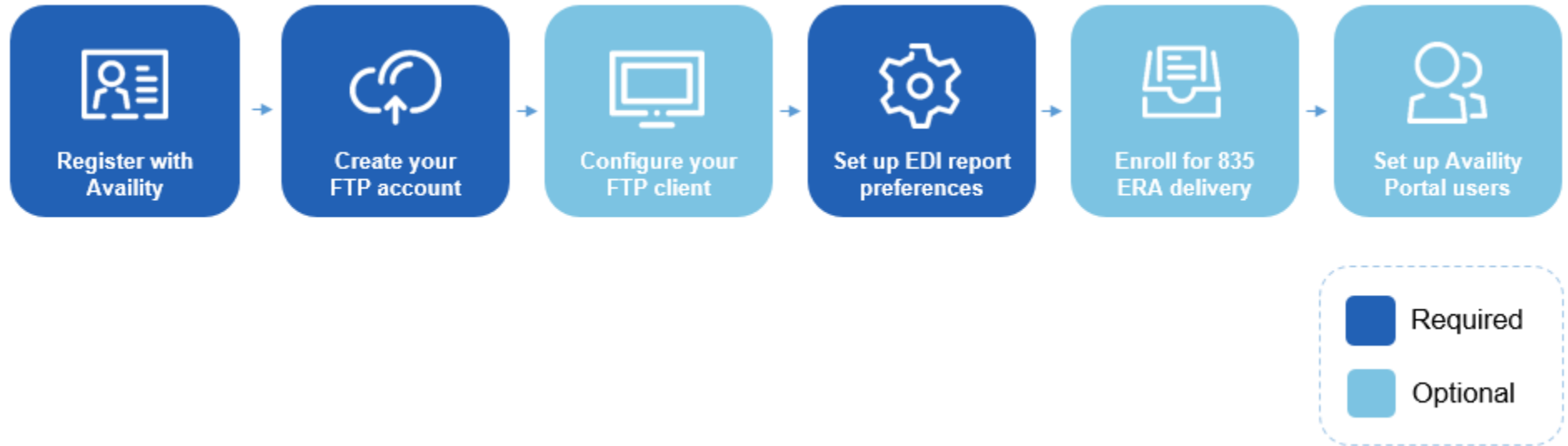

Figure 1: Setup tasks for submitting files through FTP

Submit transaction files through Availity Portal

If you'll be submitting X12 EDI files by manually uploading them through Availity Portal, you'll follow the setup process in the figure below. The task to enroll for 835 delivery is optional.

Get started by *registering your business with Availity*. If your business is already registered, then you're ready to *set up your EDI reporting preferences*.

Note: To complete the post-registration setup steps, you'll need an Availity Portal account. If you don't have an Availity Portal account, contact the Availity administrator for your business and ask them to create one for you.

Register with Availity → Set up EDI report preferences → Enroll for 835 ERA delivery → Set up Availity Portal users

Required
Optional

Figure 2: Setup tasks for submitting files through Availity Portal

Submit transactions through manual data entry in Availity Portal

If you'll be submitting transactions by manually entering data into our user-friendly Web forms, you'll follow the setup process in the figure below. The task to enroll for 835 delivery is optional.

Get started by *registering your business with Availity*. If your business is already registered, then you're ready to *enroll for 835 delivery* or *set up your Availity Portal users*.

Note: To complete the post-registration setup steps, you'll need an Availity Portal account. If you don't have an Availity Portal account, contact the Availity administrator for your business and ask them to create one for you.
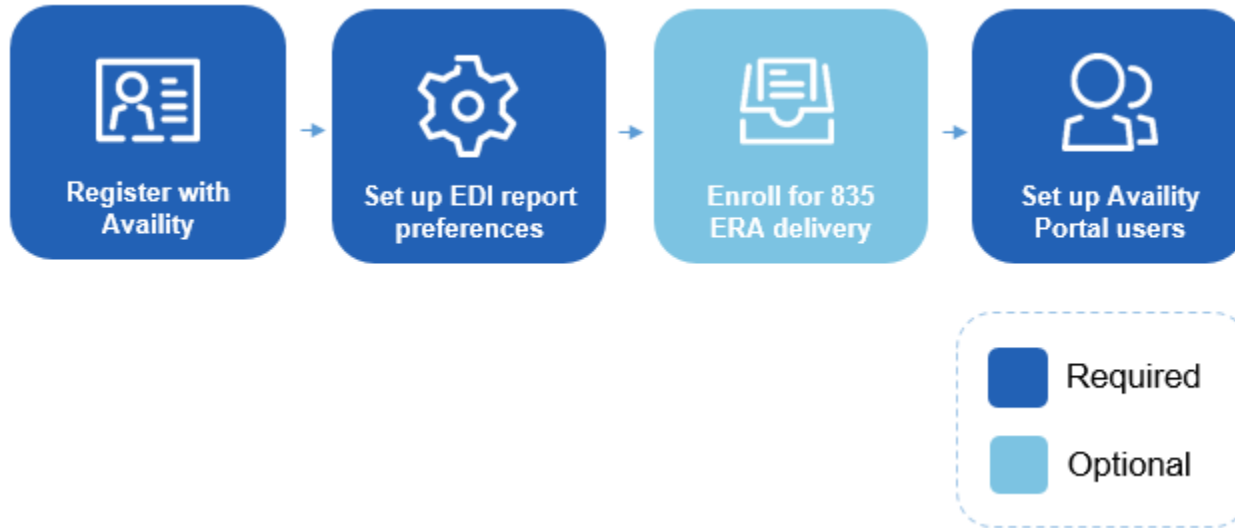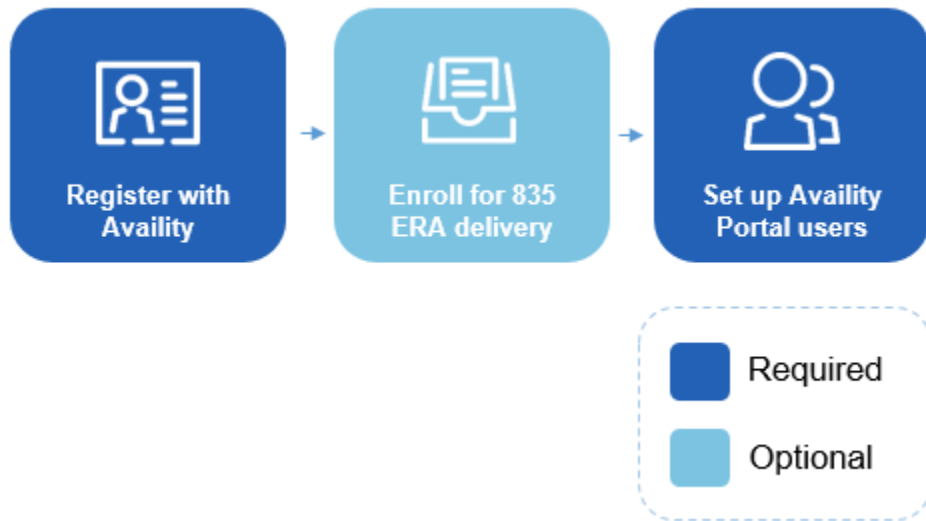

Figure 3: Setup tasks for submitting through manual data entry

Register your business

No matter which mode(s) you use to submit transactions to Availity, your business must be registered with Availity. Follow the steps below to register your business with Availity. If your business is already registered with Availity, skip this task.

1. Go to *www.availity.com* and click **REGISTER**.
2. Follow the wizard to submit your registration.

   Note: The registration must be completed by someone from your business with the authority to authorize the Availity Organization Agreement.

Once you've registered, you'll receive emails with your login credentials.

Learn More: *Learn about Availity Portal Registration*

Create your Availity FTP account

If you'll be submitting transactions to Availity through FTP, follow the steps below to create your Availity FTP account (also referred to as your FTP or SFTP mailbox).

Note: If you requested an Availity SFTP mailbox during registration and completed the associated activation, then skip this task since you've already created your Availity FTP account. If you'd like to change the password you were given for your Availity FTP account, log in to Availity Portal and navigate to **Claims & Payments** > **FTP and EDI Connection Services** > **Manage Your FTP Mailbox**.

1. Log in to Availity Portal at *https://apps.availity.com*.
2. Navigate to **Claims & Payments** > **FTP and EDI Connection Services** > **Manage Your FTP Mailbox**.

    Note: FTP administration is limited to certain roles within Availity Portal. If you can't navigate to the above location, you don't have the appropriate role. In that case, look up your administrators by navigating to **My Account Dashboard** > **My Administrators**, on the home page of Availity Portal, and ask them to add the **EDI Management** role for you so that you can manage the FTP mailbox for your organization.
3. Once you're on the Manage Your FTP Mailbox page, follow the on-screen instructions to create your user name and password for your FTP account.

    Important: Make a note of these account credentials.

Configure your FTP client

If you'll be submitting transactions to Availity through FTP, follow the steps below to configure your FTP client to connect to the Availity FTP site.

Note: As an alternative to using an FTP client to connect to the Availity FTP site, you can access the FTP site by entering the following URL into a browser and then entering your FTP user name and password: *https://ftp.availity.com*. If you choose this alternative method, you can skip this task, but you'll have to enter your FTP user name and password each time you access the Availity FTP site.

1. Launch or open your FTP client software.
2. Create a new entry (in your FTP client) for accessing the Availity FTP site, and use the table below to specify the fields for the new entry.
3. Click **Connect** or press **Enter** to connect to the server. If you're prompted to enter a user name and password, enter the same Availity FTP user name and password that you entered in your FTP client.

Field	Value
Host	ftp.availity.com
Port	9922 (typically used for SFTP)
Protocol or server type	Select the appropriate option in your FTP client software for Secure File Transfer Protocol (SFTP), if available and/or applicable. For example, **SFTP - SSH File Transfer Protocol**.
Logon type	If there is an option for the logon type, select normal.
User	The user name for your Availity FTP account.
Password	The password for your Availity FTP account.

Set up your EDI reporting preferences

If you'll be submitting transactions to Availity through FTP or by uploading files to Availity Portal, you'll want to set up your organization's reporting preferences before you start submitting your production X12 EDI files. You can choose to receive data files, text files, or both, and indicate your preference for delivery schedule and aggregation.

Note: The task of setting up EDI reporting preferences will need to be completed by someone who has a good understanding of EDI transactions.

1. Log in to Availity Portal at *https://apps.availity.com*.
2. Navigate to **Claims & Payments** > **EDI Reporting Preferences**.
3. Specify the response files and reports you want your organization to receive, using the EDI Reporting Preferences tool. Each tab and section of the EDI Reporting Preferences tool represents one report or response file.

   - Select the file and report formats, and select the delivery times (where applicable).
   - Details regarding the reporting options are available in the EDI Companion Guide (**Claims & Payments** > **FTP and EDI Connection Services** > **EDI Companion Guide**).

   Important: Save the settings on each tab of the EDI Reporting Preferences tool before moving on to another tab.

Learn More: Navigate to **Help & Training** > **Get Trained** to enroll for the EDI and Clearinghouse Solutions training options.

Enroll for 835 ERA delivery

No matter which mode(s) you use to submit transactions to Availity, you can optionally enroll to have electronic remittance advice files (also known as ERAs and 835 files) delivered to your Availity FTP mailbox. Electronic remittance advice files display payment information from all claims, whether submitted electronically or by paper. If your ERAs are already delivered to Availity for the payers that you submit claims to, good news, you can skip this setup task.

1. Before you start, determine who will receive your ERA files, as they can be sent to only one delivery location. ERA files can be sent to a provider, a clearinghouse, a vendor, or a billing service.
2. Log in to Availity Portal at *https://apps.availity.com*.
3. Navigate to **My Providers** > **Enrollments Center** > **ERA Enrollment**.
4. Follow the on-screen instructions.

   Note: You can select up to twenty payers at a time from the list in the **Payers** field, or you can click **View All Payers** and select your payers from the Select Payers window.
5. When you click **Done** on the confirmation page, a confirmation email will be sent to you and your administrator.

Learn More: Navigate to **Help & Training** > **Get Trained** to enroll for the Remittance Solutions training program. For online help, navigate to **Help & Training** > **Find Help**, and then select **Remittance**, under **Contents**.

Set up your Availity Portal users

If you'll be submitting transactions by manually uploading files through Availity Portal or by manually entering data into our user-friendly Web forms, you'll need to create an Availity Portal account for each user who will be submitting transactions. This task is optional if you'll only be submitting transactions through FTP.

1. Log in to Availity Portal at *https://apps.availity.com*.
2. Click **Add User** in **My Account Dashboard**.

   Tip: Have a lot of users? On the Add Users page, click the option to upload users in a spreadsheet in .csv format.

Learn More: Navigate to **Help & Training** > **Get Trained** to enroll for the onboarding program for Availity administrators. For online help, navigate to **Help & Training** > **Find Help**, and then select **Administrator**, under **Contents**.

GET SET UP - SUBMIT TRANSACTIONS

Submit transactions to Availity

Once you've completed the tasks, you'll be ready to submit transactions to Availity.

Send and receive X12 EDI files through FTP

If you'll be submitting X12 EDI files through the Availity FTP site, you'll see a **SendFiles** folder and a **ReceiveFiles** folder, once you've connected to the Availity FTP site.

- To upload files to Availity, click the **SendFiles** folder and then select the files from your system that you want to upload.
- To download response files and reports, click the **ReceiveFiles** folder and then select the files that you want to download.

Send and receive X12 EDI files through Availity Portal

If you'll be submitting X12 EDI files by manually uploading them through Availity Portal, log in to Availity Portal, navigate to **Claims & Payments** > **Send and Receive EDI Files**, and then select your organization (if prompted).

- To upload files to Availity, click the **SendFiles** folder and then select the files from your system that you want to upload.
- To download response files and reports, click the **ReceiveFiles** folder and then select the files that you want to download.

Submit transactions through manual data entry in Availity Portal

If you'll be submitting transactions by entering data into our user-friendly Web forms, log in to Availity Portal, and then navigate to the form that you need. To get you started, here are navigation instructions for submitting the most common (HIPAA) transactions:

- **Eligibility and benefits inquiry** - At the top of Availity Portal, click **Patient Registration** > **Eligibility and Benefits Inquiry**.
- **Authorization or referral request** - At the top of Availity Portal, click **Patient Registration** > **Authorizations & Referrals**. On the Authorizations & Referrals page, click either **Authorizations** or **Referrals**.
- **Submit a claim** - At the top of Availity Portal, click **Claims & Payments** > **Professional Claim**, or **Claims & Payments** > **Facility Claim**.
- **View electronic remittance advice** - At the top of Availity Portal, click **Claims & Payments** > **Remittance Viewer**.

Additional Information

Key resources

Availity's EDI Companion Guide

The EDI Companion Guide communicates Availity-specific requirements and other information that supplements requirements and information already provided in standard EDI and HIPAA communications. It includes detailed connectivity guidance, report and response file examples, and step-by-step instructions for using the tools.

To access the EDI Companion Guide, navigate to **Claims & Payments** > **FTP and EDI Connection Services**, and then click **EDI Companion Guide**.

Tip: For EDI batch submitters using FTP, check out the following sections in the EDI Companion Guide. You can quickly access them from the guide's table of contents.

- Manage File Transfers in the Availity Health Information Network
- Control Segments/Envelopes
- Acknowledgements and/or Reports

Availity's payer list

Check out Availity's payer list for participating payers and payer IDs. Go to *http://www.availity.com*, and then select **Web Portal Payer List**, under **Resources**.

You can also log in to Availity Portal and type **payer list** in the keyword search option.

Tip: You can submit claims for free to payers listed in the Availity Basic Clearinghouse. Those payers sponsor the service for you.

Answers to FAQs

Is enrollment required to submit claims, claim status inquiries, authorization and referral requests and inquiries?

No. You can send batches of 837 and 27x transactions without any additional enrollment. You can also use Availity Portal for direct-data entry of claims, and real time claim status and auth/referral tools. Check Availity Portal payer list for participating payers by region, tool, mode, and more.

What do I need to do to be able to submit real-time B2B transactions?

Contact Availity Client Services to request a B2B setup.

What if I forget where to find something in Availity Portal?

Use the keyword search option to quickly locate what you need. And, remember to use **Help & Training** > **Find Help** for step-by-step instructions for every Availity tool.

I can't connect to my mailbox from my FTP client

If you're unable to connect to your mailbox from your FTP client, please check your firewall settings. Your organization's IT-security team might need to create a firewall rule to allow data to transfer through the specified port. If you would like to confirm the resolution before involving your IT-security team, please attempt to connect to the FTP mailbox outside your organization's network.

Note: As an alternative to using an FTP client to connect to your mailbox, you can access your mailbox by entering the following URL into a browser: *https:// ftp.availity.com/*. Use the same Availity FTP user name and password that you entered when you set up your FTP client.

Support tools

For questions, assistance, and support, log in to Availity Portal and submit an online support ticket (24/7) by navigating to **Help & Training** > **My Support Tickets**, at the top of Availity Portal. Or, call 1.800.AVAILITY (282.4548), Monday through Friday, 8:00 a.m. to 7:30 p.m. Eastern time.

To learn about new payers, applications, and training options each month, go to the online help system (**Help & Training** > **Find Help**) and check out the What's New and Changed topic.

Find more on-demand and live training options in the Availity Learning Center (**Help & Training** > **Get Trained**).