



Healthy Blue

Welcome to the Availity Portal — Provider Online Reporting overview

Presented by E-Solutions — Adoption, Communication & Education

Welcome

This guide will assist in the Availity Portal* and Provider Online Reporting (POR) registration process for practice administrators to:

- Register and edit users in Availity.
- Register and edit users in POR.
- Access POR to launch the program's reporting application with appropriate user access.

Note: *You must register in both Availity and POR.*





Adding users in Availity



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Administrator: Adding users in Availity

1. Once logged in to the Availity Portal, choose the **More** option from the top menu bar. Under *Account Administration*, select **Add User** and complete the required fields for access.

Choose the best option:

- ☒ This user needs a new set of roles.
- ☐ This user needs the same set of roles as an existing user.

	Role(s)	Permissions What is this?
User Roles		
<input checked="" type="checkbox"/>	Base Role	More Info
<input type="checkbox"/>	Authorization and Referral Inquiry	More Info
<input type="checkbox"/>	Authorization and Referral Request	More Info
<input type="checkbox"/>	Claim Status	More Info
<input type="checkbox"/>	Claims	More Info
<input type="checkbox"/>	Claims Management	More Info
<input type="checkbox"/>	Clinician	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"/>	Physician	More Info
<input type="checkbox"/>	Provider Data Management	More Info
<input type="checkbox"/>	Provider Fee Schedule	More Info
<input checked="" type="checkbox"/>	Provider Online Reporting	More Info
<input type="checkbox"/>	Referral Coordinator	More Info

2. Select the **Provider Online Reporting** checkbox under *User Roles*, select **Next** and then **Submit**. A temporary password and user ID will be viewable to the administrator, who can then print or email the information to the end user.

A photograph of an elderly couple riding a bicycle together in a sunny park. The man is wearing a light blue shirt and a straw hat, and the woman is wearing a red and white checkered shirt. They are both smiling and looking towards the right. A blue semi-transparent banner is overlaid on the left side of the image.

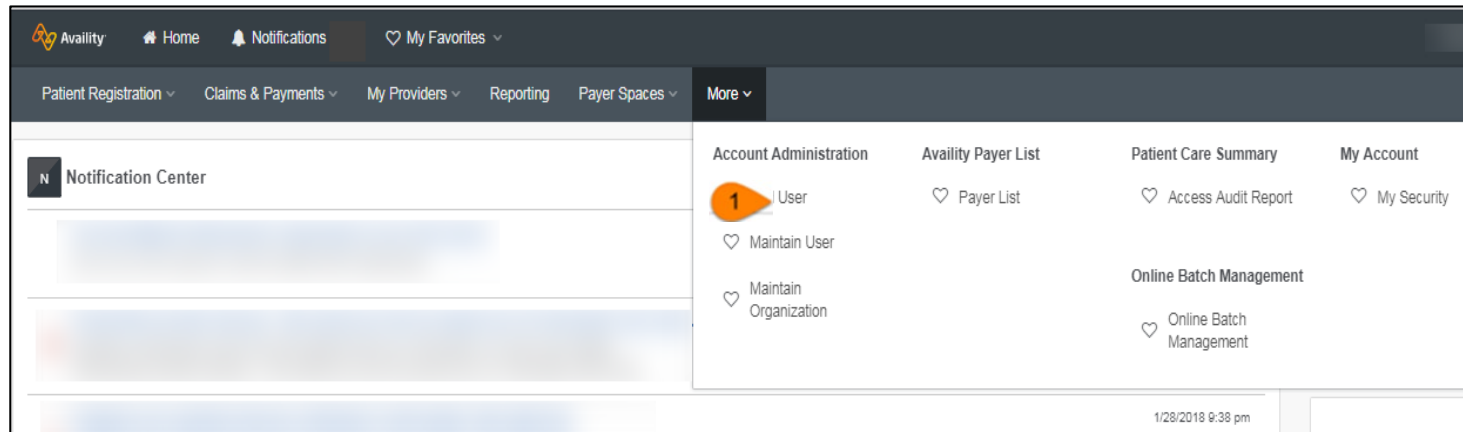
Editing users in Availity



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Administrator: Editing users in Availity

1. Once logged in to the Availity Portal, choose the **More** option from the top menu bar. Under *Account Administration*, select **Maintain User**. Locate the user's account and select the name of the user.



Administrator: Editing users in Availity (cont.)

2. In the *Roles* column, select **View/Edit**. A list of available roles displays.
3. Select the checkbox for **Provider Online Reporting** and then **Save**.

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

	Role(s)	Permissions What is this?
User Roles		
<input checked="" type="checkbox"/>	Base Role	More Info
<input checked="" type="checkbox"/>	Claim Status	More Info
<input checked="" type="checkbox"/>	Claims	More Info
<input checked="" type="checkbox"/>	EDI Management	More Info
<input checked="" type="checkbox"/>	Eligibility and Benefits	More Info
<input checked="" 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 Fee Schedule	More Info
<input type="checkbox"/>	Provider Online Reporting	More Info

3

Name of user

* indicates a required field

[Revoke User](#) [Reset Password](#) [Search](#)

User ID: Demo123

* First Name:

* Last Name:

E-mail:

Phone: - - ext.

Notes:

[Save](#) [Cancel](#)

User is associated with the following organization(s):

Organization	Customer ID	Address	Tax ID	Status	Status Date	Roles
ABC	1111	111 Street Jacksonville, FL 11111	1111111111	Active	03/24/2012	View/Edit

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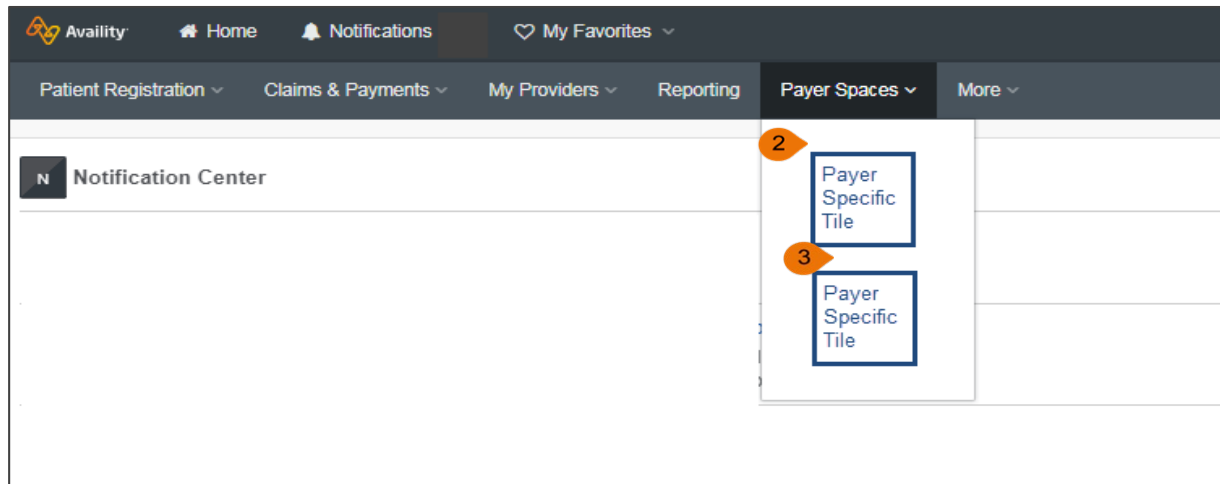
POR registration



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Administrator: POR registration

1. Log in to <https://www.availity.com>.
2. Choose **Payer Spaces** in the top menu bar.
3. Select the **payer tile** that corresponds to your market.



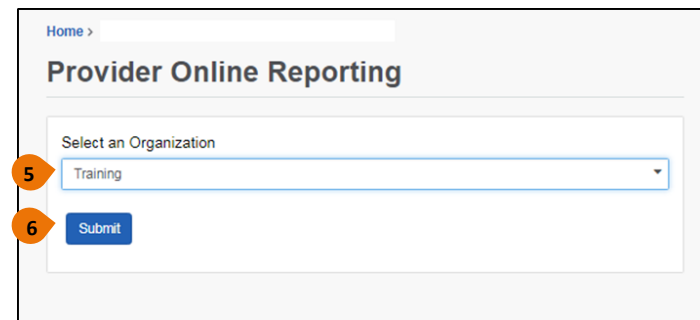
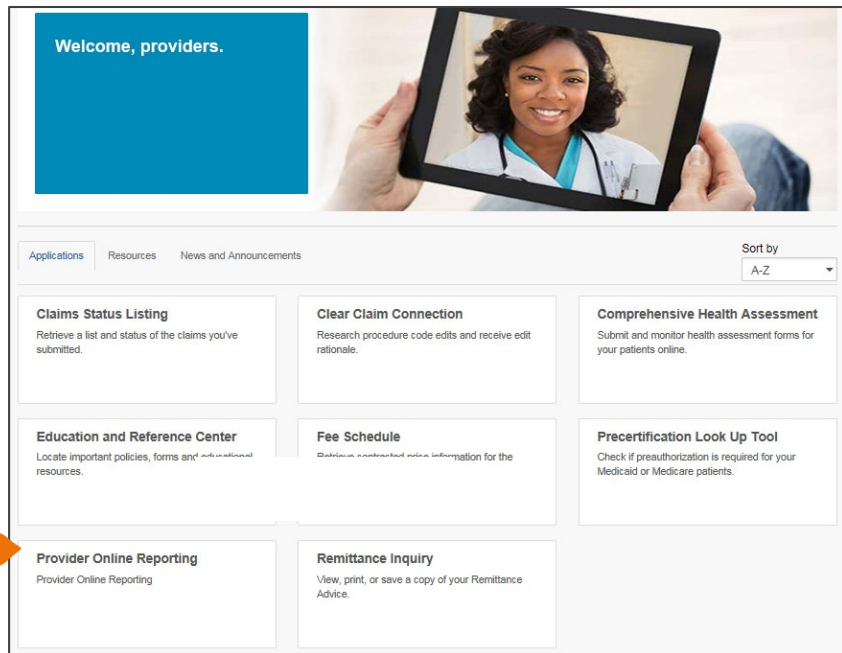
Note: First-time users accessing Payer Spaces will be asked to accept a Terms of Use Agreement. The agreement will appear for users once every 365 days.



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Administrator: POR registration (cont.)

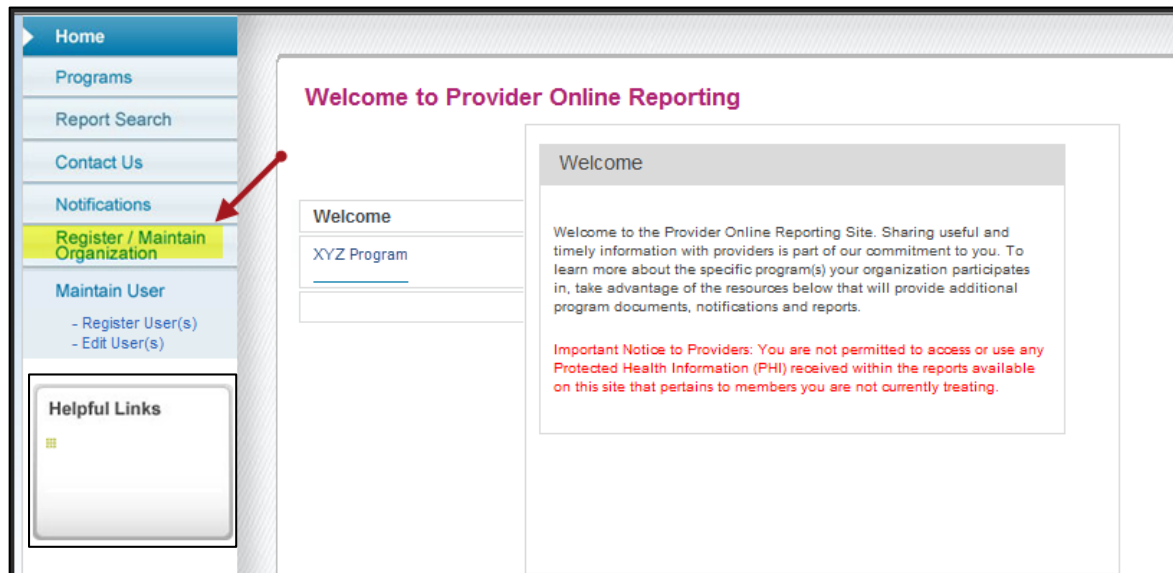
4. On the *Applications* tab, select **Provider Online Reporting**.
5. Select **Organization**.
6. Choose **Submit**.



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Administrator: POR registration (cont.)

On the *Welcome to Provider Online Reporting* page, select **Register/Maintain Organization**.



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Administrator: POR registration (cont.)

- Select **Register Tax ID(s)** for the applicable program to register the tax IDs.

Home

Programs

Report Search

Contact Us

Notifications

Register / Maintain Organization

Maintain User

- Register User(s)
- Edit User(s)

Helpful Links

Maintain Organization - orgDemoBrand

The following is a list of programs associated to the organization that are available for registration and maintenance.

Program and Tax ID Information	
Program Name	Registered Organization Tax ID(s)
XYZ Program	No Tax ID(s) registered Register Tax ID(s)

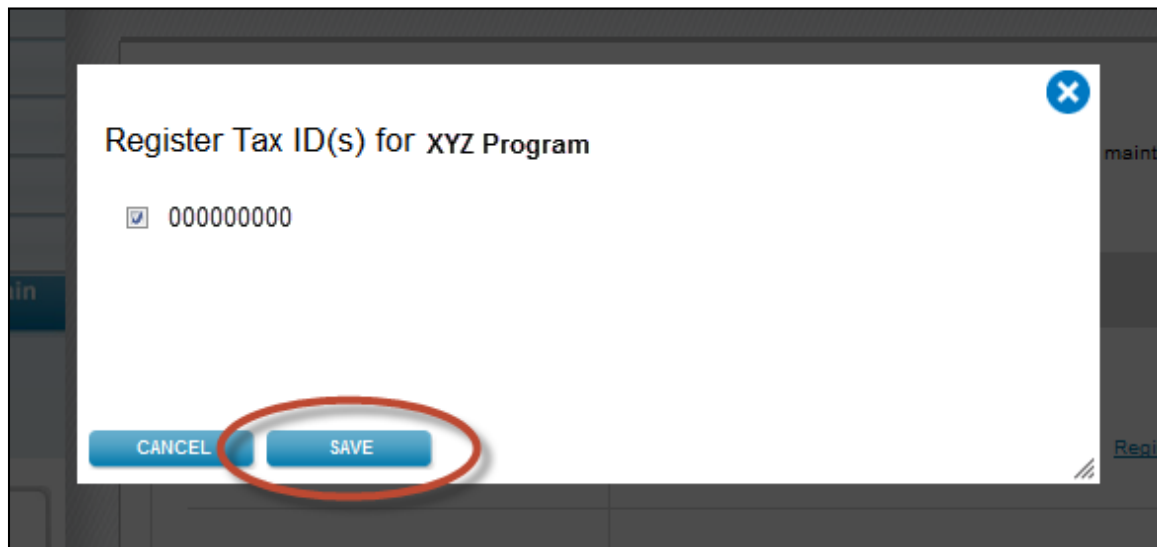
Note: The practice may be participating in more than one program; the administrator must register each program that is listed.



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Administrator: POR registration (cont.)

- A pop-up window will display all tax ID(s) that need to be registered for the program.
- Check the box for each tax ID to be registered and select **Save**.



Administrator: POR registration (cont.)

- You now have successfully completed the tax ID registration.
- Notice after the registration has been completed, the status has changed from Register Tax ID(s) to Edit Tax ID(s).

The screenshot displays a web application interface for maintaining an organization. On the left is a vertical navigation menu with the following items: Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization (highlighted with a blue bar and a right-pointing arrow), and Maintain User (which includes sub-links for Register User(s) and Edit User(s)). The main content area is titled 'Maintain Organization -' in purple. Below the title is a message: 'The following is a list of programs associated to the organization that are available for registration and maintenance.' This message is followed by a table titled 'Program and Tax ID Information'. The table has two columns: 'Program Name' and 'Registered Organization Tax ID(s)'. The first row shows 'Program XYZ' in the first column and '000000000' in the second column. Below the first row, under the 'Program Name' column, is the text 'Member Reports'. In the second column, next to the tax ID '000000000', there is a blue hyperlink labeled 'Edit Tax ID(s)' which is circled in red.

Program and Tax ID Information	
Program Name	Registered Organization Tax ID(s)
Program XYZ	000000000
Member Reports	Edit Tax ID(s)



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A photograph of an elderly couple riding a bicycle together in a sunny park. The man is wearing a light blue shirt and a straw hat, and the woman is wearing a red and white checkered shirt. They are both smiling and looking towards the right. The background shows a palm tree and other greenery.

Administrator: Adding users in POR

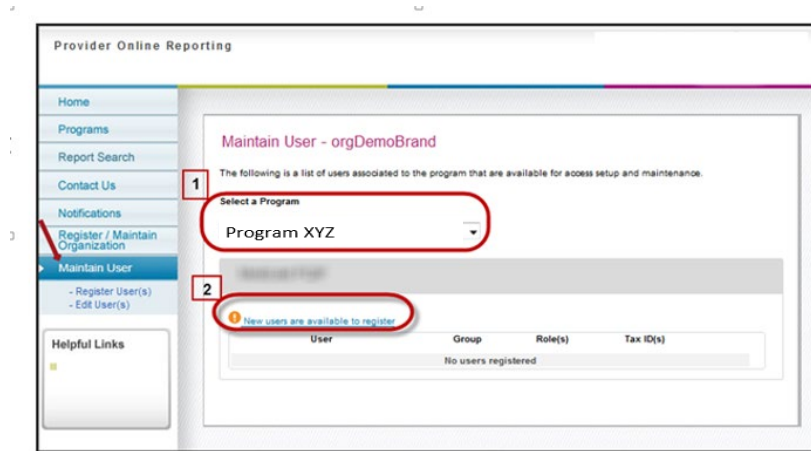


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Administrator: Adding users in POR

From the *Provider Online Reporting* home page, select **Maintain User**.

1. Choose the applicable program under *Select a Program*. If the organization is participating in more than one program, the administrator must register the user to access POR for each individual program as appropriate.
2. Select **New users are available to register**. The administrator will be taken to the *Register User* landing page (see next slide). This link will only display when the program has new users who have not been registered.



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Administrator: Adding users in POR (cont.)

Register user(s):

- Select **Program**: If the organization is participating in more than one program, the administrator must register the user to access POR for each individual program as appropriate.
 1. Select **Reports**: Choose from group names associated with the selected program.
 2. Select **User(s)**: The list of users will appear in alphabetical order by last name and will be unchecked by default. Select the appropriate user for access. (Only those users who are given the POR role in Availity will be listed here.)
 3. Select **Tax ID**.

Note: The required fields for user registration and setup may change depending on the program selected.

The screenshot shows the 'Register User(s)' form within a web application. On the left is a navigation menu with options: Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization, and Maintain User. The 'Maintain User' section is expanded, showing 'Register User(s)' and 'Edit User(s)'. The main form area is titled 'Register User(s)' and includes a 'Select Program' dropdown menu currently set to 'Member Reports'. Below this, there are three numbered steps indicated by red arrows: 1. 'Select Report(s):' with a list of checkboxes including 'Disenroll Roster', 'EPSDT Gaps In Care', 'Habilitation/Child Mental Health Waiver', 'Health Home Roster', 'Inpatient Roster', 'MCO Screener', 'New Member', 'Patient Census', 'STAR and HEDIS', and 'Value Based Purchasing'; 2. 'Select User(s):' with a text input field; and 3. 'Select Tax ID:' with a dropdown menu. To the right of these fields is a 'Preview' section with the text '< Add selections from the left to review: >'. At the bottom right of the form are 'Cancel' and 'Save' buttons.



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Administrator: Adding users in POR (cont.)

Register user(s):

4. Preview

- Select **Add to Preview** to review the selections made prior to saving.
- Select **Save**.

The image displays two screenshots of the 'Register User(s)' web application interface. The top screenshot shows the 'Select Reports' section with a list of reports (Report 1 through Report 6) and checkboxes for various user roles (Disenroll Roster, EPBDT Gaps in Care, Habit, Health, Input, MCO, New Member, Patient, STAR, Value Based Purchasing). The bottom screenshot shows the 'Preview' section with a red arrow pointing to the 'ADD TO PREVIEW' button and a red circle around the 'SAVE' button. The interface includes a sidebar with navigation links (Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization, Maintain User, Register User(s), Edit User(s)) and a main content area with a 'Register User(s)' header and a 'Select Program' dropdown menu.

Note: If changes need to be made prior to saving, select **Remove** from the preview window and complete the fields on the screen.



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A photograph of an elderly man with white hair and a young child with curly brown hair in a field of tall grass. The man is leaning over the child, and they are both looking down at something in the grass. A blue overlay with a white text box is on the left side of the image.

Editing users in POR



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Administrator: Editing user registration and setup in POR

From the *Provider Online Reporting* home page, select **Maintain User**.

- Once the user(s) have been successfully registered, the administrator can view the list of users, group information, role assignment given and tax ID that each user has access to.
- Select **Edit User** to modify existing access for the user. The *Edit User* screen will be prepopulated with the data for the selected user. (See next slide.)

Provider Online Reporting

Home
Programs
Report Search
Contact Us
Notifications
Register / Maintain Organization
Maintain User

Maintain User - orgDemoBrand

The following is a list of users associated to the program that are available for access setup and maintenance.

XYZ Program

[New users are available to register](#)

User	Group	Role(s)	Tax ID(s)
Last name, First name	Name of practice	Clinical	• 000000000

[Edit User](#)



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Administrator: Editing user registration and setup in POR (cont.)

Edit user(s):
Select **Edit User(s)** from the left navigation menu to modify access for an existing user. The *Edit User(s)* screen will be populated with the data for the selected user.

The screenshot shows the 'Edit User(s)' interface for 'Program XYZ'. On the left is a navigation menu with options: Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization, and Maintain User. Under 'Maintain User', 'Register User(s)' is highlighted with a red arrow, and 'Edit User(s)' is the active selection. The main content area is titled 'Edit User(s)' and includes a 'Select Program' dropdown set to 'Program XYZ'. Below this is a list of reports: Report 1, Report 2, Report 3, and Report 4. Report 4 is expanded, showing 'Care' and 'Mental Health Waiver' with a 'ster' suffix. There are four checkboxes: 'New Member' (unchecked), 'Patient Census' (checked), 'STAR and HEDIS' (unchecked), and 'Value Based Purchasing' (unchecked). Below these are two numbered dropdowns: '2 Select User(s):' and '3 Select Tax ID:'. At the bottom right is a 'Preview' section with the text '< Add selections from the left to review. >'. At the bottom of the main area is an 'ADD TO PREVIEW' button. At the bottom right of the preview section are 'CANCEL' and 'SAVE' buttons.



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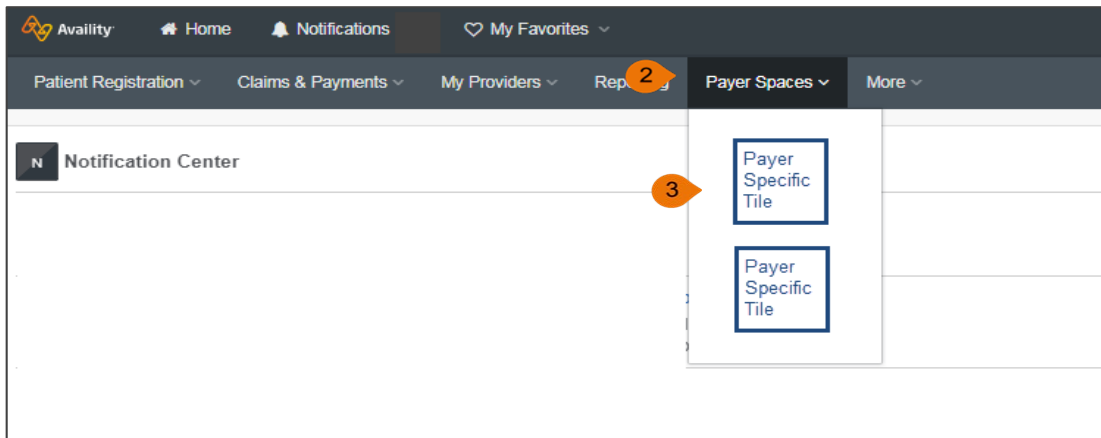
Accessing POR



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Accessing POR

1. Log in to <https://www.availity.com>.
2. Choose **Payer Spaces** in the top menu bar.
3. Select the **payer tile** that corresponds to your market.



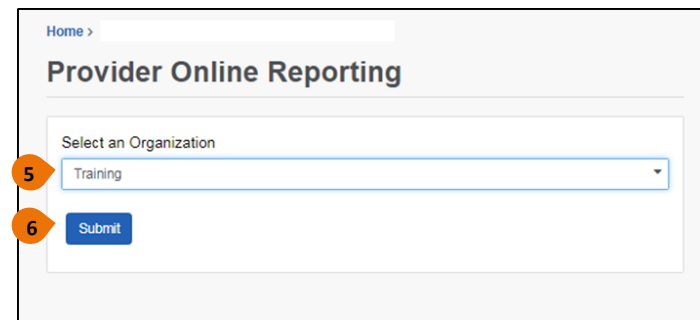
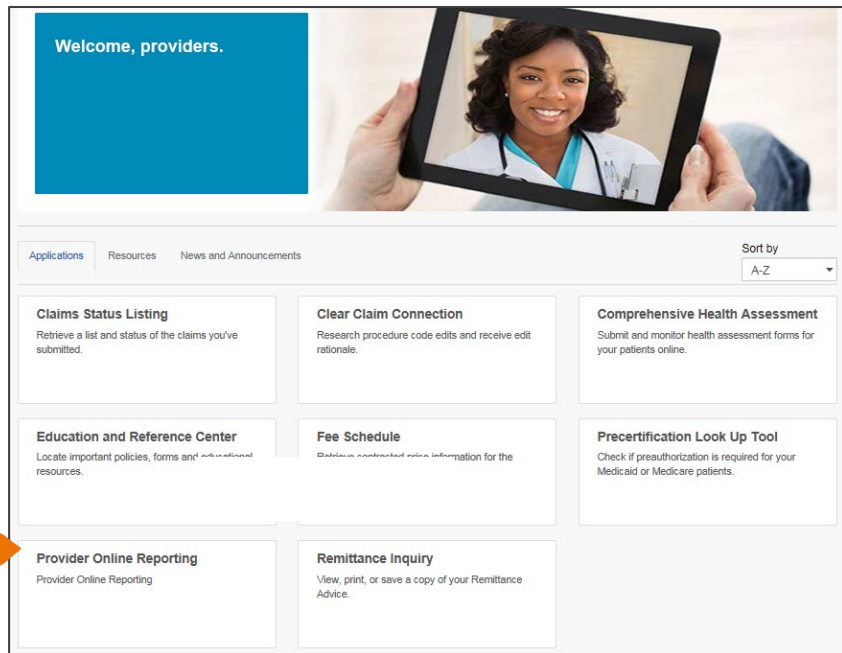
Note: First-time users accessing Payer Spaces will be asked to accept a *Terms of Use Agreement*. The agreement will appear for users once every 365 days.



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Accessing POR (cont.)

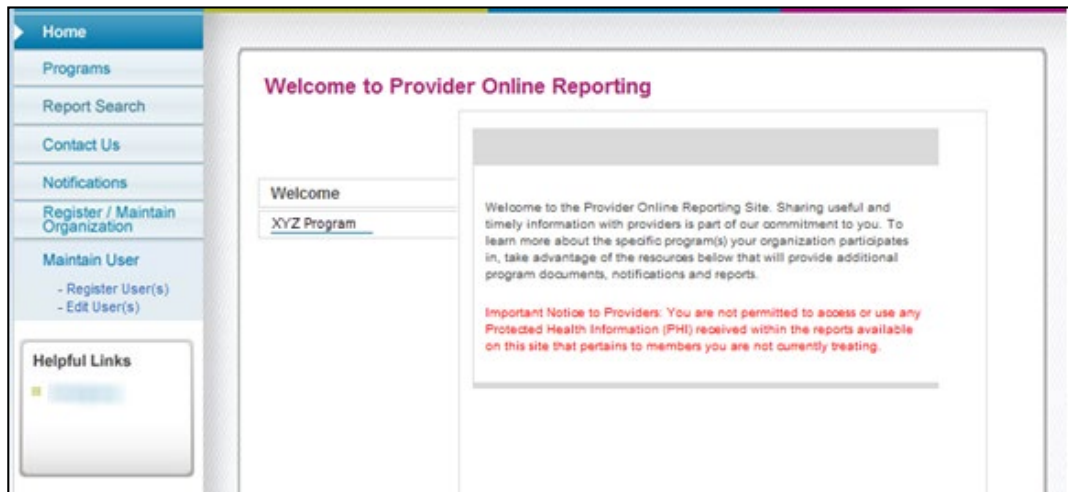
4. On the *Applications* tab, select **Provider Online Reporting**.
5. Select Organization.
6. Choose **Submit**.



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Accessing POR (cont.)

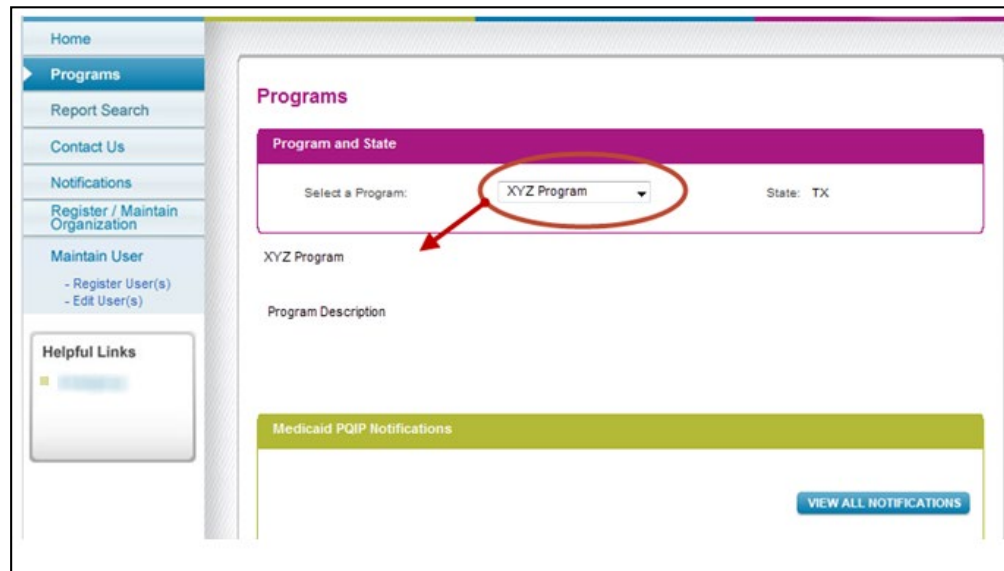
- The *Home* page in Provider Online Reporting will open. This page lists all programs the organization is eligible for.
- Use the navigation options on the left-hand side of the page to easily move around within the tool.



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Accessing POR (cont.)

- The *Programs* page provides a description about the program your organization is participating in and includes helpful documents related to your program. Select a program using the drop down arrow.



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Accessing POR (cont.)

- The *Report Search* page launches the corresponding reporting application for your program. Select the appropriate program from drop-down menu.

The screenshot shows the 'Report Search' page. On the left is a navigation menu with the following items: Home, Programs, Report Search (highlighted with a red box), Contact Us, Notifications, Register / Maintain Organization, and Maintain User (with sub-items: - Register User(s), - Edit User(s)). The main content area is titled 'Report Search' and includes a '* Required' label. It features two main sections: 'Program & State' and 'Search Criteria'. The 'Program & State' section has a dropdown menu for '* Select a Program:' (currently showing 'Program XYZ') and a text field for 'State:'. The 'Search Criteria' section has two dropdown menus: '* Tax ID' (showing 'Select') and '* Select Report' (showing 'Select'). A note below these states '* Indicates a Required Field'. A blue 'SEARCH' button is located at the bottom right of the 'Search Criteria' section. Below the search area, a blue link reads: [Link, file or further instructions will display here, depending on program](#).



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Accessing POR (cont.)

- Use the **Contact Us** page to submit questions about the POR application.
- Your question will be routed to the proper market contact.

The screenshot shows a web application interface with a sidebar on the left and a main content area on the right. The sidebar contains a navigation menu with the following items: Home, Programs, Report Search, **Contact Us** (highlighted), Notifications, Register / Maintain Organization, and Maintain User (with sub-links: - Register User(s), - Edit User(s)). Below the menu is a 'Helpful Links' section. The main content area is titled 'Contact Us' and contains a form with the following fields and sections:

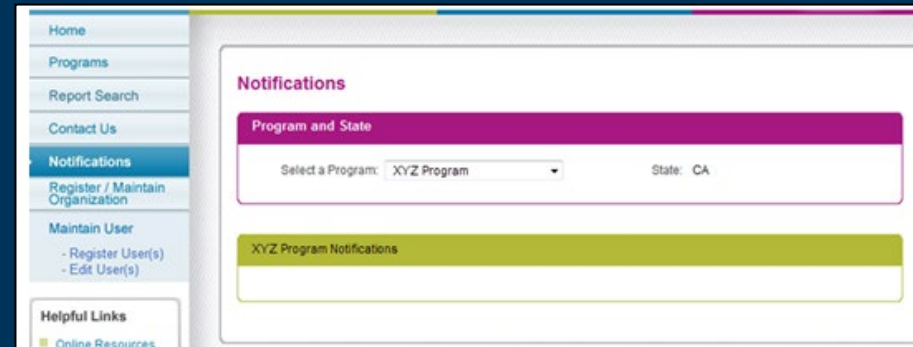
- A red asterisk and the word 'Required' at the top of the form.
- A section for 'What is your comment regarding?' with a dropdown menu showing 'XYZ Program' and a 'State: CA' label.
- A section for 'Please specify the category for your question:' with a dropdown menu.
- A section for contact information with fields for 'First Name' (with a 'First' label), 'Last Name' (with a 'Last' label), 'Phone' (with a dropdown), and 'Extension'.
- A section for 'Please specify the best way for us to contact you:' with a dropdown menu.
- A section for 'Best time to contact you:' with a dropdown menu showing 'Morning'.
- A large text area for 'Please leave your comment:' with a red note indicating 'Estimated time of response: 2-3 business days'.
- A red note at the bottom left stating 'Remaining Character Count: 250'.
- A red note at the bottom center stating 'Please do not send personal health information.'
- A blue 'SUBMIT' button at the bottom right.



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Accessing POR (cont.)

- Select the **Notifications** page to view updates for programs as applicable.
- Use **Online Resources** under *Helpful Links* to view external websites that may be useful to your organization.



Note: Functionality is dependent upon specific program requirements.



Help, tips and additional support

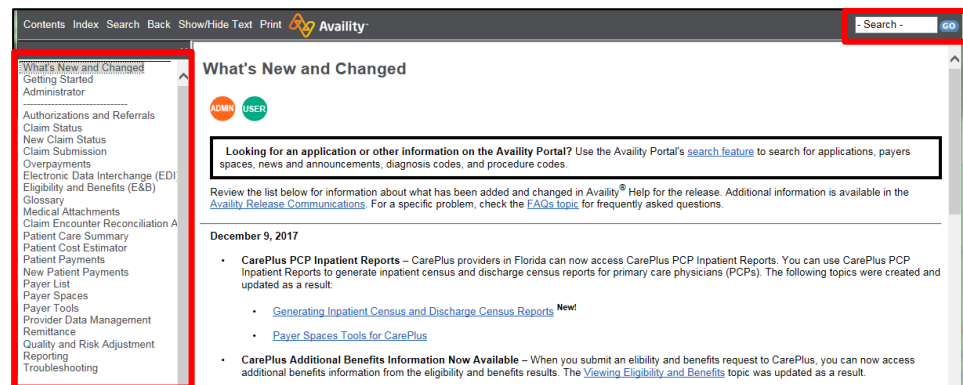
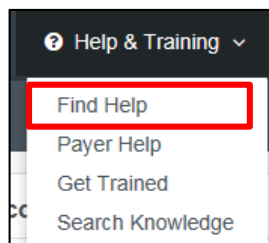


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General Availity help and training

Find help with Availity registration by following the steps below:

1. Log in to Availity at <https://www.availity.com>.
2. Select the **Help & Training** tab (upper right-hand side of the Availity screen).
3. Select **Find Help**.
4. Enter criteria in the search engine (upper right-hand side of screen) or make selections from the left-hand side of the screen.
5. Once you make your selections, the step-by-step instructions will be shown.

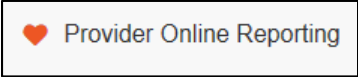


Healthy Blue

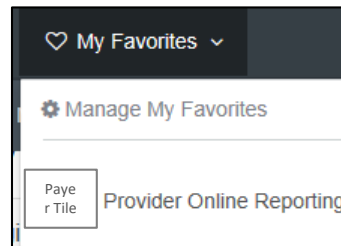
Helpful tip: Save Provider Online Reporting as a favorite

Save Provider Online Reporting as a favorite to be able to access it quickly from the Availity home page:

- Log in to Availity at <https://www.availity.com>.
- Choose **Payer Spaces** in the top menu bar.
- Select the **payer tile** that corresponds to your market.
- On the *Applications* tab, select the **heart icon** next to Provider Online Reporting so it fills in and turns red:
- Now Provider Online Reporting will appear at the top under the *My Favorites* dropdown:



Provider Online Reporting



Additional support

- If you have questions regarding the Availity Portal, please contact Availity Client Services at **1-800-282-4548**.
- If you have questions about POR, use the *Contact Us* section of the application.
- If you have other questions, contact your local contract advisor, consultant or Provider Relations representative.





* Availity, LLC is an independent company providing administrative support services on behalf of Healthy Blue.

<https://medicareprovider.healthybluemo.com>

Healthy Blue is the trade name of Missouri Care, Inc., an independent licensee of the Blue Cross Blue Shield Association.

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