

Blue Medicare Advantage 

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:

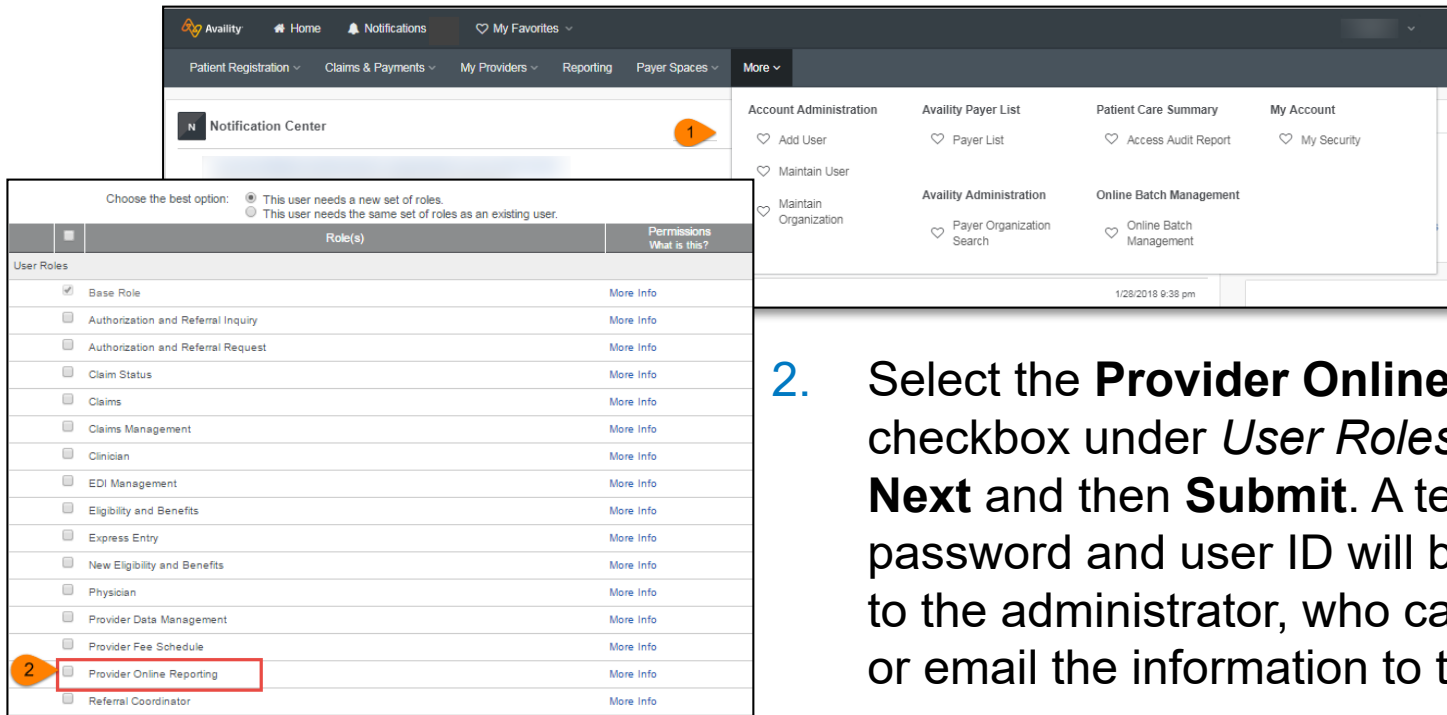
- Register and edit users in Availity.
- Register and edit users in POR.
- Access POR to launch the program's reporting application with appropriate user access.

A healthcare professional in a white coat and stethoscope is looking at a clipboard. An elderly patient in a green polo shirt is looking on. The background is a blurred hospital setting.

Adding users in Availity

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.



The screenshot shows the Availity portal interface. The top navigation bar includes 'Availity', 'Home', 'Notifications', and 'My Favorites'. Below this, a secondary menu contains 'Patient Registration', 'Claims & Payments', 'My Providers', 'Reporting', 'Payer Spaces', and 'More'. The 'More' dropdown menu is open, showing options like 'Account Administration', 'Add User', 'Maintain User', 'Maintain Organization', 'Availity Payer List', 'Payer List', 'Availity Administration', 'Payer Organization Search', 'Patient Care Summary', 'Access Audit Report', 'Online Batch Management', and 'Online Batch Management'. The 'Add User' option is selected. A modal window is open for selecting roles, with the following content:

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

<input type="checkbox"/>	Role(s)	Permissions What is this?
<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

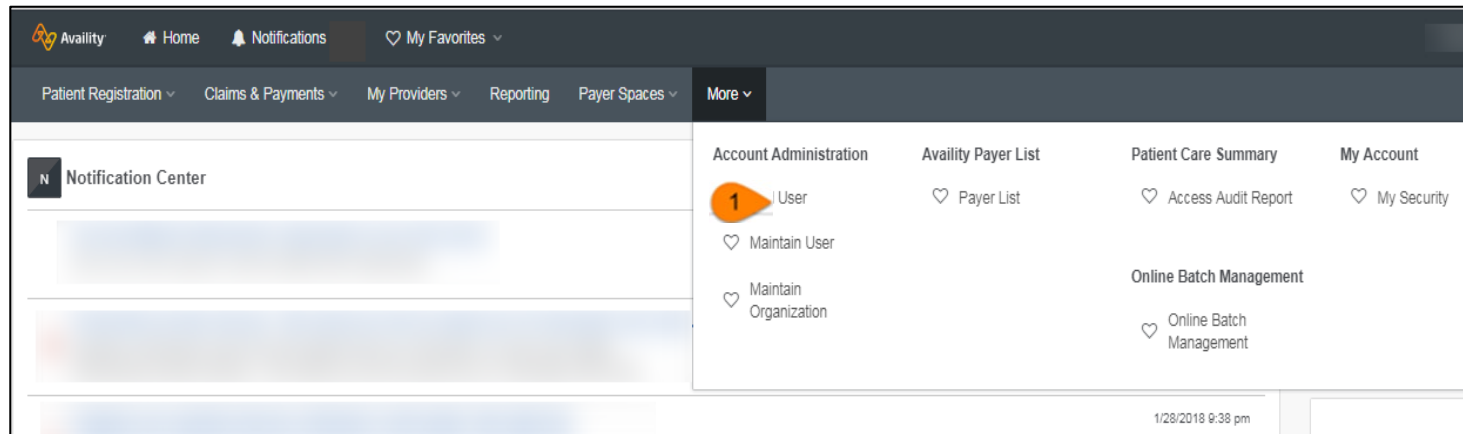
2. Select the **Provider Online Reporting** checkbox under *User Roles*, select **Next** and then **Submit**. A temporary password and user ID will be viewable to the administrator, who can then print or email the information to the end user.



Editing users in Availity

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.



Note: You must register in both Availity and POR.

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

Name of user

* indicates a required field

User ID: Demo123

* First Name:

* Last Name:

E-mail:

Phone: - - ext.

Notes:

User is associated with the following organization(s):

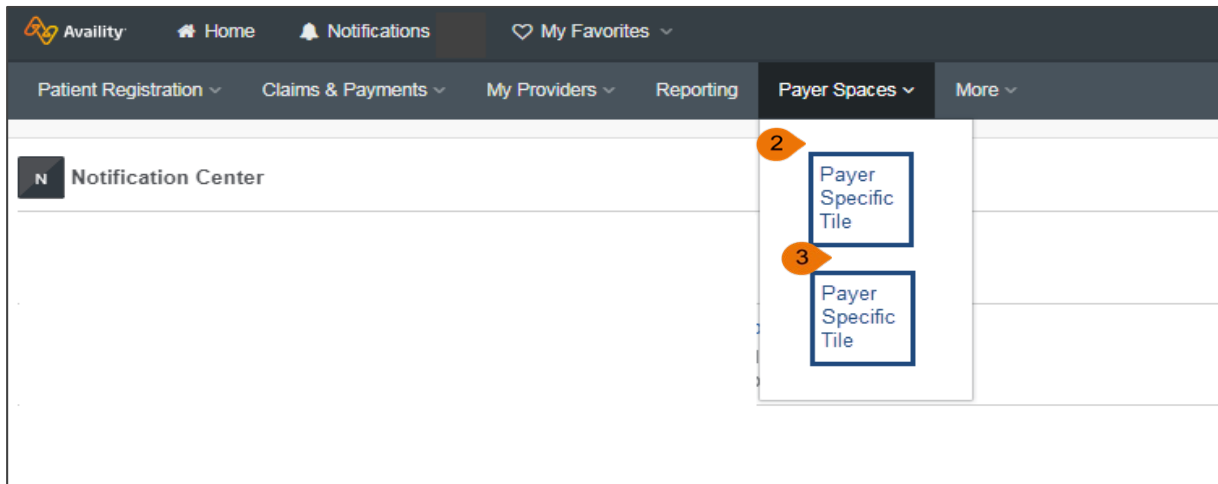
Organization	Customer ID	Address	Tax ID	Status	Status Date	Roles
ABC	1111	111 Street Jacksonville, FL 11111	1111111111	Active	03/24/20	View/Edit



POR registration

Administrator: POR registration

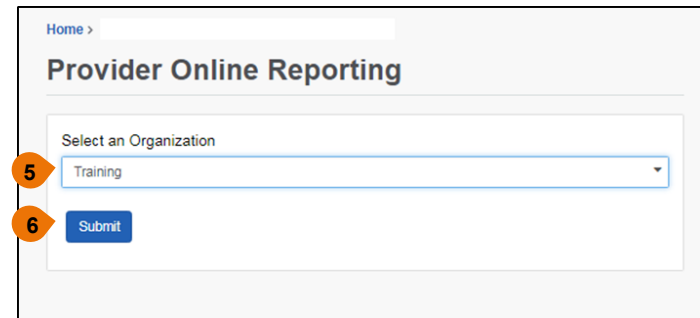
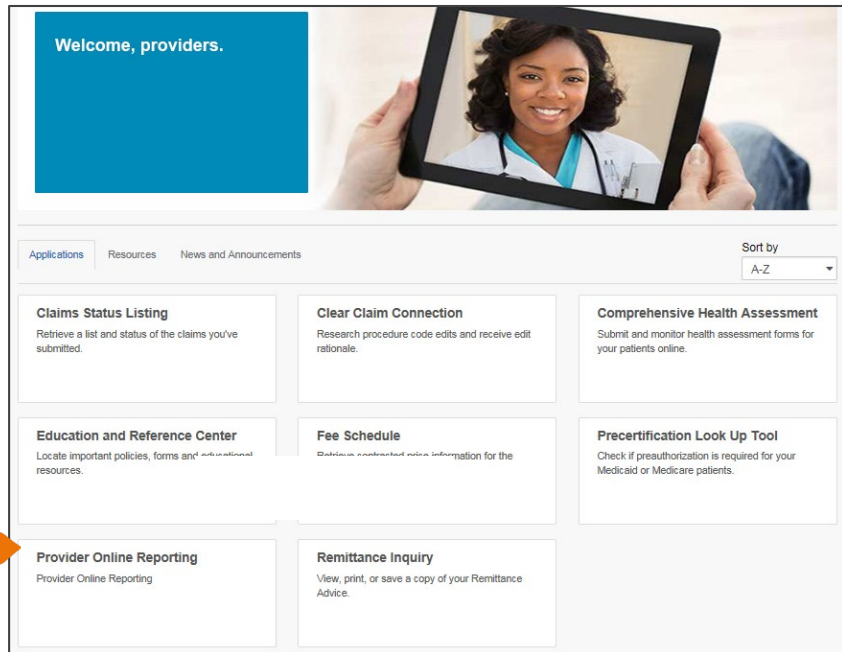
1. Log in to <https://www.availity.com>.
2. Choose **Payer Spaces** in the top menu bar.
3. Select the **payer tile** that corresponds to your market.



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.

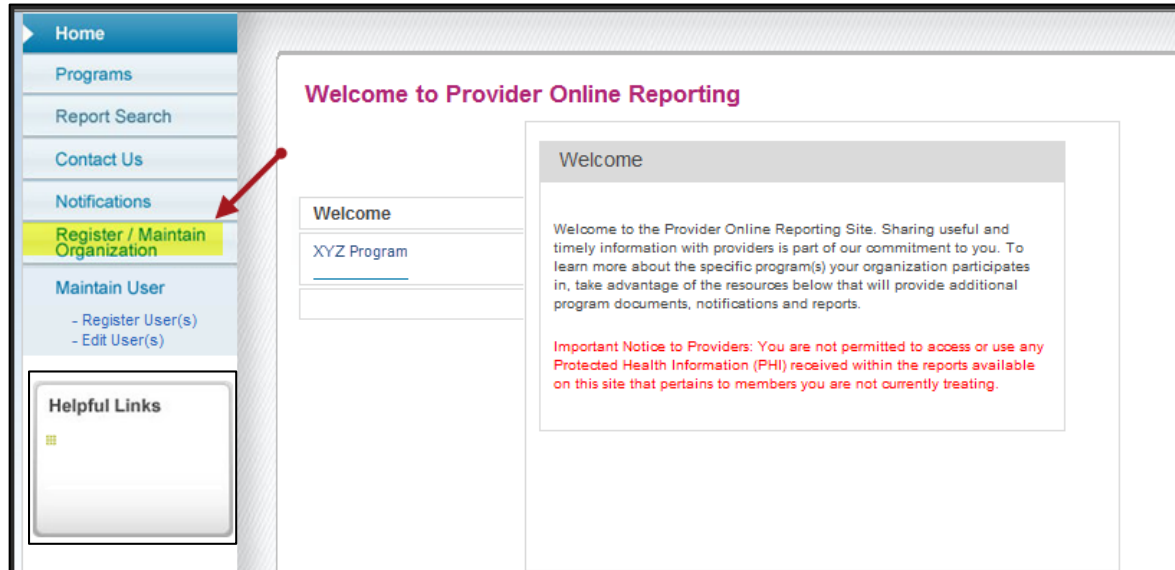
Administrator: POR registration (cont.)

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



Administrator: POR registration (cont.)

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



Administrator: POR registration (cont.)

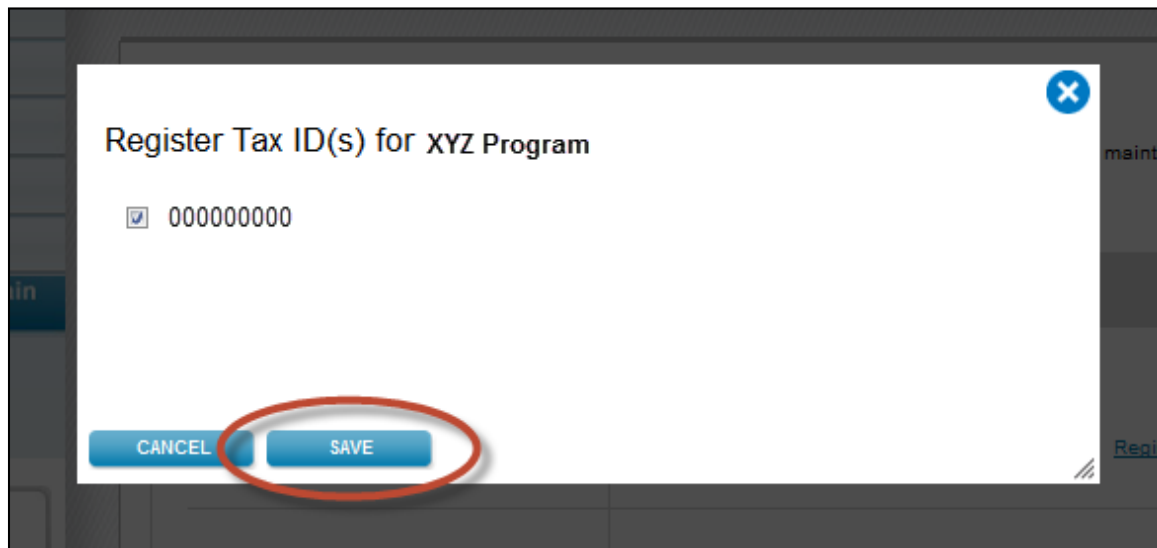
- Select **Register Tax ID(s)** for the applicable program to register the tax IDs.

The screenshot displays a web interface for managing an organization. On the left is a navigation menu with options: Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization (highlighted), and Maintain User (with sub-links for Register User(s) and Edit User(s)). Below the menu is a 'Helpful Links' section. The main content area is titled 'Maintain Organization - orgDemoBrand' and contains a message: 'The following is a list of programs associated to the organization that are available for registration and maintenance.' Below this is a table titled 'Program and Tax ID Information'.

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

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 in blue), and Maintain User (with sub-items: - Register User(s), - Edit User(s)).

The main content area is titled "Maintain Organization -" and contains the text: "The following is a list of programs associated to the organization that are available for registration and maintenance."

Below this text is a table titled "Program and Tax ID Information". The table has two columns: "Program Name" and "Registered Organization Tax ID(s)".

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

The link "Edit Tax ID(s)" in the second row of the table is circled in red.

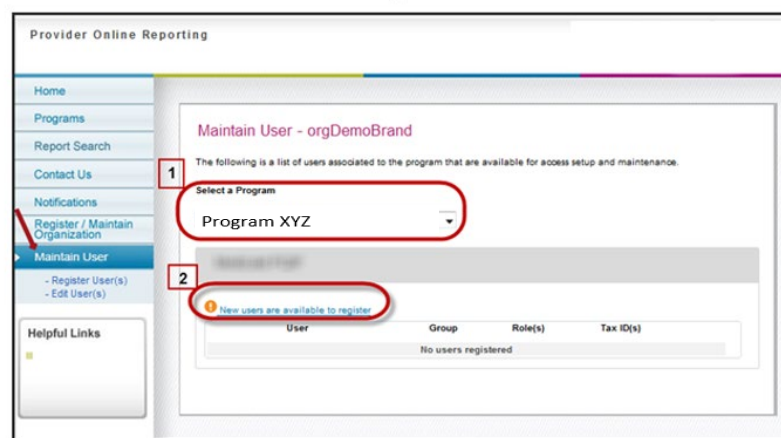
A healthcare professional in a blue coat and stethoscope is looking at a clipboard. An elderly patient in a green shirt is looking on. The background is a blurred hospital setting.

Administrator: Adding users in POR

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.



Administrator: Adding users in POR (cont.)

Register user(s):

1. 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.
2. Select **Reports**: Choose from group names associated with the selected program.
3. 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 Availability will be listed here.)
4. Select **Tax ID**.

The screenshot shows a web application interface for 'Register User(s)'. On the left is a navigation menu with items: Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization, and Maintain User. The 'Maintain User' item is expanded to show 'Register User(s)' and 'Edit User(s)'. The main content area is titled 'Register User(s)' and contains the following fields:

- 'Select Program:' dropdown menu with 'Program XYZ' selected.
- '1 Select Report(s):' section with four radio button options: Report 1, Report 2, Report 3, and Report 4.
- '2 Select User(s):' section with a text input field.
- '3 Select Tax ID:' section with a dropdown menu.
- '5 Preview:' section with a text area containing '< Add selections from the left to review. >'. Below this are 'CANCEL' and 'SAVE' buttons.

Red arrows point from the numbered callouts (1, 2, 3, 5) to their respective fields in the form.

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

Administrator: Adding users in POR (cont.)

Register user(s):

5. Preview

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

The screenshot shows the 'Register User(s)' form in a web application. The left sidebar contains navigation links: 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 content area is titled 'Register User(s)' and has a 'Select Program' dropdown set to 'Member Reports'. Under '1 Select Report(s):', several reports are listed with checkboxes: Disenroll Roster, EPSDT Gaps In Care, Habit, Health, Report 1, Report 2, Report 3, Report 4, Report 5, Report 6, New Member, Patient, STAR, and Value Based Purchasing. 'Report 4' and 'Patient' are checked. Under '2 Select User(s):', a dropdown menu is open. Under '3 Select Tax ID:', a dropdown menu is also open. On the right, the '5 Preview:' section is empty with the text 'Add selections from the left to review.' At the bottom right, there are 'CANCEL' and 'SAVE' buttons. A red circle highlights the 'ADD TO PREVIEW' button at the bottom center.

This screenshot shows the 'Register User(s)' form after the 'ADD TO PREVIEW' button was clicked. The '5 Preview:' section now displays a preview window. The preview window has a 'Hide Tax ID' dropdown and a 'Remove' button. It lists the selected reports: Report 4 (checked) and Report 6 (checked). Below the reports, it shows 'New Member', 'Patient Census', 'STAR and HEDIS', and 'Value Based Purchasing' as unselected options. The '2 Select User(s):' dropdown is still open. The '3 Select Tax ID:' dropdown is also open. At the bottom right, the 'SAVE' button is circled in red. A red arrow points from the 'ADD TO PREVIEW' button in the previous screenshot to the preview window.

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

A healthcare professional in a blue coat and stethoscope is looking at a clipboard. An elderly patient in a green shirt is looking on. The background is a blurred hospital setting.

Editing users in POR

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

Maintain User - orgDemoBrand

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

XYZ Program

i New users are available to register

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

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 displays the 'Edit User(s)' interface. On the left is a navigation menu with the following items: Home, Programs, Report Search, Contact Us, Notifications, Register / Maintain Organization, and Maintain User. Under 'Maintain User', 'Register User(s)' and 'Edit User(s)' are listed, with 'Edit User(s)' highlighted by a red arrow. The main content area is titled 'Edit User(s)' and contains the following elements:

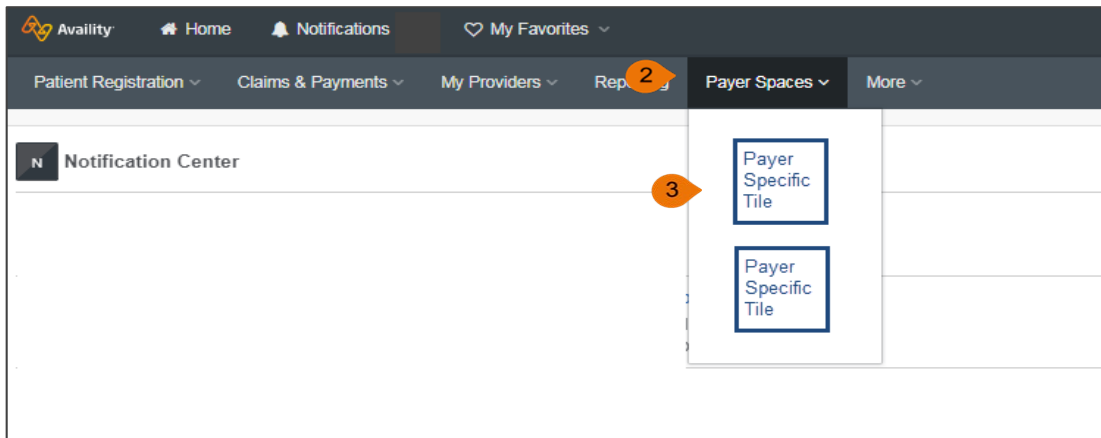
- 'Select Program': A dropdown menu showing 'Program XYZ'.
- '1 Select Report(s)': A list of four reports with checkboxes: Report 1, Report 2, Report 3, and Report 4.
- 'Value Based Purchasing': A checkbox that is currently unchecked.
- '2 Select User(s)': A dropdown menu.
- '3 Select Tax ID': A dropdown menu.
- '5 Preview': A large text area containing '< Add selections from the left to review. >'. Below this area are 'CANCEL' and 'SAVE' buttons.
- 'ADD TO PREVIEW': A blue button at the bottom center of the form.

A healthcare professional in a white coat and stethoscope is looking at a clipboard. An elderly Black man in a green polo shirt is smiling and looking at the clipboard. The background is a blurred hospital setting.

Accessing POR

Accessing POR

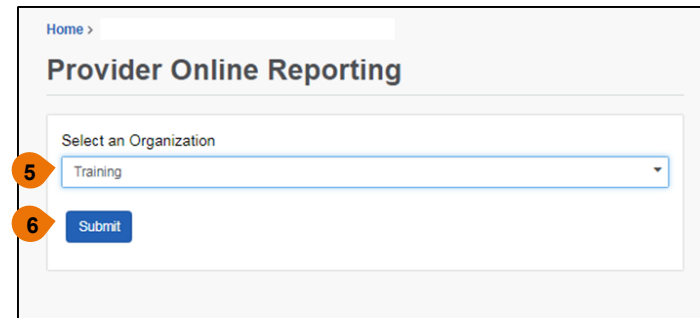
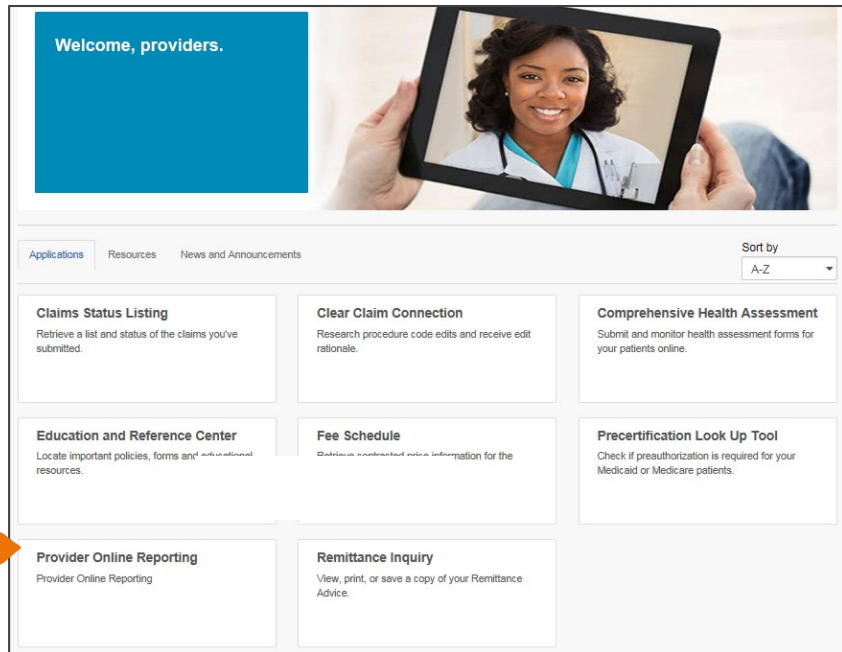
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2. Choose **Payer Spaces** in the top menu bar.
3. Select the **payer tile** that corresponds to your market.



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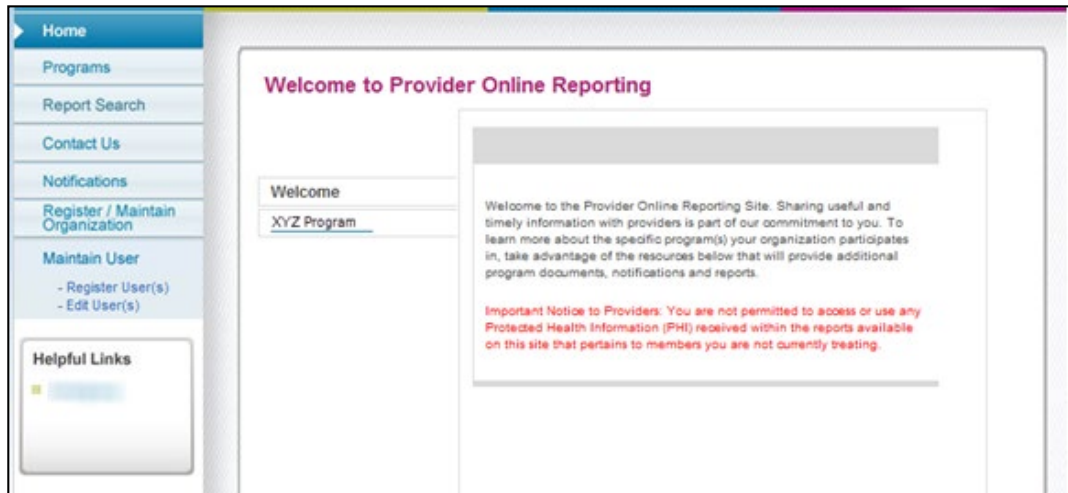
Accessing POR (cont.)

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



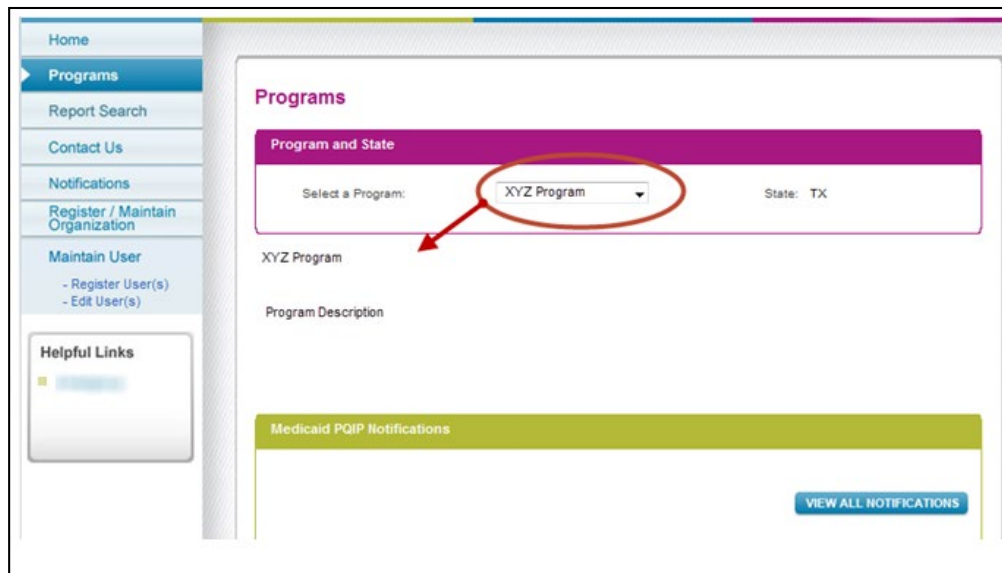
Accessing POR (cont.)

- 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.



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.



Accessing POR (cont.)

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

Home

Programs

Report Search

Contact Us

Notifications

Register / Maintain Organization

Maintain User

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

Report Search

* Required

Program & State

* Select a Program: Program XYZ State:

Search Criteria

* Tax ID Select

* Select Report Select

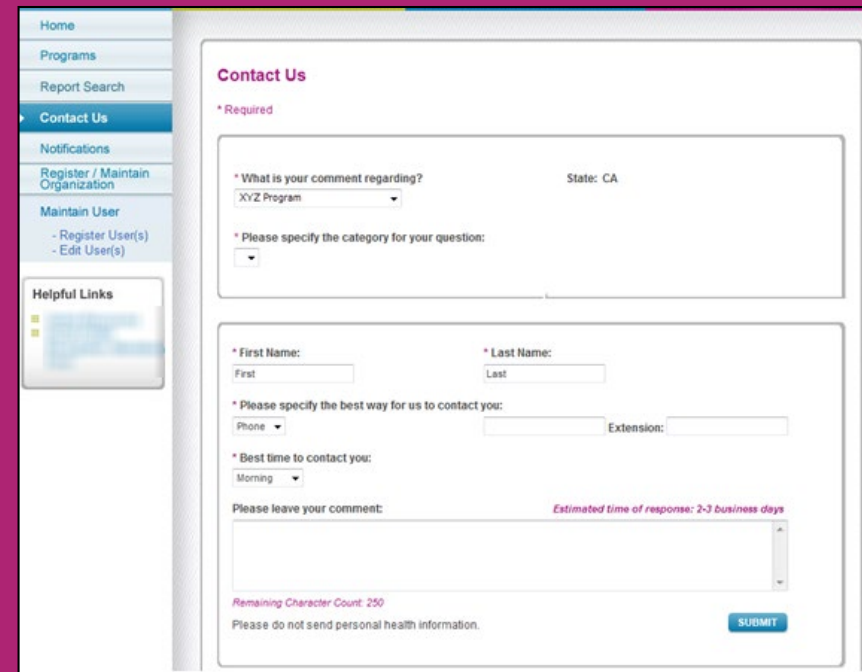
* Indicates a Required Field

SEARCH

[Link, file or further instructions will display here, depending on program](#)

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.

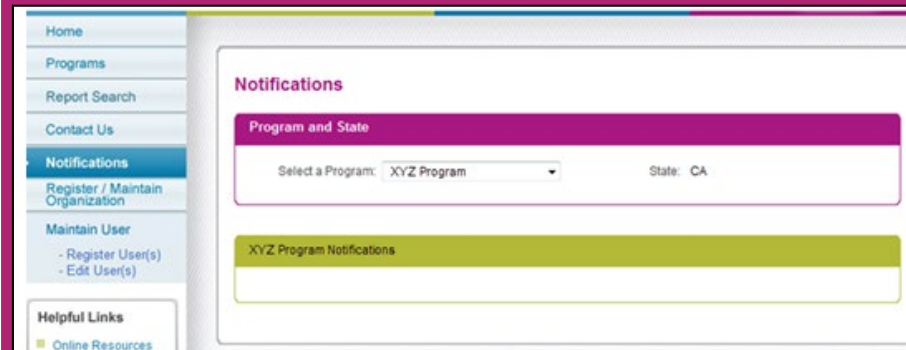


The screenshot displays a web application interface for submitting a question. On the left is a navigation menu with the following items: Home, Programs, Report Search, **Contact Us** (highlighted), Notifications, Register / Maintain Organization, and Maintain User (with sub-links for Register User(s)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

- A red asterisk indicates required fields.
- A text area for 'What is your comment regarding?' with a dropdown menu showing 'XYZ Program' and 'State: CA'.
- A dropdown menu for 'Please specify the category for your question:'.
- Input fields for 'First Name' (with a 'First' label) and 'Last Name' (with a 'Last' label).
- A dropdown for 'Phone' and an 'Extension' input field.
- A dropdown for 'Best time to contact you:' with 'Morning' selected.
- A large text area for 'Please leave your comment:' with a red note: 'Estimated time of response: 2-3 business days'.
- A red note: 'Remaining Character Count: 250'.
- A red note: 'Please do not send personal health information.'
- A blue 'SUBMIT' button.

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.

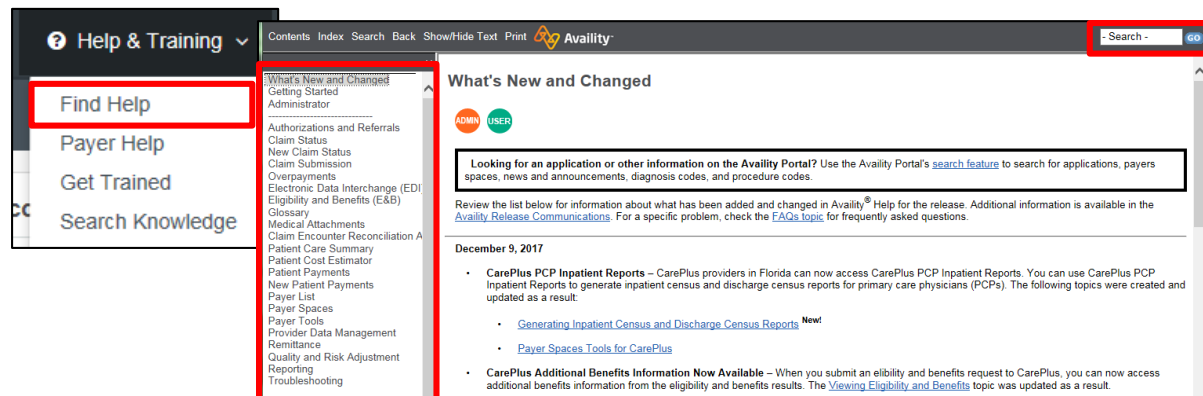
Help, tips and additional support



General Availity help and training

Find help with Availity registration by following the steps below:

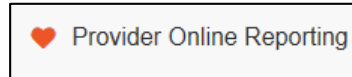
1. Log in to Availity at <https://www.availity.com>.
2. Select the **Help & Training** tab (upper right-hand side of the Availity screen).
3. Select **Find Help**.
4. Enter criteria in the search engine (upper right-hand side of screen) or make selections from the left-hand side of the screen.
5. Once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



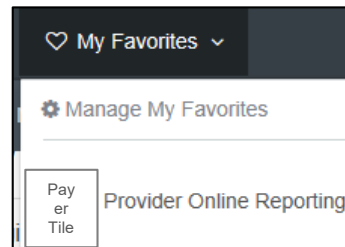
Helpful tip: Save Provider Online Reporting as a favorite

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:



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 Blue Medicare Advantage.

Blue Medicare Advantage is the trade name of Group Retiree Health Solutions, Inc. an independent licensee of the Blue Cross and Blue Shield Association.

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