Getting Started Guide: Availity Attachments Tools

Use Availity to send attachments electronically to payers. Participating payers vary by region, capabilities, process, and application. This getting started guide covers how to setup and use the Availity Portal attachments applications: Attachments – New and Medical Attachments. Also review lots of tips and insights. And explore an overview about using X12 275 EDI Medical Attachments options for receiving requests and submitting attachments electronically in a batch file.

Setup

Add and manage users

The primary *Administrator*, or users with the *User Administration* role, can add users to your organization. These admins can also update existing users. While adding or managing a user, assign the *Medical Attachments* role to users who need access to Attachments – New or Medical Attachments (the legacy version).

Setup to for electronic attachment requests

Your organization's primary Availity *Administrator* for your business, or users with the *Administrator Assistant* role, can complete setup.

1. Select **My Providers** > **Enrollments Center** > **Medical Attachments Setup**.
2. Complete the setup wizard and submit.

Frequently asked questions about setup

What does setup do?	Setup indicates to participating payers that your organization and setup billing providers are ready to receive requests for supporting documentation electronically through Availity Portal.
Can we make changes?	Yes. Follow the same steps to make changes to your organization's setup.
How are we notified? Are payers notified?	Your organization's admins and impacted users receive emails about setup and updates. And, if your organization has open requests in your **Inbox**, users with the Medical Attachments role receive daily emails and get notifications in Availity Portal Notifications Center. Availity also notifies participating payers when your organization completes setup or make billing provider changes to setup.
More help? Training?	In Availity Portal select **Help & Training** > **Find Help** and then **Medical Attachments** > **Setting Up for Medical Attachments**. Or, select **Help & Training** > **Get Trained** to launch the Availity Learning Center (ALC) and enroll in this course: **Setting Up for Medical Attachments – Online Course**.
Message a payer?	Some payers include the option for you to use the Availity messaging feature to send messages directly from requests in the **Attachments – New** app. If you want to use this option, make sure user account(s) has the *Messaging App* role. After a user submits a message, use the **Messaging** app on the Home page to continue to monitor the conversation.

Insights: Payers vary in the billing provider identifiers you need to add during set up. For example, Florida Blue requires set up by individual and/or group billing NPIs (not tax IDs). Regence requests tax IDs. **Best practice**: To ensure requests route to your organization in alignment with how you work with participating payers, be sure to add all Individual and Group Billing NPIs and business' tax IDs.

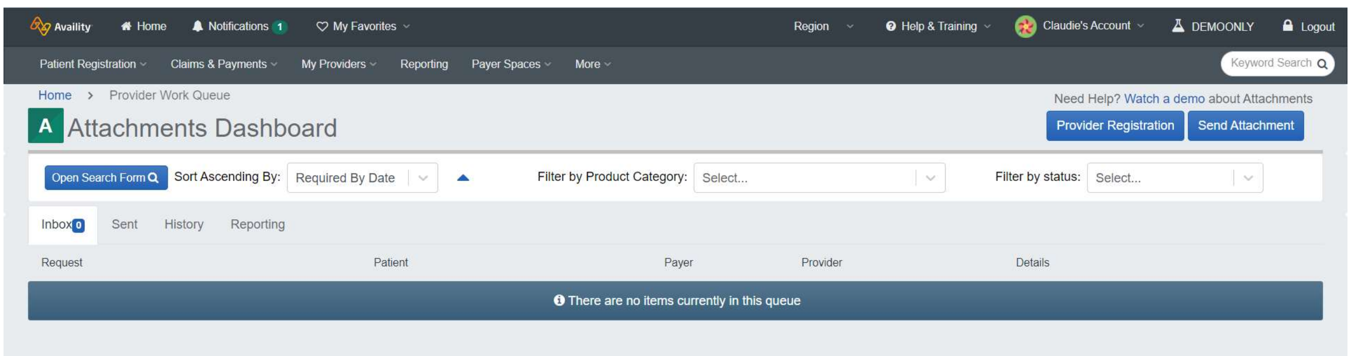
Availity Portal options

Attachments – New

Users log in to Availity Portal and select **Claims & Payments** > **Attachments - New** to submit attachments electronically to participating payers and track progress. Workflow options vary by payer. Review Availity Help for up-to-date insights.

Select this…	***To do this…***
Inbox tab	› Review requests and send requested documentation. › Review history of the request. This is especially helpful for requests returned by the payer.
Sent tab	› Review documentation sent, but not processed by the payer yet. › Download documents sent and review history of the request.
History tab	› Review documents and original requests that your organization has fulfilled and download documents sent. Also, review history of the request. › Review requests that expired or were deleted by the payer.
Reporting tab	› Export attachment record information from the Inbox, Sent, or History tabs to a CSV file.
Send Attachment button	› Send documents electronically for specific workflow scenarios with participating payers including submitting unsolicited attachments; responding to written request by submitting attachments electronically; and other specific scenarios as directed by a payer.

Example: Attachments Dashboard **Inbox** with no items currently in the queue.



Tips for adding attachments (supporting documents)

› In the **Inbox**, select the row of a record to display the attachment(s) requested, add files, and submit.

› Check Availity Help for the most up-to-date information about acceptable file types and sizes.

Tools used in all tabs—Inbox, Sent, History

› Select a record (row) to display the Attachments Detail window for that record.

› Use search, sort, and filter options to find requests.

› Select a Show History icon to review a record's history.

› Every record has a status. Find more information in Availity Help.

Tips for Sent and History lists

Select a record (row) in the **Sent** and **History** tabs to do these things:

› Download what you sent to the payer.

› Send a message to the payer, if available.

Medical Attachments

Users log in to Availity Portal and select **Claims & Payments** > **Medical Attachments** to do these things. Workflow options vary by payer. **Important note:** This is the legacy version that will soon be retired.

Select…	***To do this…***
Requests and then **Work Queue**	Respond to electronic requests from payers.
Send Attachment	Send unsolicited documentation, for participating payers.
Requests and then **In Progress**	View documentation sent, but not retrieved by the payer yet.
Requests and then **History** or **Archive**	View records with documentation retrieved by the payer, requests that expired before the provider sent documentation, or requests deleted by the payer.

Tips for submitting attachments

› When working in the Requests – Work Queue list, select the row of a request to display the requested attachment(s).

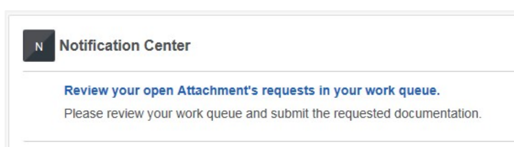
› To upload a document to be sent, select the plus sign icon and then follow your system's prompts. **Bonus!** In the Request – Work Queue, you can also drag-and-drop the document to the associated request.

› Check Availity Help for the most up-to-date information about acceptable file types and sizes.

Tip for finding records: For lists in the **Requests** tab—Work Queue, In Progress, History, Archive—use sort, search, and filter options to locate specific requests by a variety of options.

Help, training, tips, timesavers, and insights

Availity offers several standalone and integrated electronic attachment options. The menu path and process that you follow varies by payer participation and application. Check Availity Help for up-to-date information about participating payers. This guide covers **Attachments – New** and **Medical Attachment** only.

Notification Center	For quick access to new requests in your Requests Work Queue or Attachments Dashboard **Inbox**, check the **Notification Center** on your Availity Home page or in the top menu bar. *Example of notification in the Notification Center* 
Find Help	In Availity Portal, select **Help & Training** > **Find Help**. Help displays in a new window. Select the Attachments topic.
Get trained	In Availity Portal, select **Help & Training** > **Get Trained** to open the Availity Learning Center in a new browser tab. Search by keyword (**attachments**) to find on-demand and live training options. Click **Enroll** to enroll for a course and then go to your **Dashboard** to access it any time.

IMPORTANT INSIGHT #1

Your history will be in the version of the tool you used to send the attachments

If you use(d) **Medical Attachments** and **Attachments – New**, review your history in that same version. Records stay in history for one year from the last status date.

IMPORTANT INSIGHT #2

You share these tools with other Availity users in your organization.

Availity posts electronic requests from participating payers to your entire organization and might include requests to support claim adjudication, risk adjustment, authorizations, referrals, and more. It is important that you work requests for your area only and do not delete other requests or be concerned about information in your history lists.

IMPORTANT INSIGHT #3

Use the Send Attachment option based on payer's process.

Payers that display in the **Payer** list for **Medical Attachments** > **Send Attachment** tab, or the **Attachments – New**, **Send Attachment** button, vary based on your region and payer participation. For some payers, you can send unsolicited attachments. For other payers, use the tab to respond electronically to a request made by letter. Check with your payer for specific guidance and Availity Help for information about participating payers

X12 275 EDI Medical Attachments

Availity supports the batch submission of 275 transactions via the Availity solution. You can electronically exchange data without logging into the Portal using the Availity Secure File Transfer Protocol (SFTP) solution or electronically exchange data directly via the Availity portal using a Send and Receive Files mailbox.

With this solution, you can submit unsolicited attachments and respond to solicited requests from participating payers using EDI batch submission. Participating Health Plans use Availity to make requests for additional documentation from providers. This includes requesting by 277RFAI or by using payer tools in the Availity portal. Payers might also request documentation from providers by paper notification.

Follow these steps to locate Availity's EDI 275 Companion Guide:

1. In Availity Portal, select **Help & Training** > **Find Help**.
2. On the Provider Help Center Home page, select **EDI Transactions**.
3. In the topic, select **Availity EDI Clearinghouse service** > **Availity EDI Companion Guides**.

Tip: For solicited requests, Health Plans include patient information, claim number, attachment control number, and LOINC code(s) specifying the type of document(s) being requested.

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