Electronic Medical Records Exchange
Use Attachments Application in Availity Portal
Important Notes About Using Availity

When you use Availity Portal, results and data come from payer systems. Information can vary by payer, plan, product, member, your user account permissions, etc.

Information and images were current at the time this presentation was developed. Screen images and demonstrations are from a demo environment containing pre-loaded generic, de-identified information. Information might also be redacted or blurred.

It is a violation of HIPAA regulations to share credentials to a system that contains PII/ PHI. Do not share an Availity user ID with others. Your organization’s Availity administrator sets up user IDs and assigns roles.

SAVE TIME
Availity supports Google Chrome, Firefox®, and Internet Explorer 11® (or higher).

Be sure to clear your temporary internet files often and allow pop-ups from:
- apps.availity.com
- www.availity.com
- Any third-party websites accessed from the Availity Portal, such as a payer’s website.
What we’ll cover

✓ Overview
✓ Navigating the application
✓ Submitting attachments
✓ Setting up
✓ Using support tools
✓ Tips and Timesavers

Application benefits include:
• Faster claim payment accuracy and resolution
• Centralized and transparent tracking of requests and historical records sent to the payer
• Electronic processes reduce printing and shipping costs
• Increased compliance with regulatory guidelines and requirements
• Enhanced privacy and security of patient data

Tip: Your organization’s Availity primary administrator or users with the Administrator Assistant role can complete medical attachments setup.
Overview

Getting to know the basics of Availity’s attachment tools
Introduction

Availity offers medical records exchange in a secure platform, with two options.

Availity Portal tools
(focus of this training)

Integrated EMR options
(contact clinicalsupport@availity.com for info)

Capabilities include:
• Supports Payment Integrity initiative
• Includes easy filter and search to find new request and historical records
• Provides easy, efficient upload app

Curious about financial and productivity impacts of attachments? Check out this Availity infographic with information from the CAQH Index.
Complete Initial Medical Attachments Setup

After completing initial setup, make changes using the same process

Setup can be done by these Availity users at your organization:
+ Primary administrator
+ Users with the Administrator Assistant role

In Availity Portal, select My Providers > Enrollments Center. Then, select Medical Attachments Setup.

Complete setup because it:
+ Gives Availity info to share with payers about what billing identifiers you want to receive requests for.
+ Let’s you assign the attachments role to your org’s users.

+ Complete initial setup now.
+ Make changes to setup, as needed.

Tip: For Payment Integrity initiative, set up all your Billing NPIs.
Overview of the Process

**Payer**
sends request electronically through Availity

**Availity**
adds it to your organization’s Attachments Dashboard Inbox

**You**
submit attachments through the Inbox

**Availity**
transmits attachments electronically to payer

**Payer**
Processes attachments in back-end system

**You**
review historical records (in Sent and History)

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**Did you know?** Availity post requests from payers to your organization’s Attachments Dashboard Inbox. Requests from payers arrive when documentation is needed by them. You might receive them daily, weekly, monthly, or at other intervals.
Select a record in the Inbox to display the Attachment Details window.

In the Attachments Details window, review request details, add files, and submit.
Navigating the Application
The application notifies your organization about attachment requests. Users receive notifications about new attachment requests and details through emails and notifications in Availity Portal. Users must have the medical attachments role to receive and access notifications.

To review and select notifications, check the **Notifications Center** (a) on the Home page. Or, from anywhere in the portal, select **Notifications** (b) in the top navigation. Take action from a notification to go directly to the Attachments Dashboard.
More Ways to Access the Attachments Dashboard

In addition to accessing the Attachments Dashboard by notifications, use these options.

• Select (a) **Claims & Payments** and then (b) **Attachments – New**.

• Search by keyword (c) and select it from the list of search results.

• If you access it often, select it from the (d) **My Top Applications** section on the Home page.

• Select the heart icon next to the app name to mark it as a favorite. Then select it from (e) **My Favorites**.

**Reminder**: If you don’t find the Attachments option, make sure your organization is setup and your user account has the medical attachments permission.
Navigating the Attachments Dashboard

The Attachments Dashboard has three (a) tabs for you to select to display records—Inbox, Sent, and History.

Use (b) search and (c)sort options to quickly locate records in a tab.

Tip: When you select a tab, the number of records in that tab displays in a number badge. Number badges update if you search and your search filters to display fewer results.
Each request is a record (row) and includes information about the request (a), patient (b), payer (c), provider (d), and claim details (e).

<table>
<thead>
<tr>
<th>Status indicators</th>
<th>Request number</th>
<th>Request type</th>
<th>Request date</th>
<th>Request (Record) Information</th>
<th>Patient (b)</th>
<th>Payer (c)</th>
<th>Provider (d)</th>
<th>Details (e)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request</td>
<td>Patient</td>
<td>Payer</td>
<td>Provider</td>
<td>Details</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final Notice - Document name</td>
<td>MAN, BENJI</td>
<td>FIRST PHYSICIANS GROUP</td>
<td>Provider name</td>
<td>$207</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attachment due in 15 days</td>
<td>11/18/1966</td>
<td>5432154321</td>
<td>Provider identifier</td>
<td>11/27/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>501909261056</td>
<td>ABC123456789</td>
<td>02/24/2019</td>
<td>Service From Date</td>
<td>CLM87678787</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MEDICAL CLAIM</td>
<td>2342342</td>
<td></td>
<td>Service To Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Request (Record) Information, continued

a) Hover your cursor over a data element to display the field name.
b) Select a row’s Show History icon to display a Record History window.
c) Select a record (row) to display an Attachments Detail window.

d) Every record includes a color-coded status bar (left, vertical).
e) Payment Integrity requests also include a banner. The banner provides a link to open the request letter in PDF and the record notice—first, second, final.
Payment Integrity request notices for medical records are color coded by notice event.

- **First Notice**—Blue, due in ## days from request date
- **Second Notice**—Yellow, due in ## days from request date
- **Final Notice**—Red, due in ## days from request date
Modal Windows

Select a record to display the Attachments Details modal window for that record.

Example of a request in the Inbox list >>>

Select a record’s Show History icon to display the Record History modal window.

Example of a record in the History list >>>
Payment Integrity requests include a banner with a clickable link to open the payer’s medical record request letter in PDF.

**Note**: It opens in a new tab or window (depending on your browser and settings).

The banner displays for new requests as part of the record (row) in the Inbox (a) and in a record’s Attachments Detail window (b).
Navigating Sent and History Tabs

Navigate the **History** (and **Sent**) tab and review records in the same way you navigate the Inbox. Note these differences.

• The Attachments Details window for a record includes an option to download the submitted documents.

• The Record History window includes additional statuses with date and time stamps as the record moves from submitted to accepted.

• The sort by option doesn’t include a **Request by** date option.

• In the history list, you might also find request that were expired or canceled by the payer.
Status Indicators

Each record includes a vertical, color-coded status indicator.

<table>
<thead>
<tr>
<th>Color</th>
<th>Tab</th>
<th>Status / Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue</td>
<td>Sent</td>
<td>Documents were submitted to the payer and are awaiting payer processing.</td>
</tr>
<tr>
<td>Dark Gray</td>
<td>History</td>
<td>Submitted documents were accepted by the payer.</td>
</tr>
<tr>
<td>Green</td>
<td>Inbox</td>
<td>New request due within ## days. Number of days based on payer’s request.</td>
</tr>
<tr>
<td>Red</td>
<td>Inbox</td>
<td>Alert to indicate a new request is now due within three days (or less).</td>
</tr>
<tr>
<td>Red</td>
<td>History</td>
<td>Documents submitted by your organization have been rejected by the payer.</td>
</tr>
<tr>
<td>Yellow</td>
<td>History</td>
<td>Attachment request has expired or was cancelled by the payer</td>
</tr>
</tbody>
</table>
Submitting Attachments

With a focus on Payment Integrity requests
Quick Steps to Submitting Attachments

1. In the Attachments Dashboard – Inbox, select the record. The Attachments Detail modal window displays.

2. In Attachment Info, select the **Add File** button.

3. Select one or more document to be attached.

4. Repeat steps 2 and 3, as needed.

5. Select the **Submit** button.

**Notes:**
- If a document doesn’t meet acceptable file format or size requirements, an error message displays and the file is not added.
- After submitting, the record moves to the **History** tab.
Select Request

In the Attachments Dashboard – Inbox, select a request.
Add Files

(a) Review the Attachments Detail window

(b) Review the Attachment Info section(s).

(c) Select an Add File button(s) to upload document(s).
Select Document(s)

In the window that displays, select document(s) you want to submit.

**Note:** Follow your organization’s operating system and internal processes for locating and selecting documents.
Review, Repeat (if needed), and Submit

- **More files?** Add additional documents, if needed.
- **Wrong file?** Select a trash can icon (a) to remove a document before submitting.
- **Error?** If an error displays, follow steps to attach an acceptable file.
- **Ready to send?** Select the **Submit** (b) button.

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Next steps?

The record moves to the **History** tab. Records remain in the **History** tab for two years.
Setting up

Your organization’s Availity administrator or admin assistant(s) manage setup
Reminders About Setting Up

Who?
• Your organization’s primary Availity administrator
• Users within your organization with the Administrator Assistant role in Availity

Where?
Select **My Providers > Enrollments Center > Medical Attachments Setup** to complete initial setup or make changes to setup.

**Tip:** Check out the full training demo course in the Availity Learning Center—Setting Up for Medical Attachments – Training Demo.

**Tip:** After initial setup, also access setup in the Attachments – Dashboard by selecting the Provider Registration button.
1-Select Application
a) Select the organization.
b) Add billing identifiers.
c) Select the Add Id(s) button.
d) Provider(s) added to list
e) Select NEXT to continue.
Select one or more users to have the medical attachments role. Select the **SAVE** button to save setup.
3-User Access w/ Users Selected to Get Access
Setup FAQs for Step 3-User Administration

What do I do if a user isn’t listed in step 3?
Ask an Availity user administrator for your organization to add the user and assign the medical attachments role.

What if I want to remove access from a user?
In setup, go to step 3-User Access and clear (de-select) the check box next to the user’s name.
## Provider Management – Setup Examples

*Examples for illustrative purposes only*

### One org, multiple billing IDs

<table>
<thead>
<tr>
<th>Org registered w/Availity</th>
<th>Billing Provider NPIs and Tax IDs for</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Blake Hospital Care Center</td>
<td>The Blake Hospital General Hospital Specialty Hospital Central Lab Southside Lab Central Mammography Regional Mammography</td>
</tr>
</tbody>
</table>

### Multiple orgs, multiple billing IDs

<table>
<thead>
<tr>
<th>Org registered w/Availity</th>
<th>Billing Provider NPIs and Tax IDs for</th>
</tr>
</thead>
<tbody>
<tr>
<td>Carter Hospital</td>
<td>Carter Hospital General Hospital Cancer Center Hospital</td>
</tr>
<tr>
<td>Carter Labs</td>
<td>Carter Labs Central Lab Southside Lab</td>
</tr>
<tr>
<td>Carter Mammography Center</td>
<td>Carter Mammography Central Center Regional Center</td>
</tr>
</tbody>
</table>

**Note:** If a user has access to the medical attachments role for more than one organization, that user will see all records for all associated orgs.
Using Self-Service, Support Tools, and a Few More FAQs

Availity Portal
FAQs Specific to Payment Integrity Initiative

For the Payment Integrity initiative, payers want to provide as much information as possible to help with your organization’s setup and user of Availity Attachments tools. Check out these payer-specific FAQs for more insights.

Is there a limit for the size of files we can upload? Yes, you can upload files up to 100MB total. That means you can upload two files that are 50MB each, four files 25MB each, etc. The payers will continue to assess file size needs and adjust, if needed. For the most up-to-date information, refer to Availity Help topics, the Availity Release Blog, and in-application information.

What if I have a file larger than the file size limit? Use the Send Attachment option in the Attachments application.

Can I break down the files? You can, but it isn’t required. Simply upload the file even if the payer has requested a partial file. The payer will associate to the member and claim and continue moving forward and processing.

Will paper letters continue to be sent by the payer? Participating payers have advised that there will not be duplicate requests (in both paper and electronic). Once your billing tax IDs and NPIs are set up, you will receive electronic notifications via Availity exclusively and an electronic copy of the letter will be viewable within the medical attachment request.

How do I know that the files made it to the payer? As soon as you select the Submit button, the file(s) transmit immediately through a secure connection to the payer. You’ll find the request record, with the submitted attachments, in the History tab.
Self-service and Support

• Select Help & Training > Find Help to review help topics.
• Select Help & Training > Get Trained for on-demand training.
• Select Help & Training > My Support Tickets to manage online support tickets.
• Contact Availity Client Services at 1.800.282.4548.
• Select Payer Spaces > the payer’s logo > Access Your Custom Learning Center to review payer-specific training and resources.
Thank you!

Electronic Medical Records Exchange with Availity Portal Attachments Tools