

A faded, grayscale background image showing a group of business professionals in a meeting. One person in the foreground is holding a pen over a document, while others are visible in the background, some looking at a laptop screen.

# **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

## GET SET UP - MODES FOR SUBMITTING TRANSACTIONS

## 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 don't have access to an FTP connection, 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.

**Important:** Submitting transactions through manual data entry is provided at no charge but does not include government payers, such as Medicare or Medicaid, or any payers that require a contract. To determine whether any of the payers that you submit to require a contract, see the [Availity payer list](#).

**Note:** If you want to submit real-time transactions through Availity's Simple Object Access Protocol (SOAP) Web service, you'll need to contact Availity Client Services to request a setup. See the [Availity payer list](#) for payers that support real-time (SOAP) transactions.

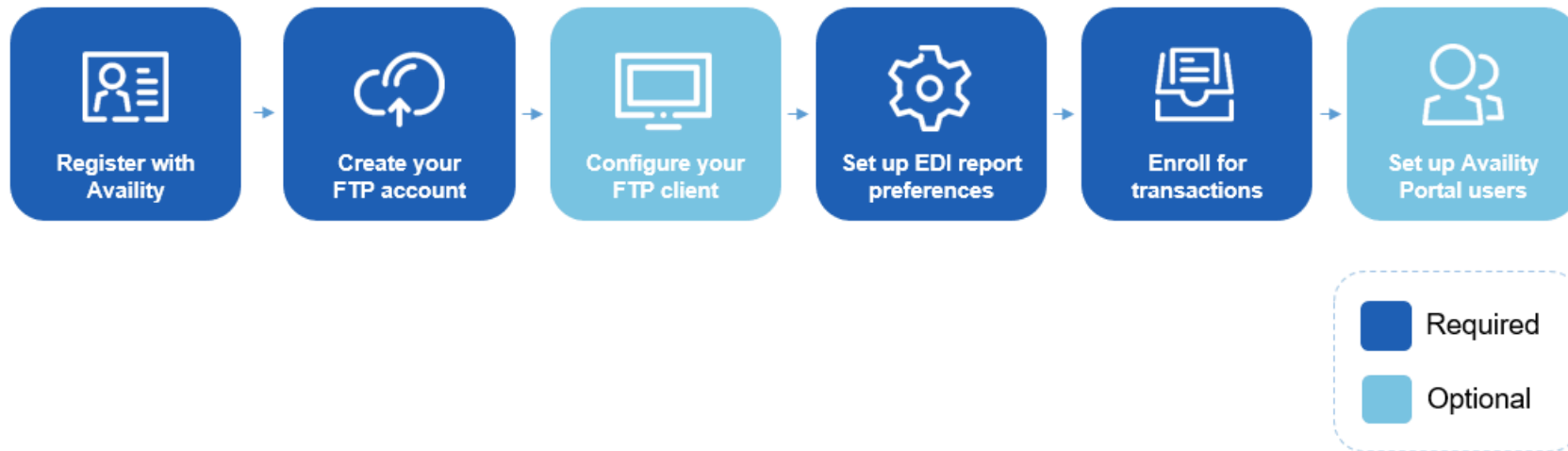
## GET SET UP - MODES FOR SUBMITTING TRANSACTIONS

### 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 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**

## GET SET UP - MODES FOR SUBMITTING TRANSACTIONS

### 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.

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.



**Figure 2: Setup tasks for submitting files through Availity Portal**

## GET SET UP - MODES FOR SUBMITTING TRANSACTIONS

### 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.

Get started by *registering your business with Availity*. If your business is already registered, then you're ready to *enroll for transactions*.

**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](http://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](#)

## GET SET UP - FTP SETUP

## 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 selecting **My Administrators** from the **Account** menu at the top 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.



## GET SET UP - FTP SETUP

### 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, <b>SFTP - SSH File Transfer Protocol</b> .
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.

## GET SET UP - EDI REPORTING PREFERENCES

## Set up your EDI reporting preferences

Availity's batch EDI processing generates response files (acknowledgements and reports) for each submitted batch file. Availity provides standard response files recommended in the official HIPAA implementation guides (called TR3s) and proprietary reports for end-to-end tracking and accountability of each submitted transaction.

Before you start submitting your production EDI files through FTP or by uploading files to Availity Portal, you'll want to set up your organization's reporting preferences to specify details of the response files you want to receive.

**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.
  - 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. For instructions on how to access the EDI Companion Guide, see [Key resources](#) on page 16. You can also obtain help on specific fields in the EDI Reporting Preferences tool by clicking the blue question mark icon (when available) adjacent to a field.

**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.

## GET SET UP - TRANSACTION ENROLLMENT

## Enroll for transactions

No matter which mode(s) you use to submit transactions to Availity, you might need to enroll for some transactions (such as claim submission) for particular health plans that you submit to. To determine if any of the health plans that you submit to require enrollments, see the [Availity payer list](#).

You can also optionally enroll to receive electronic remittance advice files (also known as ERAs and 835 files) through Availity. 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 health plans that you submit claims to, you can skip the ERA transaction enrollment process.

**Important:** If you'll be enrolling for ERA delivery, first 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. If you want your ERA files sent to a vendor or a billing service, contact that organization and ask them to enroll for ERA delivery on your behalf. You can then skip the ERA transaction enrollment process.

1. Log in to Availity Portal at <https://apps.availity.com>.
2. Navigate to **My Providers > Enrollments Center > Transaction Enrollment**.
3. The Transaction Enrollment application enables you to enroll providers either one at a time through a series of web forms, or by uploading a spreadsheet that contains the enrollment information for multiple providers and/or multiple health plans for those providers. You'll need to complete enrollments for each provider with a unique Provider Federal Tax Identification Number (TIN) or Employer Identification Number (EIN)/National Provider Identifier (NPI) combination, for any new health plan transactions they are not currently enrolled with under their TIN or EIN/NPI combination.
  - To enroll a provider with up to 10 health plans, click **Enroll** and then click **Enroll a provider**.  
If you're enrolling for ERA delivery and you want your ERA files to be delivered to a clearinghouse, select **Deliver ERA files to clearinghouse?** on the Select Provider step and then select the clearinghouse from the **Clearinghouse Organization** field.  
**Note:** If you don't see the **Deliver ERA files to clearinghouse?** option or your clearinghouse is not listed in the **Clearinghouse Organization** field, contact your clearinghouse and ask them to enroll for ERA delivery on your behalf.
  - To upload a spreadsheet containing the enrollment information for multiple providers and/or multiple health plans for those providers, click **Enroll** and then click **Upload and enroll a list of providers**.

Be sure to check the status of your enrollments, from the Transaction Enrollment application, for any follow-up actions.

## 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. Select **Add User** from the **Account** menu at the top of Availity Portal.

**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 transaction files through FTP or manual upload through Availity Portal

Once you've completed the setup tasks, you'll be ready to submit transaction files through Availity. Transaction files (also referred to as EDI batch files) must adhere to the requirements specified in the Control Segments/Envelopes section of the EDI Companion Guide. For instructions on how to access the EDI Companion Guide, see [Key resources](#) on page 16. If you work with a vendor for your EDI software, contact them for assistance with configuring any of these settings.

### Send and receive 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 (including 835 files), click the **ReceiveFiles** folder and then select the files that you want to download.

### Send and receive 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 (including 835 files), 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've completed the setup tasks and will 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** – In the Availity Portal menu, click **Patient Registration > Eligibility and Benefits Inquiry**.
- **Authorization or referral request** – In the Availity Portal menu, click **Patient Registration > Authorizations & Referrals**. On the Authorizations & Referrals page, click either **Authorizations** or **Referrals**.
- **Submit a claim** – In the Availity Portal menu, click **Claims & Payments > Professional Claim, Facility Claim or Dental Claim**.
- **Check claim status** – In the Availity Portal menu, click **Claims & Payments > Claim Status**.
- **View electronic remittance advice (ERAs)** - In the Availity Portal menu, click **Claims & Payments > Remittance Viewer**.



# Additional Information

## ADDITIONAL INFORMATION - KEY RESOURCES

## 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, specifications for control segments/envelopes, report and response file examples, and step-by-step instructions for using the tools.

To access the EDI Companion Guide, log in to Availity Portal and navigate to **Claims & Payments > FTP and EDI Connection Services**, and then click **EDI Companion Guide**. You can also access it, without logging into Availity Portal, from [https://www.availity.com/documents/edi%20guide/edi\\_guide.pdf](https://www.availity.com/documents/edi%20guide/edi_guide.pdf).

### Availity's payer list

Check out the [Availity payer list](#) for participating payers and payer IDs. You can also access the payer list by logging in to Availity Portal and typing **payer list** in the keyword search option.

- Transactions that are listed as **Available** in the payer list are sponsored by the associated payer and are provided at no charge.
- Transactions that are listed as **Contract Required** in the payer list are fee-based. For information about submitting transactions that require a contract, see the information about Comprehensive plans in [Setting Up to Use Availity's EDI Clearinghouse Service](#).

**Note:** If your organization already has a contractual agreement with Availity for submitting transactions that require a contract, no other action is required.



## Answers to FAQs

### 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.

### What do I need to do to be able to submit real-time (SOAP) transactions?

Contact Availity Client Services to request a setup.

## ADDITIONAL INFORMATION - SUPPORT TOOLS

## 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 > Availity Support**, at the top of Availity Portal. Or, contact an Availity Client Services representative at 1.800.AVAILITY (282.4548). Representatives are available Monday through Friday from 8:00 a.m. to 8:00 p.m. (Eastern time zone).

To learn about new payers, applications, and training options, visit the [Availity release blog](#).

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