

## Availity Logins for OrthoFi

### What is Availity?

Availity is a portal used by Providers to securely access patient transaction information such as prior authorization requests, eligibility, benefits, claim status and other inquiries. A single login provides access to several dental plan providers such as Aetna, BCBS networks, Humana and many more.

### What is the Challenge?

Availity has several guidelines for login management with their portal. The practice login **MUST** be admin with Availity. OrthoFi has a pre-existing login for Availity that requires the practice to grant access as an authorized user.

### Frequently Asked Questions

- What if I do not already have a practice login for Availity?
  - One will need to be created. See the links below for step-by-step instructions on how to create your login and get your provider(s) added so you have access and can make sure you're set up for all carriers in Availity.
- How do I make sure my practice login is admin?
  - When you set up your account, the person filling it out can give themselves the role of administrator. The administrator is the one who dictates what users have what level of access.
- How do I authorize the OrthoFi username?
  - The step-by-step instructions below outline the process of adding the existing OrthoFi username and what we will need access to. Once the process of adding our username is complete, we will be authorized.

### Solution

Once the practice has an access manager login, OrthoFi will confirm the username that needs to be added as an authorized user to the account.

Once OrthoFi's username is added as an authorized user, OrthoFi will be able to effectively perform eligibility verification, perform follow-up on claims, and pull ERAs/EOBs for carrier deposits.

## Practice Registration and Access Info:

[https://www.availity.com/documents/learning/LP\\_AP\\_GetStarted/index.html#/lessons/XcWuIX7MdoWdILL1r1hi6n1xGhnrX6z](https://www.availity.com/documents/learning/LP_AP_GetStarted/index.html#/lessons/XcWuIX7MdoWdILL1r1hi6n1xGhnrX6z)

## Link to Guide on Availity website:

[https://www.availity.com/documents/learning/Availity\\_Portal\\_Registration.pdf](https://www.availity.com/documents/learning/Availity_Portal_Registration.pdf)

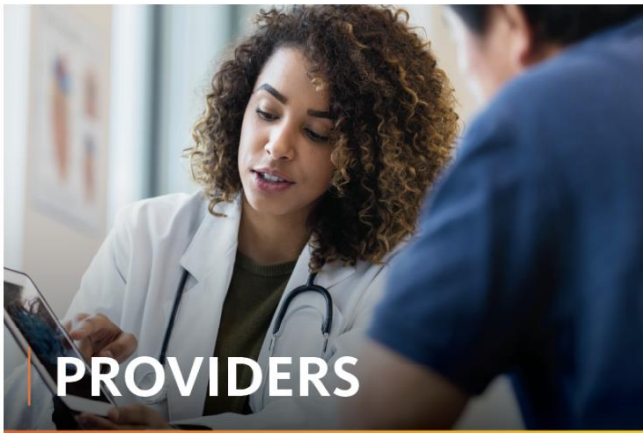
From the Availity website, in the upper right-hand corner, you'll select the **Get Started** button.



Log in to Essentials

New to Availity? [Get Started](#)

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### Healthcare Provider

I am part of a physician practice, mental health provider, specialist, or non-physician provider, and I need to exchange information with health plans (i.e. benefit requests, authorizations, remittances). Still have questions? Join us for a live webinar or explore more on our [training site](#).

[Create Account](#)

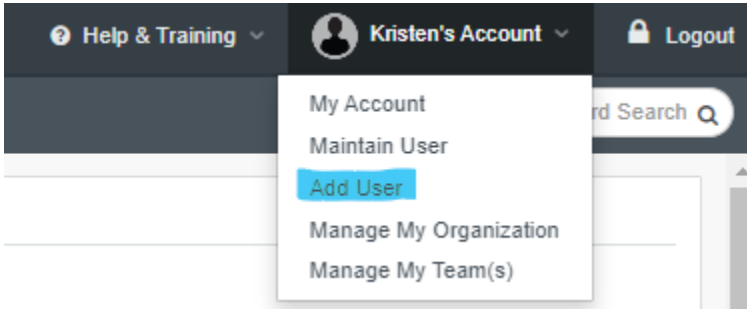
The next screen is where you'll create your user account.

**\*\*Note: When creating a login with Availity, only one email address can be tied to each account. You will not be able to re-use your email address for multiple separate logins.\*\***

## Creating a User Account:

### Step by Step Instructions:

1. Once you log into Availity, you'll go to the upper right corner and select the dropdown next to [user's name]'s account. From here, you'll click on "Add User".



2. Fill in the User ID field with the login associated with your region (see end of this document). **IMPORTANT:** Select the box directly underneath where it shows "This is an existing user ID". Please do not create a new Availity login for OrthoFi.

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## Add User

\* indicates a required field

\* User ID:   
 This is an existing user ID

\* First Name:

\* Last Name:

\* E-mail:

Phone:  -  -  ext.

Notes:

### Have a lot of users?

Upload users from a spreadsheet in .csv format.  
Copy users from one organization to another.

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## Add User

\* indicates a required field

\* User ID:   
 This is an existing user ID

3. Under the “Add this user to the following organization(s)”, you will select your practice and select Next at the bottom of the page.

## User ID Search Results

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Availity has found a match for the user ID and name combination you entered.

User ID: bjacksonOF1  
First Name: Beverly  
Last Name: Jackson

Do you want to associate this user with your organization(s)?

4. Select **YES** and move onto the next screen. This is where the practice will select the types of roles that OrthoFi will have access to. Please select the following:
  - Claims Status
  - Claims
  - Claims Overpayment recovery
  - EDI Management
  - EFT Enrollment
  - Eligibility and Benefits
  - ERA/EFT Maintenance
  - ERA/EFT View
5. Once all the above fields are selected, scroll down, and select yes. It will ask you to review and submit the above information. Please make sure that everything is correct and select **SUBMIT**. You will have the ability to edit/maintain the user information if anything needs to be added in the future. This is what it should look like:

## Review and Submit

User ID: bjacksonOF1  
First Name: Beverly  
Last Name: Jackson  
Title: Revenue Cycle Management/Finance Specialist/Accountant  
E-mail Address: Beverley.jackson@orthofi.com  
Phone:  
Notes:  
Effective Date: 04/15/2024

### Organization(s) and Roles

Organization	Address	Tax ID	Role(s)	
[REDACTED]	[REDACTED]	[REDACTED]	Base Role Claim Status Claims Claims Overpayment Recovery Eligibility and Benefits ERA / EFT Maintenance ERA / EFT View	<a href="#">Edit Info</a>

6. You'll get a screen showing "User Information Saved" and you can either add another user or move to any other page of the Availity site. You will receive an email afterwards to confirm the user has been added.

### Username to Add:

- If your practice is in Texas, Louisiana, Arkansas, Oklahoma, Nebraska, Kentucky, Missouri, Michigan, Ohio, Wisconsin, Minnesota, Illinois, Indiana, and Iowa, you will add the following:
  - Username: OFRemittance (User: Kristen Held)
  - Username: MSMWOrthofi (User: Kristen Held)
  - Username: BjacksonOF1 (User: Beverly Jackson)
- If your practice is in New York, Connecticut, Maryland, North Carolina, New Jersey, Delaware, Pennsylvania, Washington DC, Virginia, Massachusetts, Maine, New

Hampshire, Rhode Island, Vermont, Georgia, Florida, South Carolina, Mississippi, Alabama or Tennessee:

- Username: OFRemittance (User: Kristen Held)
  - Username: NESEOrthofi (User: Kristen Held)
  - Username: BJacksonOF1 (User: Beverly Jackson)
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- If your practice is in Oregon, Washington State, Colorado, Utah, Nevada, Idaho, Wyoming, New Mexico, Montana, Arizona, California, or Hawaii :
    - Username: OFRemittance (User: Kristen Held)
    - Username: NWSWOrthofi (User: Kristen Held)
    - Username: BJacksonOF1 (User: Beverly Jackson)
- 
- If your practice is part of a DSO/OSO:
    - Username: OFRemittance (User: Kristen Held)
    - Username: DSOOrthofi (User: Kristen Held)
    - Username: BJacksonOF1 (User: Beverly Jackson)