

Manage My Organization User Guide

Manage My Organization in Availity® Essentials allows administrators and administrator assistants to add, edit, and/or delete provider information within your organization(s) to your Availity account.

*Adding providers to **Manage My Organization** should be completed prior to utilizing the Availity self-service applications, as this ensures users in your organization are available in the **Select a Provider** drop-down listing in each tool.*

Not registered with Availity Essentials?

Complete the online guided registration process today via [Availity](#), at no cost.

April 2024



The following instructions display how administrators and/or administrator assistants' access and setup **Manage My Organization** in Availity.

Step 1



- › Login to [Availity Essentials](#)
- › Access and start Availity **Manage My Organization** setup



Step 2



- › Complete 4-step setup process for **Manage My Organization**
- › **Check** and **Review** Provider Data



Step 3



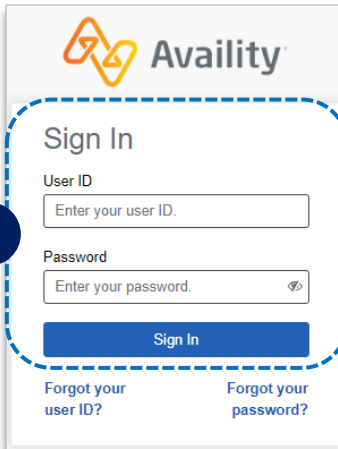
- › **Upload Multiple** Providers
- › **Support** to assist with **Manage My Organization**



Step 1: Availity Login & Add Provider

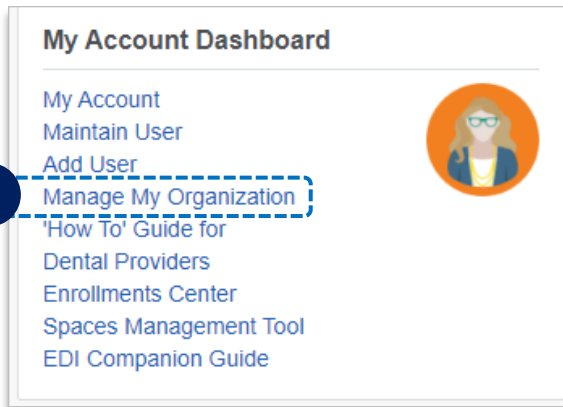
1 Assigned users can access this tool by following the instructions below:

- ▶ Go to [Availity](#)
- ▶ Select **Availity Essentials Login**
- ▶ Enter User ID and Password
- ▶ Select **Log in**



The image shows the Availity Sign In screen. A blue dashed box with the number 1 highlights the 'Sign In' section, which includes fields for 'User ID' and 'Password', a 'Sign In' button, and links for 'Forgot your user ID?' and 'Forgot your password?'.

2 Select **Manage My Organization** from **My Account Dashboard** on the Availity homepage



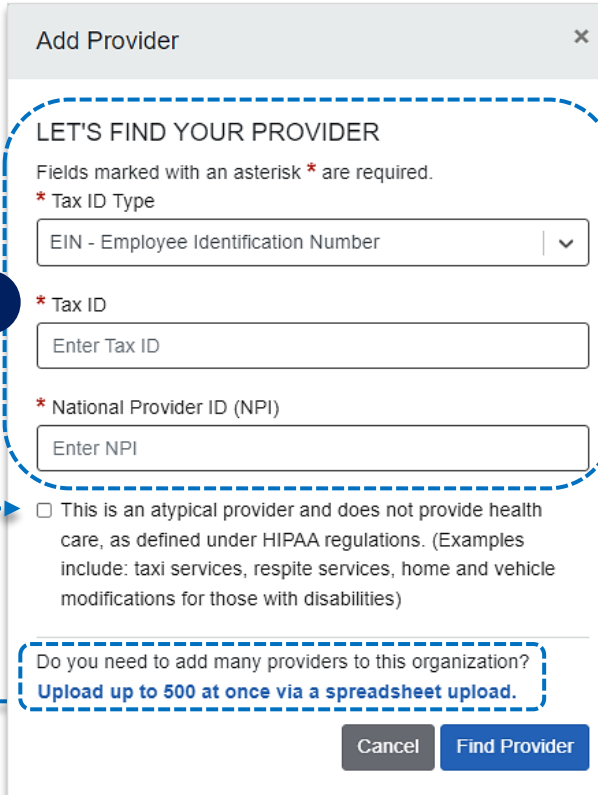
The image shows the 'My Account Dashboard' with a list of links. A blue dashed box with the number 2 highlights the 'Manage My Organization' link. Other links include 'My Account', 'Maintain User', 'Add User', 'How To Guide for Dental Providers', 'Enrollments Center', 'Spaces Management Tool', and 'EDI Companion Guide'.

3 Select the **Tax ID Type:**

- ▶ **EIN** – Employee Identification Number
- ▶ **SSN** – Social Security Number

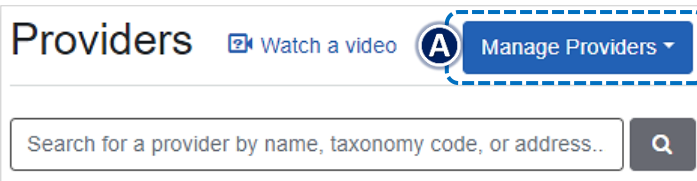
- ▶ Enter the **Tax ID** and **NPI number**
- ▶ Select **Find Provider**

Note: Check this box to **add atypical provider(s)** to your account who are not assigned an NPI number. This will remove the NPI requirement.



The image shows the 'Add Provider' screen. A blue dashed box with the number 3 highlights the 'LET'S FIND YOUR PROVIDER' section. It includes a dropdown for 'Tax ID Type' (set to 'EIN - Employee Identification Number'), input fields for '* Tax ID' and '* National Provider ID (NPI)', and a checkbox for 'This is an atypical provider and does not provide health care, as defined under HIPAA regulations...'. Below this is a link: 'Do you need to add many providers to this organization? Upload up to 500 at once via a spreadsheet upload.' At the bottom are 'Cancel' and 'Find Provider' buttons.

A Within **Manage My Organization**, select **Manage Providers**, then **Add Provider(s)**



The image shows the 'Providers' screen. A blue dashed box with the letter A highlights the 'Manage Providers' button. Below it is a search bar with the text 'Search for a provider by name, taxonomy code, or address..' and a search icon.

Quick Tips:

- If you have multiple providers to add to your organization, select **"Upload up to 500 at once via spreadsheet upload."**
- Refer to pages [6](#) and [7](#) for more detailed instructions.



Step 2: Manage My Organization Setup

Page 4 of 7

Associated provider information will return based on the required data entered.

Step 1) Review and/or update the provider **Name** and **Primary Specialty/Taxonomy** and select **Next**

Step 2) Review and/or update the provider **Identifiers** and select **Next**

Step 3) Review and/or update the provider **Address** and select **Next**

Step 4) Review all information, choose the **provider's relationship to your organization**, then click "**I certify that this provider's information is correct**" and **Submit**

1

1

2

3

4

Provider Information

Identifiers

Addresses

Review

Looks like there's a match!

Please review and/or update all of this provider's information.

PROVIDER SEARCH RESULTS:

Village ABC Clinic

Provider Type

Group/Facility

Group Name/Facility Name

Village ABC Clinic

NPI

1234567890

Primary Specialty/Taxonomy

363L00000X Physician Assistants & Advanced Pr...

Back

Next

2

1

2

3

4

Provider Information

Identifiers

Addresses

Review

Looks like there's a match!

Please review and/or update all of this provider's identifiers.

PROVIDER SEARCH RESULTS:

Village ABC Clinic

Primary Tax ID

Tax ID

123456789

Type

EIN

Add additional Tax ID

Identifiers

Add identifier

Back

Next

3

1

2

3

4

Provider Information

Identifiers

Addresses

Review

Looks like there's a match!

Please add all of the address and service location information for this provider.

Village ABC Clinic

Physical/Billing

123 Anywhere Drive
Suite 000
City, State 12345

Add an address

Back

Next

4

1

2

3

4

Provider Information

Identifiers

Addresses

Review

What is the provider's relationship to your organization?
(Select one)

?

☐ This provider is a part of my organization

☐ This is a third-party not directly affiliated with my organization (example: referred-to provider)

☒ I certify that this provider's information and relationship to my organization information is correct

Back

Submit

Quick Tip:

Choose **This provider is part of my organization** ONLY if the provider is in your office/organization. This ensures the provider information added appears in **Select a Provider** drop-down lists in Availity.



Step 2: Check and Review Provider Data

A Select and use the **Action Menu** to:

- ▶ **View/Edit provider** information
- ▶ **Copy provider to another organization** in your Availity account
- ▶ **Remove provider from organization**

Providers

[Watch a video](#)Manage Providers ▾

Q

A to Z ▾

ADAMS, ROBERT Individual			A
NPI	Tax ID		
1234567890	999999999		
<div>View/Edit provider Copy provider to another organization Remove provider from organization</div>			
CHIROPRACTIC CARE & ACUPUNCTURE LTD Group			
NPI	Tax ID	Primary Taxonomy	
1999999999	555555555	N/A	

Important Information:

- Adding, editing and/or deleting provider information in **Manage My Organization** does not update provider data on file with BCBSMT.
- To update provider information with BCBSMT, refer to the [Update Your Information](#) page on our website for assistance.



Step 3: Upload Multiple Providers

Follow the steps below to upload and add up to 500 providers using a single comma separated value (CSV) file.

- 1 After selecting **Add Provider** in **Manage My Organization**, click **Upload up to 500 at once via a spreadsheet upload**

1 Do you need to add many providers to this organization?
Upload up to 500 at once via a spreadsheet upload.

Quick Tips:

- The main heading row is required in the CSV file.
- Expand the height and width of the columns in the CSV file to review specific instructions on how to enter the format of the required or optional information.

- 2 On the **Upload and enroll a list of providers** window, select **Download sample file** for the sample CSV file to download to your computer

- ▶ Open the CSV file, review the main heading columns, enter the **required** information and then **save**
- ▶ To upload the completed CSV file, click **Choose a file**, browse to the location of the CSV file on your computer and click **Open**

2 **Download sample file.**

Choose a file

NOTE: If you are including payer assigned provider identifiers (PAPI's) in your spreadsheet, the payer name must be correct. Please refer to the list of **Participating Payers** for exact spelling.



Step 3: Upload Multiple Providers (Continued)

- 3
- ▶ The CSV file displays on the **Upload and enroll a list of providers** window
 - ▶ Select **Next**

3 Upload and enroll a list of providers

Upload up to 500 providers to ABC Organization

Upload spreadsheet of providers in .csv format.
View instructions on bulk uploading providers. ?

[Download sample file.](#)

bulk-upload-provider-roster-headers.csv

Quick Tip:
→ To remove the CSV file, click the **trash can** icon.

NOTE: If you are including payer assigned provider identifiers (PAPI's) in your spreadsheet, the payer name must be correct. Please refer to the list of **Participating Payers** for exact spelling.

[Back](#) [Next](#)

- 4
- ▶ **Review** any error messages associated with the uploaded CSV file
 - ▶ Message(s) indicates which line items in the CSV file require corrections
 - ▶ Correct the errors and then upload the CSV file again
 - **Green** = *Successfully Added*
 - **Red** = *Contained Errors*

Upload and enroll a list of providers

Provider bulk upload completed with errors

File name: papicsvMulti.csv

3 provider(s) successfully added
1 provider(s) contained errors

[Download all errors to a CSV file](#)

The following providers were not added:

Line Number	Error Reason
5	Enter a valid primary specialty/taxonomy code.

NOTE: If the file name above looks incorrect, please click the 'Refresh' button below to refresh the results.

[Refresh](#) [Close](#)

Quick Tip:

→ When correcting errors in the CSV file, remove the rows for the successfully added providers to prevent duplicate errors of adding the same provider more than once. The CSV file you upload again should only contain the rows with the corrected provider information.

Have questions or need additional education?

Education or training, contact [BCBSMT Provider Education Consultants](#)

Be sure to include your name, direct contact information & Tax ID and/or billing NPI.

Technical Availity support, contact Availity Client Services at **800-282-4548**

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