Availity™ Remittance Viewer

The Availity Remittance Viewer tool is an electronic solution that offers providers and billing services the ability to view, sort, save and print payment and remittance information. This tool is available to registered Availity users that are currently enrolled to receive the Electronic Remittance Advice (835 ERA) from Blue Cross and Blue Shield of Montana (BCBSMT). Listed below you will find detailed information as well as helpful hints to retrieve remittance information.

1. Getting Started

Go to availity.com

Select Availity Portal Login or Register

Enter User ID and Password

Select Log in button

Note: Only registered Availity users can access Remittance Viewer.

2. Accessing Remittance Viewer

Select Claims & Payments from the main menu

Select Remittance Viewer

Note: If you are not enrolled for ERA delivery from BCBSMT, refer to the Availity ERA Enrollment Tip Sheet for guidance.

3. Managing, Granting and Getting Access

Choose your provider Organization from the drop down menu

Select Manage My Access to configure access to the 835 ERA

Note: If you are have already completed the authentication process, proceed to step 4.
3. Managing, Granting and Getting Access (continued)

Under **Manage My Access** the Administrator may select the option that applies:

- **Grant Access**
- **Get Access**

**Note:** To **Grant Access** for another organization to access your ERA files, that organization (e.g., Billing Services) must be registered with Availity. Also, you must also have that organization’s Availity Customer ID.

**Helpful Hint:** Select **Learn More** located at the top of the Remittance Viewer page to learn how to revoke user access.

Click **I do not have a check/EFT** from any of the above payers

*Electronic Funds Transfer (EFT)*

Select the appropriate option for

**Have you designated another organization to receive your ERAs through Availity?**

Enter the following requirements:

- **Payee Tax ID**
- **Check/EFT Trace Number**
- **Check/EFT Amount**
- **Check/EFT Date**
  *For EFT payments use the deposit date, and for paper check payments use the issue date*

Click **Next**

**Helpful Hints for Verifying Authenticity:**

- If your provider has multiple billing NPI numbers, each NPI will need to be authenticated.
- Enter a check or EFT trace number from the last six months.
- EFT trace numbers are 15 digits and may be found on the ERA received and/or the EFT bank statement.
- EFT Trace Number Format - C/Year/Julian Date(Deposit Date)/EFT Number/0 (Example: C/16/022/E1234506/0)
- Paper Check Number Format - C/Year/Julian Date(Issue Date)/Check Number/0 (Example: C/16/022/12345678/0)
4. Searching For ERAs

Select the appropriate Organization from the drop down

Select one of the search options:

- **Search by Check**
- **Search by Patient**
- **Search by Claim**

**Note:** Instructions for each search option are included in the upcoming steps.

Enter the search criteria

**Optional:** For **Do you want to search all payers?** Select **Yes** or **No**

Click **Search**

**Note:** If selecting **No**, choose the payers to search in the **Payers** list, then click **>>** to add the payers to the **Selected Payers** list.

**Helpful Hints When Searching:**

- Not all fields are required when searching by the Check, Patient or Claim options.
- ERA results are based on the search criteria entered.
- Remittance Viewer search results can display a maximum of 500 records.

5. Search by Check Option

Enter one of the following elements:

- **Check/EFT Trace Number**
- **Check/EFT Date** *(30 day maximum date range allowed)*
5. Search by Check Option (continued)

Check Results page will display

Select Check/EFT Trace Number to view Check Details

Note: See Check/EFT Amount field to view bulk check amount.

Check Details page will display

Select Claim Number to view Claim Details

Note: See page 6 to learn more about the Claim Details page.

6. Search by Patient Option

Enter at least one search criteria:

- **Patient Control Number** – an internal account number the provider’s office uses to identify the patient
- **Patient ID** – payer-assigned ID number that is found on the BCBSMT member ID card
- **Patient Name** – the complete patient’s first name or partial first name followed by the character

Optional: Enter the From and To Date of Service
6. **Search by Patient Option** (continued)

**Patient Results** page will display

To view **Claim Details** select an option:
- **Claim Number**
- **Check/EFT Trace Number**

**Note:** See page 6 to learn more about the **Claim Details** page.

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7. **Search by Claim Option**

Enter **Claim Number** to receive **Claim Results**

**Remittance Viewer**

- **Claim Number**
- **Check/EFT Trace Number**

**Optional:** Enter **From** and **To Date of Service** with a maximum date range of seven days

**Claim Results** page will display

Select **Claim Number** and/or **Check/EFT Trace Number** to view **Claim Details**
7. Search by Claim Option (continued)

After selecting the **Claim Number** from the previous **Claim Results** page, the following information will display in the **Claim Details** results:

- **Claim Summary** – This section displays summary information about the claim, check and patient information. To view check details, select the **Check/EFT Trace Number**.

- **Claim Adjustments** – This section displays information about adjustments that have been made to the claim, including group codes, claim adjustment reason codes and adjustment amounts. This information only displays if the claim being viewed has been adjusted.

- **Line Details** – This section displays claim line information. To view the **Charge/Adjustments** code explanation, hover your cursor over the code.

- **Code Description** – To view the **Charge/Adjustments** description expand the **Code Description** section by clicking the plus sign (+), to hide the explanation, select the minus sign (-).

Select **Create PDF** to save or print the ERA file

**Note:** The below **Claim Details** page will display when searching by the Check, Patient or Claim search options.
8. Creating or Printing the ERA

To create or print the FULL ERA file:

- Select **Check/EFT Trace Number** from the **Check Results** page
- Select **Create PDF** to open in Adobe Reader

To create or print an INDIVIDUAL ERA file:

- Select **Claim Number** from the **Claim Results** and/or **Check Details** page
- Select **Create PDF** to open in Adobe Reader

**Note:** You must have Adobe Reader installed on your computer to create or print ERAs.

Refer to the below table to learn more about creating a PDF file for other scenarios.

<table>
<thead>
<tr>
<th>Select this option</th>
<th>To create a PDF file containing:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Summary only</td>
<td>Check summary information.</td>
</tr>
<tr>
<td>Check Summary and Claim Summary</td>
<td>Check summary and claim summary information.</td>
</tr>
<tr>
<td>Check Summary and all claim details (multiple claims per page)*</td>
<td>Check summary information and claim details with multiple claims per page. When you print a PDF file created with this option, you must configure the page size to fit the printable area in Adobe Reader’s print settings.</td>
</tr>
<tr>
<td>Check Summary and all claim details (one claim per page)*</td>
<td>Check summary information and claim details with one claim per page.</td>
</tr>
</tbody>
</table>

* – These options are not available if the check shown on the Check Details page is associated with more than 2,000 claims.

9. Additional Functionality

- To sort results in ascending order, click the column header until the arrow next to the header points up (▲).
- To sort results in descending order, click the column header until the arrow next to the header points down (▼).
- Click **Back** to return to the previous page.
- Select **New Search** to return to the main Remittance Viewer page and perform a new search.

**Questions?** Email the Provider Education Consultants at **PECS@bcbsmt.com**.

Be sure to include your name, direct contact information, Tax ID or Billing NPI.

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