Understanding Availity roles for Electronic Data Interchange (EDI)

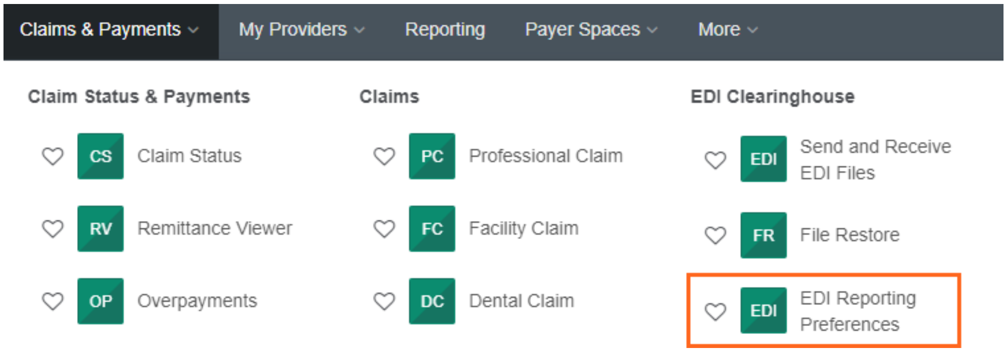
Published: Apr 1, 2021 - **Administrative**

Did you know your Availity administrator for your organization is the key to opening doors to self-service transaction roles such as EDI. A role is a group of job functions, also known as permissions. Each role consists of one or more permissions. Assigning roles is part of the process when you add a new Availity user with the **Add User** feature.

What EDI roles do I need?
EDI Management - This role consists of the following permissions available under EDI File Management in the Availity menu:

- **EDI Reporting Preferences**– Specify the EDI batch report files you want users at your organization to receive, along with file formats and other reporting preferences.
- **EDI Send and Receive Files**– Review EDI batch report files for batch files submitted using Availity's EDI File Management feature. In addition, review payer responses to Availity Web-based claim forms submitted to payers that process claims in batches.
- **File Restore**– Restore archived EDI files to your **ReceiveFiles**

Set up EDI Reporting Preferences
Availity's batch EDI processing generates response files for each batch file that you submit. The administrator for an organization can set reporting preferences that specify which response files are generated. In the Availity Portal menu, click **Claims & Payments** > **EDI Reporting Preferences.**



Enroll for the Direct Data Entry Transaction

You must be assigned the Claims role to submit professional claims or encounters. If you cannot access the claim form, contact your administrator to assign the Claims role to you. Submit transactions through manual data entry in Availity Portal. In the Availity Portal menu, click **Claims & Payments** > **Professional Claim/Facility Claim/Dental Claim <** Confirm which organization and payer you would like to submit claims for and continue to complete the fields to be directed to the **simple and time saving** claim form to enter claim information.

Need more help?

The EDI Connection Services Startup Guide is a helpful resource to help you get started, set up your EDI reporting preferences and submit transactions through manual data entry in Availity Portal.

Contact Availity

- Select **Help & Training** > **Get Trained** to display the Availity Learning Center (ALC) in a new browser tab. Search the catalog to locate and enroll in courses. Based on your needs.
- Select **Help & Training** > **Find Help** to display Availity Help in a new browser window. Use Contents to display topics. Depending on your needs, consider exploring these topics:
    - Administrator
    - Claim submission
    - Electronic Data Interchange (EDI)
    - Glossary

- Select **Help & Training** > **Availity Support** to:
- Open a ticket to request support
- Get support via Chat

Call 1-800-AVAILITY (282-4548) to speak with an Availity Client Service rep for more support.

1061-0421-PN-NE

URL: https://providernews.anthem.com/maine/article/understanding-availity-roles-for-electronic-data-interchange-edi-4

Featured In:
April 2021 Anthem Connecticut Provider News, April 2021 Anthem New Hampshire Provider News, April 2021 Anthem Maine Provider News