

# 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

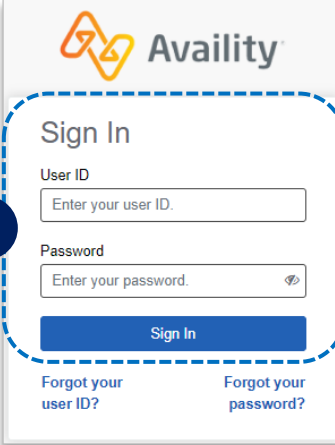


The following instructions display how administrators and/or administrator assistants' access and setup **Manage My Organization** in Availity.



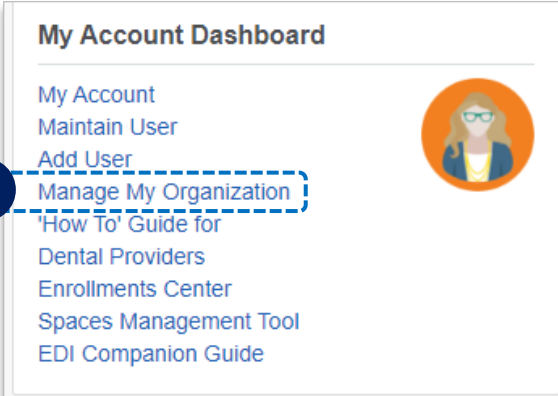
**1** Assigned users can access this tool by following the instructions below:

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



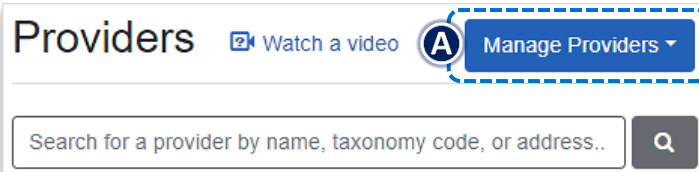
The image shows the Availity Sign In page. A blue dashed box highlights the 'Sign In' section, which includes a 'User ID' field with the placeholder 'Enter your user ID.', a 'Password' field with the placeholder 'Enter your password.' and a 'Sign In' button. Below the fields are links for 'Forgot your user ID?' and 'Forgot your password?'. A blue circle with the number '1' is positioned to the left of the dashed box.

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



The image shows the 'My Account Dashboard' menu. A blue dashed box highlights the 'Manage My Organization' option. Other options include 'My Account', 'Maintain User', 'Add User', 'How To' Guide for Dental Providers, 'Enrollments Center', 'Spaces Management Tool', and 'EDI Companion Guide'. A blue circle with the number '2' is positioned to the left of the dashed box.

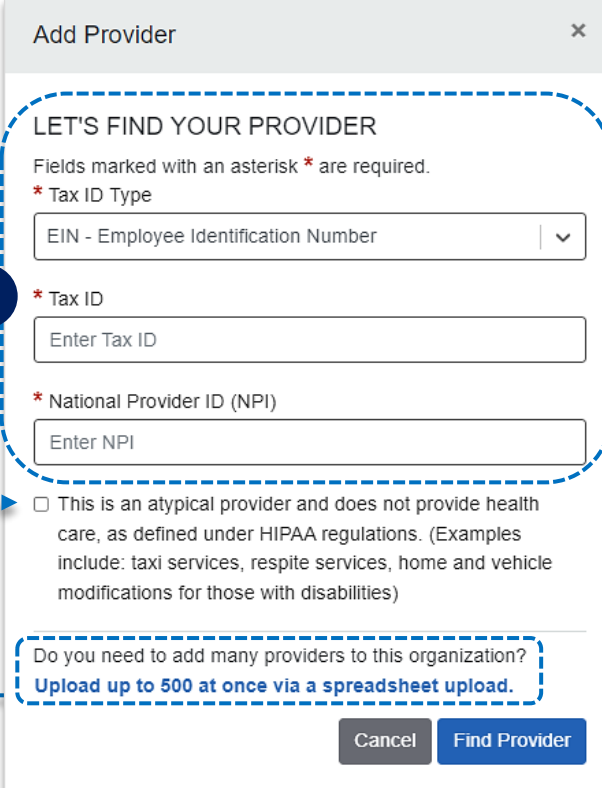
**A** Within **Manage My Organization**, select **Manage Providers**, then **Add Provider(s)**



The image shows the 'Providers' management interface. A blue dashed box highlights the 'Manage Providers' dropdown menu. Below it is a search bar with the placeholder text 'Search for a provider by name, taxonomy code, or address..' and a search icon. A blue circle with the letter 'A' is positioned to the left of the dashed box.

- 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' form. A blue dashed box highlights the 'LET'S FIND YOUR PROVIDER' section, which includes a dropdown for 'Tax ID Type' (set to 'EIN - Employee Identification Number'), a 'Tax ID' field, and an 'NPI' field. A checkbox for 'This is an atypical provider...' is present. A blue circle with the number '3' is positioned to the left of the dashed box. At the bottom, there is a question: 'Do you need to add many providers to this organization? Upload up to 500 at once via a spreadsheet upload.' with 'Cancel' and 'Find Provider' buttons.

### 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

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**

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...

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**2**

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**

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

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**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 ▾

Search for a provider by name, taxonomy code, or address... 🔍 A to Z ▾

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

**Important Information:**

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



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.**

2 **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.




- 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.

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- 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*

4

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 [BCBSOK 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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