In this document

Overview

Health care providers can submit medical records electronically through our provider portal, Availity® Essentials.

We encourage health care providers to upload medical records through Availity Essentials because:

- It's more secure than submitting by fax or mail, which is important because medical records include protected health information.

- It avoids the limitations of faxing.

- It reduces manual effort.

When Blue Cross Blue Shield of Michigan or Blue Care Network needs medical records to help us adjudicate claims or make decisions on appeals, we'll request them using one of the following methods:

Method	For more information…
Through the Attachments dashboard	See the "Receive requests for medical records and upload them through the Attachments dashboard" section on Page 2.
Through a faxed or mailed medical records request form	See the "Submit medical records using the Send Attachments feature" section on Page 4.

Note: We'll continue to accept paper and fax submissions.

Receive requests for medical records and upload them through the Attachments dashboard

Only Availity Essentials users who are assigned to the appropriate roles can receive requests for medical records through the Attachments dashboard and then upload medical records through the Attachments dashboard.

Availity Essentials administrators: Assign roles and register to receive requests electronically

Your organization's Availity Essentials administrator needs to complete two tasks.

Task 1: Assign the appropriate roles to each user who will receive medical record requests through the Attachments dashboard

Complete the following steps:

1. Log in to our provider portal (availity.com*).

2. Near the upper-right corner of the screen, click your name (in the top navigation).

3. Click *Manage My Organization*.

4. Click *Manage My Team*.

5. Do one of the following:

    o If you're the Availity Essentials administrator for a single business (organization), skip to step 6.

    o If you're the Availity Essentials administrator for multiple businesses (organizations), select the appropriate organization.

6. In the Actions column, click the action menu ☰ for the appropriate user and then click *Edit Roles*.

7. Expand the *Claims & follow up* section and mark the following check boxes:

    o Claim Status

    o Medical Attachments

8. Scroll to the bottom of the screen and click *Update Roles*.

9. Repeat these steps for each Availity Essentials user who should receive medical record requests through the Attachments dashboard.

If you later need to remove a user's access to the Attachments dashboard, remove the Claim Status and Medical Attachments roles from his or her account.

Task 2: Register NPIs and Tax IDs to receive medical record requests through Availity Essentials

Complete the following steps:

1. Click *Claims & Payments* in the Availity Essentials menu bar and then click *Attachments – New*.

2. Click the *Provider Registration* button near the upper-right corner of the screen.

3. Review the disclaimer and click *Continue*.

4. Select the appropriate organization from the *Organization* drop-down list.

5. Enter the billing NPIs for which you want to receive medical record requests electronically in the *Billing NPI(s)* field.

6. Enter the appropriate billing tax IDs in the *Tax ID(s)* field.

7. Click the *Add Id(s)* button. Registered NPIs and Tax IDs are listed on the right side of the page.

8. Click *Next*.

9. Mark the check box for each Availity Essentials user who needs to send attachments through the Attachments dashboard.

10. Click *Save*.

Note: Provider NPIs and Tax IDs can be registered to receive medical record requests electronically through only one organization's Availity Essentials account. If an NPI or Tax ID is already registered and another organization attempts to add it through the provider registration process, the administrator of the second organization will receive an error message that points to an FAQ for additional information.

Availity Essentials users: Submit attachments through the Attachments dashboard

To submit medical records electronically, Availity Essentials users must do the following:

1. Log in to our provider portal (availity.com*).

2. Click *Claims & Payments* in the menu and then click *Attachments – New*.

Note: If you don't see *Attachments – New*, reach out to your Availity Essentials administrator so they can add the appropriate roles to your account. If you don't know who to contact, see "Determine the administrators for your organization's Availity Essentials account" on Page 5.

3. Click anywhere on a request to open it.

   Tip: You can use the *Search Term* field to search for a specific request or click the *Filter List* button to set filtering preferences.

4. Click the *Add File* button next to a request reason and upload the supporting documentation.

5. Navigate to the file that contains the supporting documentation and click the *Open* button.

   In the Attachments Detail dialog, the file name displays with a progress bar. A green check mark appears on the right side of the status bar when the file has been added.

6. Once you've uploaded all attachments for the request, click the *Submit* button.

   Tip: If you aren't ready to submit the attachments, you can click the *Save* button and come back later to finish attaching files.

Blue Cross and BCN automatically accepts all attachments. You can view details about requests in the Sent, History and Reporting tabs in the Attachments dashboard.

Submit medical records using the Send Attachments feature

1. Log in to our provider portal (availity.com*).

2. Click *Claims & Payments* on the menu bar and then click *Claim Status*.

3. Follow the prompts to locate the claim for which you want to submit attachments.

4. On the claim, click *Send Attachments*.

5. Select a reason code.

6. Upload the attachments.

7. Click *Submit*.

Only Availity Essentials users who have been assigned the Medical Attachments role can view the status of the upload.

Determine the administrators for your organization's Availity Essentials account

To view a list of your organization's Availity Essentials administrators:

1. Log in to our provider portal (availity.com*).

2. Click your name (in the top navigation) and click *My Account*.

3. Click *Organization(s)* in the left navigation.

4. Click *Open My Administrators*.

5. Reach out to an administrator to have them add the Claim Status and Medical Attachments roles to your account.

*Clicking this link means that you're leaving the Blue Cross Blue Shield of Michigan and Blue Care Network website. While we recommend this site, we're not responsible for its content.

Availity is an independent company that contracts with Blue Cross Blue Shield of Michigan and Blue Care Network to offer provider portal and electronic data interchange services.