



Resource guide for Availity® Medical Attachments Dashboard

This guide can help you use the Medical Attachments Dashboard on Availity to respond to Aetna® requests for additional claim information. The dashboard is a multi-payer tool, so you may see requests from Aetna and other participating payers in the same place.

You don't need to change your clearinghouse to use the dashboard. You can keep your existing clearinghouse workflows, and the dashboard gives you another digital way to view and respond to documentation requests when available.

Use this guide to learn how to:

- Access the Medical Attachments Dashboard
- Review your Inbox
- Submit documentation for an Aetna request
- View submitted or completed items

If you're new to Availity, this guide also includes basic access steps and information for your organization's Availity administrator.

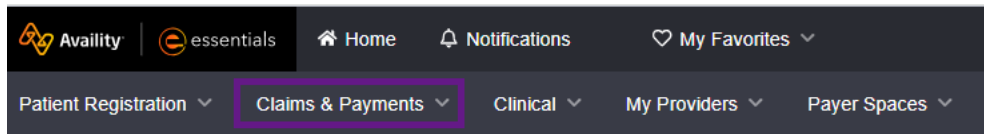
Before you begin

The Medical Attachments Dashboard is available in Availity Essentials. Your organization must be registered for medical attachments, and each user must have the correct access. If you don't see the dashboard, contact your organization's Availity administrator or Administrator Assistant.

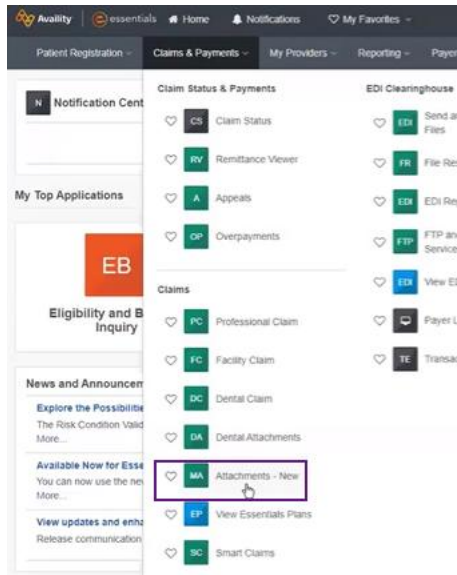
Good to know: The dashboard is available at the provider organization level. This means more than one authorized user in your organization may be able to view and respond to the same request.

Accessing the Medical Attachments Dashboard

1. Sign in to Availity Essentials at [Availity.com](https://www.availity.com)
2. If Availity asks for it, complete two-factor authentication.
3. Select the Claims & Payments menu.



4. Select Attachments – New.

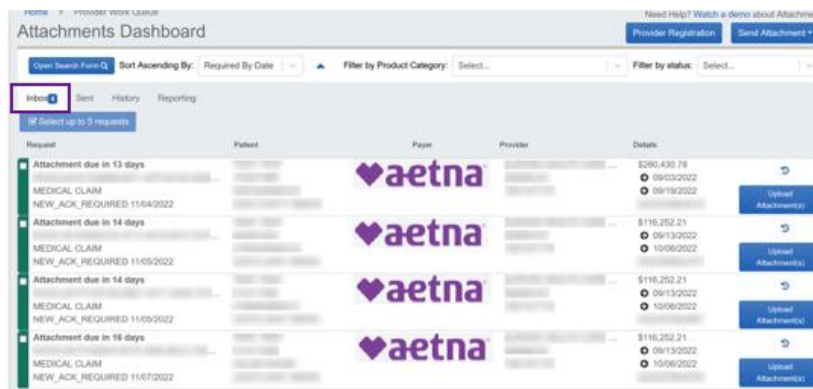


If Attachments – New isn't available, your organization's Availity® administrator may need to complete setup or give you access. See “How administrators grant access” later in this guide.

Understanding the dashboard queues

Inbox queue

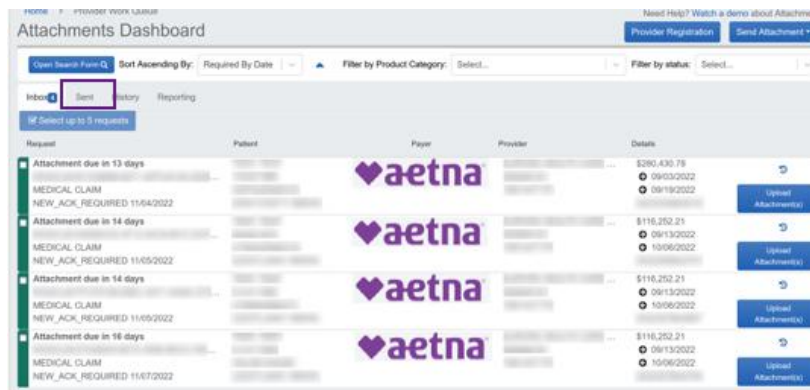
The Inbox shows claims that need more information. Because this is a multi-payer dashboard, you may see requests from Aetna® and other participating payers. Review the payer name and request details before submitting documentation.



The Inbox may include color indicators or timing information to help you understand when a response is needed. Confirm the meaning of each indicator before final approval.

Sent queue

The Sent queue shows attachment submissions that were sent from the dashboard. Use this queue to confirm that your submission moved out of the Inbox after you selected Submit.



Attachments Dashboard

Need Help? Watch a demo about Attachments

Provider Registration Send Attachment +

Open Search Panel Sort Ascending By: Required By Date Filter by Product Category: Select... Filter by status: Select...

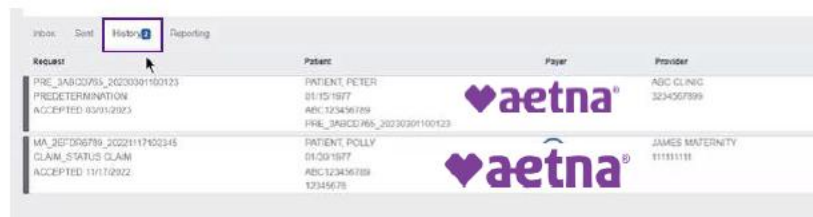
Inbox **Sent** History Reporting

16 Select Up to 5 requests

Request	Patient	Payer	Provider	Details
Attachment due in 53 days MEDICAL CLAIM NEW_ACK_REQUIRED 11/04/2022		♥ aetna		\$280,430.78 09/03/2022 09/19/2022 Upload Attachment(s)
Attachment due in 14 days MEDICAL CLAIM NEW_ACK_REQUIRED 11/05/2022		♥ aetna		\$116,252.21 09/13/2022 10/06/2022 Upload Attachment(s)
Attachment due in 14 days MEDICAL CLAIM NEW_ACK_REQUIRED 11/05/2022		♥ aetna		\$116,252.21 09/13/2022 10/06/2022 Upload Attachment(s)
Attachment due in 16 days MEDICAL CLAIM NEW_ACK_REQUIRED 11/07/2022		♥ aetna		\$116,252.21 09/13/2022 10/06/2022 Upload Attachment(s)

History queue

The History queue shows completed attachment submissions. Items remain in History for up to 12 months.



Inbox Sent **History** Reporting

Request	Patient	Payer	Provider
PRE_JAB02/765_2023031100123 PREDETERMINATION ACCEPTED 03/11/2023	PATIENT, PETER 01/15/1977 ABC123456789	♥ aetna	ABC CLINIC 323456789
MA_202306789_2022111700245 CLAIM STATUS CLAIM ACCEPTED 11/17/2022	PATIENT, POLLY 01/30/1977 ABC123456789 12345678	♥ aetna	JAMES MATERNITY 11111111

You can use the search, sort and filter options to find a specific claim or submission.

Reporting queue

Use the Reporting queue to export items from your Inbox, Sent or History queues. Select the queue, choose a date range and create the report. The report downloads as a CSV file.

Inbox Sent History Reporting	
Select up to 5 requests	
Request	Patient
Attachment due in 4 days 2134567890123 MEDICAL CLAIM NEW MM/DD/YYYY	TEST, PATIENT 3 MM/DD/YYYY ABC123456789 1234567891234
Attachment due in 4 days 3214567890123 MEDICAL CLAIM NEW MM/DD/YYYY	TEST, PATIENT 1 MM/DD/YYYY XYZ123456789 213456789123
Attachment due in 24 days 1234567890123 MEDICAL CLAIM NEW MM/DD/YYYY	TEST, PATIENT 2 MM/DD/YYYY ABD123456789 321456789123

Search and filters are disabled in reporting view

Inbox Sent History Reporting

Export Data

Select your report options below:

Select a workqueue
Select...

Select a date range
Select...

Export CSV

If the report is large, Availity® may show a message letting you know the file will take longer to prepare. You'll receive an email at the address saved in your Availity account when the report is ready.

How to respond to an Aetna® request for information

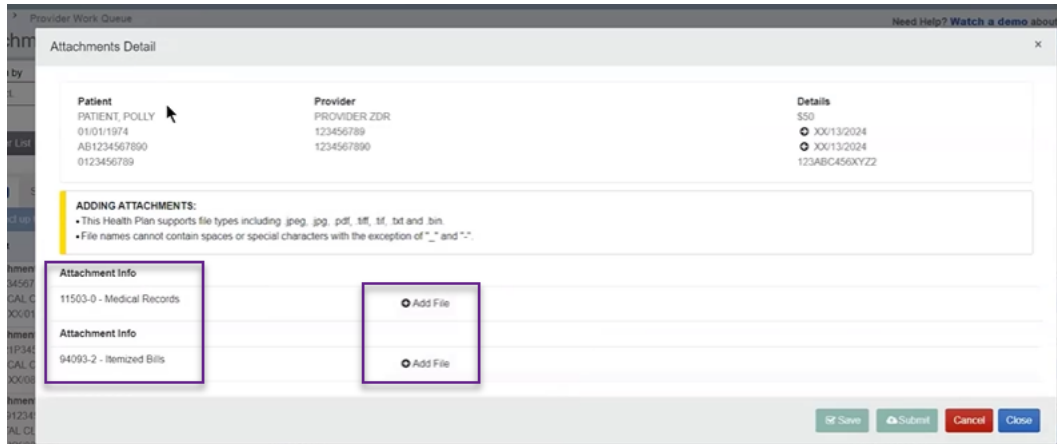
1. From the Attachments Dashboard Inbox, find the Aetna request you want to review.

Patient Registration Claims & Payments Clinical My Providers Reporting Player Spaces More	
Home > Provider Work Queue	
Attachments Dashboard	
Search by	Search Term
Select...	Search
Filter List	
Inbox Sent History Reporting	
Select up to 5 requests	
Request	Patient
Attachment due in 35 days AB2134567890 MEDICAL CLAIM NEW XX/01/2024	PATIENT, POLLY 01/01/2024 BHU1234567 0123456789
Attachment due in 37 days MK321P3456 MEDICAL CLAIM NEW XX/08/2024	LESTER, LEMON 12/01/2024 AZQ3123456789 65432198

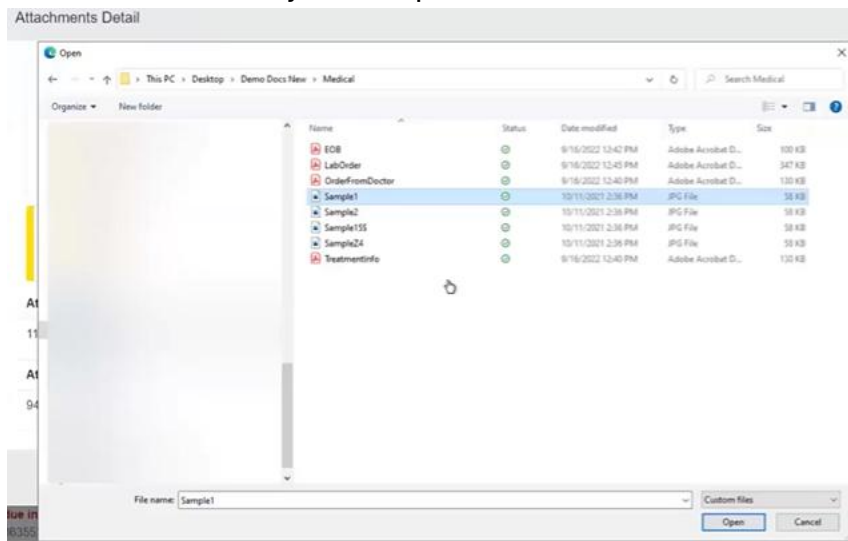
2. Select the claim or request to open the details. If a new window doesn't open, check that pop-ups are allowed for Availity.



- Review the request details to confirm what documentation is needed and select Add File.



- Choose the file from your computer.



- Confirm that the file attached successfully.

Provider Work Queue

Need Help? Watch a demo about AB

Attachments Detail

Patient	Provider	Details
POLLY, PATIENT 01010000X BHJ12344567 0123456789	PROVIDER ZDR 123456789 1234567890	\$50 02/13/2024 02/13/2024 123ABC456XYZZ

ADDING ATTACHMENTS:

- This Health Plan supports file types including .jpeg, .jpg, .pdf, .tif, .tiff, .txt and .bin.
- File names cannot contain spaces or special characters with the exception of "_", "-" and ".".

Attachment Info

11503-0 - Medical Records

Sample1.jpg

[Add Another File Attachment](#)

Attachment Info

94093-2 - Itemized Bills

[Add File](#)

[Save](#) [Submit](#) [Cancel](#) [Close](#)

6. Confirm that you've uploaded the correct file before selecting Submit.
7. Select Submit.

Provider Work Queue

Need Help? Watch a demo about AB

Attachments Detail

Patient	Provider	Details
POLLY, PATIENT 01010000X BHJ12344567 0123456789	PROVIDER ZDR 123456789 1234567890	\$50 02/13/2024 02/13/2024 123ABC456XYZZ

ADDING ATTACHMENTS:

- This Health Plan supports file types including .jpeg, .jpg, .pdf, .tif, .tiff, .txt and .bin.
- File names cannot contain spaces or special characters with the exception of "_", "-" and ".".

Attachment Info

11503-0 - Medical Records

Sample1.jpg

[Add Another File Attachment](#)

Attachment Info

94093-2 - Itemized Bills

[Add File](#)

[Save](#) [Submit](#) [Cancel](#) [Close](#)

TERMINATION Y18C13482320 Example Health Plan 1922811981 02/13/2024 Upload Attachment

Important: After you submit the attachment, you won't be able to cancel or edit the attachments. The claim will no longer appear in the Inbox. It will move to the Sent queue. Once Aetna® accepts the attachment, the item will move to the History queue.

How administrators grant access

Your organization's Availity® administrator or Administrator Assistant must complete setup before users can access the Medical Attachments Dashboard. Once setup is complete, they can assign the Medical Attachments role to users who are authorized to send attachments to payers.

1. Sign in to Availity Essentials at [Availity.com](https://www.availity.com).
2. If Availity asks for it, complete two-factor authentication.
3. Go to the Enrollments Center.
4. Under Multi-Payer Enrollments, select Medical Attachments Setup.

5. Select Medical Attachment Registration.
6. Select Next.
7. Choose the provider organization.
8. Enter the provider's NPI, tax ID or both.
9. Select Add ID(s).
10. Confirm that the provider appears in the list.
11. Select Next.
12. Find the user who needs access.
13. Check the box next to the user's name.
14. Select Save.

Good to know: If the user isn't listed, the administrator must add the user to the organization first. Each user needs their own email address in Availity®. To remove access, the administrator can uncheck the box next to the user's name and select Save. Availity sends an email when access is added or removed.

Frequently asked questions

What is the Medical Attachments Dashboard?

It's a tool in Availity Essentials that lets providers view and respond to requests for additional claim information from participating payers, including Aetna®.

Is this dashboard only for Aetna?

No. The Medical Attachments Dashboard is a multi-payer tool. You may see Aetna requests and requests from other participating payers.

Why don't I see Attachments – New?

Your organization may need to complete setup, or your user account may need access. Contact your organization's Availity administrator or Administrator Assistant.

Can more than one person in my organization see the same request?

Yes. The dashboard is available at the provider organization level, so authorized users in the same organization may be able to see the same requests.

What happens after I submit an attachment?

The claim will move from the Inbox to the Sent queue. After Aetna accepts the attachment, the item will move to the History queue.

Where can I find a past submission?

Use the History queue to find completed submissions. You can search, sort or filter the list to find a specific claim or attachment submission.

What if I submitted the wrong file?

Before selecting the Submit button, double-check that you've uploaded the correct file. After you select Submit, you cannot cancel or edit the submission.

Who can help me with Availity® access?

Contact your organization's Availity administrator or Administrator Assistant. They manage user access for your organization.

Aetna is the brand name used for products and services provided by one or more of the Aetna groups of companies, including Aetna Life Insurance Company and its affiliates (Aetna).

Availity® is a registered trademark of Availity, LLC. It is available only to providers in the U.S. and its territories.