

New *Template* Feature Added to Authorization and Referral Screens in Availity

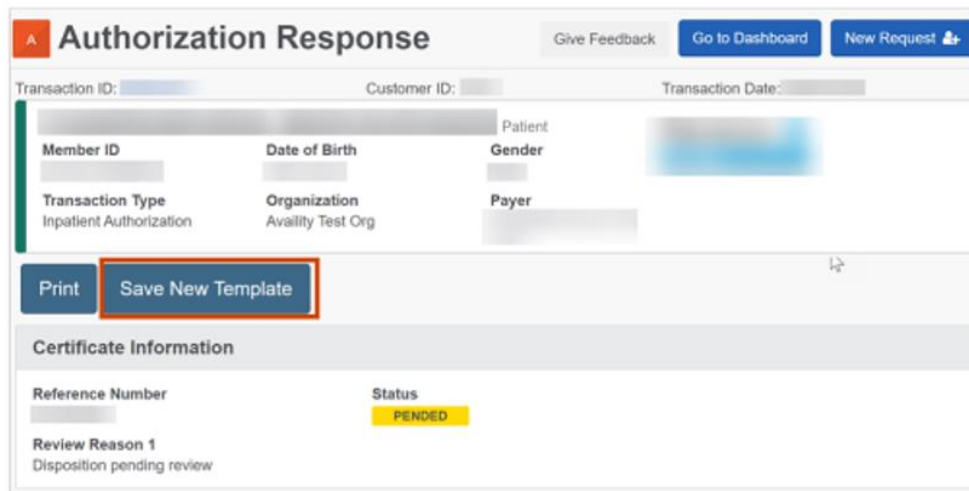
Availity¹ has added a new *Template* feature to their Authorization and Referral screens. This update will allow users to save entered information (i.e., procedure and diagnosis codes) from a previous request for use in future requests.

Users will now see a *Template* dropdown field following the *Organization* field where they enter initial content. You may use the new template dropdown to save values from the following fields:

- *Member*
- *Requesting Provider*
- *Service Information*
- *Diagnosis and Procedure Codes*
- *Rendering Provider(s)*

How to Use the New Template Feature:

- 1) From the *Authorization Response* or *Referral Response* page, click **Save New Template**



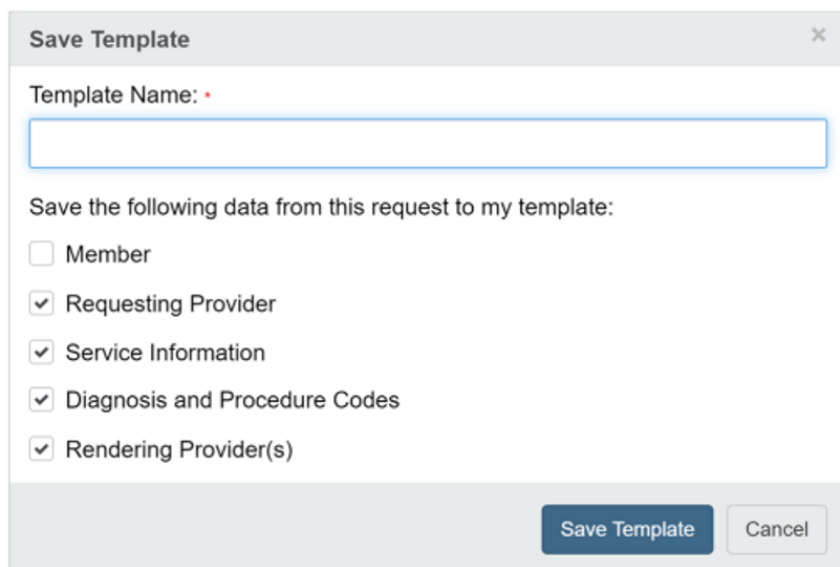
The screenshot shows the 'Authorization Response' page. At the top, there are navigation buttons: 'Give Feedback', 'Go to Dashboard', and 'New Request'. Below this, there are input fields for 'Transaction ID', 'Customer ID', and 'Transaction Date'. A table displays patient and transaction details:

Member ID		Date of Birth	Gender	Patient
[Redacted]		[Redacted]	[Redacted]	[Redacted]
Transaction Type	Organization	Payer		
Inpatient Authorization	Availity Test Org	[Redacted]		

Below the table, there are two buttons: 'Print' and 'Save New Template'. The 'Save New Template' button is highlighted with a red box. Below the buttons is a section for 'Certificate Information' with fields for 'Reference Number', 'Status' (displaying 'PENDED'), and 'Review Reason 1' (displaying 'Disposition pending review').

Note: A template does not need to be created or selected to submit an authorization or referral. The dropdown can be bypassed when the user is submitting the authorization or referral.

- 2) Type a name for the template in the *Template Name* field to save the template for your organization.
- 3) Select the data you want to save from the submitted authorization or referral, and then click **Save Template**.

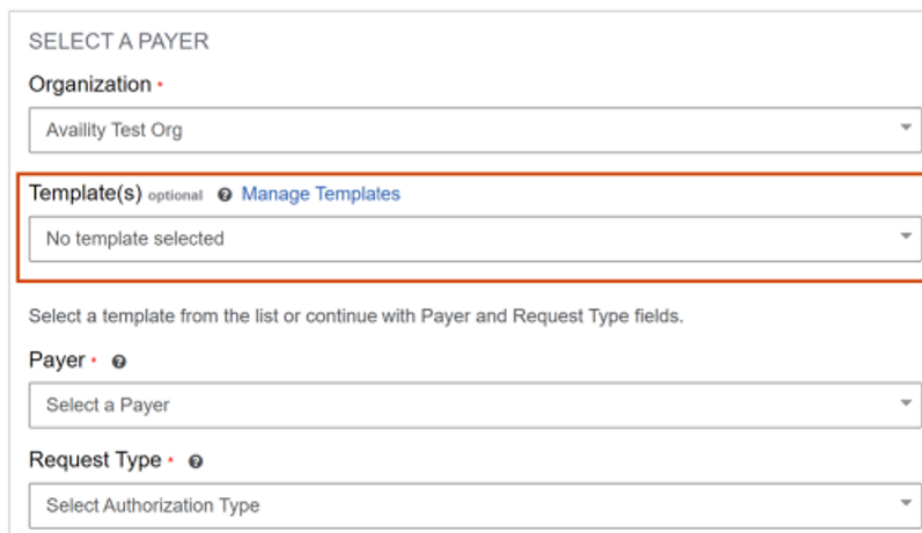


The image shows a 'Save Template' dialog box with a close button (X) in the top right corner. It contains a 'Template Name' field with a red asterisk, which is currently empty. Below this is a section titled 'Save the following data from this request to my template:' with five checkboxes: 'Member' (unchecked), 'Requesting Provider' (checked), 'Service Information' (checked), 'Diagnosis and Procedure Codes' (checked), and 'Rendering Provider(s)' (checked). At the bottom right, there are two buttons: 'Save Template' and 'Cancel'.

How to Access or Manage Saved Templates

Navigate to an authorization or referral request. The template is in the **Select a Payer** section. Click the **Template(s)** field to select from the list of templates saved for your organization. All fields saved to the template will fill in on new authorizations and referrals.

To delete a saved template, click the *Manage Templates* link and select *Delete Template*.



The image shows a 'SELECT A PAYER' form. It has four main sections: 'Organization' with a dropdown menu showing 'Availity Test Org'; 'Template(s)' with an 'optional' label, a 'Manage Templates' link, and a dropdown menu showing 'No template selected' (this section is highlighted with a red border); 'Payer' with a dropdown menu showing 'Select a Payer'; and 'Request Type' with a dropdown menu showing 'Select Authorization Type'. Below the 'Template(s)' section, there is a note: 'Select a template from the list or continue with Payer and Request Type fields.'

We hope you find this latest enhancement helpful in improving efficiencies for your office processes.

¹Availity, LLC is a multi-payer joint venture company. For more information, visit availity.com.

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