

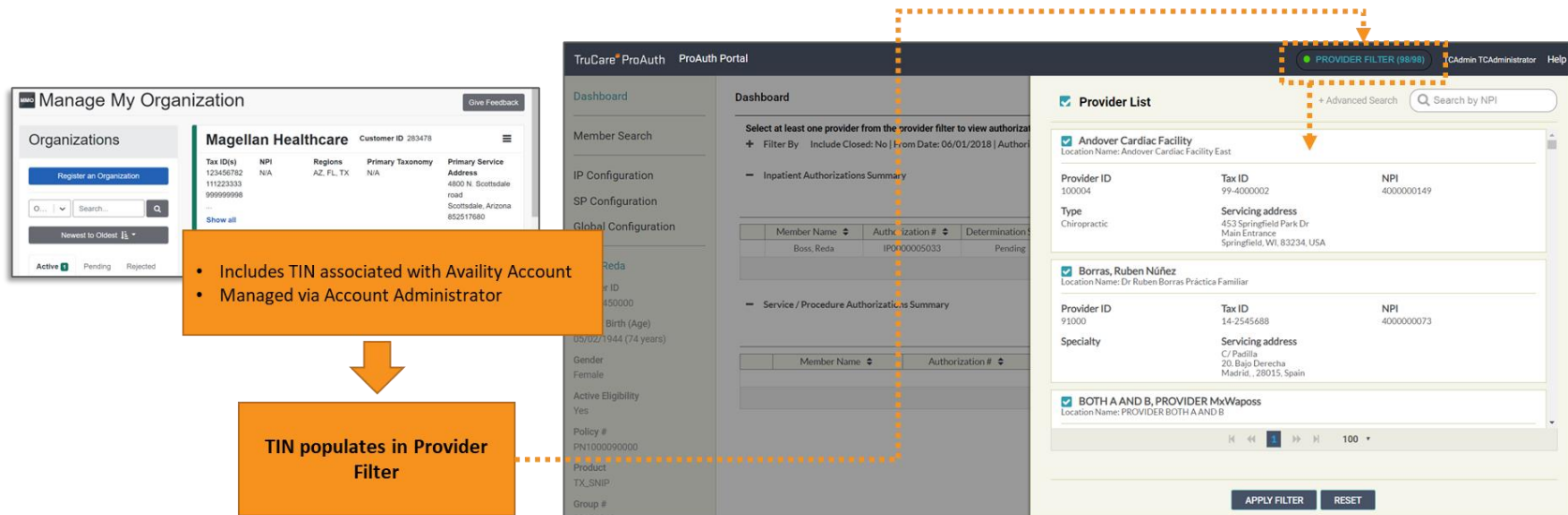
Understanding the Provider Filter

Quick Reference Guide

The **Provider Filter** is a critical function that, when applied, informs which authorizations to display based on the provider. To use the **Provider Filter** function, your organization must be registered in Availity Essentials and the Providers' Taxpayer Identification Numbers (TIN), must be loaded in Availity Essentials by your Account Administrator.

The Account Administrator is the person responsible for setting up and maintaining user accounts, maintaining organization information, and performing other administrator tasks in Availity Essentials and must have legal authority to sign agreements for the organization.

This Quick Reference Guide provides steps on how to use the **Provider Filter** function.



The screenshot displays the TruCare ProAuth ProAuth Portal interface. On the left, the 'Manage My Organization' section shows details for 'Magellan Healthcare' with a Customer ID of 283478. It lists Tax ID(s), NPI, Regions (AZ, FL, TX), Primary Taxonomy (N/A), and Primary Service Address (4800 N. Scottsdale road, Scottsdale, Arizona 852517680). An orange callout box points to this information with the text: 'Includes TIN associated with Availity Account' and 'Managed via Account Administrator'. Below this, another orange box states 'TIN populates in Provider Filter'. On the right, the 'Provider List' section shows a table of providers. An orange dashed box highlights the 'PROVIDER FILTER (88/88)' indicator at the top of the provider list, with an arrow pointing to the TIN information in the organization details on the left. The provider list includes entries for 'Andover Cardiac Facility', 'Borras, Ruben Núñez', and 'BOTH A AND B, PROVIDER MxWaposs'.

IMPORTANT:

- If the Availity Essentials “Manage My Organization” dashboard does not list the desired Provider’s TIN, then the Provider will not show in the authorization system’s **Provider Filter** feature.
- If the Provider is not listed in the **Provider Filter**, then you can still submit an authorization request; however, you will not be able to view authorizations by the Provider.
- If you wish to add a Provider, you can refer to supplemental resources for Adding a Provider with or without an NPI in Availity Essentials for Provider Filter.

Dashboard

Once in the authorization system, a clear **Dashboard** displays by default. The circle next to **Provider Filter** will default to grey, which indicates no provider has been selected. Before searching for an authorization, you must apply the **Provider Filter** function.

To apply the **Provider Filter** function, click the **Provider Filter** button in the upper right-hand corner.

The screenshot shows the Magellan Healthcare Authorization Requests dashboard. The top navigation bar includes the Magellan logo, 'Authorization Requests', and a 'PROVIDER FILTER (0/12)' button highlighted with an orange box and an arrow. Below the navigation bar, there are two buttons: 'CREATE INPATIENT AUTHORIZATION' and 'CREATE SERVICE/PROCEDURE AUTHORIZATION'. The main content area is titled 'Dashboard' and contains a 'Filter By' section with the following fields:

- Member ID:
- Authorization Number:
- Diagnosis Type:
- Date of Service From Date: (MM/DD/YYYY)
- Date of Service To Date: (MM/DD/YYYY)
- Inpatient Service Types:
- Service/Procedure Service Types:

There are also two checkboxes: 'Include Closed' and 'Requested By Me'. Below the filters are 'FILTER' and 'RESET' buttons. The dashboard is divided into two summary sections:

- Inpatient Authorizations Summary:** Includes an 'EXTEND' button and a 'VIEW AUTH DETAILS' button. Below is a table with columns: Member Name, Authorization #, Determination Status, From Date, To Date, Servicing Facility, Diagnosis Code, and State. The table shows 'No records found'.
- Service / Procedure Authorizations Summary:** Includes an 'ADD/EXTEND SERVICE' button and a 'VIEW AUTH DETAILS' button. Below is a table with columns: Member Name, Authorization #, Determination Status, Start Date, End Date, and State. The table shows 'No records found'.

RESULT: A pop-up window will appear with a list of providers.

Apply Provider Filter

Follow the steps to apply the Provider to the authorization:

1. Select the box or search in the **Advanced Search field** for the appropriate provider in the **Provider List** window.

NOTE: You can select the box next to one or multiple providers/facilities to view. If you wish to view all providers in the **Provider Filter**, you can select the box next to the **Provider List** field at the top and all providers in the list will be chosen.

2. Click the **APPLY FILTER** button.

RESULT: The desired Provider(s) will be selected, ensuring proper routing of the authorization. This will take you back to the main dashboard.

The screenshot shows a web interface titled "Provider List". At the top right, there is a search bar with a magnifying glass icon and the text "Search by NPI". Below the search bar, there is a checkbox next to "DOE, JOHN" and the text "Location Name: PRIVATE PRACTICE". Below this, there is a table with three columns: "Provider ID", "Tax ID", and "NPI". The "Provider ID" column contains "XXXXXX456". The "Tax ID" column contains "XXXXXX456". The "NPI" column contains "XXXXXX456". Below the table, there is a section titled "Specialties" with a list of specialties: "Mental Health", "Marriage/Family Therapy", "Grief/Bereavement", "Adolescent (13-17)", "Victim Violence Abuse Trauma", "Older Child (6-12)", "Substance Abuse", "Adult (18-64)", "Depressive Disorders", "Anxiety Disorder", and "PTSD". Below the specialties, there is a section titled "Servicing address". At the bottom of the interface, there is a button labeled "APPLY FILTER" and a button labeled "RESET".

Provider ID	Tax ID	NPI
XXXXXX456	XXXXXX456	XXXXXX456

Specialties

- Mental Health
- Marriage/Family Therapy
- Grief/Bereavement
- Adolescent (13-17)
- Victim Violence Abuse Trauma
- Older Child (6-12)
- Substance Abuse
- Adult (18-64)
- Depressive Disorders
- Anxiety Disorder
- PTSD

Servicing address

APPLY FILTER RESET

Now that the Provider has been attributed to the authorization request, the **Provider Filter** will now be green, indicating the Provider has been selected. You must select the + symbol next to the **Filter By** field to expand the section and reveal all available filter options.

You can modify the **Date of Service From Date** and **Date of Service To Date** fields to extend or shorten searches.

Once a provider is selected, a list of both inpatient and outpatient authorizations for the past seven days will appear for the selected providers by default.

The screenshot displays the Magellan Authorization Requests dashboard. At the top right, a 'PROVIDER FILTER (12/12)' button is highlighted with a dashed orange box. Below it, the main dashboard area contains a search section with a 'Filter By' dropdown (also highlighted), Member ID, Authorization Number, and Diagnosis Type fields. The 'Date of Service From Date' and 'Date of Service To Date' fields are highlighted with a dashed orange box. Below these are checkboxes for 'Include Closed' and 'Requested By Me'. A 'RESET' button is highlighted with a dashed orange box and connected to the 'Filter By' dropdown by a dashed line. To the right of the search section are buttons for 'CREATE INPATIENT AUTHORIZATION' and 'CREATE SERVICE/PROCEDURE AUTHORIZATION'. Below the search section are two summary tables: 'Inpatient Authorizations Summary' and 'Service / Procedure Authorizations Summary'. The 'Inpatient Authorizations Summary' table has columns for Member Name, Authorization #, Determination Status, From Date, To Date, Servicing Facility, Diagnosis Code, and State. The 'Service / Procedure Authorizations Summary' table has columns for Member Name, Authorization #, Determination Status, Start Date, End Date, and State. Both tables include pagination controls at the bottom.

Member Name	Authorization #	Determination Status	From Date	To Date	Servicing Facility	Diagnosis Code	State
SMITH, JAMES	IPXXXXXXXX456	Approved	03/06/2023	03/10/2023	FACILITY OR CLINIC	F50.2	Open
SMITH, JOHN	IPXXXXXXXX210	Approved	03/06/2023	03/16/2023	FACILITY OR CLINIC	V97.33XD	Open
SMITH, JANE	IPXXXXXXXX987	Pending	03/06/2023	03/07/2023	FACILITY OR CLINIC	F31.5	Open
SMITH, SUE	IPXXXXXXXX325	Pending	12/15/2022	03/07/2023	FACILITY OR CLINIC	F31.12	Open

Member Name	Authorization #	Determination Status	Start Date	End Date	State
BROWN, JOHN	OPXXXXXXXX325	Pending	12/20/2022	03/20/2023	Open

IMPORTANT: When conducting a new search, always select the **RESET** button to clear any previous search criteria.