Remits User Guide

V17 – March 2025

Contents

Overview

Waystar's Electronic Remittance (Remits) solution allows you to download remittance files from participating payers. The files contain both payment information and explanation of benefits (EOBs). You can then view/print the remittance files in PDF format or download the files into your Practice Management System. Then, with the appropriate module in the Practice Management system, you can automatically create payment and adjustment records in your receivables system from the data in the file.

You must be enrolled with the payer to receive remittance files (see Enrollment Process). When the enrollment application is submitted, the Payer status is set to Active. This ensures that when the payer approves the application and starts creating remittance files, the files automatically begin posting to the website.

The Electronic Remittances system allows you to:

- Locate checks or patients within the remit files prior to downloading.
- View EOBs directly from the website in a PDF format (shown in example image below).
- Access Remittance files, ESPRs, and EOBs on the Waystar website for 90 days, PDFs of remits are available for up to 2 years. Files older than two years can be requested from the Payments or Remits screens if needed.


```
CIGNA HEALTH AND LIFE INSURANCE COMPANY
P. O. BOX 182223
CHATTANOOGA, TN 37422-7223

                                          EIN:
                                          NPI:
                                          NON-PAYMENT:
                                          CHECK DATE:        07/14/2021
                                          CHECK AMT:         0.00
                                          PRODUCTION DATE:   07/14/2021
```

Patient Name	Patient CNTRL Number	FRM DT	Cost	REPTD CHGS	DRG NBR	Outlier AMT	Reimb Rate	Allow / REIM	Interest
ICN Number	HIC Number	THR DT	COVDV	NCVD/Denied	DRG AMT	Deductibles	MSP PRI Pay	Proc CD Amt	Pat Refund
CLM Status	Medical Rec Number	Pat ST	NCVDV	Claim ADJS	DRG O-C	COINS AMT	Prof Comp	Line ADJ AMT	Per Diem AMT
Corrected Name	Hic CHG=Corrected ID | TOB	CV LN	NCVL	COVD CHGS	New Tech		ESRD AMT	CONT ADJ AMT	Net REIM
Ntl Provider ID									
		070821	0	655.00		0.00	0.000	0.00	0.00
		070821	0	655.00	0.00	0.00	0.00	0.00	0.00
1			0	0.00	0.00	0.00	0.00	0.00	0.00
NA		0	0	0.00	0.00		0.00	0.00	0.00

```
      TOTALS:     # OF CLAIMS    BILLED AMT    ALLOWED AMT    DEDUCT AMT     COINS AMT    PROV PAID    PROV ADJ     CHECK AMT
                      1            655.00         0.00          0.00          0.00         0.00         0.00         0.00

GLOSSARY:  Adjustment, Group, Reason, MOA, and Remark codes
CO-        Contractual obligations. The patient may not be billed for this amount
           96Non-covered charge(s). At least one Remark Code must be provided (may be comprised of either the NCPDP Reject
           Reason Code, or Remittance Advice Remark Code that is not an ALERT.) Note: Refer to the 835 Healthcare Policy
           Identification Segment (loop 2110 Service Payment Information REF), if present.
N448       This drug/service/supply is not included in the fee schedule or contracted/legislated fee arrangement
```

Accessing the Remits solution

To access the Remits Solution, click the **CLAIMS PROCESSING** tab and select the **Remits** banner in the left navigation list. Then choose a Remits feature from the list displayed.
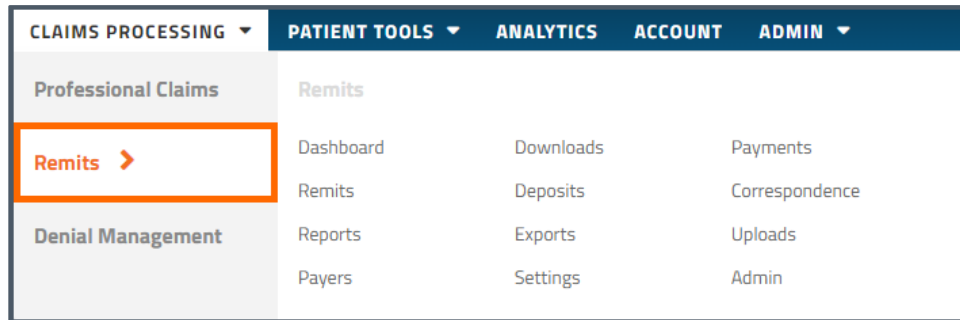
When you choose a feature, it will open, and the screen name will highlight in the menu bar at the top of the display area. To move to another screen, click the appropriate tab.
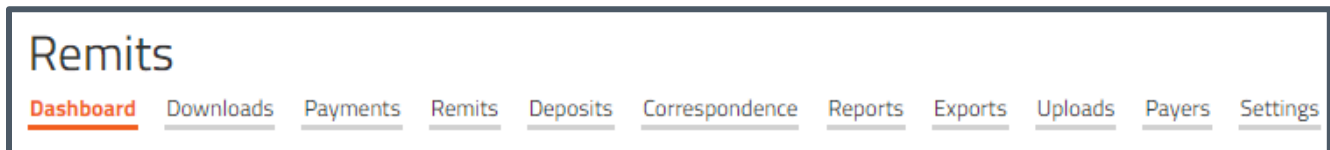
Remits dashboard

The **CLAIMS PROCESSING** > **Remits** > **Dashboard** screen is a general landing area for all basic electronic remittance usage. The screen is divided into seven sections:

1. **SEARCH REMITS menu** – Here you can quickly search for specific payments and remittances using the following search criteria:

   - **Payments** search:
     - Payment Number
     - Payment Amount
     - Payment Date

   - **Remits** search:
     - Patient Name
     - Patient Account #
     - Service Date

2. **Your Top Used Reports** – Provides links to your most frequently used Remits reports (based on the past 30 days).

   Note: If you have never run a Remits report, this section will display a default set of reports. This default report set includes the Remits Billing report, Recent Payment Detail report, Payment Adjustment Detail report and the Request Remittances report. See the Reports section for descriptions of these reports.

3. **Your Action Center** – This section lists any new, unarchived Remits transactions that have occurred since your previous login. **New Downloads**, **New Payments**, **New Deposits**, **New Correspondences** and **Failed Deposit Correspondences** are set up as numbered links, which will direct you to the corresponding, pre-filtered Remits screen displaying the associated transactions.

   - If you do not have the Remits & Deposit Management application, you will not see New Deposits in Your Action Center. Additionally, you will not see New Correspondences or Failed Deposit Correspondences in this section if you do not have Payer Lockbox.

   - Your Action Center displays any unarchived transactions that have occurred in the previous 90 days. For instance, all downloads posted to the Downloads screen in the previous 90 days will display in this menu under New Downloads. If no new Remits transactions have posted to your account in this timeframe, you will not see any items in the Your Action Center menu.

4. **Top Payer Activity** – Displays the top 10 payers in your account based on the *highest quantity* of payments received for the current day.

5. **New Payer Activity** – This section will show the most recent payers whose first remittance file has posted to your account.

6. **Payment Activity By Day** – Displays the number of payments posted to your account for each day of the current week. Each of the payment values are set up as links, which will direct you to a pre-filtered Payments screen displaying the corresponding payments and payment details.

7. **Payment Summary** – This section displays the most recent ERA payments that have not been downloaded to your practice management software.

Downloads screen

Most payers create electronic remittance files during the overnight hours, and they become available on the website the next morning. If you are an FTP user, your remittance files are automatically dropped into the FTP directory. You would then pull the files from the FTP directory to be downloaded into your practice management system (PMS). FTP users use the Claims Processing > Remits > Downloads screen only to download files that they have requested to be re-queued. Non-FTP users will use this screen to download all their remittance files to their PMS.

To download a remittance file:

1. Go to **Claims Processing > Remits > Downloads**. Files not yet downloaded are displayed by default.

2. To narrow the search, enter any of the following criteria in the **Search** menu on the left side of the screen:

   - **File Date:** Displays remits created within the specified date range.

     Note: This is typically the date the file became available from the payer; however, if an individual check was re-queued to download, a new file would be created and the requeue date will be used for this search.

   - **Payer:** Displays remits associated with the entered payer name or ID. This field includes a smart search (eyeglasses icon) feature allowing you to search for a payer on this screen.

   - **Payment Number:** Displays remits matching the entered payment transaction or check number.

     Note: To find remits using this field, you can enter the last few digits of the payment transaction or check number.

   - **Payment Amount:** Displays downloads that contain the entered check amount. This search could produce a download containing a single payment with the entered check amount, or it could produce a download containing multiple payments with that check amount.

   - **Download Amount:** Displays downloads matching the entered total payment amount as specified in the ERA file. This value is the *total* amount included in the download (manual and auto downloads) and may include several payments.

   - **View Options:** Select one of the following from the dropdown:

     – **All:** Displays both archived and unarchived remits.

     – **Unarchived:** Displays only remits that have not been archived.

3. Locate the file to download (into the PMS) and click the associated row or the **+** button located on the left side item. This will expand the download item.

4. Click the **Download** icon:

The file automatically downloads to your system.

5. After the file has downloaded, follow the instructions specified by your PMS for automatic payment posting within your PM system.

Note: If a single check in a previously downloaded file containing multiple checks is re-queued (using the **Requeue** link on the **Remits > Payments** screen), a new file will be created, containing the single check.

Searching for Downloads

Click the **+** (expand row) button in the Search or ID Search sections (see below) to find the download item you are looking for.

Search

Use this section to search for specific remittance downloads. Filter the search results with the following options:

*   File Date
*   Payer
*   Payment Number
*   Payment Amount
*   Download Amount
*   View Options
    –   Unarchived
    –   All

Once you have entered your search criteria, click the **Search** button.

ID Search

Use this section to search for a specific transaction ID that would be included with a batch of payments.

Downloads Toolbar

Use the toolbar at the top of the screen to manage your selected download files. Select the desired files and click any of the following to perform the corresponding action:

- **View Selected:** Remove all downloads from view except for the selected item(s).

- **Add Note:** Opens the Notes popup where you can add a note to the selected download(s).

- **Archive:** Hide the download(s) from view.

- **Unarchive:** If the selected download(s) have previously been archived, click this button to unhide them.

- **Export:** Send the selected download(s) to the Remits > Exports screen where you can download them in the selected format (Excel or PDF).
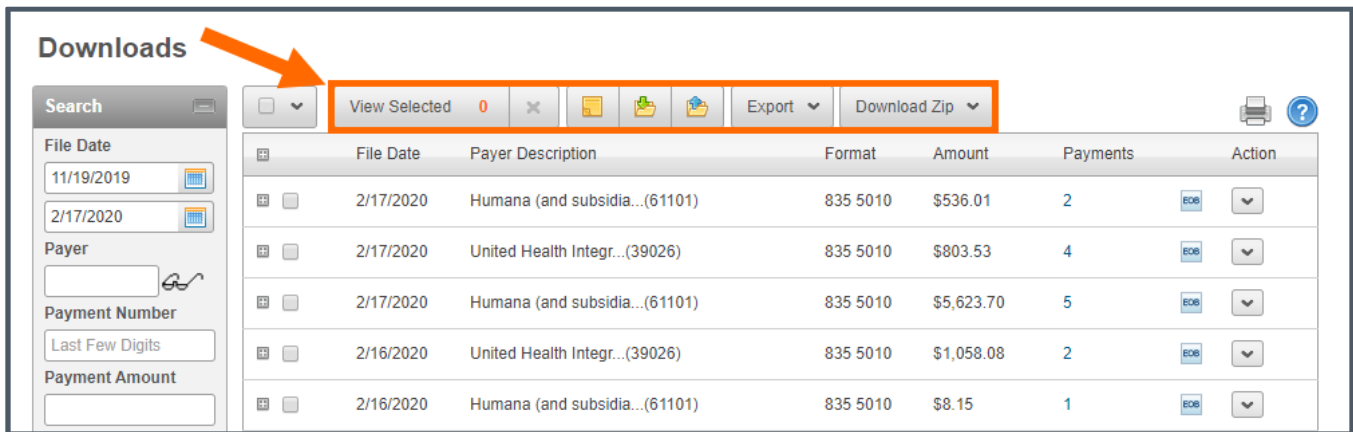
- **Download to Zip:** Download the selected files in any of the following formats:

  - 835

  - EOB

  - Text EOB

    Note: This option is available only if you have the Stage Human Readable TXT EOBs In FTP Directory FTP setting activated on the Remits > Settings > Manage FTP Settings screen. See the Settings Screen section for more information on how to modify your Remits settings.

  - SPR

  Note: You can add up to 25 downloads to a single zip file.
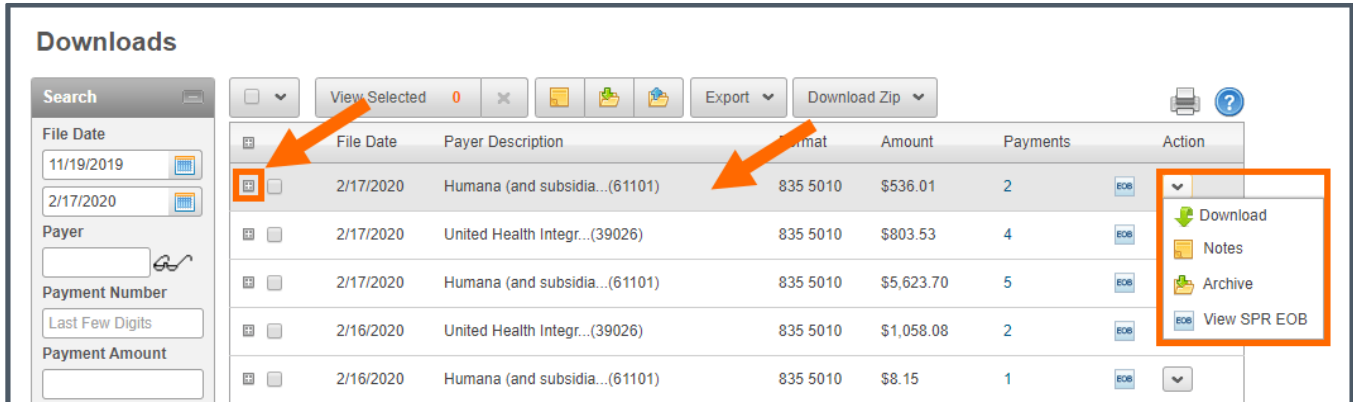
Download Actions

Click the **+** (expand row) button, click the row or hover over the arrow in the **Action** column associated with a download item to perform the following actions:

- **Download:** Downloads the file into your PMS.

- **View Txt EOB:** View a text file of all EOBs associated with the remittance.

  Note: This option is available only if you have the Stage Human Readable TXT EOBs In FTP Directory FTP setting activated on the Remits > Settings > Manage FTP Settings screen. See the Settings Screen section for more information on how to modify your Remits settings.

- **View EOB:** Create and display a report (PDF format) of all EOBs associated with the remittance.

- **View SPR EOB:** Create and display the Standard Paper Remit (PDF format) including all EOBs associated with the remittance.

- **Notes:** Add an internal note to the remittance file. The note will display only on the clearinghouse site and can be viewed by all users on the account. The most recent note added to the remittance file will display, along with the date, time and user who added the note.

- **Archive:** Hide the remittance in the clearinghouse system. The remittance will no longer display in the account or in reports, but it can still be searched for.

Download Details

Click the "+" button next to each download or click on the row to display additional details:

- **Download ID**
- **Created By**
- **Created On**
- **Last Downloaded By**
- **Last Downloaded On**
- **Archived By**

Payments screen

A remittance payment can cover payments for a single claim, multiple claims for a single patient or claims for multiple patients.
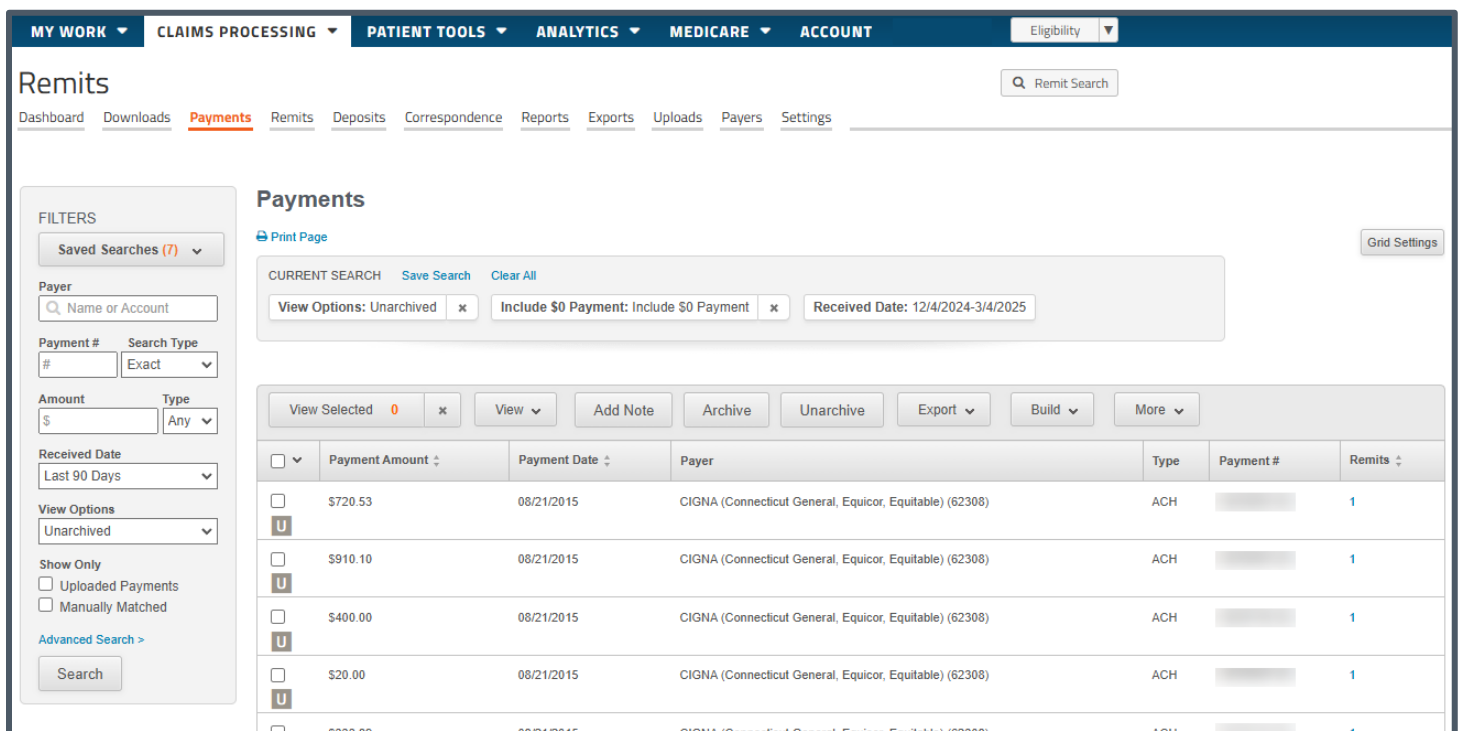
Searching remittance payments

This section explains how to search for remittance payments. When finished, the list of remittance payments will update to reflect your search criteria.

Searching

To search for remittance payments:

1. Go to **CLAIMS PROCESSING** > **Remits** > **Payments**.

   The Payments screen will open displaying a list of payments.

2. Enter any of the following search fields, and then click the **Search** button.

   - **Payer**: Enter any part of the payer's name or the payer's ID, or search for the payer using the Smart Search (eyeglasses) feature.

   - **Payment #**: Enter a payment number associated with the EFT or Check Number—use this field along with Search Type. A file can contain one or more checks. Searching by a specific check number will display the file that contains the specified check and other checks contained within the file.

   - **Search Type**: Select how you want to match the Payment #: **Exact**, **Contains**, **Begins With**, or **Ends With**. The default is **Exact**.

   - **Amount**: The exact check amount.

- **Type**: The type of payment that was posted:
  - Automated Clearinghouse/EFT (**ACH**) – This code designates that payment was processed electronically. An ACH/EFT payment is similar to direct deposit, when your payments are deposited into your bank account automatically.
  - Check (**CHK**) – This code indicates that a check has been issued for payment.
  - Non-Payment Data (**NON**) – This code indicates remittance information without any associated payment.
  - Financial Institution Option (**BOP**) – This code indicates that the third-party processor will choose the method of payment.
  - Federal Reserve Funds/Wire Transfer (**FWT**) – This code indicates that the funds were sent through the wire system.

- **Received Date**: Select a date range during which the remit was received and posted in Waystar.

  Note: The default date range when searching for received and posted remits is 90 days.

- **View Options**: Select either **All** or **Unarchived** payments.

- **Show Only**: Select a checkbox to show only Uploaded Payments or only Manually Matched payments.

To view these additional search options, click the Advanced Search link. The MORE OPTIONS pane will open to the right of the Search area.

- **Payment Date**: The date the payer created the check (or EFT).

- **Deposit Date**: Displays payments with a deposit date in the entered date range.

- **Payee NPI**: The NPI of the provider with whom the payment was associated.

- **Downloaded**: Select **All**, **Yes**, or **No** to display all payments, only those that were downloaded or only those that were not downloaded.

- **Deposit Status**: Select **All**, **Deposits Received**, or **No Deposit** to display all payments, those in which Waystar has received a deposit or those in which Waystar has not received a deposit.

- **Conversion Status**: Select **All**, **Converted**, or **Non-Converted** to display all payments, those that have been converted to an 835 or those that have not been converted to an 835.

- **Payment Splits**: Select the type of split payments to include in the search:
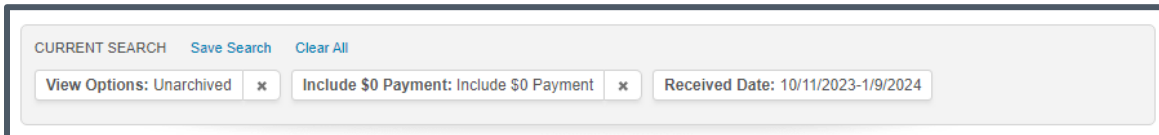
  Note: This option requires that you have the Rebatcher function.

  - **All**
  - **Total Payments**
  - **Split Payments**
  - **Original Payments**

- **Filter options**: Click the corresponding checkbox(es) to include the follow payment types in the search results:

  - **$0 Payment**
  - **Pending**
  - **Duplicates**

- **Payment ID**: The payment identification assigned to the remit file by Waystar.

- **Download ID**: The identification assigned to a remit file once it is downloaded in the Waystar system

- **Upload ID**: The identification assigned to the remit file once it is uploaded in the Waystar system.

The list of payments will update to reflect any search criteria you entered. The CURRENT SEARCH area at the top of the screen will indicate the search criteria used.

3. To remove, click the **X** to the right of the search criteria.
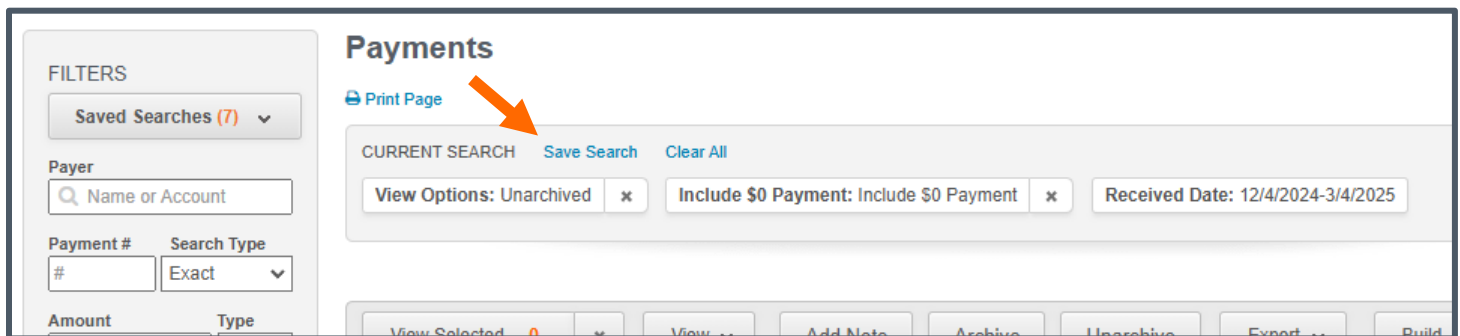
Saving a search

You can save your searches for future use.

To save a search:
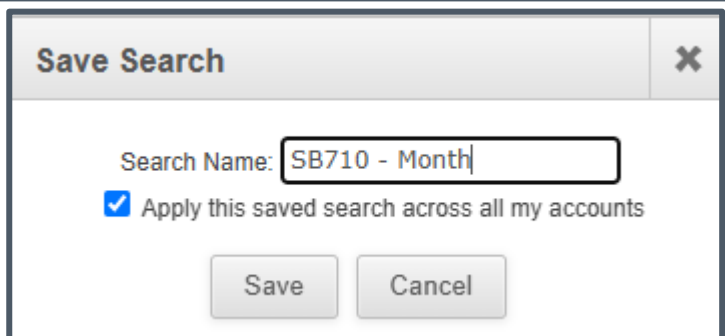
1. Perform a search.

2. At the top of the CURRENT SEARCH area, click the **Save Search** link.

The Save Search screen will open.

3. Enter the name of the search.

4. *OPTIONAL*. To use this saved search across all accounts, select the **Apply this search across all my account**s checkbox.

5. Click the **Save** button.

The search will appear under the **FILTERS** heading in the **Saved Searches** dropdown.

Using a saved search

To use a saved search:

- To open a saved search, select it from the **Saved Searches** dropdown under FILTERS near the top left of the screen.

- To delete a saved search, locate it in the **Saved Searches** dropdown, and click the delete icon on the right side.
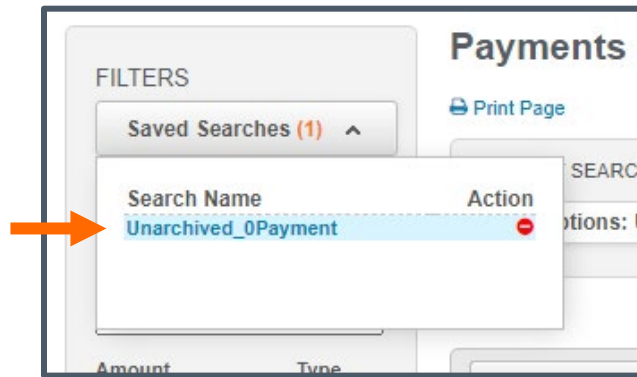
The Delete Search screen will be displayed. To confirm you wish to delete the search across any accounts to which it applies, click the **Delete** button.
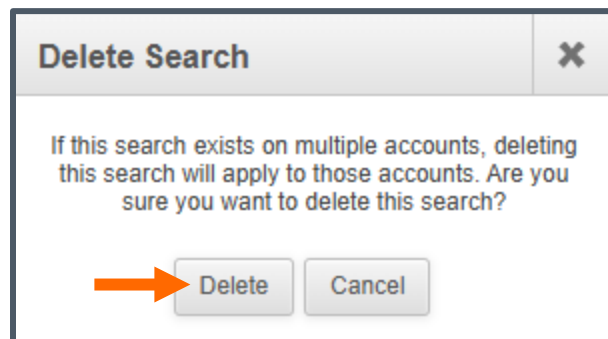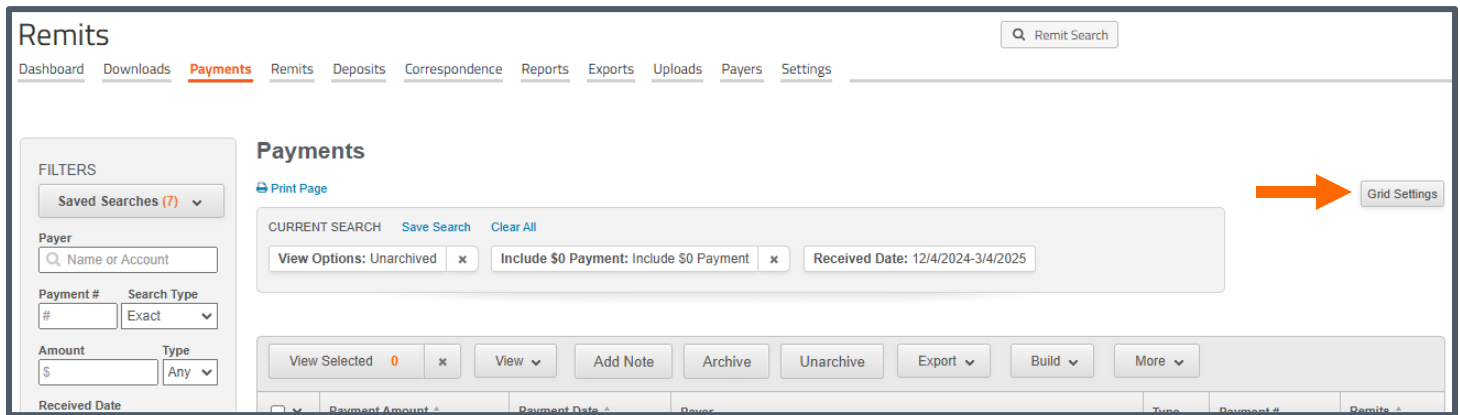
Updating the payment list/grid

This section explains how to update the payments list (grid settings). You can update what columns display and in what order.

To update the payments list/grid:
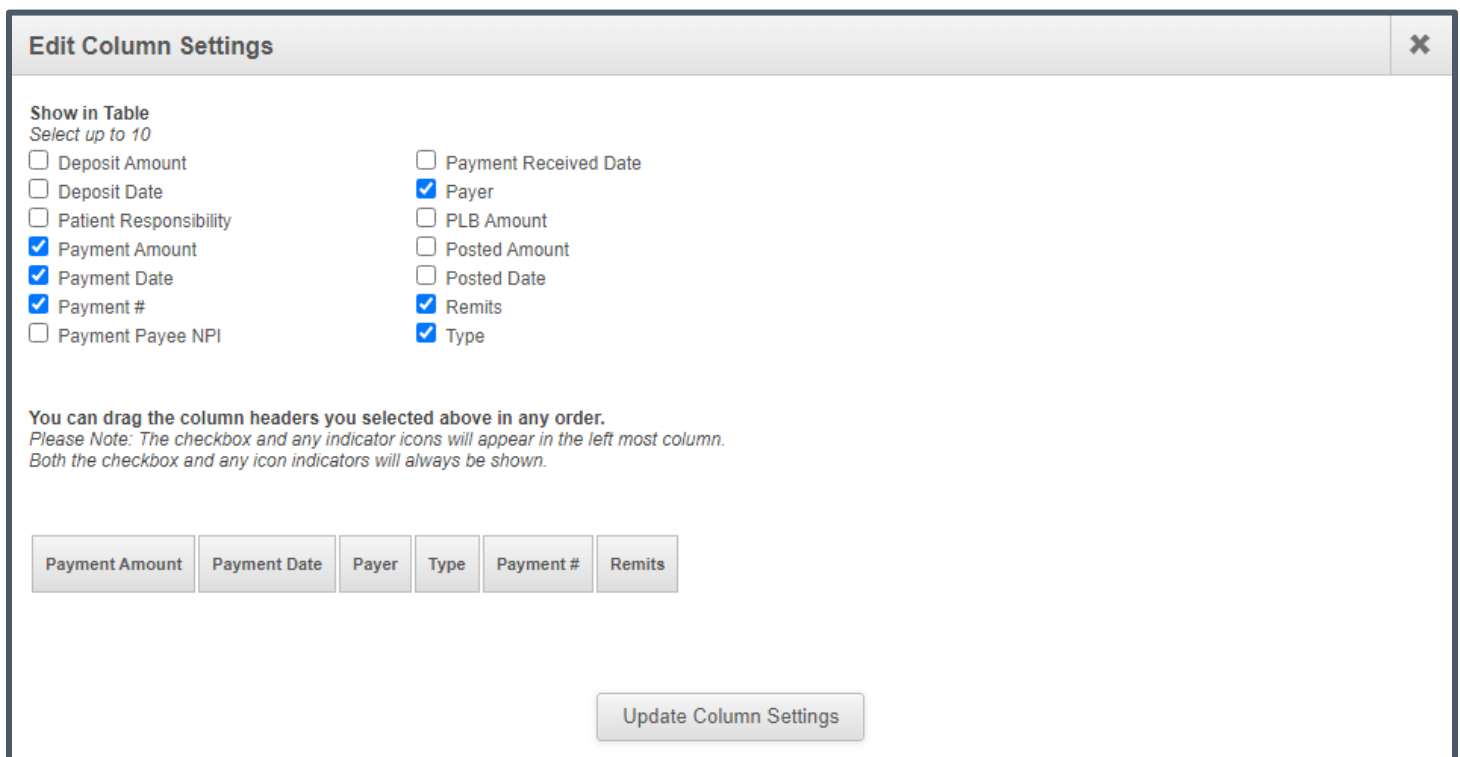
1. From the Payments screen, click the **Grid Settings** button.

The Edit Column Settings screen will open.

2. Select/deselect checkboxes at the top of the screen to add or remove columns from the payments list.

When selected/deselected, the column will appear (or disappear) from the row of column headings below the checkboxes.

3. To change the order of the columns, click-and-drag a column into any position.
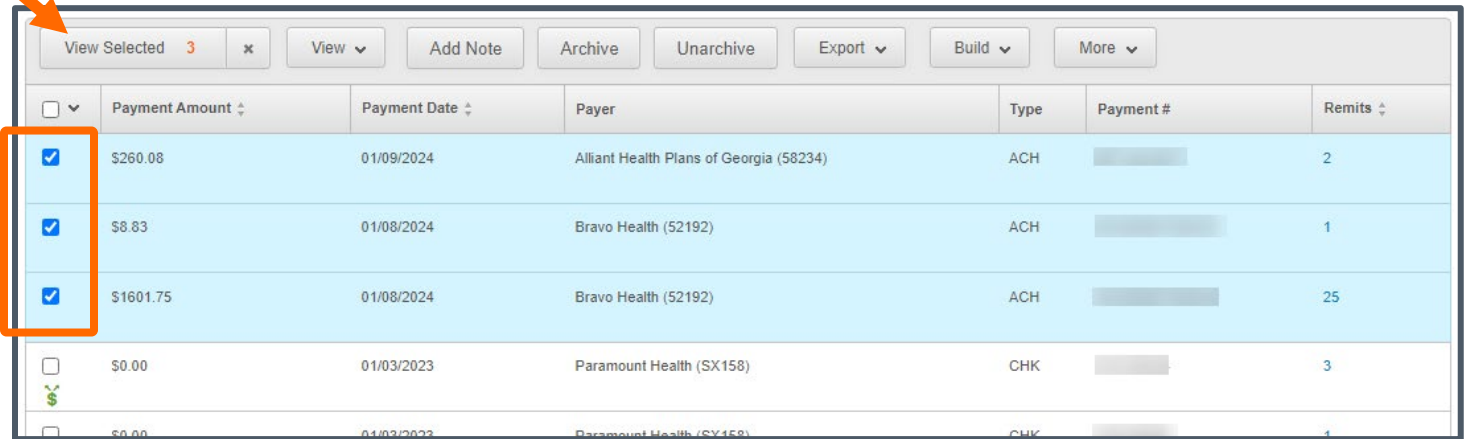

4. When finished updating columns, click the **Update Column Settings** button.

Viewing selected payments

This section explains how to narrow the payments in the list to a select few.
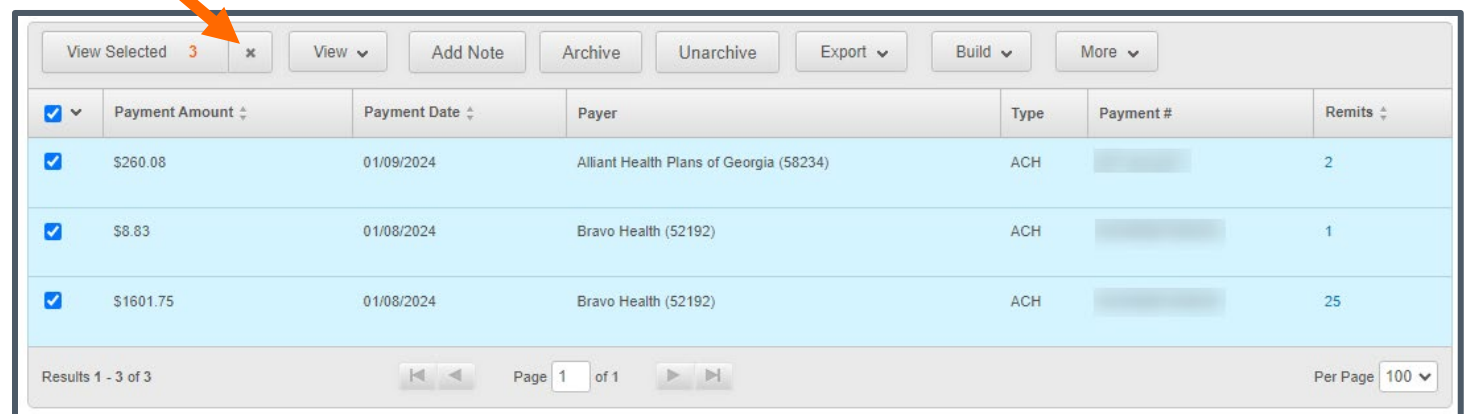
To view selected payments:

1. As needed, perform a search.
2. Select one or more checkboxes on the left side of a payment row.
3. From the toolbar, click the **View Selected** button.

The list will display only those selected payments.

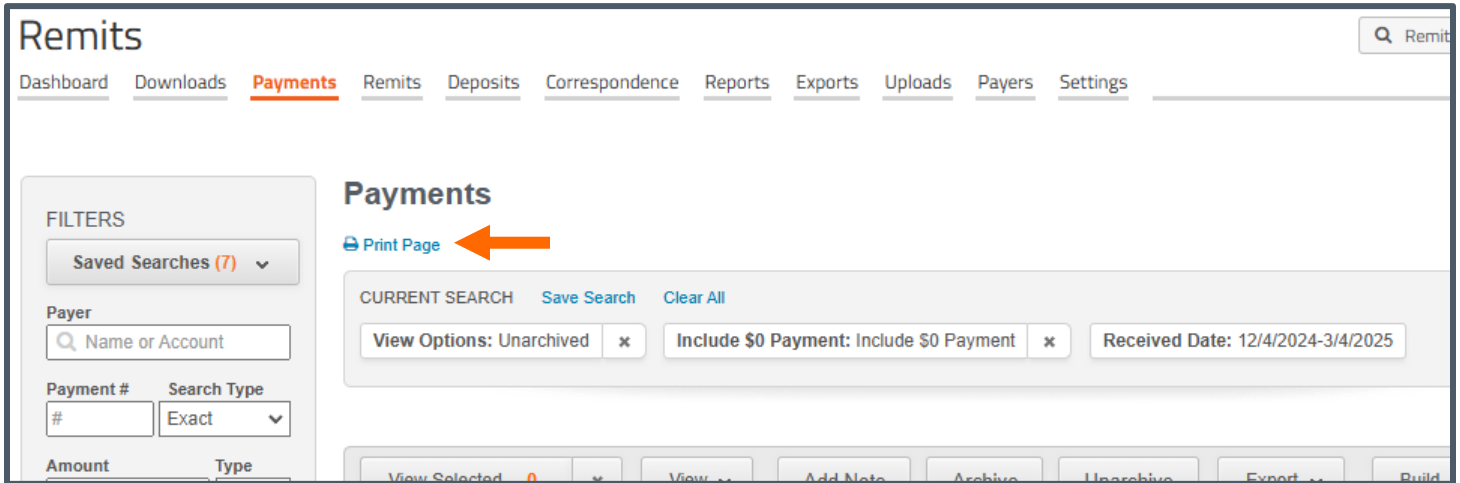4. To revert to the prior list, click the **X** to the right of the View Selected button.

Printing the Payments list

This section explains how to print the payments list on the current page of the Payments screen.

To print the payments list:

1. As needed, perform a search.
2. Click the **Print Page** link.

The Print screen will open.

3. As needed, select a printer and any other options, and then click the **Print** button.

Viewing EOBs

This section explains how to view individual and multiple EOBs (paper and Standard Paper Remit (SPR)) for the remittance payment.

Note: Payment files that are still being processed will *grey out* any actions associated with viewing the EOB.

Viewing individual paper EOBs
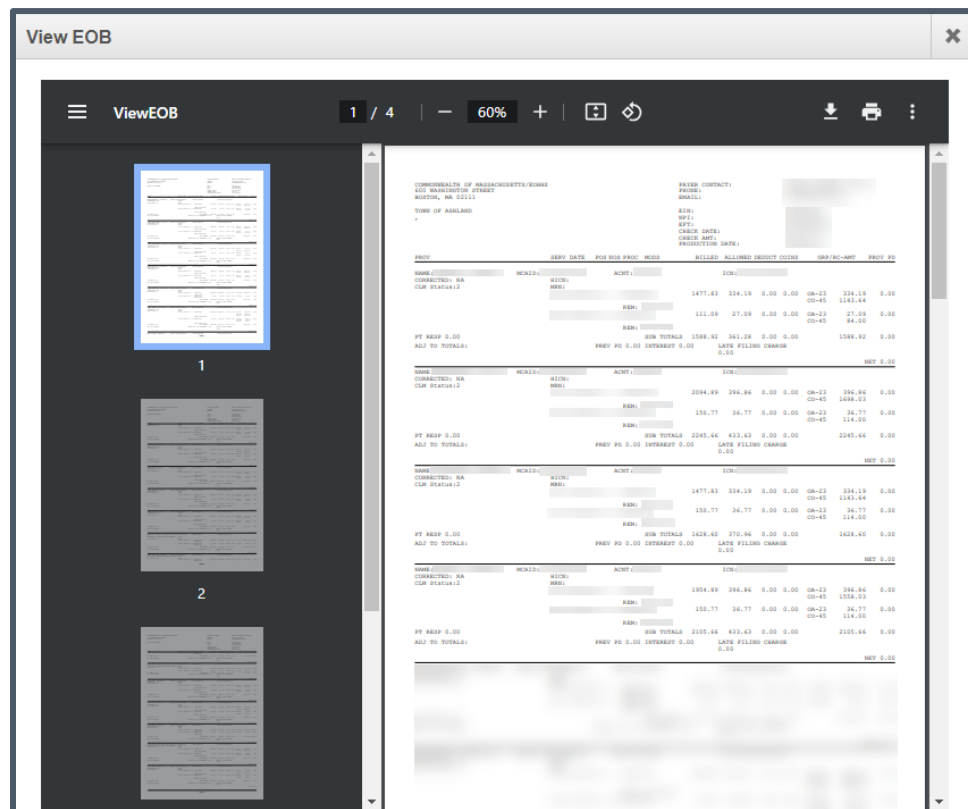
This section explains how to view individual paper EOBs for the remittance payment.

To view individual print EOBs:

1. As needed, perform a search.
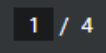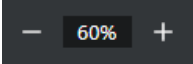
2. Hover your cursor over the appropriate payment row.

   The Action menu will open below the row.

3. Click the **View EOB** button.
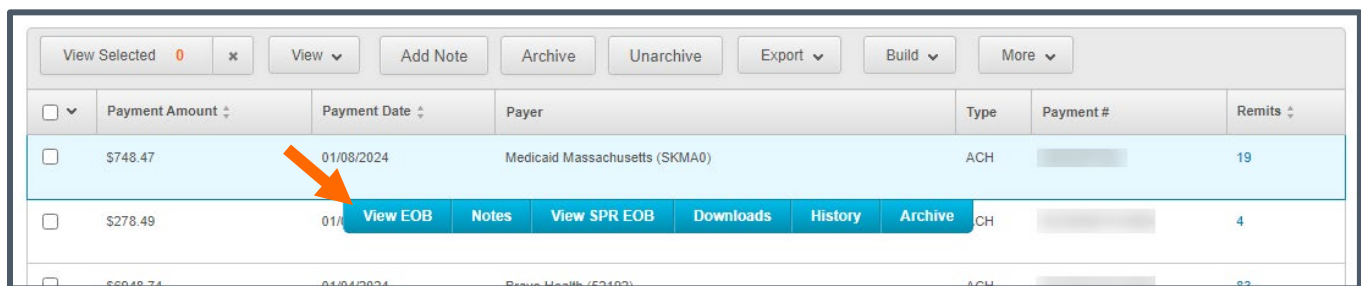
The View EOB screen will open displaying a downloadable and/or printable version of the EOB.

4. From the ViewEOB screen, you can do the following:

- Click the ☰ icon in the upper-left corner to open and close the left pane of the screen.

- 1 / 4 indicates the number of pages in the EOB. You can enter a number in the field on the left to jump to that page.

- Use — 60% + to zoom in or out on the EOB.

- Click the ⊡ icon to fit the EOB to the size of the screen.

- Click the ⟳ icon to rotate the EOB.

- Click the ⬇ icon to download the EOB. A screen will open that will allow you to save the EOB.

- Click the 🖶 icon to print the EOB. A print screen will open that will allow you to print the EOB.

- Click the **More actions** icon for additional options:

    - **Two page view**: Click to toggle between viewing one or two pages of the EOB.

    - **Annotations**: Click to toggle any annotations on or off.

    - **Document properties**: Opens a screen that displays properties.
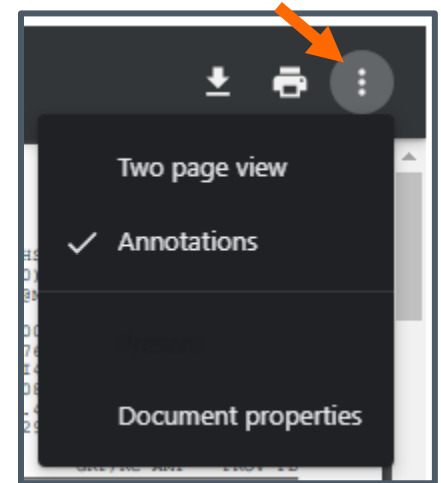
Viewing multiple paper EOBs

This section explains how to select multiple payments and view their EOBs together.

To view multiple print EOBs:

1. As needed, [perform a search](#).

2. Select one or more checkboxes on the left side of a payment row.

    You can also use the dropdown in the far-left column header to select the first 1000 rows, unselect all rows, select all rows on the current page, or unselect all rows on the current page.

3. From the toolbar > **View** dropdown, select **Paper EOBs**.

The View EOB screen will open with the selected payment EOBs available.

4. For information on how to use the View EOB screen, see the [Viewing individual paper EOBs](#) section.

Viewing individual SPR EOBs

This section explains how to view an individual SPR EOB, which is a more detailed, payer-preferred version.

Note: The SPR EOB view is intended for Institutional Claims. This view will load for Professional Claims as well, but some of the data fields will be empty.

To view the SPR EOB:

1. As needed, perform a search.

2. Hover your cursor over the appropriate payment row.

   The Action menu will open below the row.

3. Click the **View SPR EOB** button.

   The EOB screen will open.

4. To print the SPR EOB, click the **Print** button in the upper-right corner. A print screen will open that will allow you to print the EOB.

Viewing multiple SPR EOBs

This section explains how to view multiple SPR EOBs, which are a more detailed, payer-preferred version.

Note: The SPR EOB view is intended for Institutional Claims. This view will load for Professional Claims as well, but some of the data fields will be empty.

To view multiple SPR EOBs:

1. As needed, perform a search.

2. Select one or more checkboxes on the left side of a payment row.

   You can also use the dropdown in the far-left column header to select the first 1000 rows, unselect all rows, select all rows on the current page, or unselect all rows on the current page.

3. From the toolbar > **View** dropdown, select **Paper EOBs**.

The EOB screen will open with the selected payment EOBs available.

4. To print the SPR EOBs, click the **Print** button in the upper-right corner. A print screen will open that will allow you to print the EOB.

5. To view all the SPR EOBs, use the scrollbars.

Working with notes

This section explains how to add an internal note to the remittance file. The note will display only in the Waystar portal and can be viewed by all users on the account.

Notes for individual payments

To work with notes for individual payments:

1. As needed, perform a search.

2. Hover your cursor over the appropriate payment row.

   The Action menu will open below the row.

3. Click the **Notes** button.
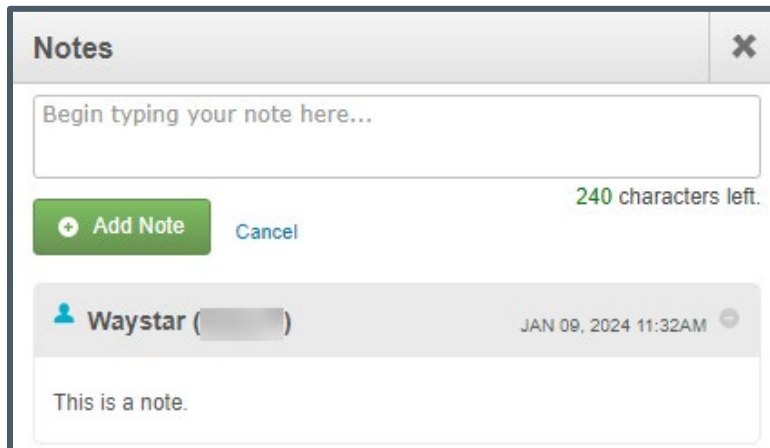
The Notes screen will open.

4. Type a note into the field.

5. Click the **Add Note** button.

   The note will appear at the bottom of the Notes screen. You can add multiple notes as needed.

6. When you close the Notes screen, the note will appear in the payment row.
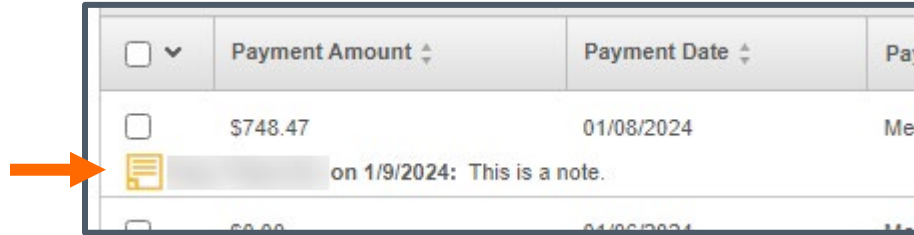
7. To delete a note, hover over the row and click the Notes button. From the Notes window, click the delete icon on the right side.

The note will delete from both the Notes screen and the payment row.
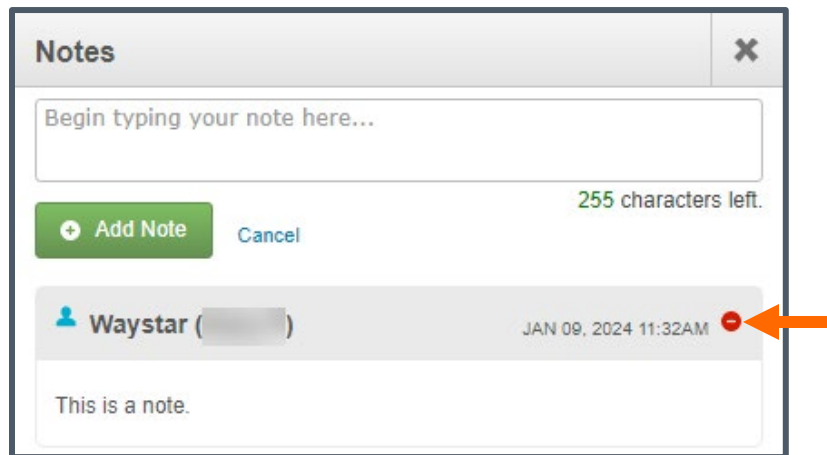
Notes for multiple payments

To work with notes for multiple payments:

1. As needed, perform a search.

2. Select one or more checkboxes on the left side of a payment row.
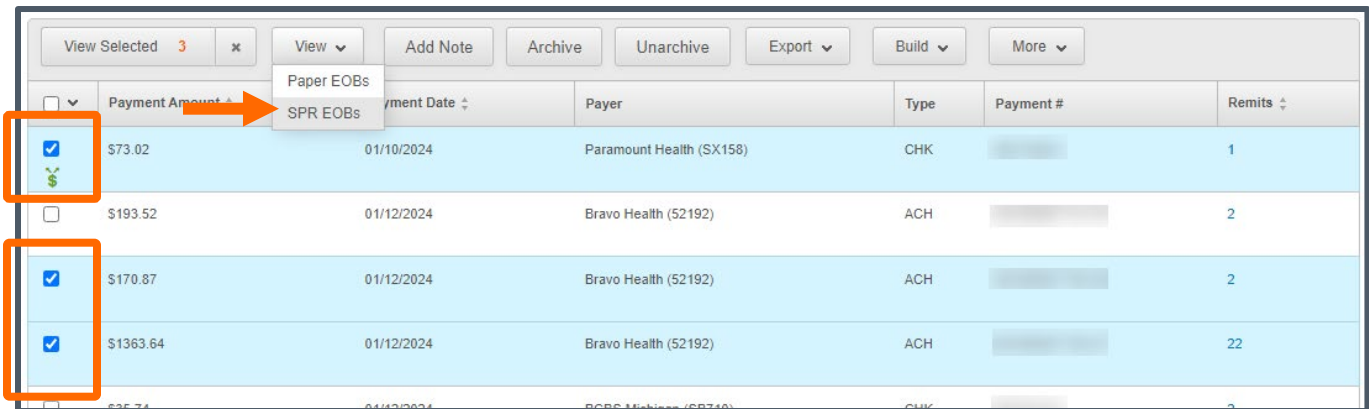
   You can also use the dropdown in the far-left column header to select the first 1000 rows, unselect all rows, select all rows on the current page, or unselect all rows on the current page.

3. From the toolbar, click the **Add Note** button.

   The Notes screen will open.

4. For information on how to use the Notes screen, see the Notes for individual payments section.

Viewing payment downloads

This section explains how to view downloaded payments, which you can download again into your PM system. To view and work with downloads, see the Downloads Screen section.

To view payment downloads:

1. As needed, perform a search.

2. Hover your cursor over the appropriate payment row.

   The Action menu will open below the row.

3. Click the **Downloads** button.
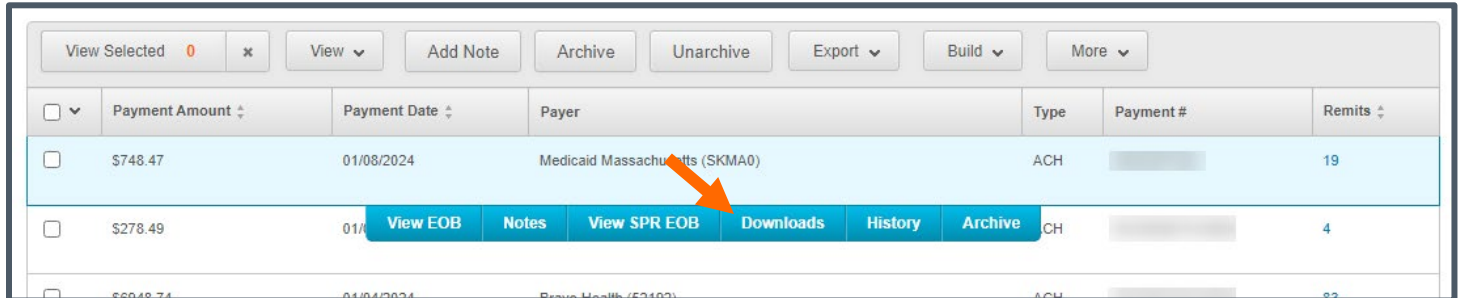
The Downloads screen will open.
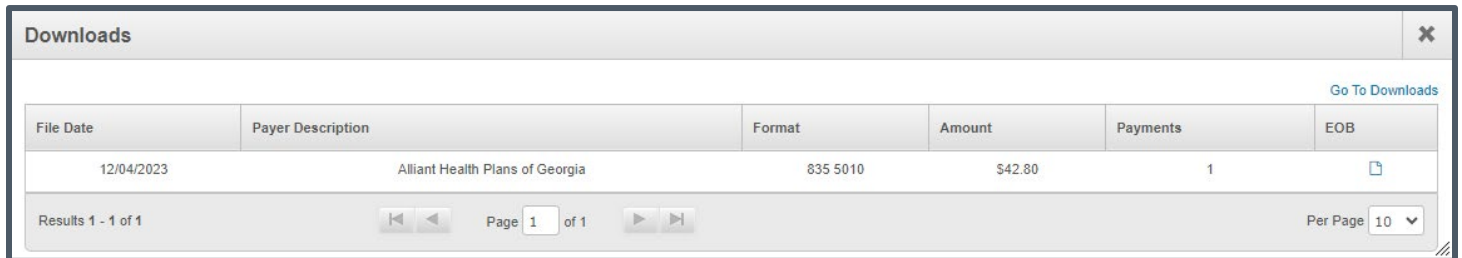
4. From the above **Downloads** screen, you can do the following:

   - **Go To Downloads**: This link takes you to the Remits > Downloads screen.

   - **View the EOB**: Click the 📄 icon in the EOB column to open the EOB. For information on how to use the View EOB screen, see the Viewing the EOB section.

   - **Navigate**: Use the navigation controls at the bottom of the screen if multiple pages of downloads appear.

   - **Close the screen**: Click the **X** in the upper-right corner of the screen.

Viewing payment history

This section explains how to view a record of all actions performed on the payment.

To view payment history:

1. As needed, perform a search.

2. Hover your cursor over the appropriate payment row.

   The Action menu will open below the row.

3. Click the **History** button.
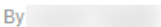
   The PAYMENT DETAILS history screen will open.
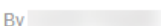
4. To save the original 5010 file, click the **Original File** link, which will open a Save As screen.
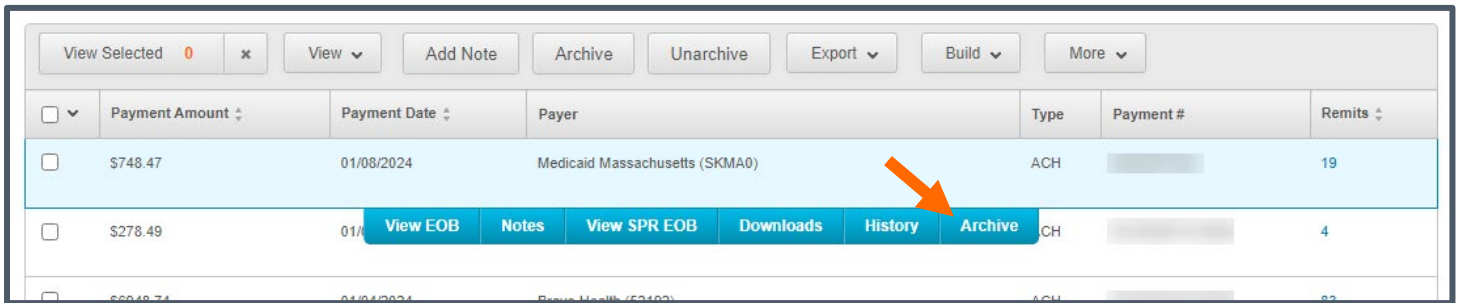
Archiving/unarchiving a payment

This section explains how to archive a payment in the Waystar system, removing it from the screen and from reporting.

Archiving/unarchiving individual payments

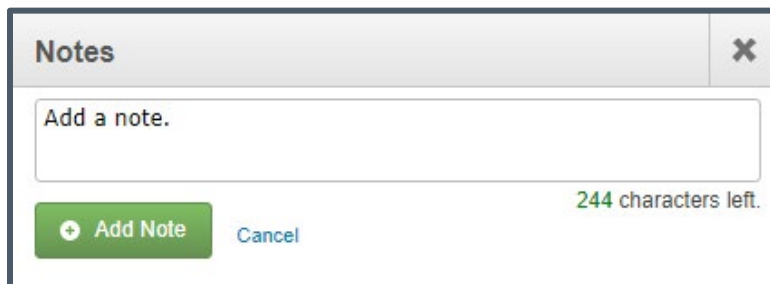To archive a payment:

1. As needed, perform a search.

2. Hover your cursor over the appropriate payment row.

   The Action menu will open below the row.

3. Click the **Archive** button.

The payment immediately archives, the archive icon will appear in the payment row, and the button in the Action menu changes to Unarchived.

4. To unarchive a payment, hover your cursor over the row and click the **Unarchive** button.

Archiving/unarchiving multiple payments

To archive/unarchive multiple payments:

1. As needed, <u>perform a search</u>.

2. Select one or more checkboxes on the left side of a payment row.

   You can also use the dropdown in the far-left column header to select the first 1000 rows, unselect all rows, select all rows on the current page, or unselect all rows on the current page.
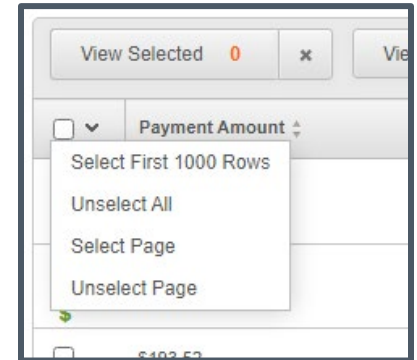
3. From the toolbar, click the **Archive** button.

   The selected payments will immediately archive and archive icons will appear in the selected rows.

4. To unarchive payments, select one or more checkboxes on the left side of an archived payment row, and then click the **Unarchive** button in the toolbar.

Exporting payments

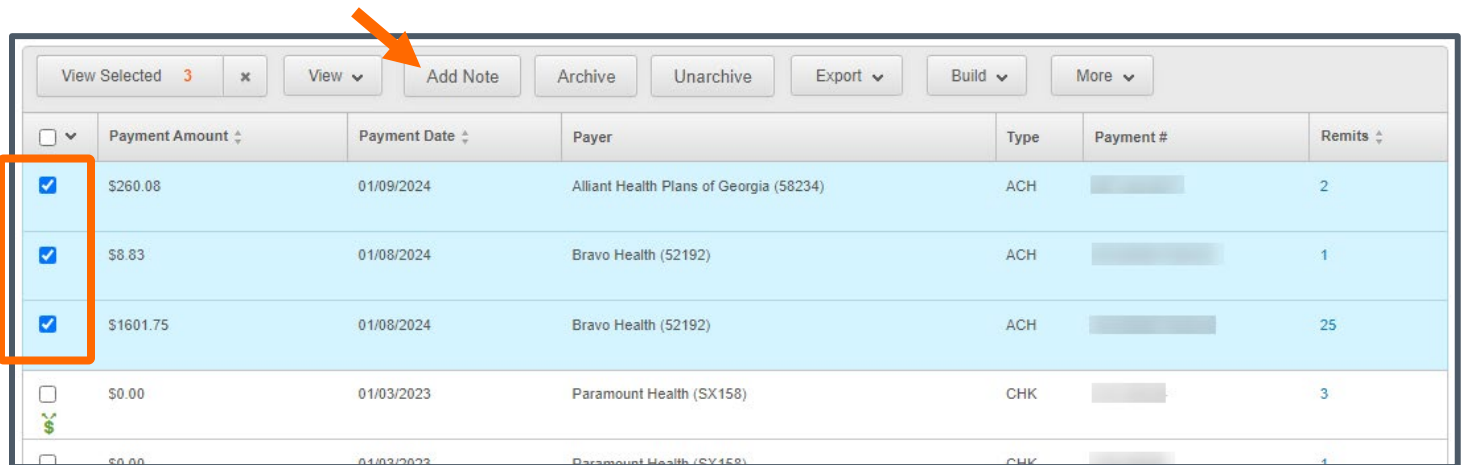This section explains how to export one or more payments to either a Microsoft Excel spreadsheet or as a PDF.

To export payments

1. As needed, perform a search.

2. Select one or more checkboxes on the left side of a payment row.

   You can also use the dropdown in the far-left column header to select the first 1000 rows, unselect all rows, select all rows on the current page, or unselect all rows on the current page.
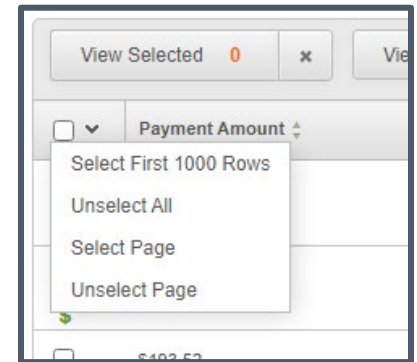
3. From the toolbar > **Export** dropdown, select either **Excel** or **PDF**.
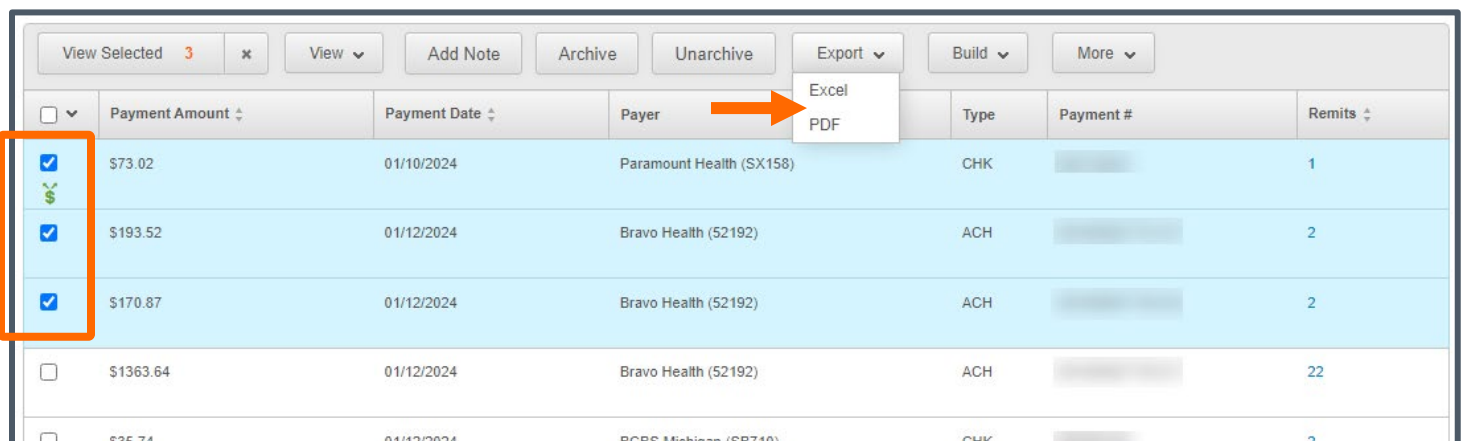
   The Custom File Name screen will open.

4. Enter a unique File Name and then click the **Export** button.

   The export will appear on the Exports screen.

Building a payment remittance download

This section explains how to build a download of remittances for the selected payment(s), grouping them by additional separation criteria. For more information about downloads, see the Downloads screen section.

To build a payment remittance download

1. As needed, perform a search.

2. Select one or more checkboxes on the left side of a payment row.

   You can also use the dropdown in the far-left column header to select the first 1000 rows, unselect all rows, select all rows on the current page, or unselect all rows on the current page.
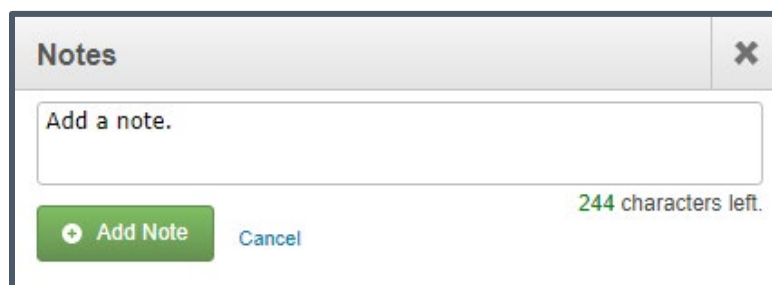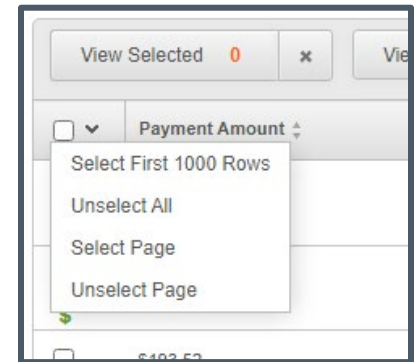
3. From the toolbar > **Build** dropdown, select **By Payer** or **By Payment**.
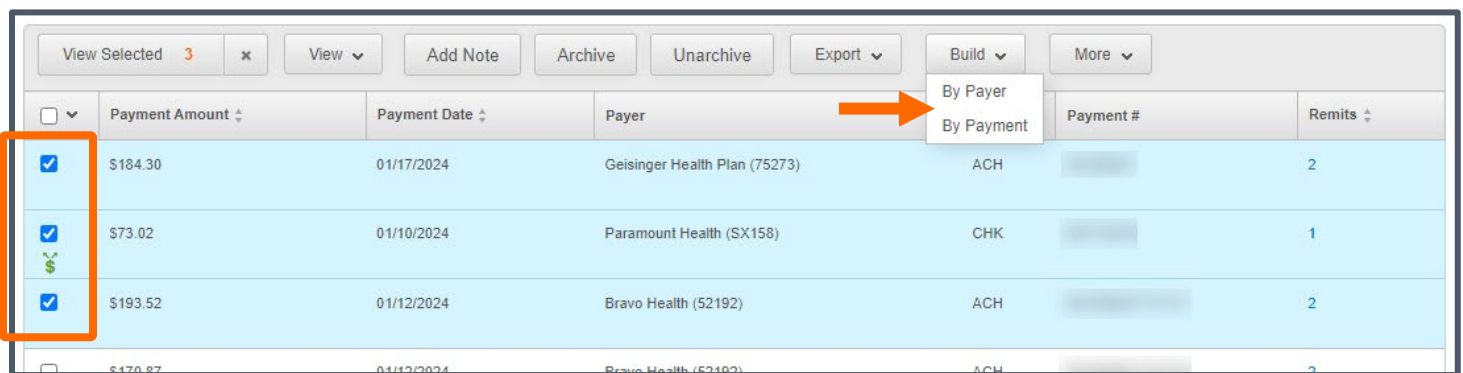
   a. If you select **By Payer**, the Additional Sort Options screen will open, allowing you to download remittances for the selected payment(s) and group them by additional separation criteria:

      • **None:** The payments will be grouped by payer (i.e. available as a payer download file).

      • **NPI:** The payments will be further grouped by NPI.

      • **Tax ID:** The payments will be further grouped by Tax ID.

      • **Identifier/Division ID:** The payments will be further grouped by the check identifier/division ID.

      • **Check Date:** The payments will be further grouped by the date listed on the check.
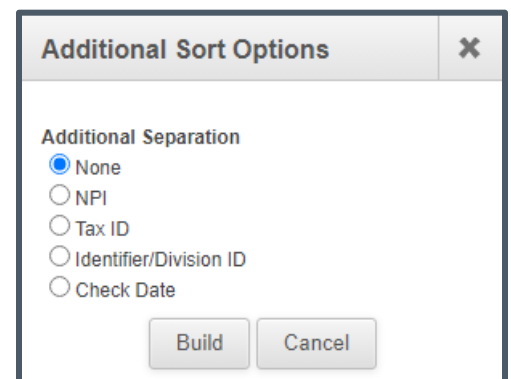
   b. After you select the desired additional build criteria, click the **Build** button on the popup to send the associated remittances to the Downloads screen.

   After clicking the **Build** button or **By Payment**, the selected payments will be built into a download, which you can then find on the Downloads screen.

Reprocessing payments for download

This section explains how to reprocess/refresh selected payments to be downloaded. This option is NOT available for duplicate files, which are marked with a red asterisk.

To reprocess payments for download:

1. As needed, perform a search.

2. Select one or more checkboxes on the left side of a payment row.

   You can also use the dropdown in the far-left column header to select the first 1000 rows, unselect all rows, select all rows on the current page, or unselect all rows on the current page.
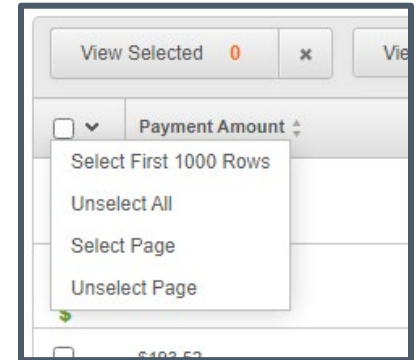
3. From the toolbar > **More** dropdown, select **Reprocess**.

   The selected payments are reprocessed and any setting updates and rebatcher changes will be applied, creating a new download.

Viewing payments on the Remits screen

This section explains how to select and view payments on the Remits screen.

To view payments on the Remits screen:

1. As needed, perform a search.

2. Select one or more checkboxes on the left side of a payment row.

    You can also use the dropdown in the far-left column header to select
    the first 1000 rows, unselect all rows, select all rows on the current
    page, or unselect all rows on the current page.
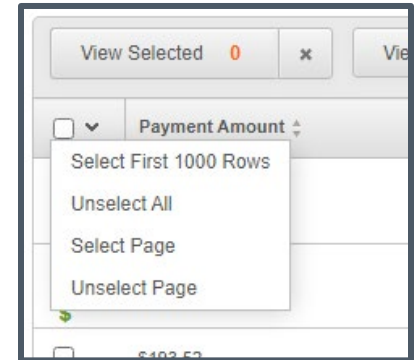
3. From the toolbar > **More** dropdown, select **Go to Remits**.

The CLAIMS PROCESSING > Remits > Remits screen will open with the selected payments display in
the list.

Understanding payment icons
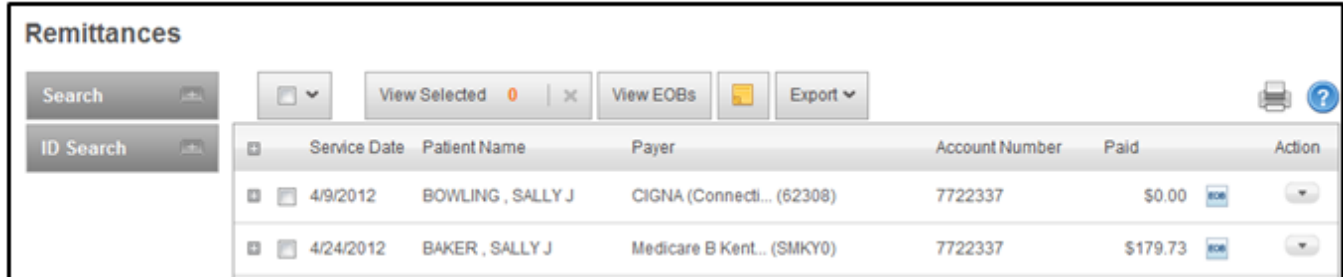
The following payment icons can appear in a payment row:

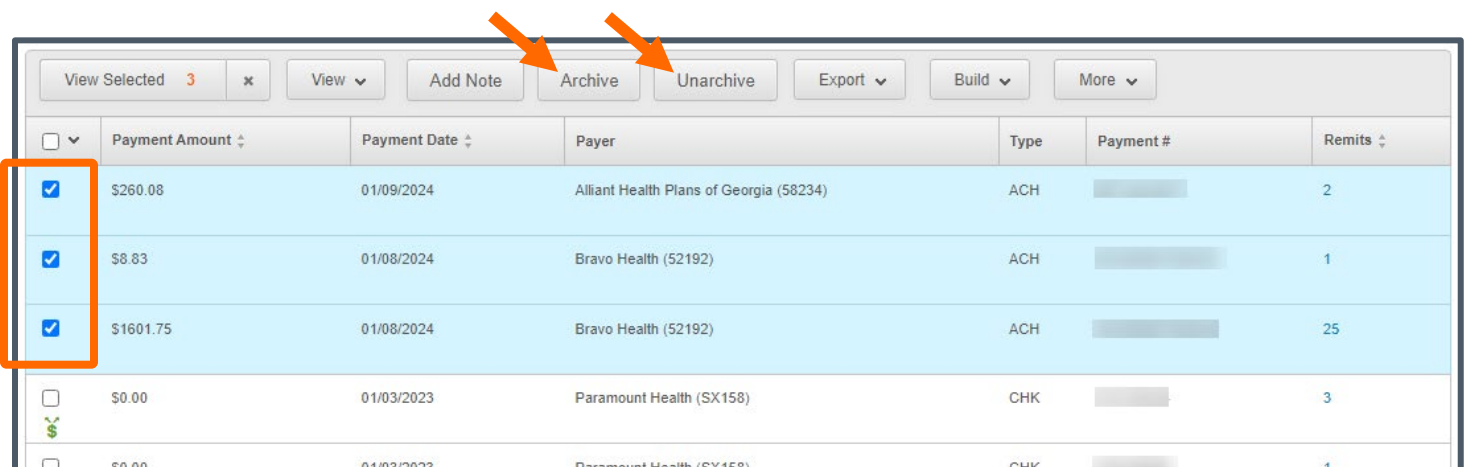| Icon	Meaning
📁	**Archived** – This icon will appear next to payments that have been archived by users and will display only if the **Show Archived** checkbox is clicked during a payment search.
$	**Deposited** – The dollar-sign icon indicates the payment has been deposited to the account's linked bank account.
*	**Duplicate** – A red asterisk will appear next to the Payment # if the file is a duplicate of a payment that was already submitted by the payer.
📝	**Notes** – An internal note has been added to the payment file. Clicking on the icon will cause the Notes screen to pop up, allowing you to view all notes appended to the payment, as well as add additional notes.
¥	**Split-Check** – Click this icon to launch the **Split Funds** popup that shows how the associated payment has been split between different accounts.
↓$	**Split-Payment** – This icon indicates that this item has been split from an original payment.
	Downloads *will not* be generated for payments associated with the **Split-Check** icon; however, they *will* be generated for payments associated with the **Split-Payment** Icon.
U	**Upload** – This icon indicates the 835 file was uploaded via the Uploads tab, rather than being received directly from the payer.
!	**Warning** – This icon indicates there may be possible errors or discrepancies in the received file.

Remits screen

The Remits screen is where you can search for and view individual patient EOBs. You can also view all the EOBs and the full remit associated with a patient's payment. To locate a remittance for a particular patient or to view the EOB associated with a remittance:

1. Go to **Remits > Remits**

		Remittances				
	Service Date	Patient Name	Payer	Account Number	Paid	Action
⊞ ☐	4/9/2012	BOWLING , SALLY J	CIGNA (Connecti... (62308)	7722337	$0.00	▾
⊞ ☐	4/24/2012	BAKER , SALLY J	Medicare B Kent... (SMKY0)	7722337	$179.73	▾

2. Enter any of the following in the search criteria fields, then click the **Search** button:

   - **Patient Name** – Enter any part of the patient's name.

   - **Patient Account Number** – Enter the patient's account number.

   - **Service Date** – Select date range during which the dates of service were paid for.

   - **Payment Number** – Enter the last few digits of the payment number.

   - **ICN** – Enter the unique payer-assigned ICN number associated with a remittance.

   - **Received Date** – Select date range during which the remittance was received and posted.

     Note: The default date range when searching for received and posted remits is 90 days.

   - **Remittance ID** – The payment identification assigned to the remit file by Waystar.

   - **Payment ID** – Exact ID number of the payment. Waystar assigns this number to the remittance file.

3. When you click the **Search** button, the individual remittance files will display.

4. Click the '+' on the left side of a payment or on a row for additional expanded information:

   - **Remittance ID** - Waystar-assigned ID.

   - **Payment Date** – The date the payment was posted.

   - **Payment Number** – The payment number assigned by the payer.

   - **ICN** – The ICN number assigned by the payer.

   - **Payment Amount** – The exact payment amount of the individual remit.

   - **Payment Type** – The type of payment that was posted:

     – Automated Clearinghouse/EFT (**ACH**) – This code is used to designate that payment was processed electronically. An ACH/EFT Payment is similar to Direct Deposit, when your payments are deposited into your bank account automatically.

     – Check (**CHK**) – Indicates that a check has been issued for payment.

     – Non-Payment Data (**NON**) – Indicates remittance information with no associated payment.

- Financial Institution Option (**BOP**) – Indicates that the third party processor will choose the method of payment.

- Federal Reserve Funds/Wire Transfer (**FWT**) – Indicates that the funds were sent through the wire system.

- **Type** – the type of claim associated with the payment. Professional or Institutional.

The following actions are available on the right side of the remit item:

- **Payer EOB** – Click to view an in-browser PDF of the entire payment.

- **View SPR EOB** – Displays a more detailed, payer-preferred version of the EOB.

  Note: The SPR EOB view is intended for institutional claims. This view will load for professional claims as well, but some of the data fields will be empty.

- **Notes** – Click to view and add internal notes to the individual remittance.

- **Reprocess** – Refreshes the file to be downloaded. This option is available only if the file is a duplicate (marked with a red asterisk).

Toolbar

The top toolbar is where you can manage your selected download files. After you selects the files you wish to handle (the number will display in the toolbar), you can:
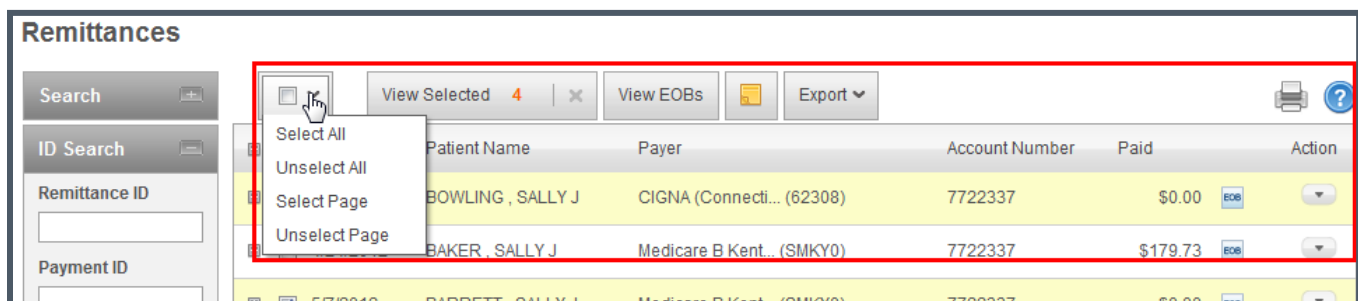
- View selected
- View EOBs
- Add Note
- Export
  - Export to Excel
  - Export to PDF

    Note: All exported files will appear on the Remits > Exports screen.
- Print

The first checkbox icon includes a dropdown that allows you the options to:

- Select All
- Unselect All
- Select Page
- Unselect Page

Action Column Options

Hover over the arrow under the **Action** column for additional options:

- **Payer EOB** – Click to view an in-browser PDF of the entire payment.
- **View SPR EOB** – Displays a more detailed, payer-preferred version of the EOB.

  Note: The SPR EOB view is intended for institutional claims. This view will load for professional claims as well, but some of the data fields will be empty.

- **Notes** – Click to view and add internal notes to the individual remittance.
- **Reprocess** – Refreshes the file to be downloaded. This option is available only if the file is a duplicate (marked with a red asterisk).

Correspondence tab

This screen lets you view all correspondence delivered/mailed to your Payer Lockbox. All paper remittances will be converted to an 835 file, and checks will be deposited into your specified bank account.

Correspondence will display the following information:

- **Received Date** – date the correspondence was delivered to the payer lockbox

- **File Name** – file name assigned by Waystar; clicking on this link will display a scanned copy of the correspondence within a web browser

- **Batch/Sequence** – number of individual sequences associated with a file

- **Action** – allows you to:

  - **View Image** – displays a scanned copy of the correspondence within a web browser

  - **Notes -** allows you to enter a 255-character correspondence-specific note

  - **Archive** – archives correspondence and removes it from view (all correspondence can be unarchived)

Note: For payment files that are still being processed, any actions associated with viewing the correspondence will be greyed-out.
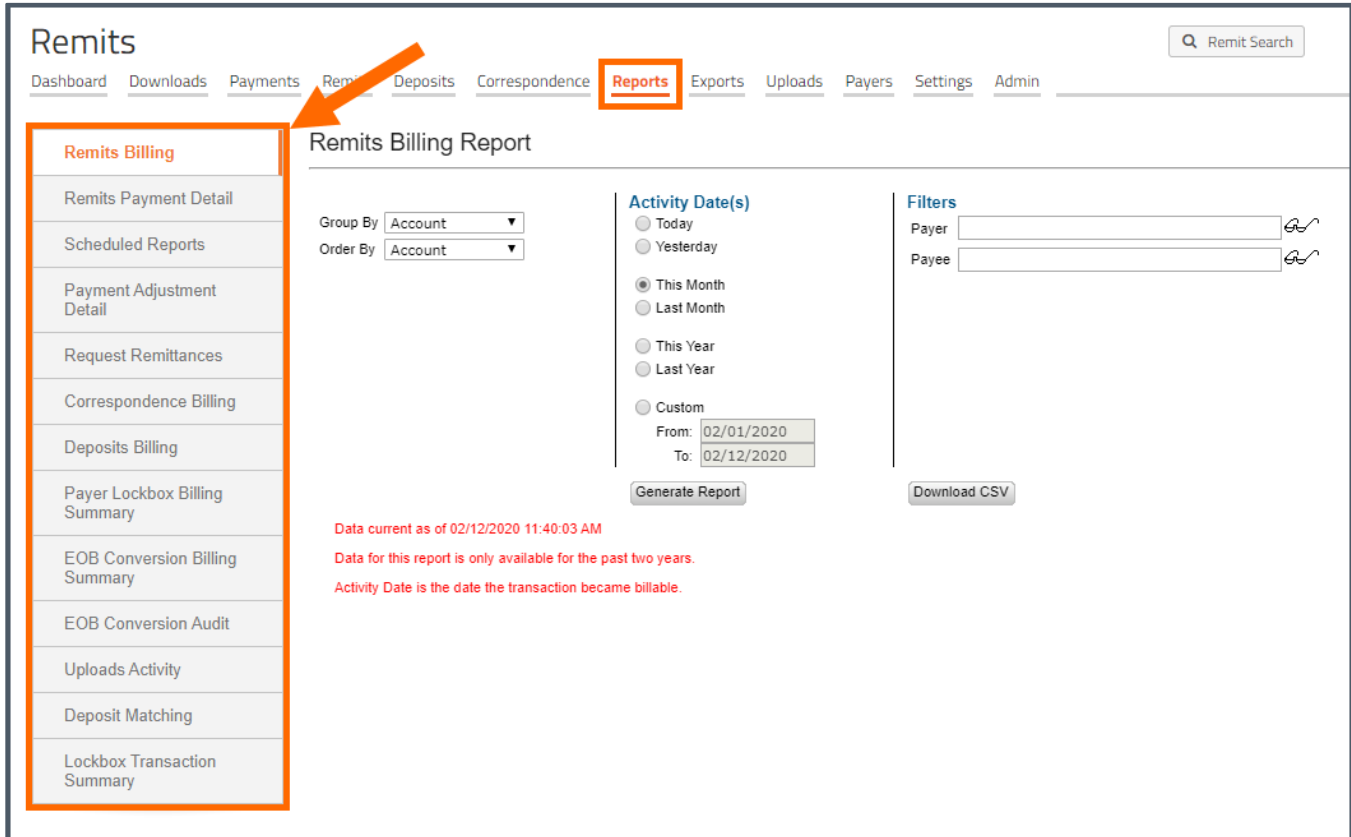
Reports

Go to **Claims Processing > Remits > Reports** to run reports on the remittance files that have downloaded to your account. Once you click the Reports tab, you will land on the Remits Billing Report screen by default, but click any of the report buttons on the left navigation bar to access the associated report:

Remits Billing Report

The **Remits Billing** report produces a summary of all remittances received by Waystar for the account within a given date range. This report provides information on the volume of billable remit transactions.

- You may select one of the pre-defined **Activity Date(s)** ranges or you may create a **Custom** range. (Dates are based on Received date.)

- If you have child accounts (e.g., a billing service), you can further specify the sort sequence by **Account** or by entire **Domain** under the Scope field.

- You can select **Group By** and **Order By** information from the appropriate dropdowns.

- Once you have specified your report criteria, Click the **Generate Report** button. A new window will appear, showing the number of remittances based on the criteria entered.

- To download the report, click the **Download CSV** button to generate an Excel CSV of the data.

Remits Billing Report

Account: Training Account (5076)
Activity Date(s): 01/01/2013 to 6/10/2013
Report Generated: 06/10/2013 05:16 PM

Close Window

Filter(s): None

Payer	Full Functionality	Data Delivery	Total Remits	Paid Amount
Anthem Regional (IN, KY, OH) (ZBIKO)	2,683	0	2,683	$10,117,277.45
CIGNA (Connecticut General, Equicor, Equitable) (62308)	117	0	117	$32,638.88
Humana (and subsidiaries) claims (61101)	438	0	438	$332,830.87
Passport Health Plan (61129)	1,044	0	1,044	$1,501,089.83
Totals	4,282	0	4,282	$11,983,837.03

Remits Payment Detail Report

The **Remits Payment Detail** report produces a summary of all payments received by Waystar for the account within a given date range.
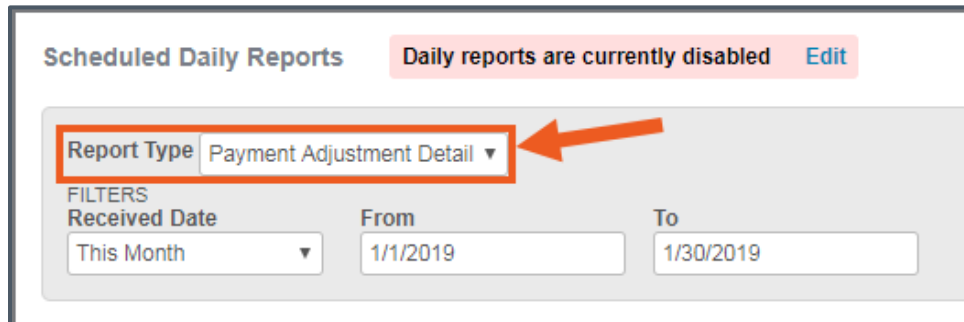
- You may select one of the pre-defined **Date Ranges** or you may create a **Custom** range (Dates are based on Received date.)

- If you have child accounts (e.g., a billing service), you can further specify the sort sequence by **Account** or by entire Domain.

- Once you have specified your report criteria, click the **Generate Report** button. A new window will display the number of payments based on the criteria entered.

- To download the report, click the **Download CSV** button to generate an Excel CSV of the data.

Remits Payment Detail Report   Close Window

Account: **Training Account (5076)**   Filter(s): **None**
Received Date(s): 05/01/2013 to 05/31/2013
Report Generated: 06/10/2013 05:23 PM

* indicates a duplicate Payment

Payer	Received Date	Payment Date	Payment Number	Payment Amount	# of Remits
Anthem Regional (IN, KY, OH) (ZBIKO)	05/09/2013	01/27/2012	T144262911	$6,739.84	86
	05/09/2013	01/27/2012	T144262909	$3,925.92	49
	05/09/2013	01/31/2012	T0205635721	$27,760.19	158
	05/09/2013	01/31/2012	T0205635720	$21,620.22	90
	05/09/2013	01/31/2012	T0205636225	$8,804.02	56
	05/09/2013	01/31/2012	T0205634483	$3,085.13	62
	05/09/2013	01/31/2012	T0205636797	$21,192.26	91
	05/09/2013	01/31/2012	T0205634965	$6,009.06	114
	05/09/2013	01/31/2012	T0205634954	$6,263.05	58
	05/09/2013	01/31/2012	*T0205634954	($765.60)	0
	05/09/2013	01/31/2012	T0205631442	$74,900.15	1301
	05/09/2013	01/31/2012	*T0205631442	$0.64	0
	05/09/2013	01/31/2012	T0205635093	$4,884.70	42
	05/09/2013	01/31/2012	T0205635295	$2,443.77	89
	05/09/2013	01/31/2012	T0205635094	$8,083.39	106
	05/09/2013	02/01/2012	T0307604445	$2,868.37	70
	05/09/2013	02/01/2012	T0307605116	$4,861.84	105
	05/09/2013	02/01/2012	T0307604452	$475.32	2
	05/09/2013	02/01/2012	T0307607124	$972.21	7
	05/09/2013	02/01/2012	T0307605321	$78.15	3
	05/09/2013	02/01/2012	T0307597903	$8,057.22	157
	05/09/2013	02/02/2012	T0109375208	$187.35	2
	05/09/2013	02/02/2012	T0085020245	$10.24	1
	05/09/2013	02/02/2012	T0045020404	$26.00	2
	05/09/2013	02/02/2012	T0045020292	$13.19	1
	05/09/2013	02/02/2012	T0045020227	$551.73	4
	05/09/2013	02/02/2012	T0045020268	$379.20	16
	Subtotal			**$213,427.60**	**2672**
CIGNA (Connecticut General, Equicor, Equitable) (62308)	05/09/2013	01/25/2012	T6010175559	$61.03	1
	05/09/2013	01/25/2012	T6663397564	$100.92	1
	05/09/2013	01/25/2012	T6663398129	$823.82	10
	05/09/2013	01/25/2012	T6663398902	$61.00	1
	05/09/2013	01/25/2012	T6663399820	$32.46	1
	05/09/2013	01/25/2012	T9914134425	$66.98	3
	05/09/2013	01/24/2012	T601787113	$99.62	1

Scheduled Reports

Click **Scheduled Reports** to be directed to the Scheduled Daily Reports screen. From here, you can set up various types of recurring/daily reports.

To begin, select the Remits report you would like to schedule or view from the **Report Type** dropdown:

By default, daily reporting is disabled; however, click the **Edit** link to the right of **Daily reports are currently disabled** to enable the selected recurring reports and identify which accounts should be included in those reports.

Once auto-reporting has been enabled, the associated reports will populate near the bottom of the Scheduled Daily Reports tab each day. Once your reports are available:

- Select the appropriate date range option(s) in the **FILTERS** section and click **Apply Filters** to filter the auto-generated reports list.

- Click the **Download** button in a report line to download a CSV spreadsheet of the associated data.

Note: If you have a Waystar FTP account, recurring reports set up on the Scheduled Reports tab will stage to that account by default. If you do not want to receive these reports via FTP, please contact Waystar Support or create a Support case in the Support and Training Center.

Payment Adjustment Detail Report

The **Payment Adjustment Detail** report provides split payment details for a specified date range and/or account, allowing you to track how payments are split out to designated payees/accounts.

This report is divided into two different sections:

One Time Report

After selecting the Payment Adjustment Detail Report, you will be directed to the One Time Report tab.

To generate a one-time Payment Adjustment Detail Report:

1. Select a pre-defined date range option from the **Received Date** dropdown.

   OR

   Select **Custom Month** from the **Received Date** dropdown and enter the custom date range in the **From** and **To** fields.

2. If necessary, enter the desired provider account name/ID in the **Account** field to filter the split payment details by account

3. Click **Generate Report** to produce an on-screen version of the report.

   OR

   Click **Export to CSV** to download a more detailed spreadsheet of the reported data.

   Note: If the selected criteria include over 5,000 payments, you will need to export the report to Excel to see the all of the results.

If you clicked the Generate Report button to view an on-screen version of the report, the following payment details will display near the bottom of the screen:

- **Account Name:** Provider account receiving the split payments

- **Payer Name:** Payer name/ID that sent the payment file

- **Check Date:** The date listed on the check

- **Check Number:** The number associated with the EFT or check. A file can contain one or more checks.

- **Remit Count:** The number of payments included in the original payment file sent by the payer

- **Original/Split:** Indicates whether the line item is an original (**O**) or split (**S**) payment

  Note: Original (O) payments will be listed before split (S) payments in the report.

- **Check Total:** The total payment amount in the original payment/payments

- **Claim Total:** The total charge amount listed on the associated claim

- **Download File Name:** The payer-assigned payment file name

- **PLB:** Payment information identifying provider adjustments, such as write-offs, take-backs, credits, etc.

- **Adj Amount:** The adjusted payment amount returned by the payer

- **Payee ID:** The provider account ID receiving the split payments

- **Identifier:** The PLB tracking/account number, if available

Scheduled Daily Reports

Select the **Scheduled Daily Reports** tab to set up and view recurring/daily Payment Adjustment Detail Reports. These reports will include the split payments details defined in the One Time Report section above.

By default, the daily reports feature is disabled. Click the **Edit** link to the right of **Daily reports are currently disabled** to enable the recurring reports and identify which accounts should be included in those reports.

Once auto-reporting has been enabled, the associated reports will populate near the bottom of the Scheduled Daily Reports tab each day. Once your reports are available:

- Select the appropriate date range option(s) in the **FILTERS** section and click **Apply Filters** to filter the auto-generated reports list.
- Click the **Download** button in a report line to download a CSV spreadsheet of the associated data.

Note: If you have a Waystar FTP account, your recurring/daily Payment Adjustment Detail Reports will stage to that account by default. If you do not want to receive these reports via FTP, please contact Waystar Support or create a Support case in the Support and Training Center.

In-App Documentation

Click the **Info about this report** link at the top of the report screen to see on-screen documentation on the Payment Adjustment Detail Report.

Request Remittances Report

The **Request Remittances** report helps you determine if additional electronic enrollments can be established for providers submitting claims from your account. This report will compare claims and remits for a selected account or domain to the associated remits electronic payer list to display the percentage of remit payers the provider is submitting claims to which are Not Enrolled, have Enrollment In Progress, or are already Enrolled.

To generate/update the Request Remittances report:

1. Enter the following filter criteria:

   - **NPIs:** Displays enrollment data for the entered provider ID(s)

   - **Payer:** Displays enrollment data for the entered payer name/ID

2. If necessary, click the **Archived** checkbox to see results for archived payers/providers.

3. Click **Search**. The pie chart will provide an overview of your enrollment data:
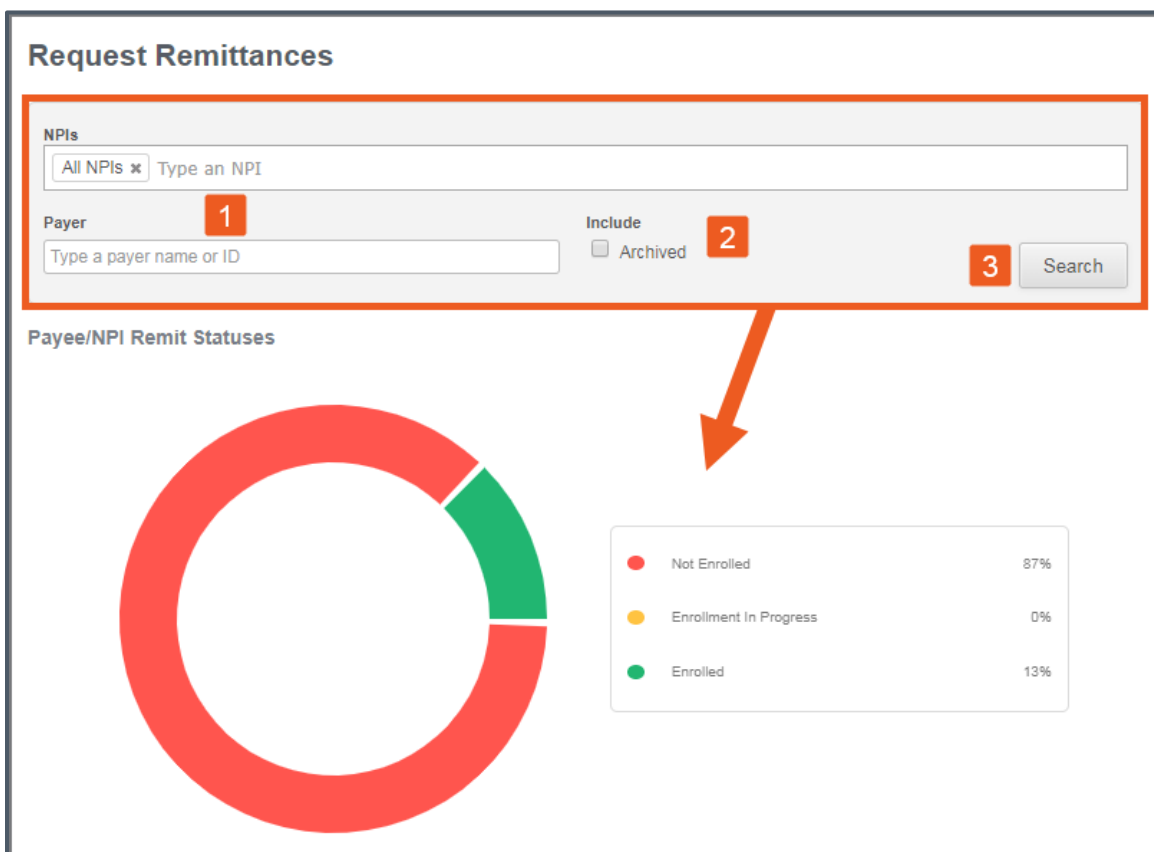
The reported payer and provider data will display towards the bottom of the screen:

Pie Chart Data Breakdown

The Request Remittances pie chart provides a breakdown of provider enrollment in your account/domain:

- **Not Enrolled:** Providers who have not enrolled for Waystar remits

- **Enrollment In Progress:** Providers who have pending paperwork for any active payer who can supply electronic remits

- **Enrolled:** Providers who are currently enrolled for Waystar Remits

Requests Remittances Toolbar

You can perform a number of actions using the row of buttons at the top of the reported list. Begin by selecting one or more payer/provider items by clicking the associated checkbox (see below). You can also use the checkbox dropdown in the column header to select/deselect all of the payers/providers in the search results.

After selecting the desired reported item(s), click one of the following toolbar buttons to perform an action on the associated payers/providers:

- **View Selected:** Removes all of the listed payers/providers from view except for the selected item(s).

- **Archive:** Allows you to hide the associated payers/providers from view. When this action has been performed successfully, a green notification will display at the top of the screen.

- **Unarchive:** Allows you to unhide the associated payers/providers from view. When this action has been performed successfully, a green notification will display at the top of the screen.

  Note: An item must be hidden before you can unhide it. To view hidden items, you must perform a payer search (see above) with the **Archived** checkbox selected.

- **Download as CSV:** Select one of the following options from the dropdown:

  – **Download Mass-Enrollment CSV:** Download the selected payer/provider information in a standardized enrollment CSV template. After adding the Customer ID and Tax ID fields in the downloaded spreadsheet, you can upload the completed CSV in the Waystar Enrollment application to begin enrollment for the associated providers.

    See the Enrollment Quick Start Guide for step-by-step instructions on how to mass upload provider enrollment requests.

  – **Full Export CSV:** Download a detailed CSV spreadsheet of the selected items.

Request Remittances Action Menu
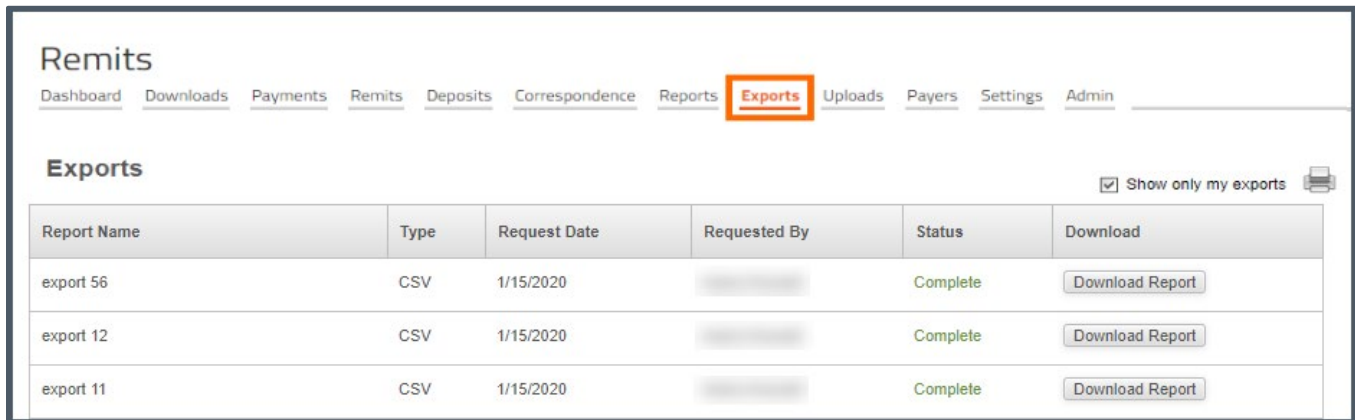
Select a provider from the **Select Provider Name** dropdown and click one of the following links in the **Action** column to perform the associated action on the selected provider:

- **Create Provider:** Directs you to the Add New Provider screen in the Enrollment application where you can add the selected provider to begin enrollment.

  Note: See the [Enrollment Quick Start Guide](#) for step-by-step instructions on how to add a new provider in the Waystar system for enrollment.

- **Enroll:** Automatically creates a Waystar Remits enrollment request for the selected provider.

- **Verify Request:** Opens the New Enrollment Request(s) screen where you can verify the provider, payer, and application information before submitting the enrollment request.

- **Archive/Unarchive:** Hide or unhide the associated provider from the Request Remittances report.

Exports screen

The **Claims Processing > Remits > Exports** screen displays all exported content that was generated via the **Downloads**, **Payments**, **Deposits** and **Correspondence** screens:

Each item on the Exports list displays the following information:

- **Report Name:** Indicates the unique name assigned to the content when it was exported.
- **Type:** Indicates the export format. Remits content can be exported as a CSV, PDF or Tiff file.
- **Request Date:** Indicates the date the content was exported.
- **Requested By:** Indicates the user who exported the content.
- **Status:** Indicates the export processing status.

The following actions can be performed on the Exports screen:

- Click the **Download Report** button corresponding to an export to download the content in the format in which it was exported (as indicated in the Type column).
- Click the **Print** icon in the upper-right corner to print the current page view.
- Click the **Show only my exports** checkbox to view only the exported files that you created.

Notes:

- All exported content retrieves data from the associated Remits screen (Downloads, Payments, Deposits, and Correspondences).
- The exports are *not* built from raw remit data and, as a result, may display differently that what is shown in the raw data.

Uploads screen

The **Remits > Uploads** screen displays all 835 files that have been recently uploaded:

The Uploads screen displays the following information about your 835 uploads:

- **Upload ID:** The identification number assigned to the file when it is uploaded

- **Upload Date:** The date the file was uploaded

- **Format:** The file format. Depending on the submitted form, the field will display **835 5010** or **835 4010**.

- **File Name:** Click this link to view the file in its original format.

- **Uploaded By:** The user who uploaded the file.

- **Status:** The status of the upload. This field will display one of the following statuses:

  - **Completed:** The file contains all necessary information and has been uploaded successfully.

  - **Failed:** Indicates that there was an issue when processing the upload. Click the **Failed** or **Completed With Errors** link in the **Status** column to view a more specific error description.

    See **What are the Possible 835 Uploads Errors and How do I Fix Them?** (article 16619 in the Waystar Support and Training Center) for details on possible 835 uploads errors and instructions on how to resolve them.

- **Processing:** The file is in the process of being uploaded.

- **Conversion Failure:** Indicates that there was an issue when converting the paper EOB to an 835. Click the **Conversion Failure** link in the **Status** column to view a more specific error description.

- **Transactions:** The number of payments included in the uploaded file. Click the associated number to view a list of the included files.

The checkboxes on the left side of the uploads list allow you to add a note to, archive/unarchive, and export (see the corresponding sections below) any number of selected items.

Note: After completing the desired actions on the selected items, it is best practice to deselect them by clicking the **X** to the right of the **View Selected** button. Selected items are not automatically deselected when you leave this screen or complete an action.
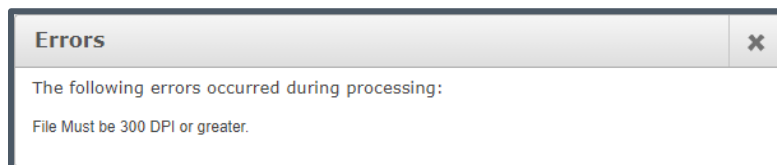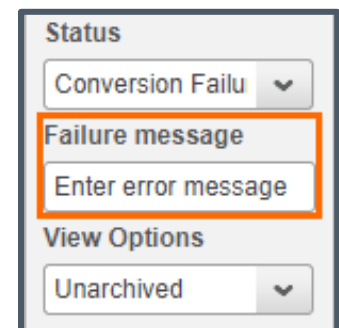
Search for an Uploaded File

Use the Search menu on the left side of the screen to filter your results using the following criteria:

- **File Name:** Displays all uploads with the entered file name (e.g., "Medicare" will display all files containing Medicare in the file name).

- **Upload Date:** The date the file was uploaded.

- **Format:** Select **PDF**, **TIFF**, or **835 EDI** to display those files types only, or click **All** (selected by default) to display all file types.

- **Status:** Status of the file in the upload process (**All**, **Completed**, **Failed**, **Processing**, or **Conversion Failure**).

  If **Failed** or **Conversion Failure** are selected from the **Status** dropdown, an additional **Failure message** filter will appear:

  Enter a free-text error message in this field and click **Search** to filter the Uploads listing by the error message posted for each Failed and/or Conversion Failure status. Failed and Conversion Failure error messages are displayed when you click the corresponding link in the **Status** column:

- **View Options:** Modify this dropdown to have all uploads listed, or just those that have not been archived (see the **Archive/Unarchive an Upload** section below for more information about archiving and unarchiving uploads).

- Click the **My Uploads Only** checkbox to display only the files you have uploaded.

Click the plus icon next to **ID Search** to expand the corresponding menu. You can then enter an **Upload ID** and click **Search** to display the specified upload.

Once you have entered the appropriate search criteria, click the **Search** button in the Search or ID Search menus to complete a search. The page will display the uploads that correspond to your filter options.

Upload a New File

Follow these steps to upload a new 835 file:

1. Click the **Upload Files** button. The Upload Files popup will appear:
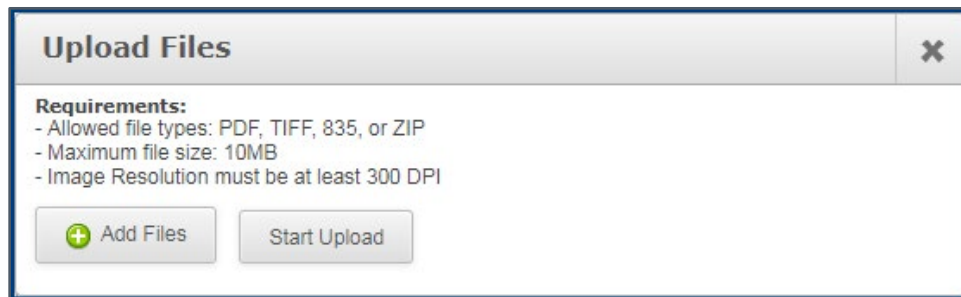

2. Click **Add Files**.

3. Locate the appropriate file in your system. The 835 file must adhere to the following parameters:

    • Cannot exceed a maximum file size of 10 MB

    • Image resolution must be at least 300 DPI

    Note: Multiple files may be uploaded simultaneously if compressed into one zip file.

4. Click **Start Upload**. If uploaded successfully, the file will be included in the Uploads list.

    Note: Do not leave the Uploads screen until the files have uploaded completely. Leaving this page before the files have finished uploading (see below) will prevent the files from uploading properly.
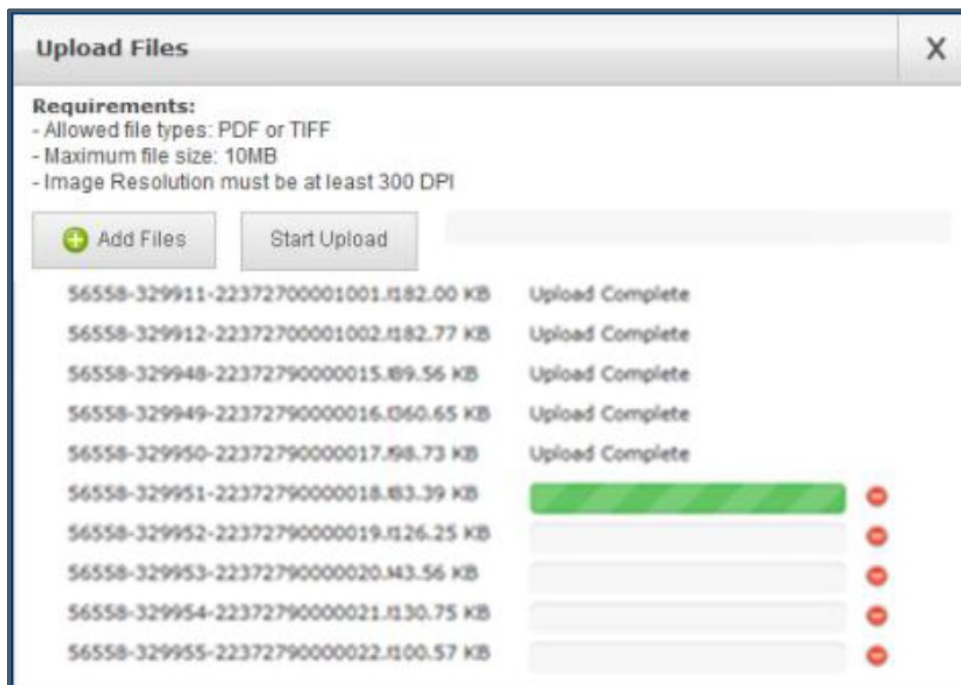
When the file has been uploaded, it will become a build on demand payment. No download will be generated unless you build one.

View an Upload

Click the appropriate link under the **File Name** column to see the file in its original format:

	Upload ID	Upload Date	Format	File Name	Uploaded By	Status	Transactions	Action
☐		12/23/2017	Deposits	6.27.16 DepositsLogEFTs.xlsx		Completed	16	⌄
☐		11/30/2017	Deposits	FinalBalancedProdNPI.xls		Completed	20	⌄
☐		11/04/2017	TIFF	pmt-1.tif		Completed	0	⌄

Uploads Action Menu

Hover over the arrow in the **Action** column associated with an upload item to perform the following actions:

	Upload ID	Upload Date	Format	File Name	Uploaded By	Status	Transactions	Action
☐		02/11/2020	Deposits			Completed	10	⌄
☐		02/11/2020	835 5010			Completed	0	
☐		02/11/2020	835 5010			Completed	5	
☐		02/11/2020	835 5010			Completed	0	⌄

Notes
Archive
Void

- **Notes:** Add a note to the upload. The note will display in Waystar only and can be viewed by all users on the account.

- **Archive:** Hide the upload in Waystar. The upload will no longer display in the account or in reports, but it can still be searched for.

Add a Note to Multiple Uploads

Follow these steps to add a note to multiple uploads:

1. Select the desired files.
2. Click the notes icon on the Uploads toolbar:

The Notes popup will appear.

3. Enter the desired text into the **Notes** field.
4. Click Add Note.

Archive/Unarchive Multiple Uploads

After selecting the desired uploads, click the archive icon on the Uploads toolbar to remove them from the list. You can also click the unarchive icon if you would like to add previously archived items back to the list:

Follow these steps to unarchive multiple items:

1. Select **All** from the **View Options** dropdown.
2. Click **Search**
3. Select the items you would like added back to the Uploads list.
4. Click the unarchive icon. The items will re-appear on the Uploads list.

Export Multiple Uploads

Follow these steps to view multiple uploads in an Excel, PDF, or batch image file:

1. Select the desired files.

2. Click the **Export** dropdown on the Uploads toolbar.

3. Select the desired file type from the dropdown (**To Excel**, **To PDF**, **To Tiff**). The Custom File Name popup will appear.

4. Enter an appropriate name for the file you are exporting.

5. Click **Export**

View Upload Payments

Follow these steps to view all payments included in an upload file:

1. Select the desired file(s).

2. Click the **More** dropdown on the Uploads toolbar.

3. Select **Go to Payments** from the dropdown. The Payments screen will appear and will be pre-filtered to display only the payments included in the selected upload(s).

You can also view the payments included in an upload by clicking the number in the Transactions column:

Upload ID	Upload Date	Format	File Name	Uploaded By	Status	Transactions		Action
☐	12/17/2017	835 5010			Completed	3		∨
☐	12/10/2017	835 5010			Completed	3		∨
☐	12/09/2017	835 5010			Completed	0		∨
☐	12/09/2017	835 5010			Completed	0		∨
☐	12/03/2017	835 5010			Completed	1		∨

Tips and Tricks for Working with Uploads

Duplicate logic (which is applied to 835 files from payers) *also* applies to uploaded 835 files. This means you won't see the same payment multiple times. If the file is identified as a duplicate, then it is hidden (but still available if necessary).

Help

Every Remits screen has a Help (question mark) button on the far right side of the screen. Clicking on the button displays a dropdown with additional information about the screen.

Payer Search screen

The **Payer Search** screen identifies insurance payers who can provide electronic remittances through Waystar.com.

The Payer Search screen can be used to search:
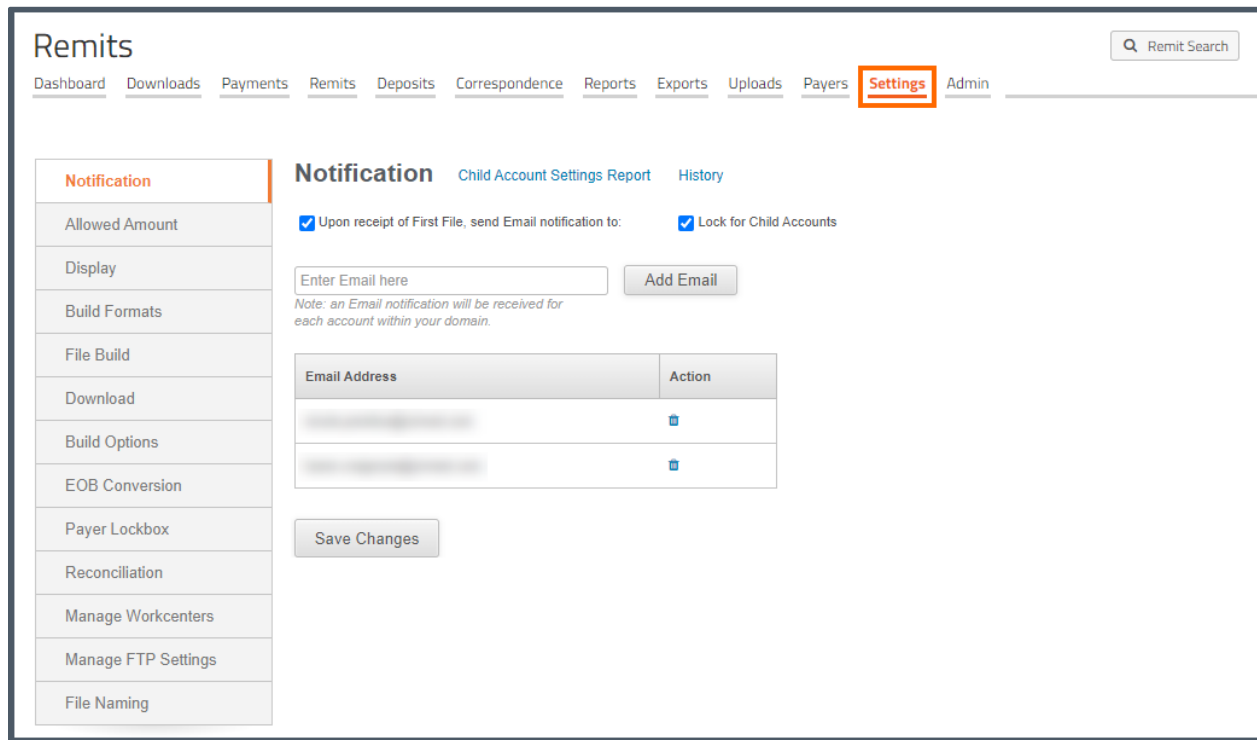
- Payers who can provide electronic remittances through Waystar.com
- Updates to the enrollment process

Note: All Payers who offer electronic remits through the Waystar site require enrollment.

Settings screen

This area displays the available settings for the Remits application.

1. Go to **Remits > Settings**.

2. The Settings screen permits you to set up the following:

- **Notification:** Set which e-mail addresses are notified when the first remit file is received.

- **Allowed Amount:** Set your allowed amount calculation on a per-payer basis.

    Note: These overrides apply to all accounts within the domain.

- **Display:** Control account-specific EOBs and warning-message display options.

- **Build Formats:** Select the default remit file format and create payer-exceptions to that format.

- **File Build:** Control how you receive remittance files for downloading into your practice management system.

- **Download:** Select your default settings for the Downloads screen.

- **Build Options:** Control when payments are downloaded to your account and how they are grouped.

- **EOB Conversion:** Configure additional EOB Conversion settings.

- **Payer Lockbox:** Configure additional EOB Conversion with Payer Lockbox conversion settings.

- **Reconciliation:** Configure additional Remits & Deposit Management settings.

- **Manage Workcenters:** Set up your Unmatched Deposits workcenter.

- **Manage FTP Settings:** Control how your EOBs are staged to FTP.

- **File Naming:** Set up file naming conventions for your remittance files.

Build Options

Go to the **Build Options** screen to control when payments are downloaded to your account and how they are grouped on the Remits > Downloads screen. This gives you more flexibility with the way you work, reconcile, and consolidate your 835 files.
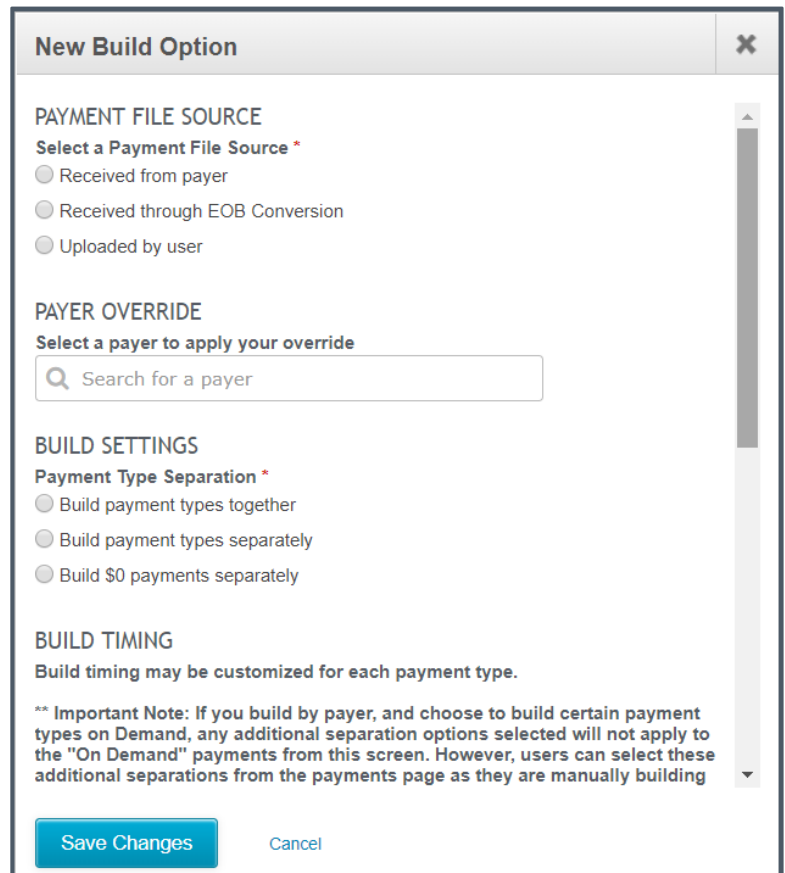
Creating new build configurations

To create a new build configuration for incoming payment files:

1. Click the **+ New Build Option** button at the top of the screen. The New Build Option popup will appear:

2. Select one of the following radio buttons from the **PAYMENT FILE SOURCE** section to apply your build configuration to the selected file source:

   - **Received from payer:** Select for payments that are received directly from the payer

   - **Received through EOB Conversion:** Select for payments that are converted through the EOB Conversion application

   - **Uploaded by user:** Select for payments that are uploaded manually or via FTP

3. Enter a payer name/ID in the **PAYER OVERRIDE** section to apply the settings in this configuration to that payer only.

   Note: Please verify that the entered payer name/ID is correct. If the entered payer information is incorrect, the rules applied in your configuration will not fire.

New Build Option ✕

PAYMENT FILE SOURCE
Select a Payment File Source *
◯ Received from payer
◯ Received through EOB Conversion
◯ Uploaded by user

PAYER OVERRIDE
Select a payer to apply your override
🔍 Search for a payer

BUILD SETTINGS
Payment Type Separation *
◯ Build payment types together
◯ Build payment types separately
◯ Build $0 payments separately

BUILD TIMING
Build timing may be customized for each payment type.

** Important Note: If you build by payer, and choose to build certain payment types on Demand, any additional separation options selected will not apply to the "On Demand" payments from this screen. However, users can select these additional separations from the payments page as they are manually building

Save Changes   Cancel

---

4. Select one of the following radio buttons from the **BUILD SETTINGS** section to control how your payments are grouped upon the initial download:

   - **Build payment types together:** Downloaded payments will be grouped by payment type (ACH, Check, BOP, FWT, $0, etc.) into one file by payment source.

   - **Build payment types separately:** Downloaded payments will not grouped by any attribute and must be downloaded individually by payment source.

   - **Build $0 payments separately:** All $0 payments (regardless of payment type) will be grouped in a separate file.

5. Select any of the following dropdown options in the **BUILD TIMING** section to control when the associated payment types are downloaded to your account:

   IMPORTANT: If you select Payer from the Additional Build Options section (see below) and choose to build certain payment types on demand, any Additional Separation options selected will not apply to the on-demand payments. To apply the additional separation to these payments, you must select the desired additional build options on the **Remits > Payments** screen as you are manually building those payments. See the Building a payment remittance download section for instructions on how to apply additional build options to payments on the Payments screen.

   • **Build on Demand:** Payments of the corresponding type will be built and downloaded to the Downloads screen when requested.

     Note: If Build payment types together was selected in step 4 above, Build on Demand will be the only BUILD TIMING option available.

   • **Build on Receipt:** Payments of the corresponding type will be built and downloaded to the Downloads screen as soon as they are received.

   • **Build on Receipt of Deposit:** If you have the Remits & Deposit Management application, select this option to build payments only when a matching deposit have been found.

6. Select one of the following radio buttons in the **Additional Build Options** section to apply further build options:

   • **Payment:** Payment for this configuration will be built by check number. If this option is selected, only one check will be included in each download.

     Note: If the Build payment types together option was selected in the BUILD SETTINGS section (see step 4 above), you will receive only one payment file with this selection because one payment cannot have various payment types.

   • **Payer:** Payments for this configuration will be built by individual payer IDs (i.e., one or more payments from a payer ID can be included in one file). If this option is selected, the Additional Separation list will populate with the following additional options:

     – **None:** Payments will be grouped by payer (i.e., available as a payer download file).

     – **NPI:** Payments built for the specified payer ID(s) will be grouped by NPI.

     – **Tax ID:** Payments built for the specified payer ID(s) will be grouped by Tax ID.

     – **Identifier/Division ID:** Payments built for the specified payer ID(s) will be grouped by the check identifier/division ID.

     – **Check Date:** Payments built for the specified payer ID(s) will be grouped by the date listed on the check.

     – **Check Date & Division ID:** Payments built for the specified payer ID(s) will be grouped by the date listed on the check and the check division ID

7. Click **Save Changes**. The build configuration will display in the Build Options listing (see the **Build Options Listing** section below for more information).

8. If desired, click the **Lock for Child Accounts** checkbox at the top of the screen to lock your build configurations for all accounts.

Build Options configuration example and outcome

See the following example of a payment build configuration that can be set up using the instructions provided in the **Creating New Build Configurations** section above:

Build Options selected

- **PAYMENT FILE SOURCE: Received from payer**

- **PAYMENT OVERRIDE:** No overrides

- **BUILD SETTINGS: Build $0 payments separately**

- **BUILD TIMING:** All payments types are set to **Build on Receipt**

- **Additional Build options: Payer**

  - **None** is selected from the **Additional Separation** section inside Additional Build options

Outcome of the configuration example

With the above build options applied:

- You may receive multiple United Healthcare payments via 30 different check numbers. Within those files, 15 were payments greater than $0.

- You may have two downloads, with one containing all non-$0 payment files combined to one file (15 checks) and another containing only the $0 payments.

Build Options listing

All previously created payment build configurations will be displayed in a grid toward the bottom of the Build Options screen:

This grid is divided into two different sections:

- **Default Build Options:** Displays all build configurations set up for a specific file sources.
- **Payer Overrides:** Displays all build configurations set up for specific payers.

Each of these grids/tables will display the following configuration details:

- **File Source:** The file source of the associated build rule
- **Payer:** Payer(s) sending payments via the associated build rule
- **Build Timing:** Payments for the associated build rule are built:
  - **On Demand:** Payments of the corresponding type will be built and downloaded to the Downloads screen when requested.
  - **On Receipt:** Payments of the corresponding type will be built and downloaded to the Downloads screen as soon as they are received.
  - **On Receipt of Deposit:** Payments of the corresponding type will be built only when a matching deposit have been found.

    Note: This Build Timing option is available only for users with the Remits & Deposit Management application.
  - **Multiple:** The build configuration has more than one of the above Build Timing options applied.
- **Payment Type Separation:** Indicates how the associated payments are grouped when received.
- **Additional Build Separation:** Displays any additional build options set up by Payment or Payer.

Build Options listing Action menu

Once build options have been created, you can perform additional actions on those configurations with the hover action menu. To access this hover menu, simply hover over the appropriate line item and a blue menu will appear with the following buttons:

File Source	Payer	Build Timing	Payment Type Separation	Additional Build Separation
Received from Payer	A Plus Staffing (ALL States) [WC, Auto] (A0280)	On Receipt	Build Payment Types Separately	Build by Payment
Received from Payer	ACM UHC MAMSI MD Edit Copy Remove		Build $0 Payments Separately	Build by Payer, Build by Tax ID

- **Edit:** Opens the Edit Payer Overrides popup where you can modify any of the build options set up when the configuration was created (see the **Creating New Build Configurations** section above for more information about these options).

- **Copy:** Opens the Copy Payer Override popup, allowing you to easily create a new build configuration from an existing rule.

- **Remove** (Payer Overrides Only)**:** Remove the build configuration from the system. After clicking, you will be asked to confirm the action.

Revision Log

Date	Description	Version
March 2025	Updated the "Payments screen" section with the Search Type field	17
December 2024	Updated "Payments screen" section	16
August 2024	Updated "Payments screen" section	15