Print Services User Guide

V1.2 – August 2021

WAYSTAR

Contents

Welcome to the Print Services Solution

Our Print Services solution produces professional, laser printed color statements, collection letters, and customized special mailings. Documents are inserted into windowed envelopes, which include return envelopes speeding up your cash collections.

This guide presents information on:

- Batches – How to upload and review a batch of documents.
- Documents – How to search and view the status of a document.
- Address Issues – How to search and correct a document with an address issue.
- Print Services Reports – How to access and view reports to manage your Print Services solution.

The Print Services Solution:

- Is more than a statement, it's a solution designed to collect your money faster!
- Automates and streamlines the Patient Statement process.
- Allows you to view patient statements online.
- Tracks and manages patient documents with ease.
- Guarantees your statements are mailed within 48 hours of being uploaded to Waystar.

Overview

Print Services screens consist of the following standard components:

- Search Area/ Search Bar
- Display Area
- Action Area

Search Area / Search Bar

The search area, or search bar, allows you to look for specific information to generate records in the display area. Information can be entered in one or more fields to retrieve a search result. The more information entered, the more customized the result.

Display Area

The display area, depending on the active screen, presents batches or documents. The information populated in the display area changes when the search criteria changes.

Action Area

The action area includes buttons, links, or tabs that create an action when selected. Actions appear under the Action column of the display area, but may appear on different parts of the screen.

Uploading a Print Services Batch

You can upload a Print Services batch using two methods:

- Manual
- File Transfer Protocol (FTP)
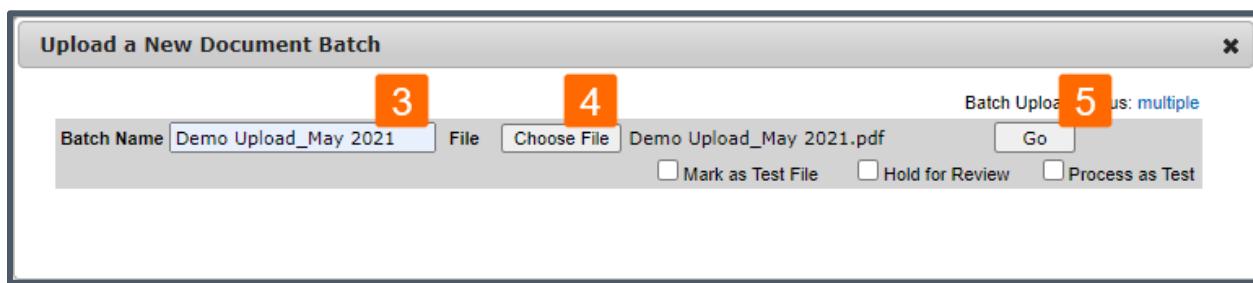
The manual upload method:

- Allows files to be uploaded any time of the day, or when needed
- Easy to use
- Easy to learn
- Great tool for small offices
- Does not require programming

Manual Batch

Follow these steps to manually upload a batch to Waystar:

1. Go to the **Print Services > Batches** tab to access the **Batches** screen.
2. Click on the **Upload a New Batch** button. The Upload a New Document Batch popup appears.
3. Type the name of the batch in the **Batch Name** field.
4. Click the **Choose File** button to locate the saved file in your system.
5. Click the **Go** button:

6. The **Uploadin**g process bar displays and you are directed to the Batches screen upon completion.

Note: If a batch has been uploaded in error, please contact the Waystar Print Services Department within two (2) hours (from when the file was uploaded) to delete the file.

The File Transfer Protocol (FTP) method:

- Automated and fast – this program allows for two-way communication between Waystar and your Practice Management (PM) system.
- Processes your batch every day at a set time, or when needed.
- Updates your PM system daily.
- Secure File Transfer – Uses an established encryption protocol.
- Supported by most PM systems.
- Industry standard for transmitting data files.

waystar.com   4

- Great tool for large offices.
- Requires programming.

File Transfer Protocol (FTP) Batch

In order to use FTP as a batch upload method, contact Waystar's Implementation Team to get started with the FTP process.

Batch Status

A batch status indicates where the file is in the upload process. Each time a new batch is uploaded, review the status to ensure the file did not fail or receive an error during the upload process. If a batch fails or contains an error, the batch must be successfully uploaded before documents can be processed.
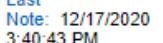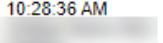
Displayed below is an example of the Batches screen. The Status column is highlighted:

Clicking on the status link will open a window with the history of that batch. There are seven descriptions that a batch status can be listed as:

- **In Progress** - The batch is being processed by Waystar.
- **In Review** - Batch was held for review. Batches are held for review until you manually release them.
- **Queued for Printing** - The batch is in the process of being printed.
- **In Quality Check** - The printed documents (contained in the batch) are being reviewed to ensure they meet quality standards.

- **Queued for Mailing** - Batch has been printed and delivered to the United States Postal Service (USPS).

- **Complete** - The batch has completed processing.

- **Error** - The batch encountered an error during the batch upload process.

- **Held Format in Test** - The batch was not submitted to the Print department.
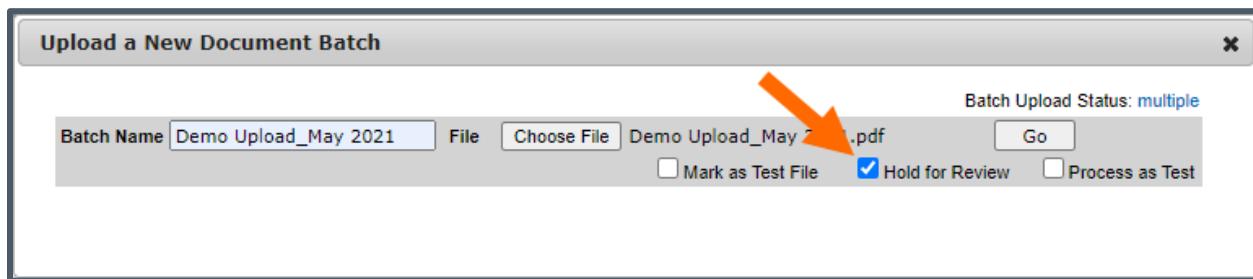
Upload a Batch for Review

The Print Services solution allows you to upload a batch of documents to be held for review. Holding a batch for review allows time and flexibility to:

- Review the data contained in each document.

- Review the data for consistency.

- Omit documents within a file.

Follow the steps below to upload a batch in review:

1. Go to the **Print Services > Batches** tab to access the Batches screen.

2. Click on the **Upload a New Batch** button.

3. Type the name of the batch in the **Batch Name** field.

4. Click the **Choose File** button to locate the saved file from your computer.

5. Click the **Hold for Review** checkbox:

6. Click the **Go** button.

7. The **Uploadin**g process bar displays and you are directed to the Batches screen upon completion.

Release a Batch Held for Review

Batches that have an "In Review" status must be released in order for documents to be processed. Batches can stay in the "In Review" status indefinitely. Follow the steps below to release a batch held for review:

1. Go to the **Print Services > Batches** tab to access the **Batches** screen.

2. Locate the "In Review" (status) batch to be released.

3. Click the **Release** button.
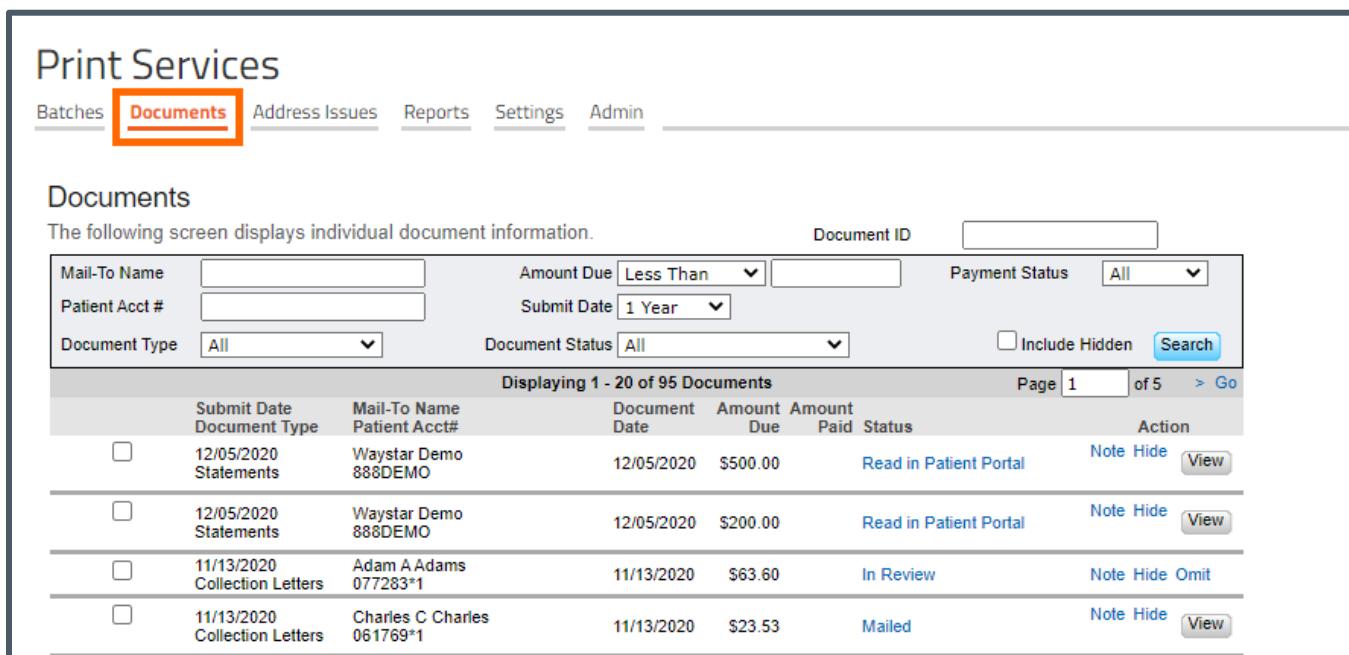
Cancel a Batch

Only Batches with the status "Queued for Processing" can be canceled. Follow these steps to cancel a batch:

1. Go to the **Print Services > Batches** tab to access the **Batches** screen.
2. Locate the **Action** column in the display area of the Batches screen.
3. Click the **Cancel** button.

Documents Screen

The Documents screen displays patient-level documents.

This screen contains functionality to:

- Search for a document
- View the status of a document
- Omit a Document
- View a PDF of the document
- Create a document note
- Hide a document
- View the history of a document

Search for a Document

The Documents screen contains a search feature that allows information to be entered for locating specific documents:

Information can be entered in one or more fields to retrieve a search result. The more information entered, the more customized the result.

View the Status of a Document

Follow the steps in the table below to view the status of a document:

1. Go to the **Print Services > Documents** tab to access the **Documents** screen.
2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.
3. Locate the **Status** column associated with the desired document.

There are several documentation statuses that can display, depending on the delivery method:

- **Pre-Processing** – Document has been received by Waystar and the batch is waiting to be processed.
- **In Review** – Document has been held for review by a client user.
- **Queued for Processing** – Document has been processed and is waiting to be printed.
- **Queued for Printing** – Document has been sent to the print queue but waiting for available print capacity.
- **Printing in Progress** – Document is printing.
- **Queued for Mailing** – Document has been printed and is awaiting final fulfillment.
- **Mailed** – Document has been mailed.
- **Not Mailed** – Document was sent to the print department, but was not mailed due to certain criteria.
- **Mailed and Returned** – This status is not currently being used; saved for a future enhancement.
- **Canceled** – Document was included in a batch that was canceled by the user.
- **Omitted** – Document was omitted before being sent to the print department.
- **Delivered Electronically** – (eDelivery only) Patient has not read the email containing the electronic statement within three days so a reminder email has been sent.
- **Read in Patient Portal** – (eDelivery only) Patient has read the email containing the electronic statement in the Patient Notebook portal.

- **Dropped to Paper** – (eDelivery only) Patient has not read the email containing the electronic statement within seven days so the statement has been mailed via paper.

- **Removed from Portal** – (eDelivery only) Document has been removed from the Patient Notebook portal.

Note: eDelivery is a solution offered by Waystar which allows providers to send their patients an electronic version of their patient statement.

Omit a Document

Only documents uploaded in a review batch can be omitted. Follow the steps below to omit a document:
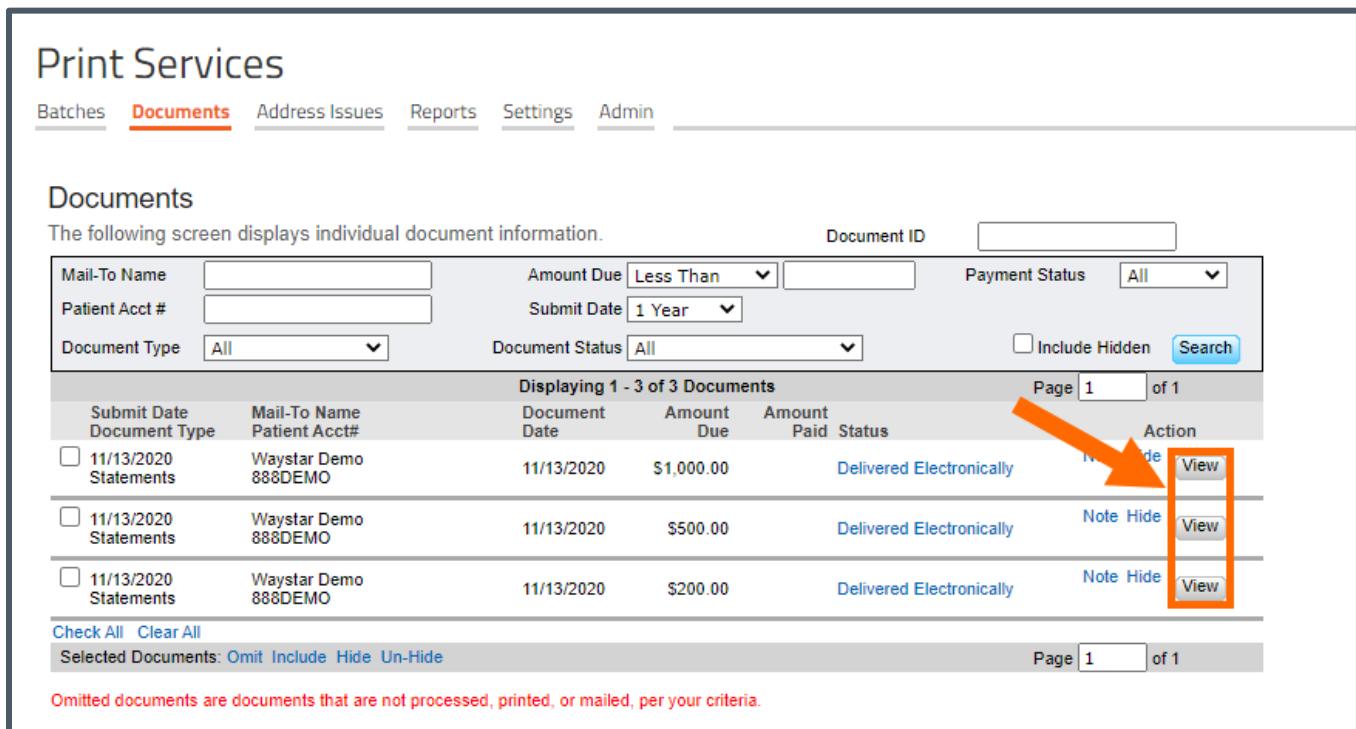
1. Go to the **Print Services > Batches** tab to access the **Batches** screen.

2. Locate the **Total Docs** column in the display area of the **Batches** screen.

3. Click the **Total Docs** link associated with the desired "In Review" batch.

4. Locate the document to be omitted in the display area of the **Documents** screen.

5. Click the **Omit** link associated with the document to be omitted:

	Displaying 1 - 20 of 95 Documents						Page 1 of 5 > Go
	Submit Date Document Type	Mail-To Name Patient Acct#	Document Date	Amount Due	Amount Paid	Status	Action
☐	12/05/2020 Statements	Waystar Demo 888DEMO	12/05/2020	$500.00		Read in Patient Portal	Note Hide View
☐	12/05/2020 Statements	Waystar Demo 888DEMO	12/05/2020	$200.00		Read in Patient Portal	Note Hide View
☐	11/13/2020 Collection Letters	Adam A Adams 077283*1	11/13/2020	$63.60		In Review	Note Hide Omit
☐	11/13/2020 Collection Letters	Charles C Charles 061769*1	11/13/2020	$23.53		Mailed	Note Hide View

View a PDF of a Document

Follow the steps below to view a PDF of a document:

1. Go to the **Print Services > Documents** tab to access the Documents screen.

2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.

3. Click the **View** button associated with the desired document:

4. A window displays a PDF of the image.

Create a Document Note

Follow the steps below to create a document note:

1. Go to the **Print Services > Documents** tab to access the Documents screen.

2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.

3. Click the **Note** link located under the **Action** column. The **New Note** pop-up window displays:
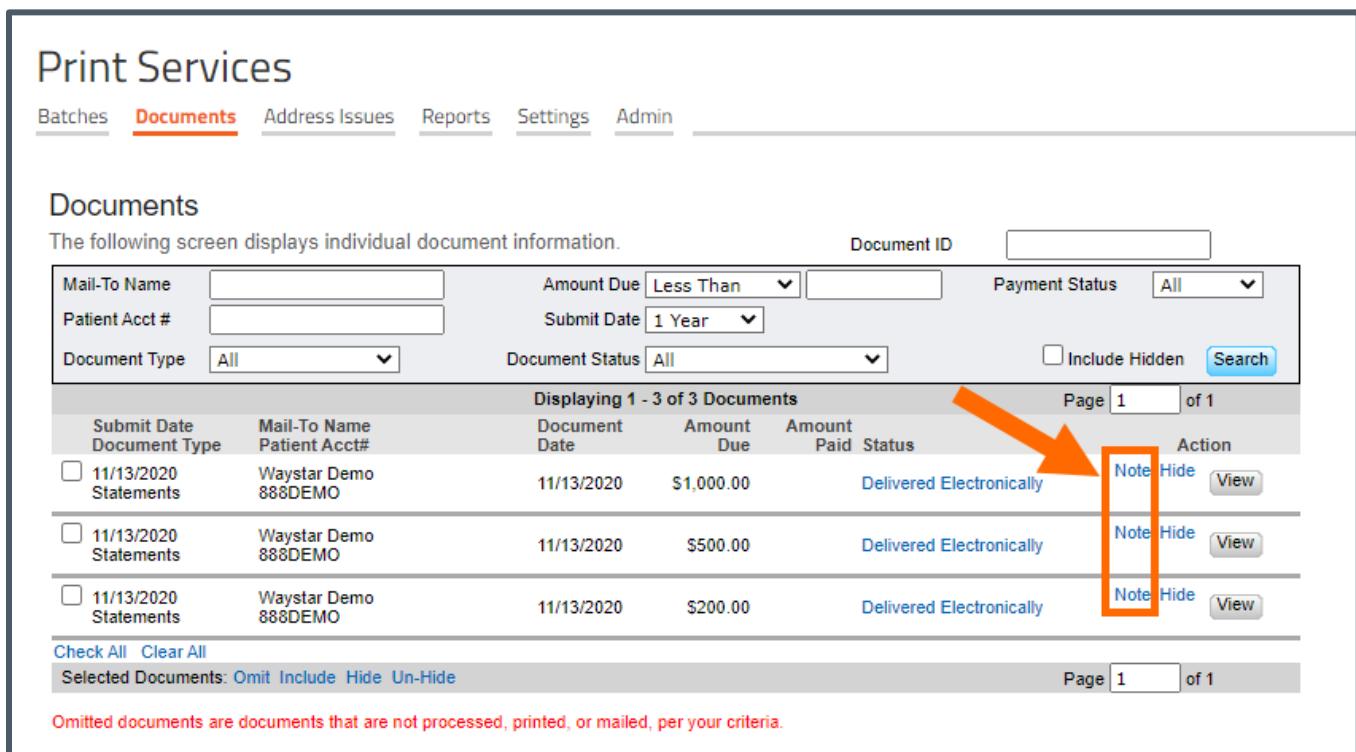
4. Type the desired information in the text field and click **Add Note**.

5. Click the **Last Note** link to view the entire note.

Hide a Document

Follow the steps below to hide a document:

1. Go to the **Print Services > Documents** tab to access the Documents screen.

2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.

3. Click the **Hide** link located under the Action column associated with the Mail-To Name or Patient Account Number:

View History of a Document

A Document History screen is generated for every document submitted to Waystar and contains the following information:

- Document ID
- Batch ID
- Date Received (Date and Time)
- Date Built (Date and Time)
- Link to original Inbound File
- Message (Action)

Follow the steps below to view the Document History screen:

1. Go to the **Print Services > Documents** tab to access the **Documents** screen.

2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.

3. Click the **Status** link associated with the Patient Name/ Mail-To Name to see the **Document History**:

Tracking Lockbox Payments in Print Services

Customers must be a current subscriber of the Lockbox solution to view Amount Paid information.

If you are not a Lockbox customer, then the Amount Paid column is always visible, but no information displays.
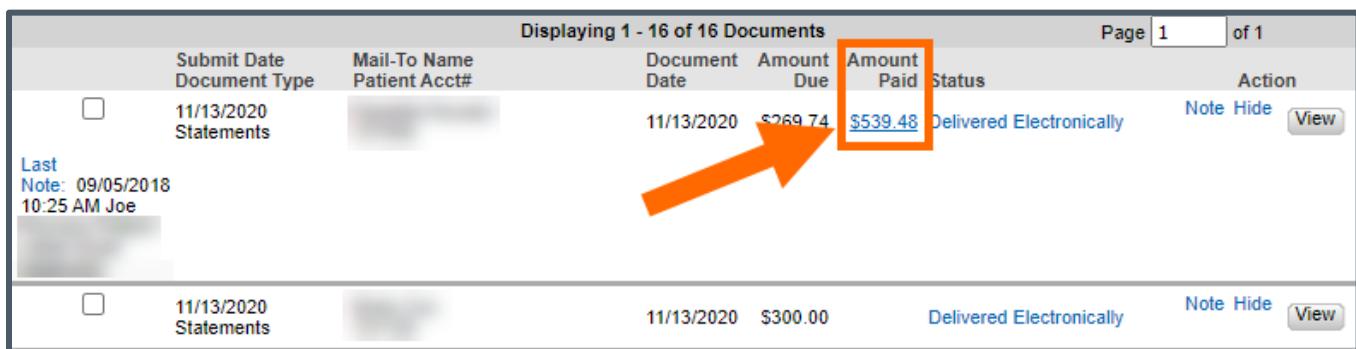
There are two methods by which Amount Paid information can be tracked:

- By Batch
- By Document

Track Payments Received by Batch

Follow the steps in the table below to track payments received by batch:

1. Go to the **Print Services > Batches** tab to access the **Batches** screen.

2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.

3. Click the **Total Docs** link associated with the desired batch. The **Documents** screen will display, presenting the documents contained in the selected batch.

4. Locate the **Amount Paid** column in the display area of the **Documents** screen.

5. Click on the desired link in the **Amount Paid** column to view an image of the payment sent to the **Lockbox**:

Track Payments Received by Document

Follow the steps below to track payments received by document:

1. Go to the **Print Services > Documents** tab to access the Documents screen.

2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.

3. Locate the **Amount Paid** column in the display area of the **Documents** screen.

4. Click on the desired link in the **Amount Paid** column to view an image of the payment sent to the **Lockbox**:

Address Issues Screen

The Address Issues screen displays documents that may be invalid according to the United States Postal Service (USPS) standards and the National Change of Address Database (NCOA). If a document appears on this screen it may or may not be delivered.

- **Waystar Mailing Attempts** – Waystar attempts to mail every statement received, including documents containing an address issues.

- **Warning Messages** – If a document contains an issue, then a warning message, or description of the error, is presented on the Address Issues screen. A warning message does not indicate the address is invalid, it means the address provided did not match with an address on file with the USPS national database.

- **Invalid Addresses** – Documents containing an invalid address are sent to the return address on the statement. When a document is not mailed because of an invalid address, a description of the error is presented on the Address Issues screen.

- **CASS Software** – The Coding Accuracy Support System, or CASS, is linked to the USPS database designed to improve the accuracy of the address and zip code that appears on each item in a mailing. Waystar submits all documents through CASS to ensure the addresses provided are valid before it is mailed. If an address is invalid, then the Address Issues screen displays the warning.

  Note: Documents omitted due to CASS code programming will display a status of Not Mailed.

Address Issues Screen Function

The Address Issues screen allows you to:

- Search for an address issue.
- View documents containing an invalid address.
- View documents that have a change of address.
- View the status of a document with an address issue.
- Add a note to an address issue.
- Hide or Reconcile an address issue.
- Download a CSV of address issues pertaining to the documents displayed on the Address Issues screen.

Search for an Address Issue

Follow the steps below to search for an address issue:

1. Go to the **Print Services > Address Issues** tab to access the Address Issues screen.
2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.
3. Locate the **Change of Address or Invalid Reason** column.
4. This column presents a description of the address issue associated with the document:

View the Status of an Address Issue

Follow the steps below to view the status for an address issue:

1. Go to the **Print Services > Address Issues** tab to access the Address Issues screen.

2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.

3. Locate the **Result** column in the **Display Area**.

4. The **Result** column displays the status of the document.

Correct an Address Issue

Follow the steps below to correct an address issue:

1. Go to the **Print Services > Address Issues** tab to access the Address Issues screen.

2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed in the display area.

3. Correct the address issue in your Practice Management system.

4. Click the **Hide** button for the now corrected document on the Address Issues screen.

Create a Note on an Address Issue Document

Follow the steps below to add a note to a document with an address issue:

1. Go to the **Print Services > Address Issues** tab to access the Address Issues screen.
2. Locate the desired document by utilizing the **Search** tool, or review the documents already displayed.
3. Click the **Note** link located under the **Action** column.
4. Type the desired information in the text field and click **Add Note**. The Document screen displays the entered note for the specified patient.
5. Click the **Last Note** link to view the entire note.
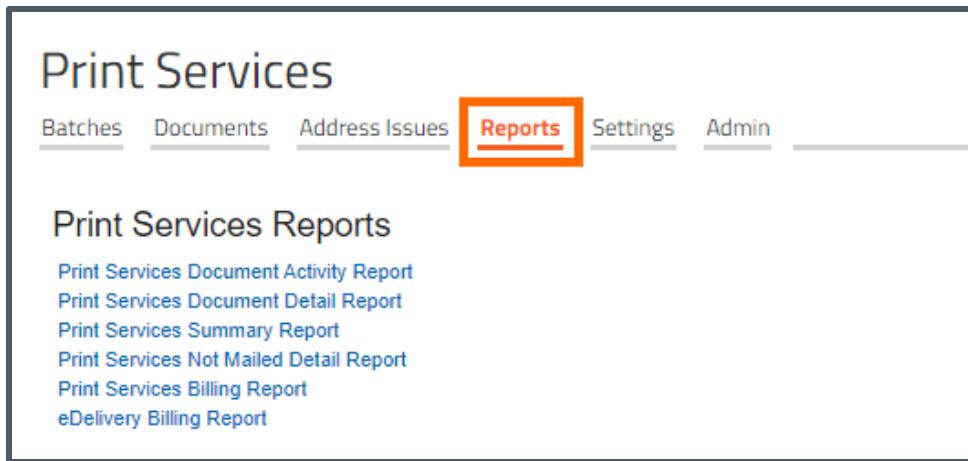
Download an Address Issue CSV Report

Follow the steps below to download a CSV report of address issues pertaining to the documents displayed on the Address Issues screen.

1. Go to the **Print Services > Address Issues** tab to access the Address Issues screen.
2. Click the **Download CSV** link. A **File Download** window will display.
3. Click **Open**.
4. The **Address Issues CSV Report** will open.

Print Services Reports

Go to the **Print Services > Reports** tab to access the Reports screen:

Print Services reports assist you with tracking statements, payments and errors.

Print Services Document Activity Report

The Print Services Document Activity Report presents date-specific information for every uploaded batch, sorted by account (customer) and/ or domain. The generated report includes the following data:

- Account name(s) and account number(s)
- Date batch was uploaded
- User who uploaded the batch
- Batch

- Total documents in a batch
- Billable documents
- Total pages
- Amount to be collected

Print Services Document Detail Report

The Print Services Document Detail Report screen presents an in depth information for a specific document type, submitted during a requested period of time. The generated report includes the following data:

- Submit Date
- Mail-To Name
- Patient Account Number
- Document Type
- Document Date
- Transaction Amount

Print Services Summary Report

The Print Services Summary Report presents the status of documents by account. This report presents the number of documents containing address issues, mailed and unmailed documents, and the total number of documents in each status. The generated report includes the following data:

- Account Name
- Account Number
- Address Issues
- Not Mailed Documents (number of document not mailed)
- Mailed Documents (number of documents mailed)
- Total Documents (number of documents mailed and unmailed)

Print Services Not Mailed Detail Report

The Print Services Not Mailed Report presents the status of unmailed documents by account. This report presents the number of documents containing address issues and the total number of documents in that status. Transaction dates can only span 31 days of statements uploads. The generated report includes the following data:

- The account(s) associated with the unmailed document(s)
- The number of unmailed documents by account
- The amount associated with each unmailed document
- The total amount associated with all unmailed documents for an account

Print Services Billing Report

The Print Services Billing Report contains transaction information processed by account. The generated report includes the following data:

- The number of Print Services Transactions Processed

- The dollar Amount associated with the transactions

- The number of Pages included in each document

- The amount associated with the document

eDelivery Billing Report

The eDelivery Billing Report contains transaction information regarding Waystar's statement eDelivery and Patient Notebook platforms. More specifically, the report indicates provider activity around the eDelivery/Patient Notebook experience.

Note: See the **Patient Notebook User Guide** for more information around the eDelivery and Patient Notebook platforms.

The generated report includes the following data:

- The number of Electronic Documents delivered.

- The number of email/SMS text Reminders sent inviting patients to the Patient Notebook platform.

- The number of Welcome emails/SMS text messages sent manually by the provider via the Patient Notebook platform.

- The number of new statements sent via email/SMS text.

- The number of statement Reminders sent via email/SMS text.

  Note: These reminders are sent if a delivered statement has not been viewed in Patient Notebook after three days.

- The number of eDelivery statements dropped to paper.

Revision Log

Date	Description	Version
August 2021	• Updated multiple screenshots throughout the guide to reflect minor UI upgrades • Revised the description of the Print Services Not Mailed Detail Report • Revised the description of the Print Services Billing Report • Added the eDelivery Billing Report section	1.2
March 2016	• Added Held Format in Test status to the Batch Status section • Added note to CASS Software bullet	1.1