



Remits User Guide

V17 – March 2025

Contents

Overview	4
Accessing the Remits solution	5
Remits dashboard	5
Downloads screen	7
Searching for Downloads	8
Search.....	8
ID Search	9
Downloads Toolbar	10
Download Actions	11
Download Details	12
Payments screen	13
Searching remittance payments	13
Searching	13
Saving a search	15
Using a saved search.....	16
Updating the payment list/grid	17
Viewing selected payments	19
Printing the Payments list	20
Viewing EOBS	21
Viewing individual paper EOBS	21
Viewing multiple paper EOBS.....	23
Viewing individual SPR EOBS	25
Viewing multiple SPR EOBS	26
Working with notes	28
Notes for individual payments	28
Notes for multiple payments	30
Viewing payment downloads	31
Viewing payment history	32
Archiving/unarchiving a payment	33
Archiving/unarchiving individual payments.....	33
Archiving/unarchiving multiple payments	34
Exporting payments	35
Building a payment remittance download	36
Reprocessing payments for download	37
Viewing payments on the Remits screen	38
Understanding payment icons	39
Remits screen	40
Toolbar	41
Action Column Options	42
Correspondence tab	43
Reports	44
Remits Billing Report	45
Remits Payment Detail Report	46
Scheduled Reports	47
Payment Adjustment Detail Report	48
One Time Report.....	48
Scheduled Daily Reports	49

In-App Documentation.....	49
Request Remittances Report	50
Pie Chart Data Breakdown	51
Requests Remittances Toolbar.....	52
Request Remittances Action Menu	53
Exports screen.....	54
Uploads screen	55
Search for an Uploaded File.....	56
Upload a New File	57
View an Upload	58
Uploads Action Menu.....	58
Add a Note to Multiple Uploads	59
Archive/Unarchive Multiple Uploads	59
Export Multiple Uploads	60
View Upload Payments.....	60
Tips and Tricks for Working with Uploads	60
Help	61
Payer Search screen	61
Settings screen	62
Build Options.....	63
Creating new build configurations	63
Build Options configuration example and outcome.....	65
Build Options listing.....	66
Revision Log	68

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

CLAIMS PROCESSING ▾	PATIENT TOOLS ▾	ANALYTICS	ACCOUNT	ADMIN ▾
Professional Claims	Remits			
Remits ➔	Dashboard	Downloads	Payments	
Denial Management	Remits	Deposits	Correspondence	
	Reports	Exports	Uploads	
	Payers	Settings	Admin	

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](#) [Downloads](#) [Payments](#) [Remits](#) [Deposits](#) [Correspondence](#) [Reports](#) [Exports](#) [Uploads](#) [Payers](#) [Settings](#)

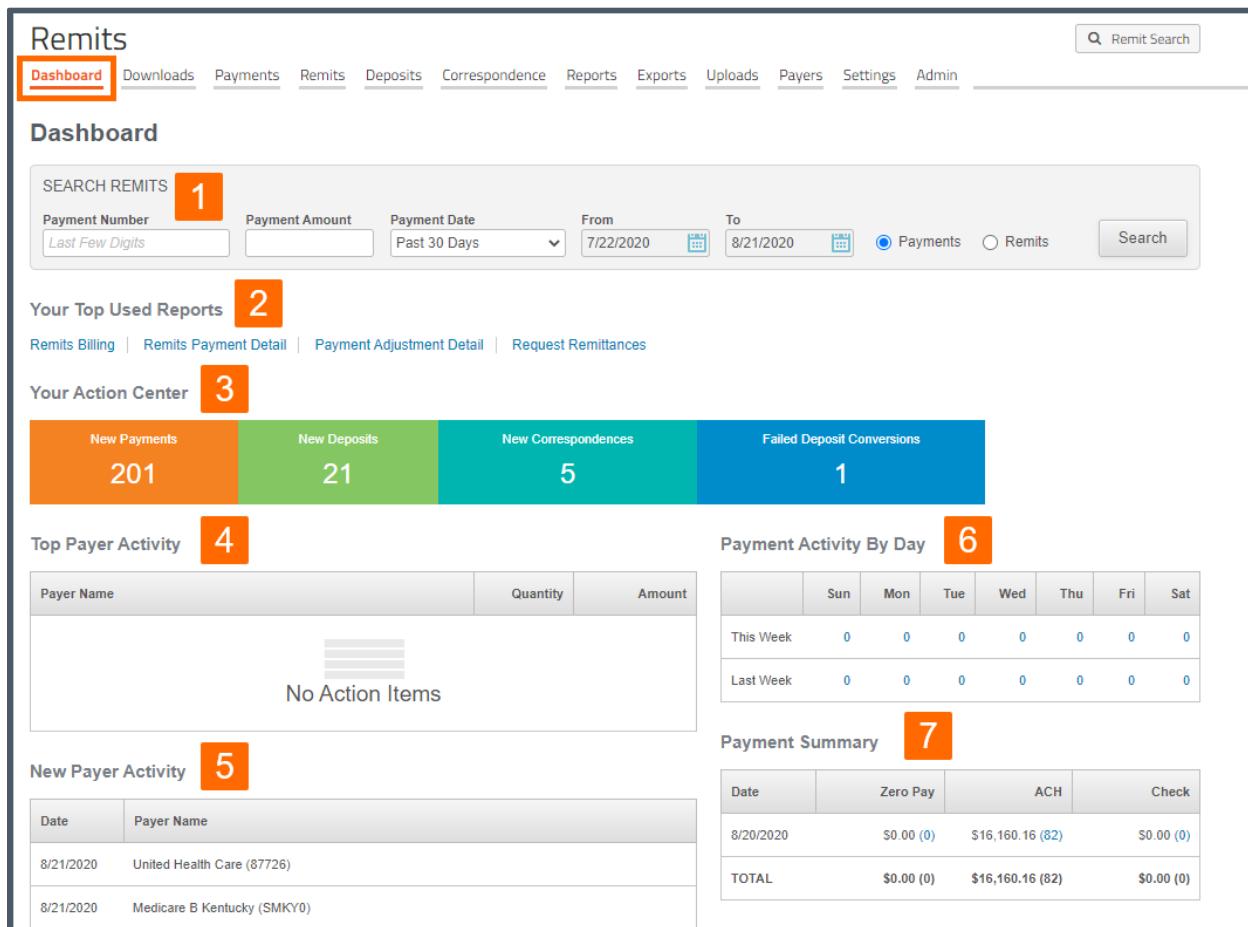
Remits dashboard

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.



The screenshot shows the Waystar Remits dashboard with the following sections and data points:

- Dashboard**: Shows a search bar for "REMIT SEARCH" and a "SEARCH REMITS" button (1).
- Your Top Used Reports**: Includes links to Remits Billing, Remits Payment Detail, Payment Adjustment Detail, and Request Remittances (2).
- Your Action Center**: Displays four categories with counts: New Payments (201), New Deposits (21), New Correspondences (5), and Failed Deposit Conversions (1) (3).
- Top Payer Activity**: Shows a table with columns for Payer Name, Quantity, and Amount. It displays "No Action Items" (4).
- New Payer Activity**: Shows a table with Date and Payer Name. It includes rows for 8/21/2020 (United Health Care (87726)) and 8/21/2020 (Medicare B Kentucky (SMKY0)) (5).
- Payment Activity By Day**: A grid showing the number of payments per day from Sunday to Saturday for the current week and last week (6).
- Payment Summary**: A table showing ERA payment details by date, including Zero Pay, ACH, and Check amounts (7).

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 screenshot shows the 'Downloads' screen in Waystar. On the left, there is a search panel with fields for File Date (11/19/2019 to 2/17/2020), Payer (dropdown), Payment Number (Last Few Digits), Payment Amount, Download Amount, View Options (Unarchived), and ID Search. A large orange box labeled '2' highlights the 'ID Search' field. To the right is a table of download details. An orange box labeled '3' highlights the first row of the table. Another orange box labeled '4' highlights the 'Download' button in the 'Action' column of the same row. The table includes columns for File Date, Payer Description, Format, Amount, Payments, and Action. The first row shows a payment from Humana (and subsidiaries) on 2/17/2020.

File Date	Payer Description	Format	Amount	Payments	Action
2/17/2020	Humana (and subsidia...(61101)	835 5010	\$536.01	2	4
2/17/2020	United Health Integr...(39026)	835 5010	\$803.53	4	
2/17/2020	Humana (and subsidia...(61101)	835 5010	\$5,623.70	5	
2/16/2020	United Health Integr...(39026)	835 5010	\$1,058.08	2	
2/16/2020	Humana (and subsidia...(61101)	835 5010	\$8.15	1	
2/16/2020	Humana (and subsidia...(61101)	835 5010	\$52,232.40	4	

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.

Downloads

Search

File Date	Payer Description	Format	Amount	Payments	Action
11/19/2019	Humana (and subsidia...(61101)	835 5010	\$536.01	2	EOB ▼
2/17/2020	United Health Integr...(39026)	835 5010	\$803.53	4	EOB ▼
2/17/2020	Humana (and subsidia...(61101)	835 5010	\$5,623.70	5	EOB ▼
2/16/2020	United Health Integr...(39026)	835 5010	\$1,058.08	2	EOB ▼
2/16/2020	Humana (and subsidia...(61101)	835 5010	\$8.15	1	EOB ▼
2/16/2020	Humana (and subsidia...(61101)	835 5010	\$52,232.40	4	EOB ▼
2/16/2020	Humana (and subsidia...(61101)	835 5010	\$520.27	1	EOB ▼
2/16/2020	Anthem Regional (IN,...(ZBIKO)	835 5010	\$227.14	2	EOB ▼
2/15/2020	Anthem Regional (IN,...(ZBIKO)	835 5010	\$180.38	1	EOB ▼
2/15/2020	Anthem Regional (IN,...(ZBIKO)	835 5010	\$1,444.08	1	EOB ▼

ID Search

ID Search

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

Downloads

ID Search

File Date	Payer Description	Format	Amount	Payments	Action
6/27/2019	Medicare B Kentucky(SMKY0)	835 5010	\$549.37	1	EOB ▼
5/30/2019	United Health Care(87726)	835 5010	\$595.00	1	EOB ▼
5/17/2019	United Health Care(87726)	835 5010	\$594.00	1	EOB ▼
5/17/2019	United Health Care(87726)	835 5010	\$597.00	1	EOB ▼

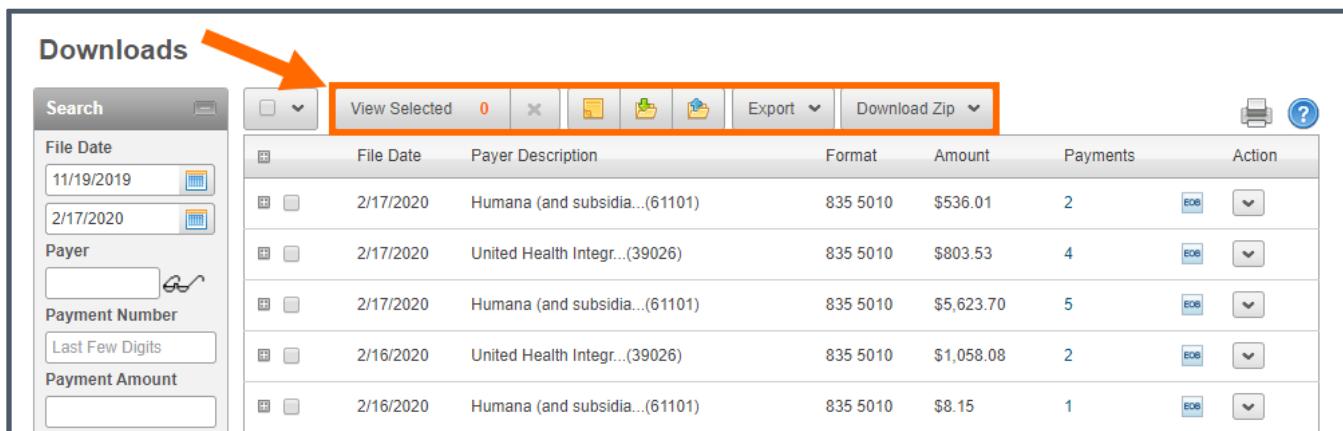
Displaying 1 - 4 of 4 records Page of 1

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.



The screenshot shows the 'Downloads' screen. On the left is a search panel with fields for File Date (11/19/2019 to 2/17/2020), Payer (dropdown), Payment Number (dropdown), and Payment Amount (dropdown). The main area is a grid of download entries. An orange arrow points to the toolbar at the top right, which includes buttons for 'View Selected' (with a count of 0), 'X', 'Print', 'Archive', 'Unarchive', 'Export', and 'Download Zip'. The grid columns are: File Date, Payer Description, Format, Amount, Payments, and Action (with EOB and dropdown icons).

File Date	Payer Description	Format	Amount	Payments	Action
11/19/2019	Humana (and subsidia...(61101)	835 5010	\$536.01	2	EOB
2/17/2020	United Health Integr...(39026)	835 5010	\$803.53	4	EOB
2/17/2020	Humana (and subsidia...(61101)	835 5010	\$5,623.70	5	EOB
2/16/2020	United Health Integr...(39026)	835 5010	\$1,058.08	2	EOB
2/16/2020	Humana (and subsidia...(61101)	835 5010	\$8.15	1	EOB

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:

The screenshot shows a 'Downloads' interface with a search panel on the left and a main table on the right. The table has columns: File Date, Payer Description, Format, Amount, Payments, and Action. An orange arrow points to the '+' icon in the first row's Action column. Another orange arrow points to the same row, indicating it's selected. A third orange box highlights the 'Action' column header. A context menu is open on the last row of the table, listing four options: 'Download' (green leaf icon), 'Notes' (yellow folder icon), 'Archive' (orange folder icon), and 'View SPR EOB' (blue folder icon). The 'Download' option is also highlighted with an orange border.

Downloads							
Search		File Date	Payer Description	Format	Amount	Payments	Action
<input type="button" value="File Date"/>	<input type="button" value="Payer"/>	11/19/2019	Humana (and subsidia...(61101)	835 5010	\$536.01	2	
<input type="button" value="Payment Number"/>		2/17/2020	United Health Integr...(39026)	835 5010	\$803.53	4	
<input type="button" value="Last Few Digits"/>		2/17/2020	Humana (and subsidia...(61101)	835 5010	\$5,623.70	5	
<input type="button" value="Payment Amount"/>		2/16/2020	United Health Integr...(39026)	835 5010	\$1,058.08	2	
		2/16/2020	Humana (and subsidia...(61101)	835 5010	\$8.15	1	

- **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**

	File Date	Payer Description	Format	Amount	Payments	Action
   	6/25/2019	CIGNA (Connecticut G...(62308)	835 5010	\$0.00	1	 

Download Details

Download ID: 31045079
Created By: Waystar S (Waystar)
Created On: 6/25/2019 10:47 AM
Last Downloaded By: FTPUser
Last Downloaded On: 6/25/2019 10:47 AM
Archived By:

 View Txt EOB
 View EOB
 View SPR EOB
 Notes
 Unarchive

 Download

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.

	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input type="checkbox"/>	\$720.53	08/21/2015	CIGNA (Connecticut General, Equicor, Equitable) (62308)	ACH	[REDACTED]	1
<input type="checkbox"/>	\$910.10	08/21/2015	CIGNA (Connecticut General, Equicor, Equitable) (62308)	ACH	[REDACTED]	1
<input type="checkbox"/>	\$400.00	08/21/2015	CIGNA (Connecticut General, Equicor, Equitable) (62308)	ACH	[REDACTED]	1
<input type="checkbox"/>	\$20.00	08/21/2015	CIGNA (Connecticut General, Equicor, Equitable) (62308)	ACH	[REDACTED]	1
<input type="checkbox"/>	\$200.00	08/21/2015	CIGNA (Connecticut General, Equicor, Equitable) (62308)	ACH	[REDACTED]	1

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.

CURRENT SEARCH Save Search Clear All
View Options: Unarchived x Include \$0 Payment: Include \$0 Payment x Received Date: 10/11/2023-1/9/2024

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.

FILTERS
Saved Searches (7) ▾
Payer
Name or Account
Payment # Search Type
Exact
Amount Type
View Selected 0 View Add Note Archive Unarchive Export Build
Payments
CURRENT SEARCH Save Search Clear All
View Options: Unarchived x Include \$0 Payment: Include \$0 Payment x Received Date: 12/4/2024-3/4/2025

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 accounts** checkbox.
5. Click the **Save** button.

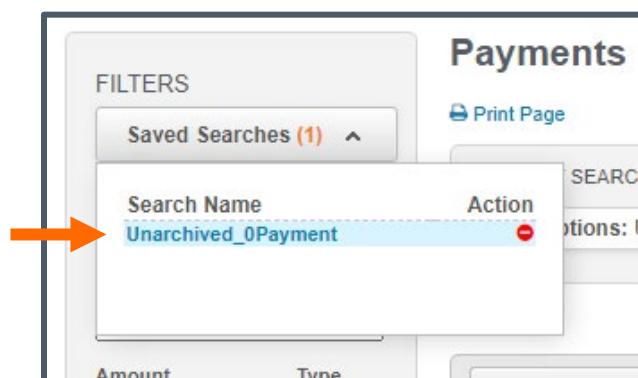
The search will appear under the **FILTERS** heading in the **Saved Searches** dropdown.

Save Search
Search Name: SB710 - Month
 Apply this saved search across all my accounts
Save Cancel

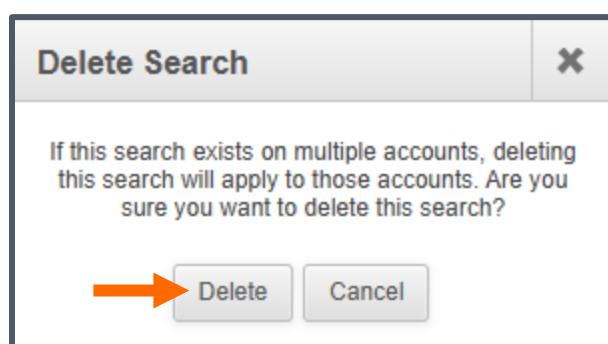
Using a saved search

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:

- From the Payments screen, click the **Grid Settings** button.

The screenshot shows the 'Payments' screen in Waystar. On the left, there's a 'FILTERS' sidebar with sections for 'Saved Searches', 'Payer', 'Payment #', 'Amount', and 'Received Date'. The main area is titled 'Payments' and contains a search bar with filters like 'View Options: Unarchived', 'Include \$0 Payment: Include \$0 Payment', and 'Received Date: 12/4/2024-3/4/2025'. Below the search bar are buttons for 'View Selected', 'View', 'Add Note', 'Archive', 'Unarchive', 'Export', 'Build', and 'More'. On the far right, there's a 'Grid Settings' button, which is highlighted with a large orange arrow. At the top right of the screen is a 'Remit Search' input field.

The Edit Column Settings screen will open.

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

The screenshot shows the 'Edit Column Settings' dialog box. It has a title bar with a close button. Inside, there's a section titled 'Show in Table' with a note 'Select up to 10'. A list of checkboxes includes 'Deposit Amount', 'Deposit Date', 'Patient Responsibility', 'Payment Amount' (checked), 'Payment Date' (checked), 'Payment #' (checked), 'Payment Payee NPI', 'Payment Received Date', 'PLB Amount', 'Posted Amount', 'Posted Date', 'Remits' (checked), and 'Type' (checked). Below this is a note: 'You can drag the column headers you selected above in any order.' and 'Please Note: The checkbox and any indicator icons will appear in the left most column. Both the checkbox and any icon indicators will always be shown.' At the bottom, there's a row of buttons labeled 'Payment Amount', 'Payment Date', 'Payer', 'Type', 'Payment #', and 'Remits', followed by a 'Update Column Settings' button.

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.

You can drag the column headers you selected above in any order.
Please Note: The checkbox and any indicator icons will appear in the left most column.
Both the checkbox and any icon indicators will always be shown.

Payment Amount	Payment Date	Payer	Type	Payment Remits	Remits
----------------	--------------	-------	------	----------------	--------

Update Column Settings

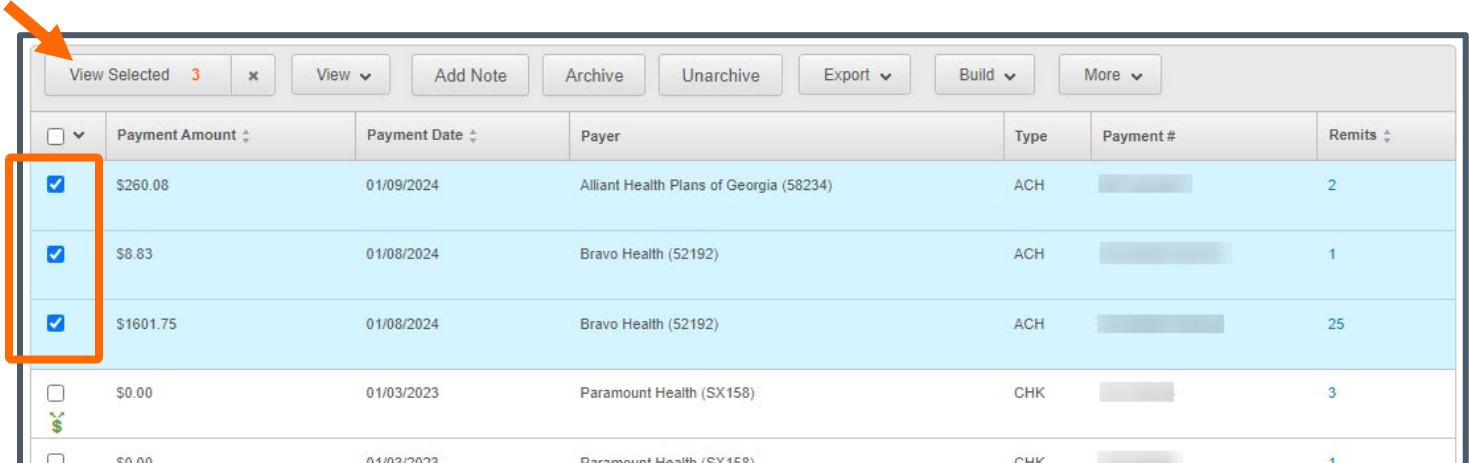
4. When finished updating columns, click the **Update Column Settings** button.

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.



	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input type="checkbox"/>	\$260.08	01/09/2024	Alliant Health Plans of Georgia (58234)	ACH	[REDACTED]	2
<input checked="" type="checkbox"/>	\$8.83	01/08/2024	Bravo Health (52192)	ACH	[REDACTED]	1
<input checked="" type="checkbox"/>	\$1601.75	01/08/2024	Bravo Health (52192)	ACH	[REDACTED]	25
<input type="checkbox"/>	\$0.00	01/03/2023	Paramount Health (SX158)	CHK	[REDACTED]	3
<input type="checkbox"/>	\$0.00	01/03/2023	Paramount Health (SX158)	CHK	[REDACTED]	1

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.



	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input checked="" type="checkbox"/>	\$260.08	01/09/2024	Alliant Health Plans of Georgia (58234)	ACH	[REDACTED]	2
<input checked="" type="checkbox"/>	\$8.83	01/08/2024	Bravo Health (52192)	ACH	[REDACTED]	1
<input checked="" type="checkbox"/>	\$1601.75	01/08/2024	Bravo Health (52192)	ACH	[REDACTED]	25
Results 1 - 3 of 3						
Page 1 of 1				Per Page <select>100</select>		

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 screenshot shows the Waystar Remits interface. The top navigation bar includes links for Dashboard, Downloads, Payments (which is underlined in red), Remits, Deposits, Correspondence, Reports, Exports, Uploads, Payers, and Settings. A search bar at the top right contains the text "Remit". Below the navigation is a "FILTERS" section with a dropdown for "Saved Searches (7)". Under "Payer", there is a search field labeled "Name or Account". Under "Payment #", there are fields for "#", "Search Type" (set to "Exact"), "Amount", and "Type". To the right of the filters is the main "Payments" search area. It features a title "Payments", a "Print Page" button with a blue icon, and search parameters: "CURRENT SEARCH", "Save Search", "Clear All", "View Options: Unarchived", "Include \$0 Payment: Include \$0 Payment", and "Received Date: 12/4/2024-3/4/2025". At the bottom of the search area are buttons for "View Selected", "Archive", "Unarchive", "Export", and "Build". An orange arrow points to the "Print Page" button.

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.

View Selected 0		*	View ▾	Add Note	Archive	Unarchive	Export ▾	Build ▾	More ▾	
□ ▾	Payment Amount ▾	Payment Date ▾	Payer	Type	Payment #	Remits ▾				
<input type="checkbox"/>	\$748.47	01/08/2024	Medicaid Massachusetts (SKMA0)	ACH		19				
<input type="checkbox"/>	\$278.49	01/08/2024	View EOB Notes View SPR EOB Downloads History Archive ACH			4				
<input type="checkbox"/>	56048-74	01/04/2024	Brae Health (52100)	ACH		82				

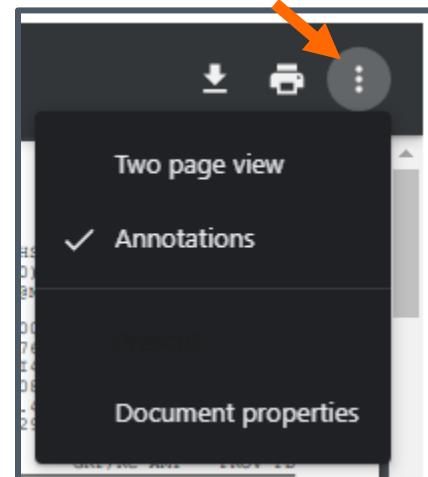
The View EOB screen will open displaying a downloadable and/or printable version of the EOB.

The View EOB screen displays a modal window containing the following information:

- Preview:** Shows a thumbnail of the EOB document.
- Detailed Breakdown:** Shows a table of charges with columns: NAME, CONTRACTED, MAIDI, ACNT, ION, PAYOR, SERV DATE, FOR RSB PROG, MOD, BILLING, ALLOWED, DIRECT COSTS, DRG/RC-AMT, BRY, PT, and REM.
- Second Preview:** Shows another thumbnail of the EOB document.

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.
-  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  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.



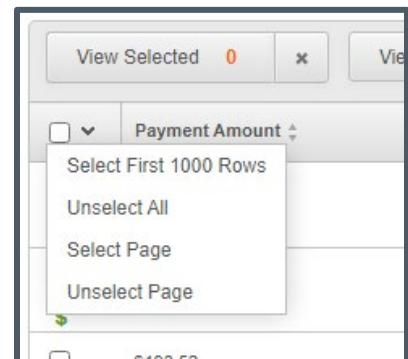
Viewing multiple paper EOBS

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.

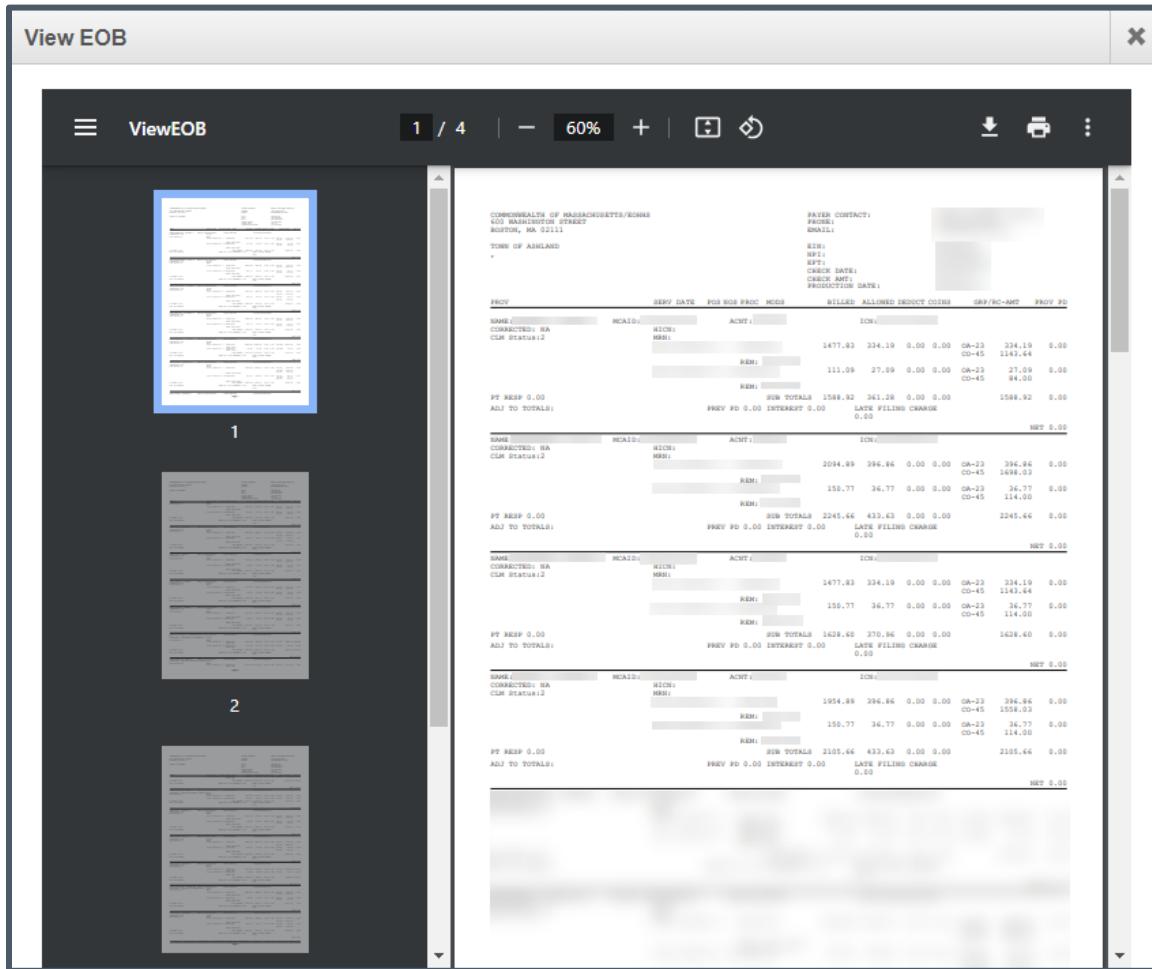


3. From the toolbar > View dropdown, select **Paper EOBS**.

	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input checked="" type="checkbox"/>	\$73.02	01/10/2024	Paramount Health (SX158)	CHK		1
<input type="checkbox"/>	\$193.52	01/12/2024	Bravo Health (52192)	ACH		2
<input checked="" type="checkbox"/>	\$170.87	01/12/2024	Bravo Health (52192)	ACH		2
<input checked="" type="checkbox"/>	\$1363.64	01/12/2024	Bravo Health (52192)	ACH		22
	\$25.74	01/12/2024	BCBS Michigan (SB740)	CHK		2

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.

	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input type="checkbox"/>	\$748.47	01/08/2024	Medicaid Massachusetts (SKMA0)	ACH		19
<input type="checkbox"/>	\$278.49	01/08/2024	View EOB Notes View SPR EOB Downloads History Archive ACH			4
<input type="checkbox"/>						

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.

== COMMONWEALTH OF MASSACHUSETTS/EOHHS
TOWN OF ASHLAND FPE: C COMMONWEALTH OF MASSACHUSETTS/EOHHS
PAID: 01/08/24 600 WASHINGTON STREET
TOB: 411 BOSTON MA 02111
NPI: [REDACTED] FTN: TE: (800)841-2900
CLM#: [REDACTED] CHECK/EFT: [REDACTED]
CHECK AMT: 748.47

PATIENT: [REDACTED] PCN:
MID: SVC FROM: 09/14/23 MRN:
CLAIM STAT: 2 THRU: 09/14/23 ICN:
COR MID:

CHARGES: PAYMENT DATA: =DRG 0.00=REIM RATE
1588.92=REPORTED 0.00=DRG AMOUNT 0.00=MSP PRIM PAYER
0.00=NCVD/DENIED 0.00=DRG/OPER/CAP 0.00=PROF COMPONENT
0.00=CLAIM ADJ 1227.64=LINE ADJ AMT 0.00=ESRD AMOUNT
0.00=COVERED 0.00=OUTLIER 0.00=PROC CD AMOUNT
DAYS/VISITS: 0.00=CAP OUTLIER 0.00=ALLOW/REIM
=COST REPT 0.00=CASH DEDUCT 0.00=SEQUSTRATN
0=CODV/UTIL 0.00=BLOOD DEDUCT 0.00=INTEREST
0=NON-COVERED 0.00=COINSURANCE 0.00=CONTRACT ADJ
0=CODV VISITS 0.00=PAT REFUND 0.00=PER DIEM AMT
0=NCOV VISITS 0.00=PBP REDUCT 0.00=PA REDUCT
0.00=DISC PEN AMT 0.00=NET REIM AMT

ADJ REASON CODES:
REV DATE HCPCS APC/HIPPS MODS QTY CHARGES ALLOW/REIM GC RSN AMOUNT REMARK CODES
LICN HCPI
SVC Desc 09/14 A0429 RH 1 1477.83 0.00 OA 23 334.19 N419 N45
1001 CO 45 1143.64

09/14 A0425 RH 4.2 111.09 0.00 OA 23 27.09 N419 N45
1002 CO 45 84.00

GLOSSARY
OA Other adjustments
CO Contractual obligations. The patient may not be billed for this amount

Viewing multiple SPR EOBS

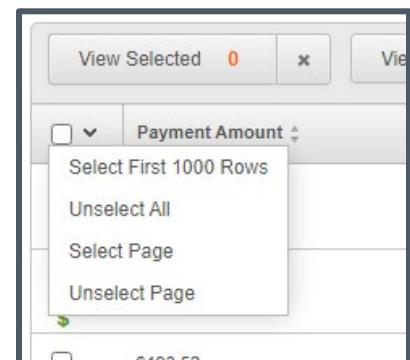
This section explains how to view multiple SPR EOBS, which are a more detailed, payer-preferred version.

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**.

	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input checked="" type="checkbox"/>	\$73.02	01/10/2024	Paramount Health (SX158)	CHK		1
<input type="checkbox"/>	\$193.52	01/12/2024	Bravo Health (52192)	ACH		2
<input checked="" type="checkbox"/>	\$170.87	01/12/2024	Bravo Health (52192)	ACH		2
<input checked="" type="checkbox"/>	\$1363.64	01/12/2024	Bravo Health (52192)	ACH		22
	\$25.74	01/12/2024	PCRS Medicare (CB710)	CHK		2

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.

EOB

Print

== PARAMOUNT INSURANCE COMPANY		PARAMOUNT INSURANCE COMPANY	
IHA OF ANN ARBOR PC	FPE: C	PAID: 01/10/24	P.O. BOX 928
PO BOX 778964	TOB:	TOLEDO OH 43697	
CHICAGO IL 60677	FTN:	TE:	
NPI:	CHECK/EFT:		
CLM#:	CHECK AMT:	73.02	
<hr/>			
PATIENT: [REDACTED]	PCN: [REDACTED]		
MID: [REDACTED]	SVC FROM: 02/08/23	MRN: [REDACTED]	
CLAIM STAT: 1	THRU: [REDACTED]	ICN: [REDACTED]	
COR MID:			
<hr/>			
CHARGES:	PAYMENT DATA:	=DRG	0.00=REIM RATE
121.00=REPORTED	0.00=DRG AMOUNT	0.00=MSP PRIM PAYER	
0.00=NCVD/DENIED	0.00=DRG/OPER/CAP	0.00=PROF COMPONENT	
0.00=CLAIM ADJ'S	47.98=LINE ADJ AMT	0.00=ESRD AMOUNT	
0.00=COVERED	0.00=OUTLIER	0.00=PROC CD AMOUNT	
DAYS/VISITS:	0.00=CAP OUTLIER	73.02=ALLOW/REIM	
=COST REPT	0.00=CASH DEDUCT	0.00=SEQUESTRAN	
0=CVO/UTIL	0.00=BLOOD DEDUCT	0.00=INTEREST	
0=NON-COVERED	0.00=COINSURANCE	0.00=CONTRACT ADJ	
0=CVO VISITS	0.00=PAT REFUND	0.00=PER DIEM AMT	
0=NCOV VISITS	0.00=PBP REDUCT	0.00=PA REDUCT	
	0.00=DISC PEN AMT	73.02=NET REIM AMT	
<hr/>			
ADJ REASON CODES:			
REV DATE	HCPSC	APC/HIPPS	MODS
LICN	HCPI		
SVC Desc			
02/08 90715		1	76.00
P1301378830-1			47.25 CO 45
			28.75 N25
02/08 90471		1	45.00
P1301378830-2			25.77 CO 45
			19.23 N25
<hr/>			
GLOSSARY			
CO Contractual obligations. The patient may not be billed for this amount			
N25 This company has been contracted by your benefit plan to provide administrative claims payment services only. This company does not assume financial risk or obligation with respect to claims processed on			

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.

View Selected 0		*	View	Add Note	Archive	Unarchive	Export	Build	More
□	Payment Amount	Payment Date	Payer	Type	Payment #	Remits			
□	\$748.47	01/08/2024	Medicaid Massachusetts (SKMA0)	ACH		19			
□	\$278.49	01/08/2024	View EOB	Notes	View SPR EOB	Downloads	History	Archive	ACH
□									22

The Notes screen will open.

Notes

Add a note.

244 characters left.

+ Add Note Cancel

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.

Notes

Begin typing your note here...

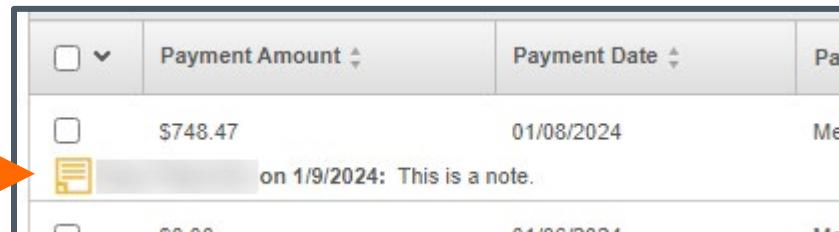
240 characters left.

+ Add Note Cancel

Waystar () JAN 09, 2024 11:32AM

This is a note.

6. When you close the Notes screen, the note will appear in the payment row.

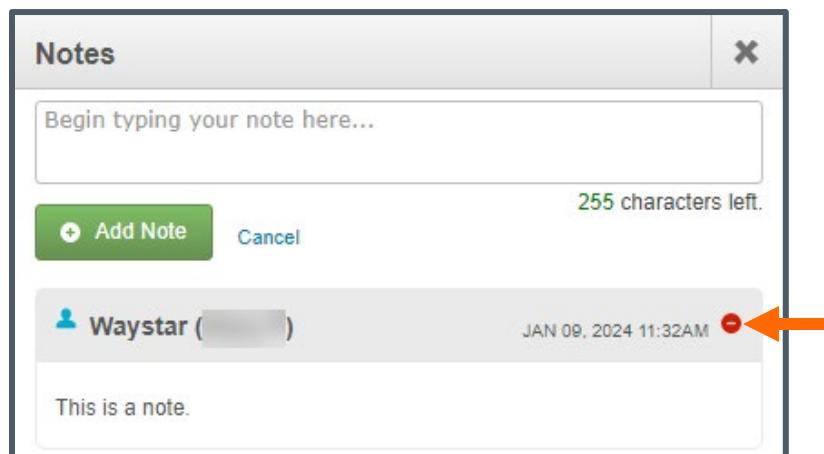


A screenshot of a payment row in a software application. The row includes columns for Payment Amount (\$748.47), Payment Date (01/08/2024), and a Notes section. An orange arrow points to the Notes section, which contains the text "on 1/9/2024: This is a note." The entire row is highlighted with a black border.

<input type="checkbox"/>	Payment Amount	Payment Date	Pay
<input type="checkbox"/>	\$748.47	01/08/2024	Me
	on 1/9/2024: This is a note.		
<input type="checkbox"/>	0.00	01/08/2024	Ma

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.

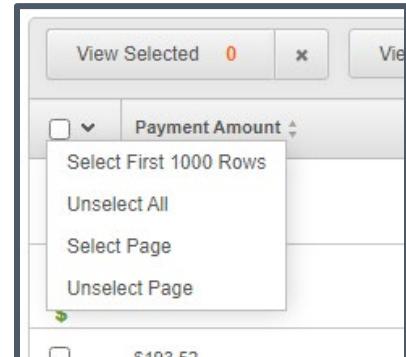


Notes for multiple payments

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.

	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input checked="" type="checkbox"/>	\$260.08	01/09/2024	Alliant Health Plans of Georgia (58234)	ACH		2
<input checked="" type="checkbox"/>	\$8.83	01/08/2024	Bravo Health (52192)	ACH		1
<input checked="" type="checkbox"/>	\$1601.75	01/08/2024	Bravo Health (52192)	ACH		25
<input type="checkbox"/>	\$0.00	01/03/2023	Paramount Health (SX158)	CHK		3
	\$0.00	01/03/2023	Paramount Health (SX158)	CHK		1

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.

View Selected 0							
View		Add Note	Archive	Unarchive	Export	Build	More
<input type="checkbox"/>	Payment Amount ▲	Payment Date ▲	Payer	Type	Payment #	Remits ▲	
<input type="checkbox"/>	\$748.47	01/08/2024	Medicaid Massachusetts (SKMA0)	ACH		19	
<input type="checkbox"/>	\$278.49	01/08/2024	Reserve Health (F2102)	ACH		4	
<input type="checkbox"/>	SS042-T4	01/04/2024		ACH		22	

The Downloads screen will open.

Downloads						
File Date	Payer Description	Format	Amount	Payments	EOB	Go To Downloads
12/04/2023	Alliant Health Plans of Georgia	835 5010	\$42.80	1		
Results 1 - 1 of 1						

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.

View Selected 0								*	View	Add Note	Archive	Unarchive	Export	Build	More
	Payment Amount	Payment Date	Payer				Type	Payment #	Remits						
<input type="checkbox"/>	\$748.47	01/08/2024	Medicaid Massachusetts (SKMA0)				ACH		19						
<input type="checkbox"/>	\$278.49	01/08/2024	View EOB	Notes	View SPR EOB	Downloads	History	Archive	CH						
<input type="checkbox"/>	\$6049.74	01/04/2024	Brave Health (52100)				ACH		82						

The PAYMENT DETAILS history screen will open.

PAYMENT DETAILS	
Payment ID:	553493011
Received Date:	06/16/2022 11:01 AM
Payer NPI:	0000000063
Amount:	\$33.33
Inbound Format:	5010 Original File
Route:	24
Last Download:	06/16/2022 11:01 AM
Status:	Completed
9/1/2023	
Matched to Deposit: 2:46 PM on 9/1/2023	
By	
Deposit ID	13794607
Account	729
Amount	\$33.33
Deposit Date	1/1/0001
Upload ID	0
Format	
Check Number	
8/31/2023	
Matched to Deposit: 9:46 AM on 8/31/2023	
By	
Deposit ID	13794607
Account	729
Amount	\$33.33

4. To save the original 5010 file, click the [Original File](#) link, which will open a Save As screen.

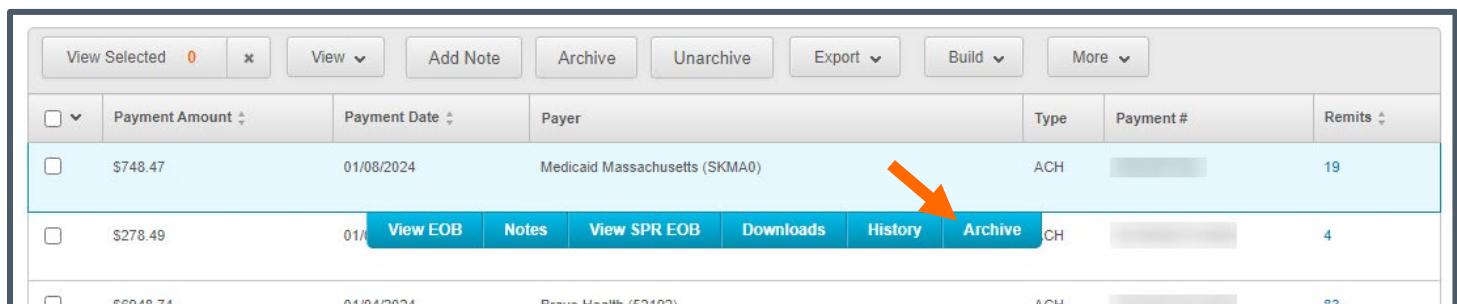
Archiving/unarchiving a payment

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

Archiving/unarchiving individual payments

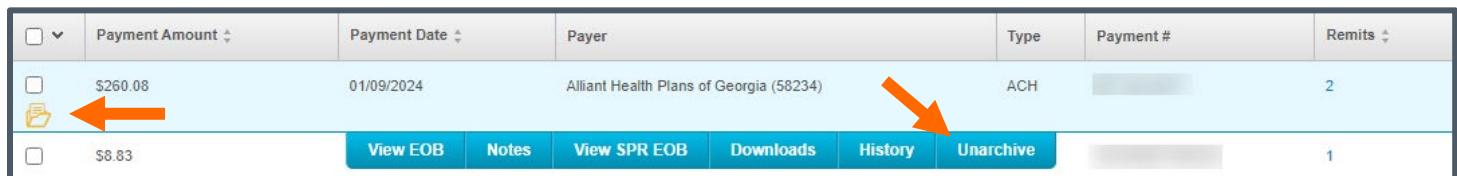
To archive a payment:

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.



View Selected 0		*	View	Add Note	Archive	Unarchive	Export	Build	More
<input type="checkbox"/>	Payment Amount	Payment Date	Payer	Type	Payment #	Remits			
<input type="checkbox"/>	\$748.47	01/08/2024	Medicaid Massachusetts (SKMA0)	ACH		19			
<input type="checkbox"/>	\$278.49	01/08/2024	Alliant Health Plans of Georgia (58234)	ACH		4			
<input type="checkbox"/>	\$260.08	01/09/2024	Alliant Health Plans of Georgia (58234)	ACH		2			
<input type="checkbox"/>	\$8.83			View EOB	Notes	View SPR EOB	Downloads	History	Archive

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



View Selected 0		*	View	Add Note	Archive	Unarchive	Export	Build	More
<input type="checkbox"/>	Payment Amount	Payment Date	Payer	Type	Payment #	Remits			
<input type="checkbox"/>	\$260.08	01/09/2024	Alliant Health Plans of Georgia (58234)	ACH		2			
<input type="checkbox"/>	\$8.83			View EOB	Notes	View SPR EOB	Downloads	History	Unarchive

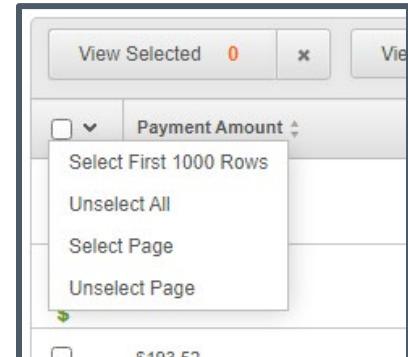
4. To unarchive a payment, hover your cursor over the row and click the **Unarchive** button.

Archiving/unarchiving multiple payments

To archive/unarchive multiple payments:

1. As needed, [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 **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.

	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input checked="" type="checkbox"/>	\$260.08	01/09/2024	Alliant Health Plans of Georgia (58234)	ACH		2
<input checked="" type="checkbox"/>	\$8.83	01/08/2024	Bravo Health (52192)	ACH		1
<input checked="" type="checkbox"/>	\$1601.75	01/08/2024	Bravo Health (52192)	ACH		25
<input type="checkbox"/>	\$0.00	01/03/2023	Paramount Health (SX158)	CHK		3
<input type="checkbox"/>	\$0.00	01/03/2023	Paramount Health (SX158)	CHK		4

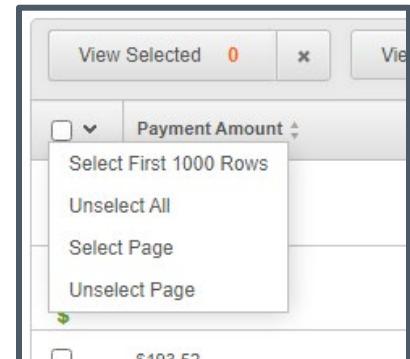
Exporting payments

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**.

	Payment Amount	Payment Date	Payer	Type	Payment #	Remits
<input checked="" type="checkbox"/>	\$73.02	01/10/2024	Paramount Health (SX158)	CHK		1
<input checked="" type="checkbox"/>	\$193.52	01/12/2024	Bravo Health (52192)	ACH		2
<input checked="" type="checkbox"/>	\$170.87	01/12/2024	Bravo Health (52192)	ACH		2
<input type="checkbox"/>	\$1363.64	01/12/2024	Bravo Health (52192)	ACH		22
<input type="checkbox"/>	\$25.74	01/12/2024	PCBS Michigan (SP710)	CHK		2

The Custom File Name screen will open.

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

Custom File Name

File Name

2024-01-27_Payments

Export

The export will appear on the [Exports screen](#).

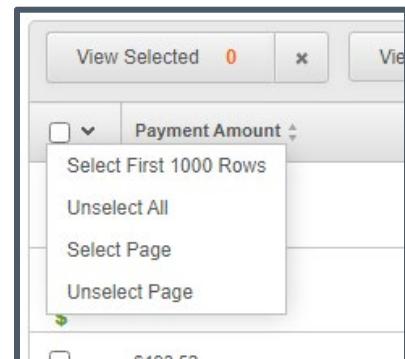
Building a payment remittance download

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

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



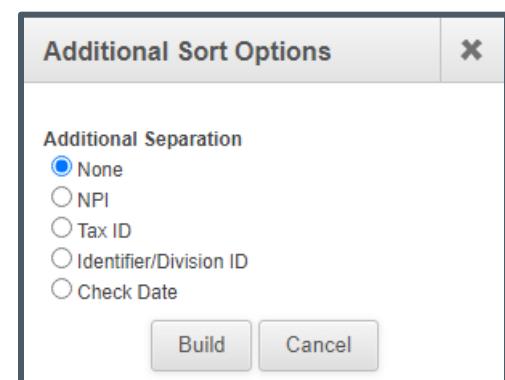
- From the toolbar > **Build** dropdown, select **By Payer** or **By Payment**.

<input type="checkbox"/>	Payment Amount	Payment Date	Payer	ACH	Payment #	Remits
<input checked="" type="checkbox"/>	\$184.30	01/17/2024	Geisinger Health Plan (75273)	ACH		2
<input checked="" type="checkbox"/>	\$73.02	01/10/2024	Paramount Health (SX158)	CHK		1
<input checked="" type="checkbox"/>	\$193.52	01/12/2024	Bravo Health (52192)	ACH		2

- 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.

- 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](#).

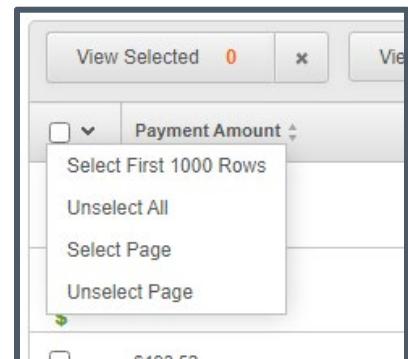
Reprocessing payments for download

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.

The screenshot shows a software interface for managing payments. At the top, there's a toolbar with various buttons like "View Selected" (showing 3 items), "View", "Add Note", "Archive", "Unarchive", "Export", "Build", and a "More" dropdown. An orange arrow points from the "More" dropdown to the "Reprocess" button. Below the toolbar is a table listing five payment records. Each record has a checkbox in the first column, a dollar sign icon, and a green checkmark icon. The first two rows have their checkboxes checked. The third row has an unchecked checkbox. The fourth and fifth rows have checked checkboxes. The columns include "Payment Amount", "Payment Date", "Payer", "Type", "Remits", and "Status".

	Payment Amount	Payment Date	Payer	Type	Remits	Status
<input checked="" type="checkbox"/> \$4110.99	06/20/2022	Anthem Regional (IN, KY, OH) (ZBIKO)	ACH		1	
<input checked="" type="checkbox"/> \$230673.34	06/20/2022	Medicare B Kentucky (SMKY0)	ACH		61	
<input type="checkbox"/> \$1124.36	06/20/2022	Medicaid Kentucky (SKKY0)	ACH		22	
<input checked="" type="checkbox"/> \$322.25	06/20/2022	CIGNA (Connecticut General, Equicor, Equitable) (62308)	ACH		1	
<input type="checkbox"/> \$650.68	06/20/2022	CIGNA (Connecticut General, Equicor, Equitable) (62308)	ACH		1	

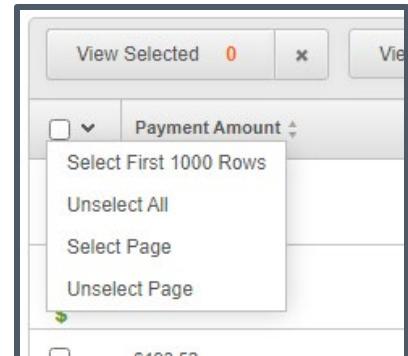
Viewing payments on the Remits screen

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 screenshot shows a table of payments with the following data:

	Payment Amount	Payment Date	Payer	Type		Remits
<input checked="" type="checkbox"/>	\$184.30	01/17/2024	Geisinger Health Plan (75273)	ACH		2
<input checked="" type="checkbox"/>	\$73.02	01/10/2024	Paramount Health (SX158)	CHK		1
<input checked="" type="checkbox"/>	\$193.52	01/12/2024	Bravo Health (52192)	ACH		2

The CLAIMS PROCESSING > Remits > [Remits screen](#) will open with the selected payments display in the list.

Understanding payment icons

	\$283.85	02/20/2022	Unicare (80314)	ACH		2
	\$29.00	01/12/2024	MVP Health Care (14165)	ACH		1
	\$3.02	01/10/2024	Paramount Health (SX158)	CHK		1

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 <i>will not</i> be generated for payments associated with the Split-Check icon; however, they <i>will</i> be generated for payments associated with the Split-Payment icon.
	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						
	Search	View Selected	0	View EOBS	Export	Action
ID Search	Service Date		Patient Name	Payer	Account Number	Paid
	<input type="checkbox"/>	4/9/2012	BOWLING , SALLY J	CIGNA (Connecti... (62308)	7722337	\$0.00
	<input type="checkbox"/>	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

Remittances					
Search	ID Search	Remittance ID	Patient Name	Payer	Action
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BOWLING , SALLY J	CIGNA (Connecti... (62308)	7722337 \$0.00 EOB
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BAKER , SALLY J	Medicare B Kent., (SMKY0)	7722337 \$179.73 EOB
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	BARRETT , SALLY J	Medicare B Kent., (SMKY0)	7722337 \$0.00 EOB

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)

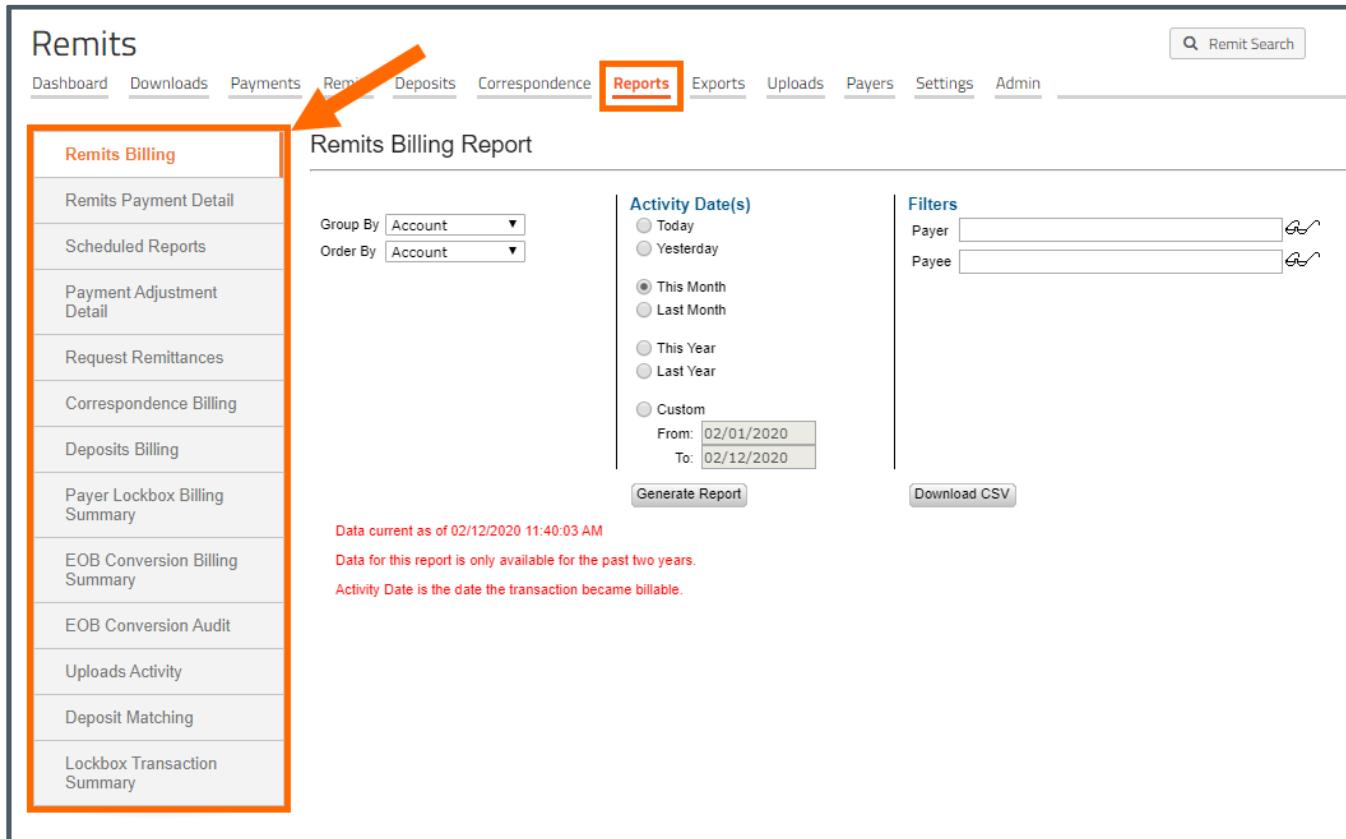
Note: For payment files that are still being processed, any actions associated with viewing the correspondence will be greyed-out.

The screenshot shows the Waystar Remits application interface. The top navigation bar includes links for Dashboard, Downloads, Payments, Remits, Deposits, Correspondence (which is highlighted with a red box), Reports, Exports, Uploads, Payers, Settings, and Admin. Below the navigation is a search bar labeled 'Remit Search'. The main content area is titled 'Correspondence' and contains a table with columns: Received Date, File Name, Batch / Sequence, Status, and Action. On the left side, there is a 'Search' sidebar with dropdown menus for Status, Received Date (set to 11/14/2019 and 2/12/2020), File Name, First Few Digits, View Options (set to Unarchived), and a Search button. There is also an 'ID Search' section with a dropdown menu.

Received Date	File Name	Batch / Sequence	Status	Action
1/14/2020	[REDACTED]	90000	Received	[dropdown]
1/09/2020	[REDACTED]	90001	Received	[dropdown]
1/09/2020	[REDACTED]	90001	Received	[dropdown]
1/09/2020	[REDACTED]	90001	Received	[dropdown]
1/09/2020	[REDACTED]	90001	Received	[dropdown]
1/09/2020	[REDACTED]	90001	Received	[dropdown]
1/09/2020	[REDACTED]	90000	Received	[dropdown]

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

Dashboard Downloads Payments Remits Deposits Correspondence Reports Exports Uploads Payers Settings Admin

Remits Billing Report

Remits Billing

- Remits Payment Detail
- Scheduled Reports
- Payment Adjustment Detail
- Request Remittances
- Correspondence Billing
- Deposits Billing
- Payer Lockbox Billing Summary
- EOB Conversion Billing Summary
- EOB Conversion Audit
- Uploads Activity
- Deposit Matching
- Lockbox Transaction Summary

Activity Date(s)

Group By Account Order By Account

Today
 Yesterday
 This Month
 Last Month
 This Year
 Last Year
 Custom
From: 02/01/2020 To: 02/12/2020

Filters

Payer Payee

Generate Report Download CSV

Data current as of 02/12/2020 11:40:03 AM
Data for this report is only available for the past two years.
Activity Date is the date the transaction became billable.

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					Close Window
Account:		Training Account (5076)			Filter(s): None
Activity Date(s):		01/01/2013 to 6/10/2013			
Report Generated:		06/10/2013 05:16 PM			
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
						Filter(s): None
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	T0205638797	\$21,192.26	91	
	05/09/2013	01/31/2012	T0205634965	\$8,009.06	114	
	05/09/2013	01/31/2012	T0205634954	\$8,283.05	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	\$4,881.84	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	T8010175569	\$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	T801787113	\$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:

The screenshot shows the 'Scheduled Daily Reports' interface. At the top, there's a message: 'Daily reports are currently disabled' with an 'Edit' link. Below this, the 'Report Type' dropdown is highlighted with a red box and an arrow pointing to it. The dropdown menu lists 'Payment Adjustment Detail'. Underneath, there's a 'FILTERS' section with 'Received Date' set to 'This Month', and date range fields for 'From' (1/1/2019) and 'To' (1/30/2019).

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 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

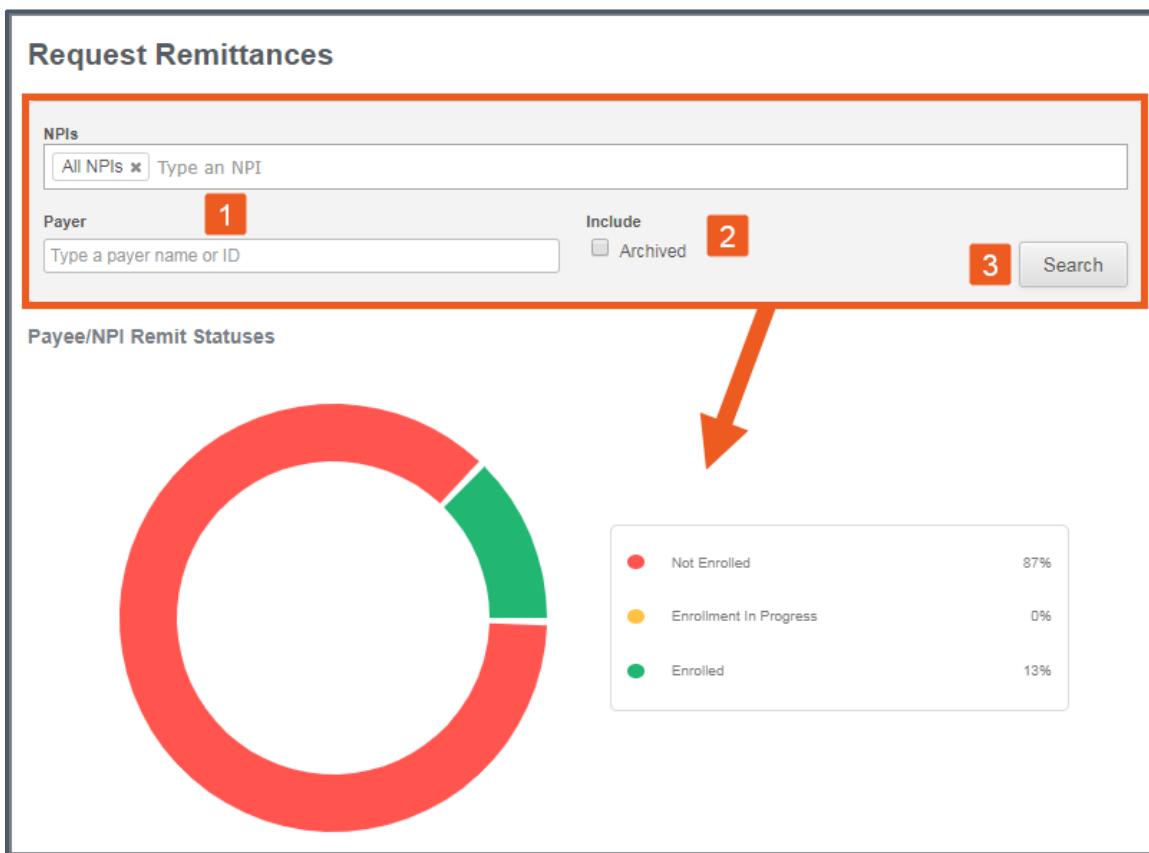
Click the **Info about this report** link at the top of the report screen to see on-screen documentation on the Payment Adjustment Detail Report.

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:

The screenshot shows a software interface with a yellow header bar stating "90.0 % of your claims submitted in the past 30 days are not currently configured to receive a remittance where a remittance is available." Below this is a section titled "Instructions for Mass-Enrollment" with two numbered steps: 1. Select row(s) below and download by clicking the Download Mass - Enrollment CSV button. 2. After adding Customer ID and Tax ID to the .CSV file you may save the file and upload it for mass enrollment on the Upload Requests screen.

NPIs Not Enrolled

20 Results

	Payer	Claim Volume	NPI	*Select Provider Name	Action
<input type="checkbox"/>	Aetna (60054)	1	[REDACTED]	No providers available for this NPI. Use action menu to see available options.	<input type="button" value="▼"/>
<input type="checkbox"/>	Anthem Regional (IN, KY, OH) (ZBIKO)	43	[REDACTED]	Select <input type="button" value="▼"/>	<input type="button" value="▼"/>
<input type="checkbox"/>	BC/BS of Minnesota (SB720)	1	[REDACTED]	No providers available for this NPI. Use action menu to see available options.	<input type="button" value="▼"/>

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.

The screenshot shows a table with a toolbar at the top. The toolbar includes buttons for 'View Selected (2)', 'Archive', 'Unarchive', and 'Download CSV'. A red box highlights the 'View Selected' button. The table has columns for Payer, Claim Volume, NPI, and Action. The first two rows have checked checkboxes in the Payer column. The third row has an unchecked checkbox. Red text in the last two rows indicates 'No providers available for this NPI. Use action menu to see available options.' The 'Action' column contains dropdown menus.

Actions				
Payer	Claim Volume	NPI	*Select Provider Name	Action
<input checked="" type="checkbox"/> Aetna (60054)	1		No providers available for this NPI. Use action menu to see available options.	<input type="button"/>
<input checked="" type="checkbox"/> Anthem Regional (IN, KY, OH) (ZBIKO)	43		Select	<input type="button"/>
<input type="checkbox"/> BC/BS of Minnesota (SB720)	1		No providers available for this NPI. Use action menu to see available options.	<input type="button"/>

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.

	Payer	Claim Volume	NPI	*Select Provider Name	Action
<input type="checkbox"/>	Aetna (60054)	1	[REDACTED]	No providers available for this NPI. Use action menu to see available options.	<input type="checkbox"/>
<input type="checkbox"/>	Anthem Regional (IN, KY, OH) (ZBIKO)	43	[REDACTED]	Select	<input type="checkbox"/> Enroll Verify Request Archive
<input type="checkbox"/>	BC/BS of Minnesota (SB720)	1	[REDACTED]	No providers available for this NPI. Use action menu to see available options.	<input type="checkbox"/>

Exports screen

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

The screenshot shows the 'Exports' section of the Remits screen. The 'Exports' tab is highlighted with a red box. The table below lists three exports:

Report Name	Type	Request Date	Requested By	Status	Download
export 56	CSV	1/15/2020	[redacted]	Complete	Download Report
export 12	CSV	1/15/2020	[redacted]	Complete	Download Report
export 11	CSV	1/15/2020	[redacted]	Complete	Download Report

Checkboxes for 'Show only my exports' and 'Print' are visible at the top right.

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 than what is shown in the raw data.

Uploads screen

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

Upload ID	Upload Date	Format	File Name	Uploaded By	Status	Transactions	Action
[REDACTED]	02/11/2020	Deposits	[REDACTED]	[REDACTED]	Completed	10	[DOWN]
[REDACTED]	02/11/2020	835 5010	[REDACTED]	[REDACTED]	Completed	0	[DOWN]
[REDACTED]	02/11/2020	835 5010	[REDACTED]	[REDACTED]	Completed	5	[DOWN]
[REDACTED]	02/11/2020	835 5010	[REDACTED]	[REDACTED]	Completed	0	[DOWN]
[REDACTED]	02/11/2020	Deposits	[REDACTED]	[REDACTED]	Completed	8 (2 voided)	[DOWN]
[REDACTED]	02/06/2020	835 5010	[REDACTED]	[REDACTED]	Completed	19	[DOWN]
[REDACTED]	02/06/2020	835 5010	[REDACTED]	[REDACTED]	Completed	19	[DOWN]
[REDACTED]	01/16/2020	Deposits	[REDACTED]	[REDACTED]	Completed	10	[DOWN]
[REDACTED]	01/07/2020	TIFF	[REDACTED]	[REDACTED]	Processing	0	[DOWN]
[REDACTED]	01/07/2020		[REDACTED]	[REDACTED]	Failed	0	!
[REDACTED]	01/07/2020		[REDACTED]	[REDACTED]	Failed	0	!
[REDACTED]	01/07/2020		[REDACTED]	[REDACTED]	Failed	0	!

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.

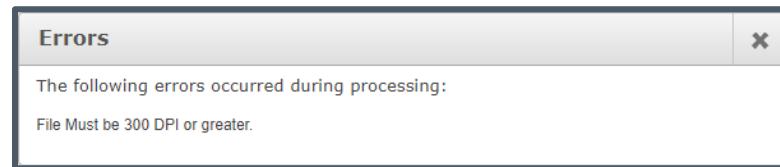
Search for an Uploaded File

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 file 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.

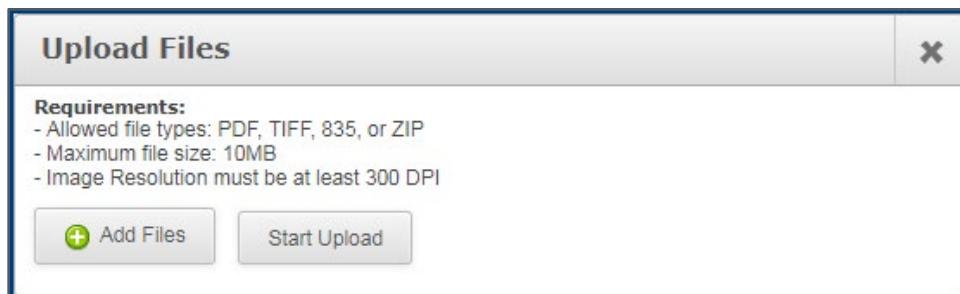
Click the plus icon next to **ID Search** to expand the corresponding menu. You can then enter an **Upload ID** and click **Search** to display the specified upload.

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:

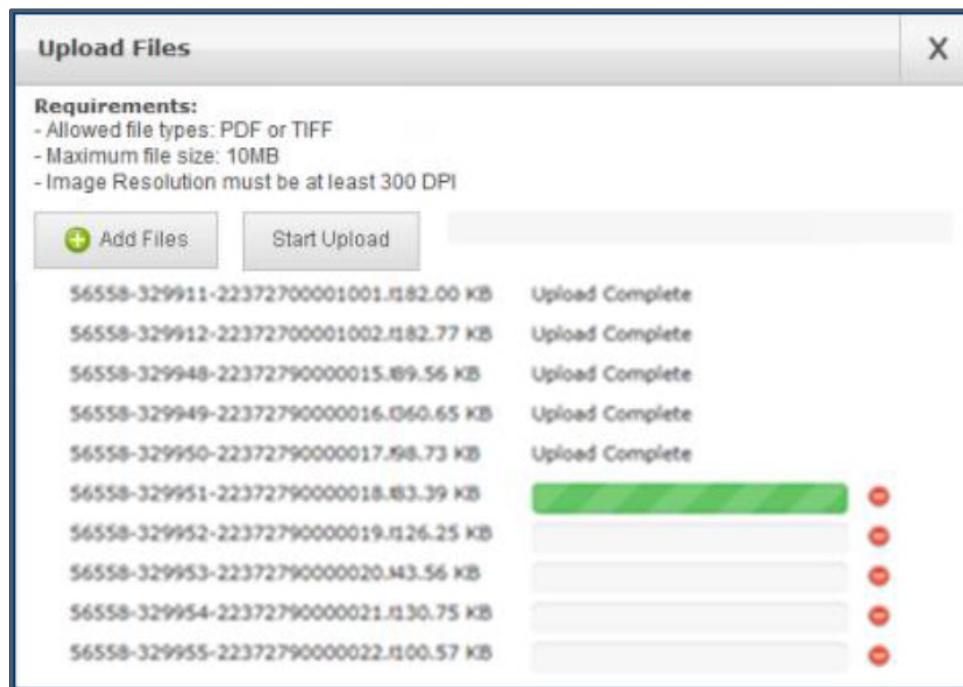


2. Click **Add Files**.
3. Locate the appropriate file in your system. The 835 file must adhere to the following parameters:
 - Cannot exceed a maximum file size of 10 MB
 - Image resolution must be at least 300 DPI

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.

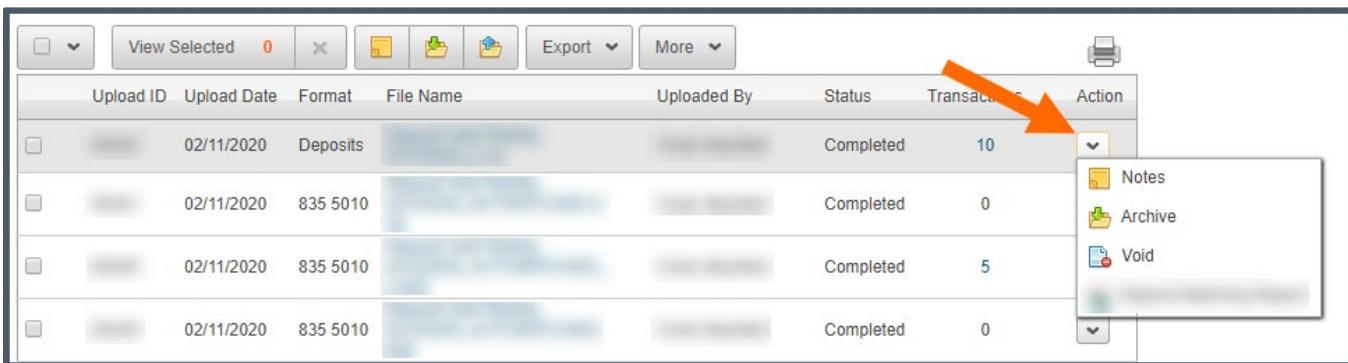
View an Upload

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
<input type="checkbox"/>	12/23/2017	Deposits	6.27.16 DepositsLogEFTs.xlsx		Completed	16	
<input type="checkbox"/>	11/30/2017	Deposits	FinalBalancedProdNPI.xls		Completed	20	
<input type="checkbox"/>	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:



The screenshot shows a list of uploaded files with an 'Action' column containing a dropdown arrow. A red arrow points to this dropdown arrow for the first item. A tooltip menu is displayed, listing three options: 'Notes' (with a note icon), 'Archive' (with an archive icon), and 'Void' (with a trash icon).

Upload ID	Upload Date	Format	File Name	Uploaded By	Status	Transactions	Action
<input type="checkbox"/>	02/11/2020	Deposits	[REDACTED]		Completed	10	
<input type="checkbox"/>	02/11/2020	835 5010	[REDACTED]		Completed	0	
<input type="checkbox"/>	02/11/2020	835 5010	[REDACTED]		Completed	5	
<input type="checkbox"/>	02/11/2020	835 5010	[REDACTED]		Completed	0	

- 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:

	Upload ID	Upload Date	Format	File Name	Uploaded By	Status	Transactions	Action
<input checked="" type="checkbox"/>		12/23/2017		Deposits		Completed	16	<input type="button" value="▼"/>
<input checked="" type="checkbox"/>		11/30/2017		Deposits		Completed	20	<input type="button" value="▼"/>
<input type="checkbox"/>		11/04/2017		TIFF		Completed	0	<input type="button" value="▼"/>

Displaying 1 - 4 of 4 records Page 1 of 1

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:

	Upload ID	Upload Date	Format	File Name	Uploaded By	Status	Transactions	Action
<input checked="" type="checkbox"/>		12/23/2017		Deposits		Completed	16	<input type="button" value="▼"/>
<input checked="" type="checkbox"/>		11/30/2017		Deposits		Completed	20	<input type="button" value="▼"/>
<input type="checkbox"/>		11/04/2017		TIFF		Completed	0	<input type="button" value="▼"/>

Displaying 1 - 4 of 4 records Page 1 of 1

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
<input type="checkbox"/>	12/17/2017	835 5010			Completed	3	
<input type="checkbox"/>	12/10/2017	835 5010			Completed	3	
<input type="checkbox"/>	12/09/2017	835 5010			Completed	0	 
<input type="checkbox"/>	12/09/2017	835 5010			Completed	0	 
<input type="checkbox"/>	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.

The Downloads screen lists ERA posting files for uploading into a Practice Management or HIS system. The screen lists files that have not been downloaded yet by default. To view all listings use the View Options search option.

The screen allows you to perform actions on a single item with the Action menu (dropdown), or work with multiples with the use of the toolbar.

The main actions you can perform are:

- Download
- View EOB
- Notes
- Archive
- Unarchive

For more detailed information and videos, please access our [Support and Training Center](#).

Downloads

File Date	Payer Description	Format	Amount	Payments	Action
3/13/2012					

Payer Search screen

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

Payer Search

Payer Name or ID	Enroll Required	All	Ext Payer Identifier	Search			
Download (.CSV) Displaying 1 - 40 of 1005 Payers Page 1 of 26 > Go							
Payer Name and PayerID	External Payer Identifier	Apps	Enroll Required	Outbound Format	Notes	Dual CH Allowed	Claims Attachments
1199 National Benefit Fund (13162)	1X000000000	PR	Y	4010		N	N
4Most (61425)	61425	PIER	Y	4010		N	N
64159 - Definity Health (87726)	1411289245	PERS	Y	4010		N	N
64159 - Definity Health (ZUHCR)	1363355110	R	Y	4010		N	N
AARP Medicare Supplement/Fixed Indemnity by UnitedHealthcare (36273)	see ZUHCR	PIRS	Y	4010		N	N

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**.

The screenshot shows the Remits application interface with the 'Settings' tab highlighted. On the left, a sidebar lists various configuration options: Notification, Allowed Amount, Display, Build Formats, File Build, Download, Build Options, EOB Conversion, Payer Lockbox, Reconciliation, Manage Workcenters, Manage FTP Settings, and File Naming. The 'Notification' tab is active, displaying a sub-menu with 'Notification' selected. Under 'Notification', there are sections for 'Child Account Settings', 'Report', and 'History'. A checkbox 'Upon receipt of First File, send Email notification to:' is checked, and another checkbox 'Lock for Child Accounts' is also checked. Below these are fields for entering an email address ('Enter Email here') and an 'Add Email' button. A note states: 'Note: an Email notification will be received for each account within your domain.' A table lists email addresses with actions: one row has a delete icon, and another has a lock icon. At the bottom is a 'Save Changes' button.

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.
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 be 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.

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**

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:

File Source	Payer	Build Timing	Payment Type Separation	Additional Build Separation
Received from Payer	All Payers	Multiple	Build Payment Types Separately	Build by Payer
Received from EOB Conversion	All Payers	Multiple	Build Payment Types Together	Build by Payer
Uploaded by User	All Payers	Multiple	Build Payment Types Together	Build by Payer

Results 1 - 3 of 3 Page 1 of 1 Per Page 10

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 - DC - DE (Z1139)	Multiple	Build \$0 Payments Separately	Build by Payer, Build by Tax ID
Received from Payer	Aetna (60054)	Multiple	Build \$0 Payments Separately	Build by Payer, Build by Tax ID

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

- **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