

Overview

This document provides information for Legacy ClaimRemedi users. It explains the difference between how to process 835 remit files in ClaimRemedi versus Waystar.

Terminology differences

In ClaimRemedi, the entire 835 remittance check or payment file is referred to as a **Remit**, in Waystar, it is called a **Payment**.

In ClaimRemedi, the individual EOB inside a remittance file is referred to as an **EOB**, in Waystar, it is called a **Remit**.

835 remit downloads

Most payers create electronic remittance files during the overnight hours, and they become available on the Waystar website the next morning.

If you are defined as an FTP User, the files are automatically dropped into the FTP folder. You can then copy the files from the FTP folder to be posted into your Practice Management system. Use the **Remits > Downloads** page in Waystar only to download files that you have requested to reappear.

Non-FTP clients will use the **Remits > Downloads** page to download all their 835 remit files to their Practice Management system.

The Waystar Remits Dashboard as well as the (Downloads, Payments, and Remits) pages are used to search for specific payment files, as well as individual EOBs/remits. Payment files and individual remits can then be viewed and printed.

Note: For more information on becoming an FTP User, contact Waystar support.

Downloading an 835 remit file from ClaimRemedi

Click *ERA File* in the *Search* menu. The ERA File search shows the ERAs received by ClaimRemedi. If your facility assigns users to specific billing providers, that user will see an ERA file containing multiple claims if at least one billing provider is included that the user has been granted access to. When expanding the ERA file, the user will be able to view only the claim(s) that are associated with his/her allowed billing providers.

ClaimRemedi

Search ▾

Facility
ClaimRemedi Demo01

W

Custom
 Eligibility
 Claim File
 Claim
ERA File
 ERA
 Response Report

 Dashboard
 Enrollment

▶ Details

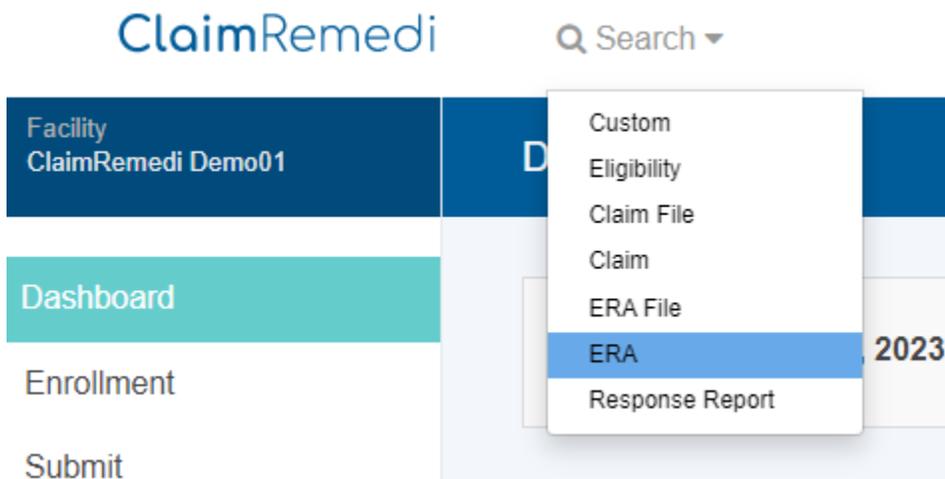
ERA FILE SEARCH RESULTS										
	CHK DATE	FILE NAME	PAYER NAME	PAYEE ID	CHK/EFT \$	CHK/EFT	CLAIMS	CHK/EFT #	STATUS	ARCHIVE DATE
▶	12/24/2016	CR835_20140626_10.Medicare.TXT	PAYER NAME	1234567893	\$0.00	NON	1	304505598	Unarchived	1/1/1900
▶	12/24/2016	CR835_20140626_12.Medicare.TXT	PAYER NAME		\$0.00	NON	2	304505600	Unarchived	1/1/1900
▶	12/24/2016	CR835_20140626_13.Medicare.TXT	PAYER NAME		\$0.00	NON	3	304505597	Unarchived	1/1/1900
▶	12/24/2016	CR835_20140626_15.Medicare.TXT	PAYER NAME		\$3,189.83	ACH	68	884776011	Unarchived	1/1/1900

To...	Click...
Download the ERA file	The CHK/EFT #. The file downloads with the report settings you selected in the ERA Details panel. The total check amount appears on the first page of the printed ERA.
Display the claims in the ERA	The arrow in the first column in the grid. The claims display with the ICN (payer claim control number) that the payer assigned to the claim.
Download the ERA	The ICN. (the ICN is visible by clicking the arrow in the first column in the grid to expand the row). The ERA downloads in the style designated in ERA Details. You can change the ERA Details on the left (below Search Details) and in the default settings.
Open the Claim View window	The Claim ID.

You can right-click an ERA file. The table below shows right click options.

RIGHT-CLICK MENU	
Archive	Archives the transaction. You can still search if the Archive Status includes archived ERAs.
Unarchive	Unarchives the ERA and includes it in Unarchived searches.
Unarchive RR	Unarchives the 835 in the Response Reports.
Requeue RR	Re-queues the Response Report. You can also select the ERA file line item then click the Requeue Selected Response Report shoulder icon (red box with up arrow).
Download RR	Downloads the corresponding 835 from the Response Reports and archives it in the Response Reports.

Searching, Reviewing, and Printing 835 Remit files and EOBs in ClaimRemedi



SEARCH RESULTS

Eligibility Claim File Claim ERA File **ERA** Response Report

Details

ERA SEARCH RESULTS

CHK DATE	LAST NAME	FIRST NAME	CLAIM ID	ICN	DOS	BILLED \$	PAID \$	PAYER NAME	PATIENTID	BILL. NPI	TAX ID	CHECK EFT #
12/02/2016	AX	MXXXXXX	E000004	100000000000	11/10/2016	\$220.00	\$59.64	PAYER NAME	5XXXXXXXXXX	1234567893	300000007	884743582
12/29/2016	AXX	A	E000006	2000000000005	12/17/2014	\$149.00	\$0.00	PAYER NAME	1XXXXXXXXXX	1234567893	300000005	904261493
12/08/2016	AXX	CXXXXXX	E000008	2000000000001	09/29/2016	\$230.21	\$0.00	PAYER NAME	1XXXXXXXXXX	1234567893	300000007	904241937
12/08/2016	AXX	D	E000006	2000000000004	11/23/2016	\$187.49	\$0.00	PAYER NAME	1XXXXXXXXXX	1234567893	300000007	904241935

Click *ERA* in the *Search* menu. The ERA search displays individual claims instead of ERA claim files.

To...	Click...
Create an ERA claim	The ICN. The ERA is created in the style designated in ERA Details. You can change the ERA Details on the left below Search Details and in the default settings.
Open the Claim View window	The Claim ID.
Download multiple ERAs	Hold Shift or Ctrl and select the ERAs. In the shoulder icon, click View Selected ERAs. All ERAs must be in the same ERA file.

You can right-click an ERA. The table below shows right click options.

RIGHT-CLICK MENU

Lookup Eligibility	Searches for previous ClaimRemedi eligibility transactions using date of service.
Download RR	Downloads the corresponding 835 for the claim from the Response Reports and archives it in the Response Reports.

Managing 835 Remit files in Waystar

Go to **Claims Processing > Remits > Dashboard**

The Remits **Dashboard** screen is a general landing area of all basic electronic remittance usage. Search Remits User Guide in the Waystar STC for detailed information.

The Remits **Download** screen will display all files not yet downloaded by default. If you are an FTP user, you will only use this screen to re-download files. See the Downloads section below for more detailed instruction on how to download Remit files to your local network.

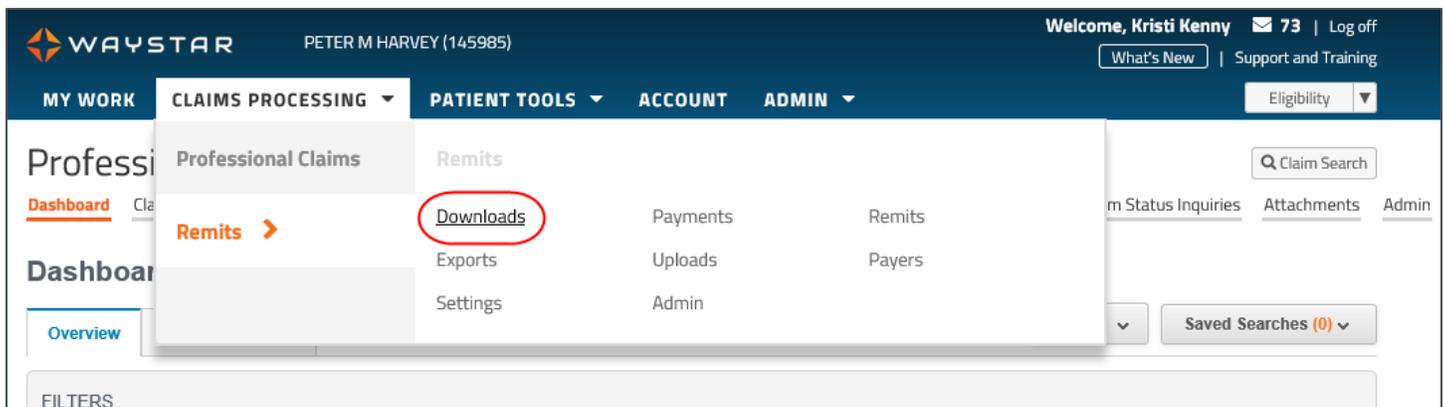
The Remits **Payments** screen displays remittance files by individual payment or check number. Use this screen to search for individual payments files to print, view or download. Search functions allow you to search for payments by a variety of methods.

The **Remits** screen is where you can search for and view individual patient EOB's. You can also view all of the EOB's and the full remit associated with a patient's payment. Search functions allow you to search for individual remits/EOB's by a variety of methods associated with the original claim.

Downloading an 835 Remit file in Waystar

To download 835 remit files in Waystar:

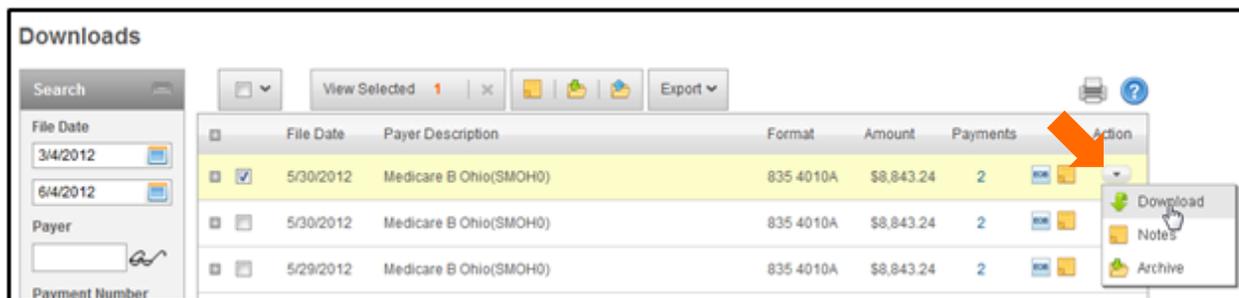
1. Go to **Claims Processing > Remits > Downloads**.



The screenshot shows the Waystar web application interface. At the top, there is a navigation bar with the Waystar logo, user name 'PETER M HARVEY (145985)', and 'Welcome, Kristi Kenny' with a notification icon for 73. Below the navigation bar, there are several menu items: 'MY WORK', 'CLAIMS PROCESSING', 'PATIENT TOOLS', 'ACCOUNT', and 'ADMIN'. The 'CLAIMS PROCESSING' menu is expanded, showing 'Professional Claims' and 'Remits'. Under 'Remits', the 'Downloads' option is circled in red. Other options under 'Remits' include 'Payments', 'Exports', and 'Settings'. The 'ACCOUNT' menu is also expanded, showing 'Uploads' and 'Admin'. The 'ADMIN' menu is also expanded, showing 'Remits' and 'Payers'. The main content area shows a search bar for 'Claim Search' and a 'Saved Searches (0)' button.

2. Files not yet downloaded are displayed by default. File details appear in columns. To narrow the search, enter any of the following beneath the **Search** criteria:

- **File Date** – This is the date the file was created on the Waystar website. Normally it's the date the file became available from the payer, but if an individual check was reprocessed to download, it would be the date the check was reprocessed, thus creating a new file.
 - **Payer** – Enter any part of the payer's name or ID, or search for the payer using the Smart Search (eyeglasses) feature.
 - **Payment Number** – The last few digits of the payment transaction or check number.
 - **View Options** – Select **All** from this dropdown to see all downloads with the previously specified attributes or **Unarchived** to display only those files that have not been archived.
3. Locate the file to download and click the '+' button located next to the file or the row to expand the file details.
 4. Click the **Download** icon.

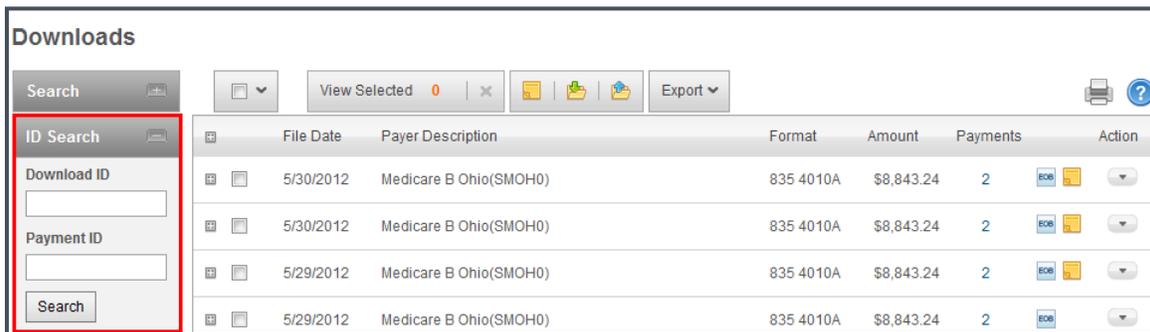


5. The **File Download** window pops up, asking if you want to open or save this file.
6. Click the **Save** button.
7. The **Save As** window pops up, requesting the location to place the file. Enter the path for the Practice Management system.
8. Click the **Save** button.
The file will be downloaded. This should only take a few seconds. When complete, the **Download Complete** screen will pop up.
9. Click the **Close** button.
10. After the file has downloaded, follow the instructions specified by your Practice Management system for automatic payment posting within your PM system. Additional action items include:
 - The **View EOB** link under the Action column will create and display a report (PDF format) of all EOBs associated with the remits file.
 - The **Notes** link allows you to add an internal note to the remittance file. The note will display only on the Waystar 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.
 - The **Archive** link will archive the payment into the Waystar system. The payment will no longer display in the account or in reports but can still be searched for.

Note: If a single check within a previously downloaded file that contained multiple checks is reprocessed (using the **Reprocess** option on the **Payments** screen), a new file will be created, containing the single check.

ID Search

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



The screenshot shows the 'Downloads' interface. On the left, there is a sidebar with 'ID Search' highlighted in red. Below it are input fields for 'Download ID' and 'Payment ID', and a 'Search' button. The main area features a toolbar with 'View Selected 0' and an 'Export' dropdown. Below the toolbar is a table with columns: File Date, Payer Description, Format, Amount, Payments, and Action. The table contains four rows of Medicare B Ohio(SMOH0) transactions from 5/30/2012 and 5/29/2012, each with an amount of \$8,843.24 and 2 payments.

Toolbar

The top toolbar is where you can manage your selected download files. After you select the files you wish to handle (the number will display in the toolbar), you can:

- View Selected
- Add Notes
- Archive
- Unarchive
- Export to Excel or to PDF
- Print



This screenshot shows the 'Downloads' interface with three files selected. The toolbar now shows 'View Selected 3'. A dropdown menu is open from the first checkbox icon, listing the following options: 'Select All', 'Unselect All', 'Select Page', and 'Unselect Page'. The table below shows three selected rows of Medicare B Ohio(SMOH0) transactions.

The first checkbox icon includes a dropdown with these options:

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

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

Action Column Options

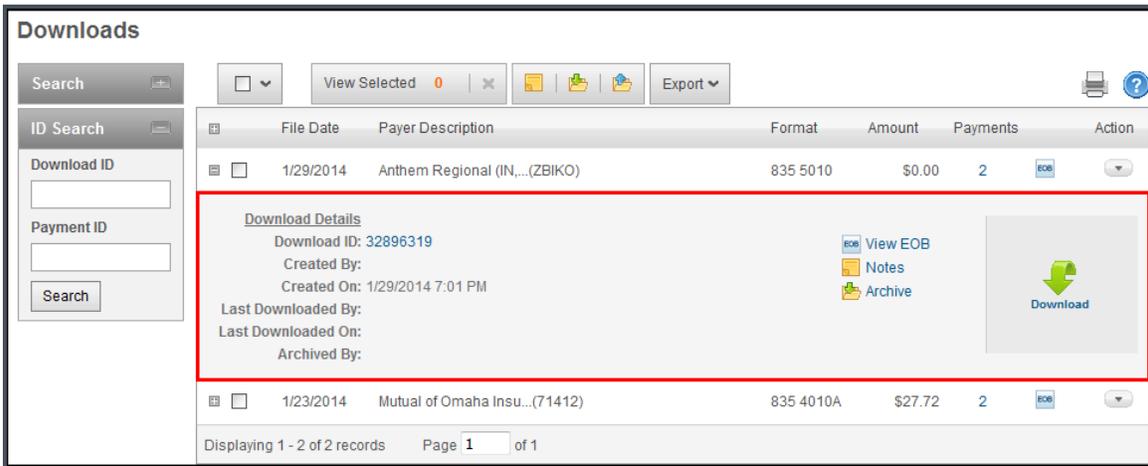
Click on the arrow under the **Action** column for additional options:

- **Download** – Downloads the file into your Practice Management System.
- **View EOB** – Displays the detailed EOB.
- **Notes** – Opens a **Notes** popup, where you can enter a 255-character payment-specific note.
- **Archive** – Archives the payment in the Waystar system, removing it from the page and reporting.

Download Details

Click the “+” button next to each remit file or click on the row to display additional details:

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



The screenshot shows the 'Downloads' section of the Waystar interface. It includes a search bar, a table of download records, and a detailed view for the first record. The table has columns for File Date, Payer Description, Format, Amount, Payments, and Action. The first record is for 'Anthem Regional (IN,...(ZBIKO)' with a download ID of 32896319. The expanded details show the download ID, creation date, and options to view EOB, add notes, or archive the record. A 'Download' button is also visible.

File Date	Payer Description	Format	Amount	Payments	Action
1/29/2014	Anthem Regional (IN,...(ZBIKO)	835 5010	\$0.00	2	View EOB Notes Archive Download
1/23/2014	Mutual of Omaha Insu...(71412)	835 4010A	\$27.72	2	View EOB Notes Archive Download

Download ID: 32896319
 Created On: 1/29/2014 7:01 PM
 Last Downloaded By:
 Last Downloaded On:
 Archived By:

Note: Click the “-“ button to collapse the remit detail information.

Dropdown Action Items

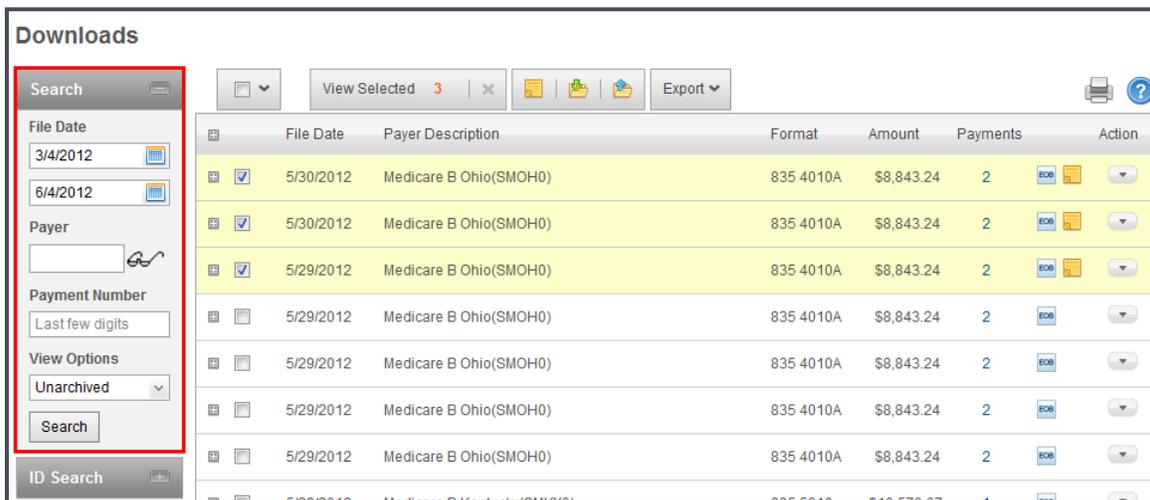
Waystar offers two distinct actions to assist in maintaining remit correspondence. Click on the '+' button next to the action title to view additional options specific to that action.

Search

Use this section to search for specific remit payments. Filter the search results with the following options:

- File Date
- Payer
- Payment Number
- View Options
 - Unarchived
 - All

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



The screenshot shows the 'Downloads' section of the application. On the left, a search sidebar is highlighted with a red border. It contains the following fields and options:

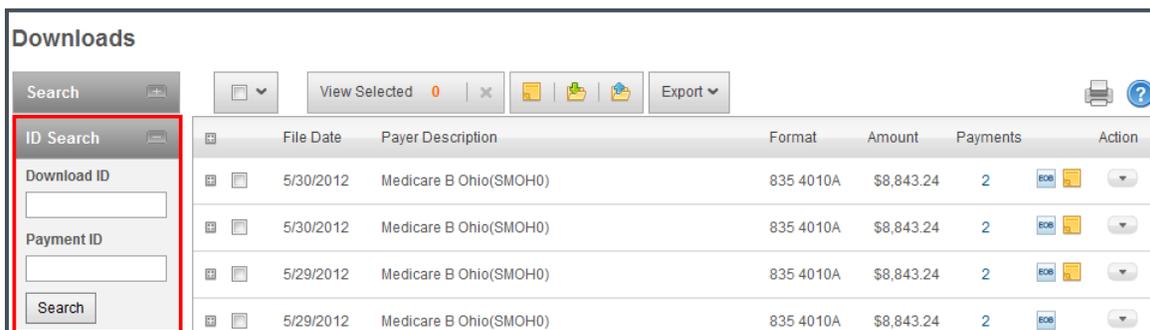
- Search** (input field)
- File Date**: Two date pickers with values 3/4/2012 and 6/4/2012.
- Payer**: A text input field with a magnifying glass icon.
- Payment Number**: A text input field with the placeholder 'Last few digits'.
- View Options**: A dropdown menu currently set to 'Unarchived'.
- Search** button.
- ID Search** button (at the bottom of the sidebar).

The main table displays search results with the following columns: File Date, Payer Description, Format, Amount, Payments, and Action. Three rows are highlighted in yellow, indicating they are selected. The table data is as follows:

File Date	Payer Description	Format	Amount	Payments	Action
5/30/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]
5/30/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]
5/29/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]
5/29/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]
5/29/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]
5/29/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]

ID Search

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



The screenshot shows the 'Downloads' section of the application. On the left, an 'ID Search' sidebar is highlighted with a red border. It contains the following fields and options:

- ID Search** (input field)
- Download ID**: A text input field.
- Payment ID**: A text input field.
- Search** button.

The main table displays search results with the following columns: File Date, Payer Description, Format, Amount, Payments, and Action. Four rows are visible in the table:

File Date	Payer Description	Format	Amount	Payments	Action
5/30/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]
5/30/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]
5/29/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]
5/29/2012	Medicare B Ohio(SMOH0)	835 4010A	\$8,843.24	2	[Icons]

Action Column Options

Click on the arrow under the **Action** column for additional options:

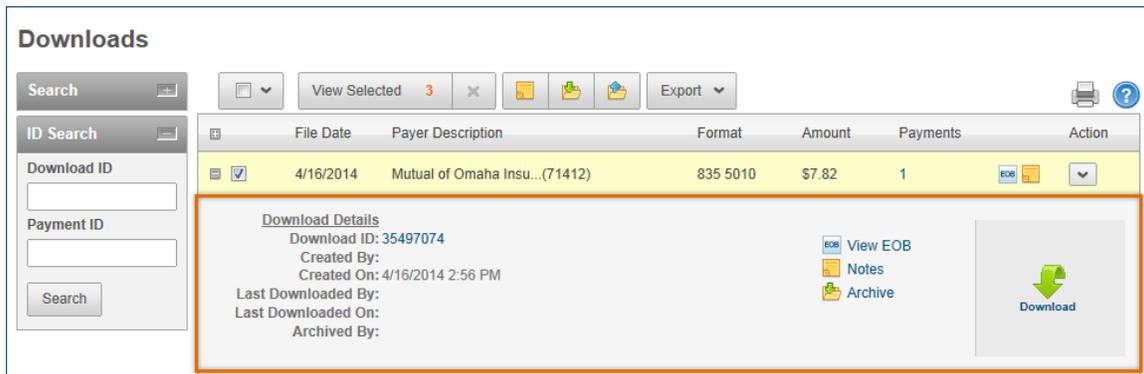
- **Download** – Downloads the file into your Practice Management System.
- **Notes** – Opens a **Notes** popup, where you can enter a 255-character payment-specific note.
- **Archive** – Archives the payment in the Waystar system, removing it from the page and reporting.

Download Details

Click the “+” button next to each remit file or click on the row to display additional details:

- File Name
- Download ID
- Created By
- Created On
- Last Downloaded By
- Last Downloaded On
- Archived By

Note: Click the “-“ button to collapse the remit detail information.



The screenshot shows the 'Downloads' section of the Waystar interface. It features a search bar, a table of downloads, and a detailed view for a selected row. The table has columns for File Date, Payer Description, Format, Amount, Payments, and Action. The selected row is highlighted in yellow and shows a download ID of 35497074. The detailed view below the row shows the download ID, creation date and time, and a 'Download' button with a green arrow icon.

File Date	Payer Description	Format	Amount	Payments	Action
4/16/2014	Mutual of Omaha Insu...(71412)	835 5010	\$7.82	1	View EOB Notes Archive Download

Download Details
 Download ID: 35497074
 Created By:
 Created On: 4/16/2014 2:56 PM
 Last Downloaded By:
 Last Downloaded On:
 Archived By: