835 Remit Downloads Guide for ClaimRemedi Users

January 2023

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.

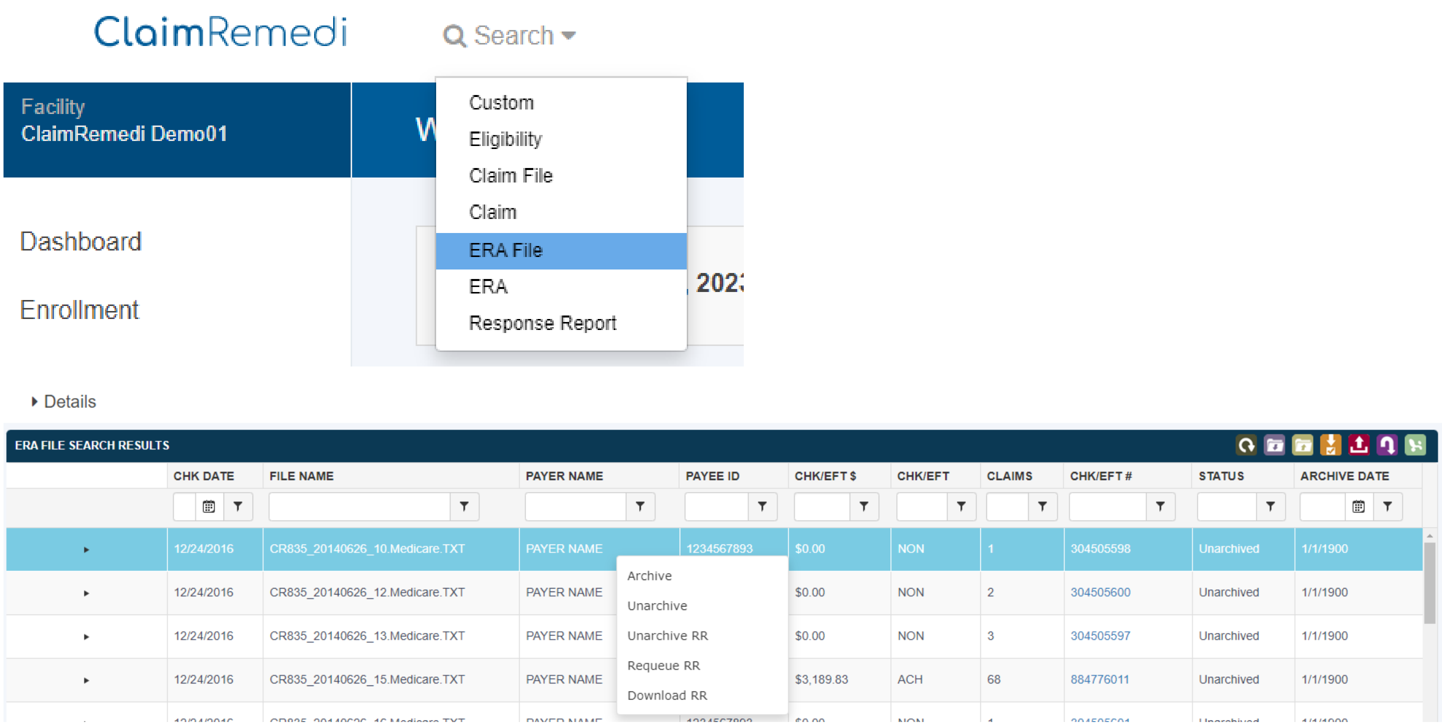
Non-FTP clients will use the **Remits** > **Downloads** page to download all their 835 remit files to their Practice Management system.

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.

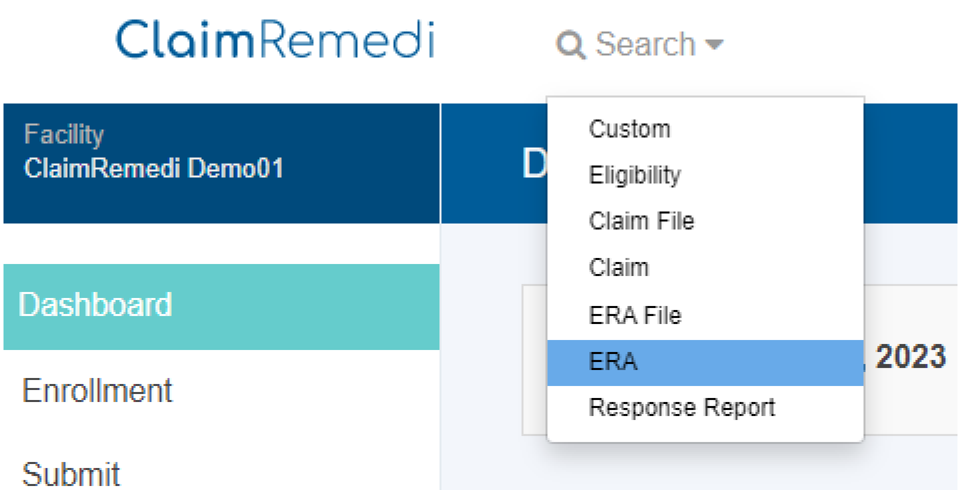


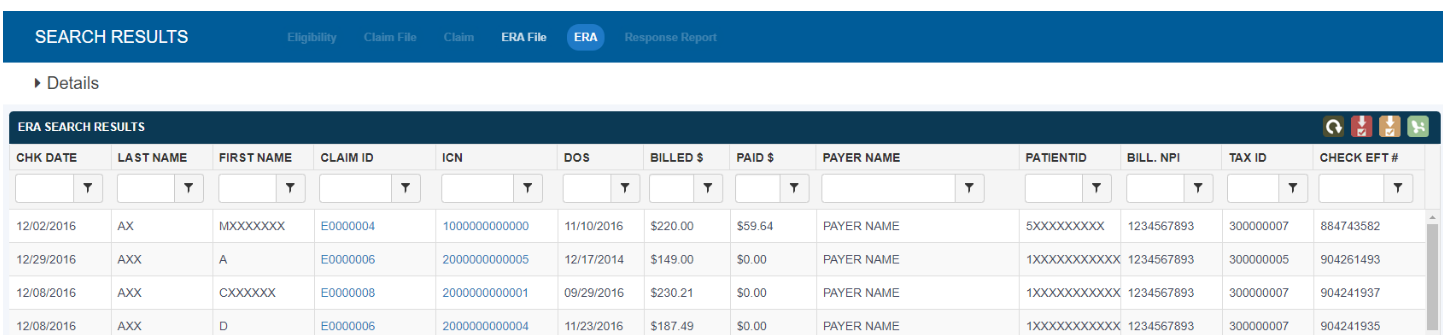
To…	*Click…*
Download the ERA file	The CHK/EFT #. The file downloads with the report settings you selected in the ERA Details panel. The total check amount appears on the first page of the printed ERA.
Display the claims in the ERA	The arrow in the first column in the grid. The claims display with the 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





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.

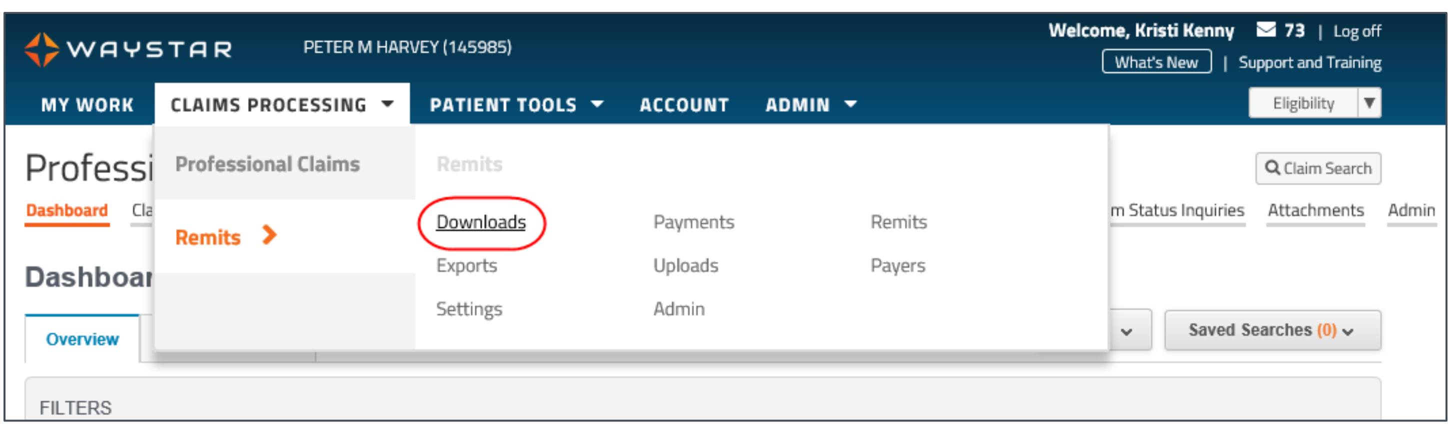
The Remits **Payments** screen displays remittance files by individual payment or check number. Use this screen to search for individual payments files to print, view or download. Search functions allow you to search for payments by a variety of methods.

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:

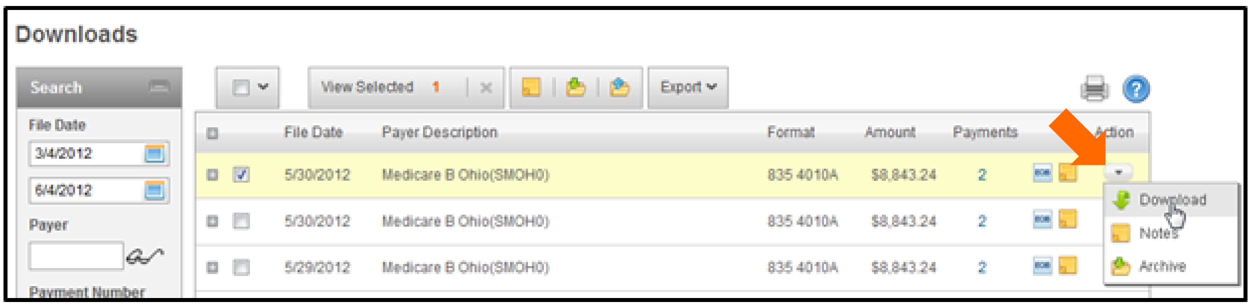
1. Go to **Claims Processing** > **Remits** > **Downloads**.



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.



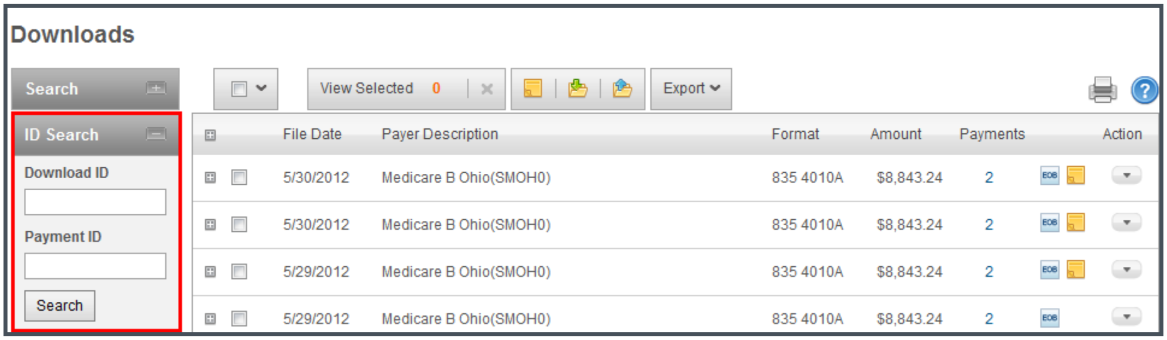
5. The **File Download** window pops up, asking if you want to open or save this file.
6. Click the **Save** button.
7. The **Save As** window pops up, requesting the location to place the file. Enter the path for the Practice Management system.
8. Click the **Save** button.

   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.



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

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

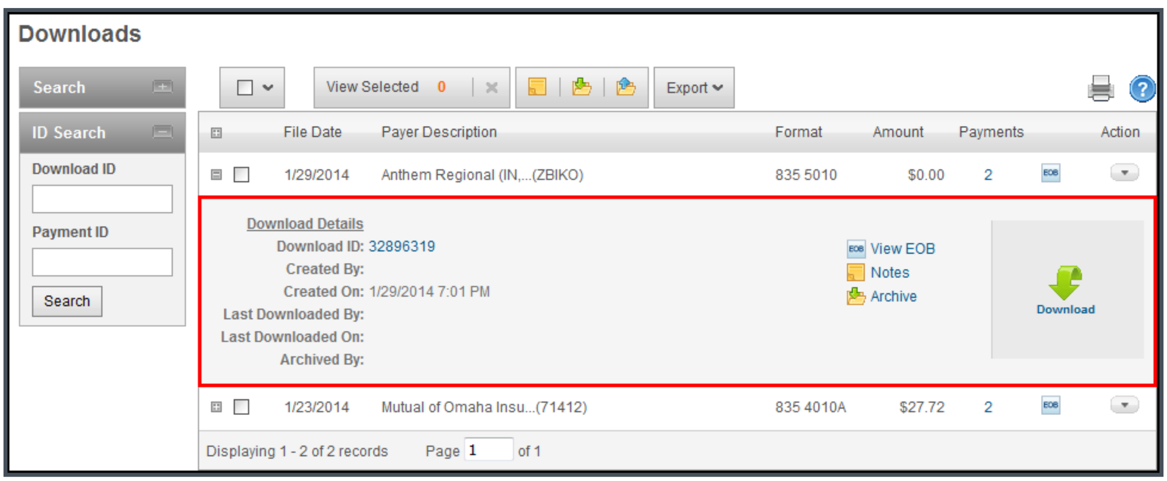
Click on the arrow under the **Action** column for additional options:

- **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



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

Dropdown Action Items

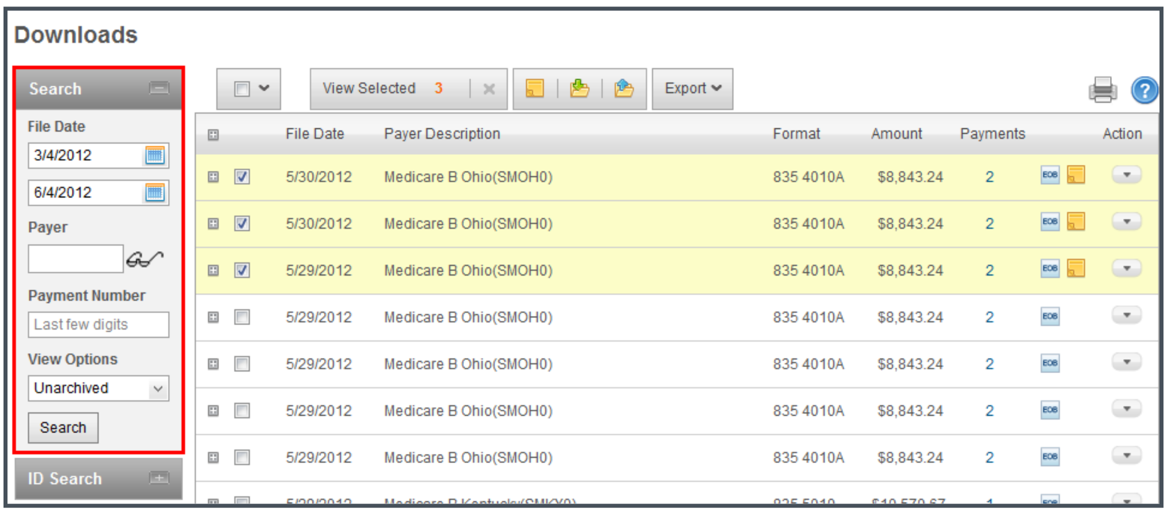
Waystar offers two distinct actions to assist in maintaining remit correspondence. Click on the ‘+’ button next to the action title to view additional options specific to that action.

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.



ID Search

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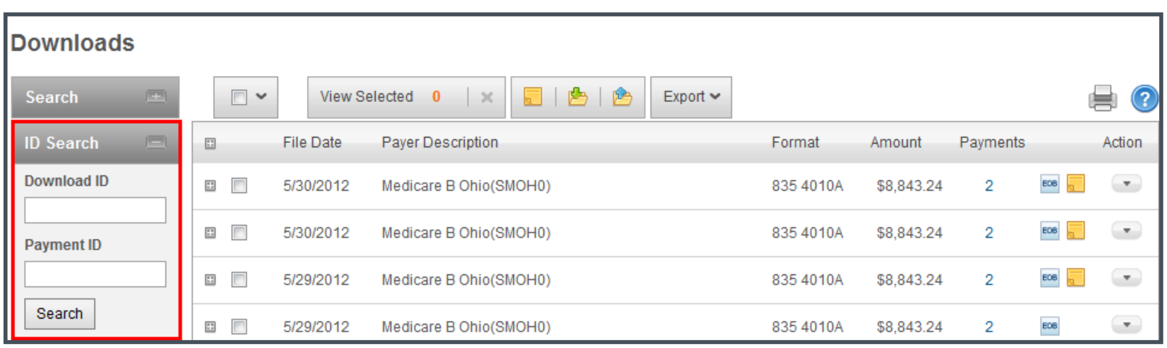

Action Column Options

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.