

## Overview

This document provides information for Legacy Recondo ClaimRemedi users. It explains the difference between how you used the ClaimRemedi dashboard in the past and how you'll use Waystar Claims Processing dashboards moving forward.

In Waystar, the **Claims Processing > Professional Claims or Institutional Claims > Dashboard** screen/report provides a high-level view of your professional or institutional claim performance. Using the claim rejection data generated on this report, you can determine how effectively your claims are being cleaned at the clearinghouse and whether payer communications/follow-ups need to occur.

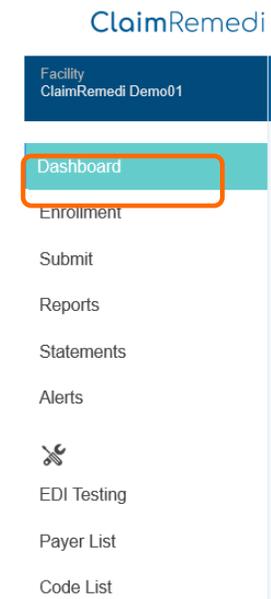
## Terminology differences

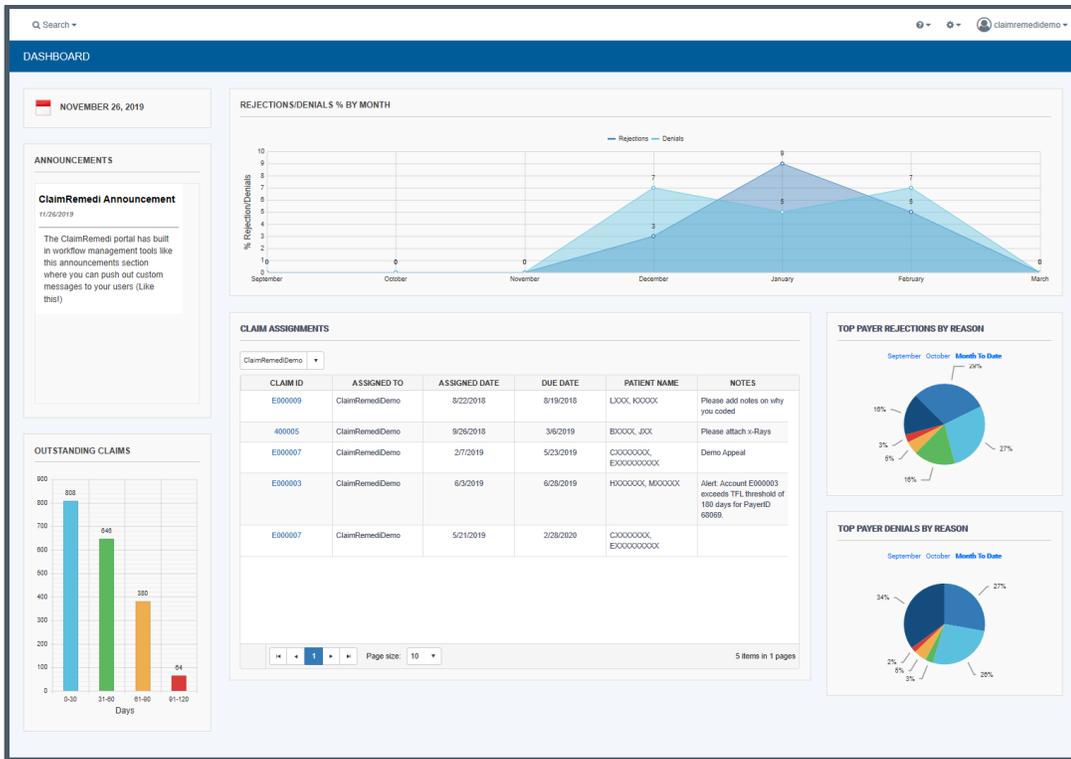
In ClaimRemedi, the location to manually upload claim files is called **Submit**, in Waystar, it is located under **Batches**.

In ClaimRemedi, the 999 and 277 status reports are called Response Reports, in Waystar, they are called **Claim Integration Reports**

## ClaimRemedi dashboard

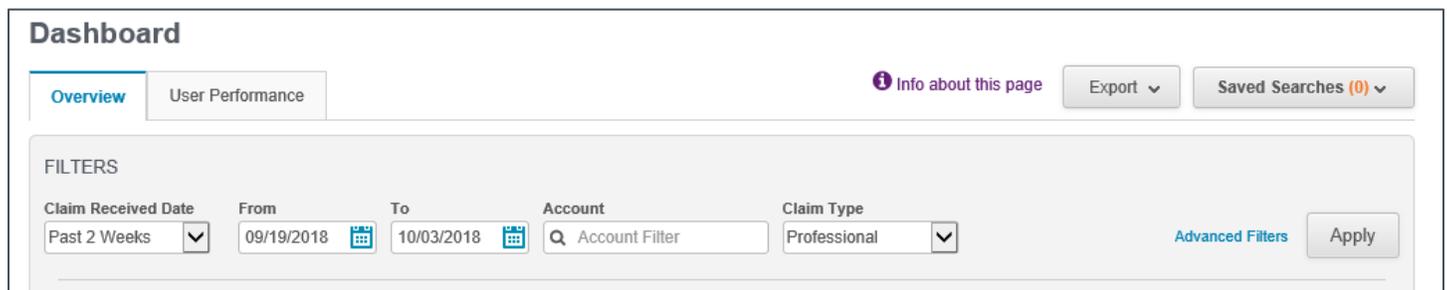
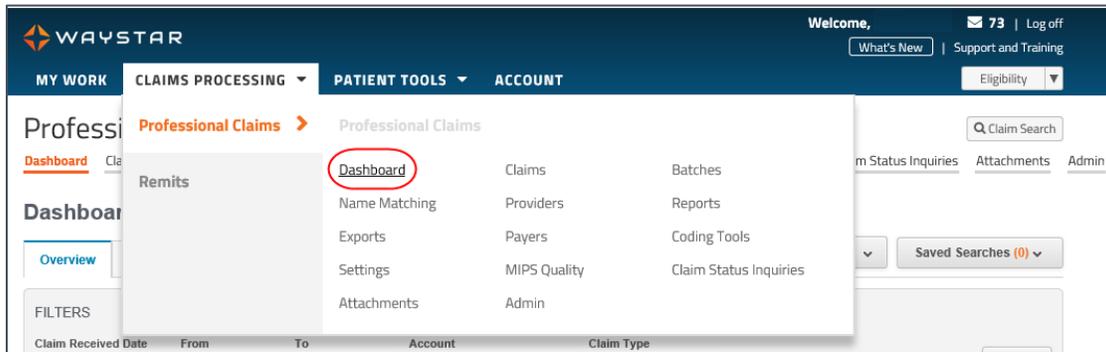
The dashboard provides a general overview of claims, rejections, denials, outstanding claims, and claim assignments. Each module on the Dashboard is described below.





## Claims Dashboard

In Waystar, go to **Claims Processing > Professional Claims** or **Institutional Claims > Dashboard** to view pre-loaded rejection data for *all* claims received in your domain over the past two weeks; however, you may want to filter the data to find the claims you are looking for, as explained below.



## Updating the Claims Dashboard report

To filter/update the Claims Dashboard report:

1. Enter any of the following criteria in the FILTERS menu near the top of the page:
  - **Claim Received Date:** Displays data for claims received within the specified date range. To specify a date range, you can either select an option from the dropdown or enter a custom date range in the **From** and **To** fields.
 

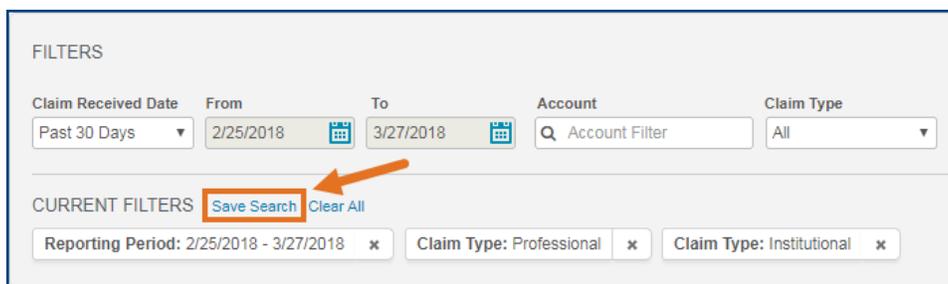
**Note:** Claims received prior to the past 90 days are unavailable for reporting.
  - **Account:** Displays all claim data for the entered account or domain that you have access to. When entering text in this field, suggested accounts will automatically appear below the field.
  - **Claim Type:** Professional or Institutional.
2. If necessary, click the **Advanced Filters** link to access additional filter options:
  - a. Enter any of the following criteria:
    - **Include name matching rejections:** Displays rejection data for claims that have passed through payer name matching.
    - **Include archived claims:** Displays data for claims that were previously archived/hidden in Waystar.
  - b. Once the desired advanced filter options are selected, click **Apply** at the bottom of the Advanced Filters popup.
3. Click the **Apply** button to update the report.

## Saving your filter options

If you will be applying the same filters to the Dashboard report often, it may be a good idea to save those filter options for future use.

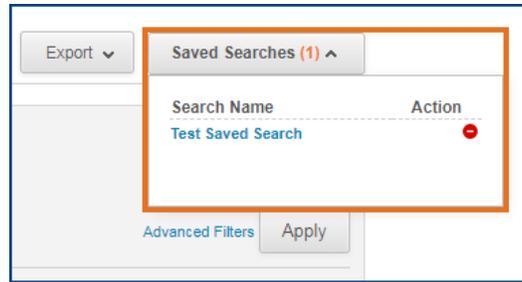
To save a custom filter:

1. Perform the desired search using the steps in the previous “Updating the Claims Dashboard report” section.
2. Click the **Save Search** link in the CURRENT FILTERS section:



The Save a Search popup will appear

3. Enter a unique custom filter name in the **Search Name** field.
4. Click **Save**. The search will be added to the Saved Searches dropdown on the Dashboard screen:



To run a saved search, simply select the appropriate custom filter name from the Saved Searches dropdown. The Dashboard report will update accordingly.

## Viewing Claims Dashboard report data

Below the FILTERS menu, you will see the Dashboard data broken down into three different groups. These data groups are designed to help you track your claim and payer performance at varying levels. See below for descriptions of the Key Claims Metrics, account breakdown, and Latest Batches sections.

### Key claims metrics

The Key Claims Metrics sections displays percentage data to help you determine where your claims are being rejected and how effectively they are being cleaned by the clearinghouse:



The Key Claims Metrics sections include the following data:

- **Clearinghouse Rejections:** The percentage of claims stopped for a clearinghouse rejection on their first pass divided by the total number of claims submitted in the selected timeframe.
- **Payer Rejections:** The percentage of claims stopped for a payer rejection on their first pass divided by the total number of claims submitted in the selected timeframe.
- **Perfect Pass Claims:** The percentage of claims that arrive at the payer without being halted by Waystar or the payer on their first pass divided by the total number of claims submitted in the selected timeframe.
- **Clean after Waystar:** The percentage of claims that arrive at the payer without encountering a payer rejection on their first pass divided by the total number of claims submitted in the selected timeframe.

**Note:** Hover over any section including the info (i) icon (Perfect Pass Claims and Clean After Waystar) to see the associated in-app description.

### Latest batches

The Latest Batches section displays a daily breakdown (for the past five days) of the file uploads and claims submitted in your account/domain:

LATEST BATCHES			
Date	Files	Claims	
Wed 3/28/2018	17,000	100,000	
Tue 3/27/2018	230	23,000	
Mon 3/26/2018	572	5,000	
Sun 3/25/2018	970	72,000	
Sat 3/24/2018	3,456	34,000	

## Full account/domain breakdown

The table near the bottom of the screen displays a full description of the claim and payer performance broken down by account. The number of accounts included in your current filter will display above the table:

1 Accounts							
Account	Total Claims	Normal Processing	Clearinghouse Rejections	Payer Rejections	At Payer	Claim Complete	Clean after Waystar
<b>TOTAL</b>	<b>102</b>	<b>0</b>	<b>102</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.0%</b>
Endeavour Test Account (109437)	102	0	102	0	0	0	0.0%

Results 1 - 1 of 1      Page 1 of 1      Per Page: 10

The table is further broken down by TOTAL claims in your account/domain and then by individual accounts.

The following account data is displayed in the table:

- **Account:** Account Name (Account ID).
- **Total Claims:** The total number of claims received.
- **Normal Processing:** Claims that were accepted by the clearinghouse.
- **Clearinghouse Rejections:** Claims that were rejected by the clearinghouse.
- **Payer Rejections:** Claims that were rejected by the payer (or intermediary).
- **At Payer:** Claims that were accepted by the payer and are processing normally. No follow-ups are needed for these claims.
- **Claim Complete:** Claims that have returned a remit, are in their finalized state, or are more than 90 days old.
- **Clean after Waystar:** Claims that were corrected in the clearinghouse.

## Additional information – Claim received date vs. Transaction date

Claims Dashboard metrics are based on claim received dates (i.e., the date the claim was entered in the system). This is different than other Claims Processing applications, which are based on transaction dates (i.e., the date the last message was updated on the claim). For this reason, the Claims Dashboard will display different claim quantities than what is shown on other Claims Processing screens; however, you can drill down to view the reported claims on the Claims Listing screen. See the **Drill down to the Claims Listing page** section below for more information.

## Sorting your account details

Sort the account details by any of the following attributes simply by clicking the associated arrow in the column header:

Account	Total Claims ▾	Normal Processing ▲ ▾	Clearinghouse Rejections ▲ ▾	Payer Rejections ▲ ▾	At Payer ▲ ▾	Claim Complete ▲ ▾	Clean after Waystar
<b>TOTAL</b>	6	0	6	0	0	0	0.0%
Endeavour Test Account (109437)	6	0	6	0	0	0	0.0%

- Total Claims
- Normal Processing
- Clearinghouse Rejections
- Payer Rejections
- At Payer
- Claim Complete
- Clean after Waystar

All columns will sort high to low. Click the arrow a second time to reverse the previously applied sorting (ascending vs. descending).

## Drill down to the Claims Listing page

While the Claims Dashboard provides a high-level view of your claim performance, you also have the option of drilling down to view the reported claims on the Claims Listing page.

To view the reported claims on the Claims Listing screen:

1. Filter the report by **Claim Type**. See the **Updating the Claims Dashboard Report** section on page 1 for more information about filtering the Claims Dashboard data.

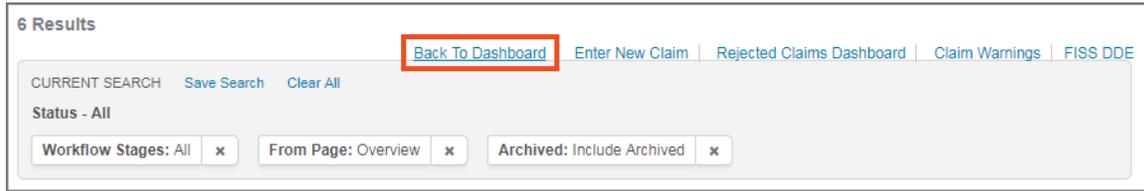
**Note:** By default, the Claims Dashboard is filtered to include *all* claims types (institutional and professional).

2. With the Claims Dashboard filtered by **Professional** or **Institutional** claims, locate the appropriate account data at the bottom of the screen and click any metric to see the associated claims on the Claims Listing screen:

198 Accounts							
Account	Total Claims ▾	Normal Processing ▲ ▾	Clearinghouse Rejections ▲ ▾	Payer Rejections ▲ ▾	At Payer ▲ ▾	Claim Complete ▲ ▾	Clean after Waystar
<b>TOTAL</b>	126	0	126	0	0	0	0.0%
	126	0	126	0	0	0	0.0%
	0	0	0	0	0	0	0.0%

You will be directed to the Claims Listing screen auto-filtered to display only the claims selected on the Claims Dashboard.

- If desired, click the **Back To Dashboard** link at the top of the Claims Listing screen to return to the Claims Dashboard report with all previously-applied filters:

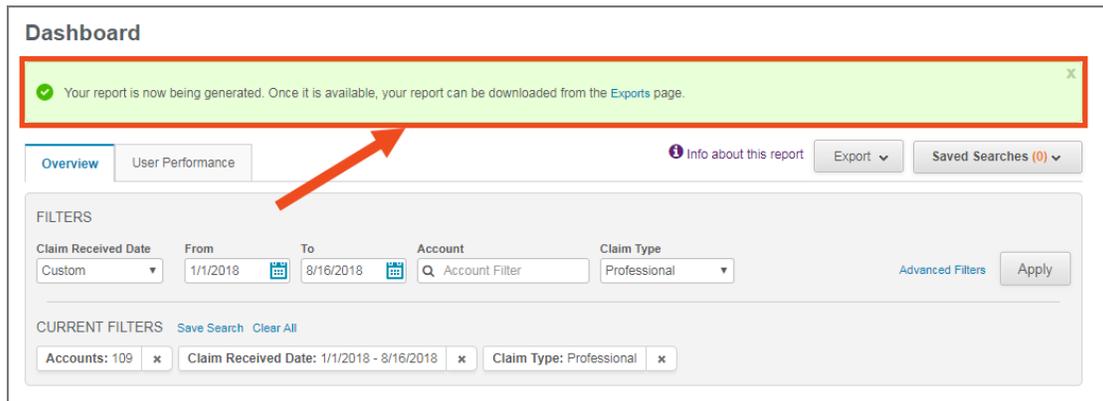


## Exporting your account details

To download a .CSV spreadsheet of the reported claims data:

- Hover over the **Export** dropdown at the top of the screen and click one of the following .CSV options:
  - Export Summary to .CSV:** Downloads a .CSV spreadsheet to your system containing the claims data displayed on your Dashboard screen (at the time of the download).
  - Export Detail to .CSV:** Sends a .CSV file to the Professional Claims or Institutional Claims > Exports screen containing *all* claims data included in the Waystar system (i.e., Professional Claims, Remits, etc.) for the reported claims.

After clicking the Export Detail to .CSV option from the Export dropdown, a green notification will display at the top of the Dashboard screen stating that the report is being generated:



See below for instructions on how to download the report from the Exports screen.

- If you selected the Export Detail to .CSV option from the Export dropdown, go to the **Professional Claims** or **Institutional Claims > Exports** screen.
- Locate your name and the appropriate report item from the report list and click the corresponding **Download** button in the **Action** column:

**Note:** All reports exported from the Claims Dashboard will display “Claims Dashboard” in the Source column (see below).

Created	User	Source	Status	Action
8/16/2018 5:45:58 PM		Claims Dashboard	Complete	<b>Download</b>
8/16/2018 5:07:02 PM		Claims Dashboard	Complete	<b>Download</b>

An orange arrow points from the 'Complete' status of the second row to its 'Download' button, which is also highlighted with a red box.

The report will download to your system.