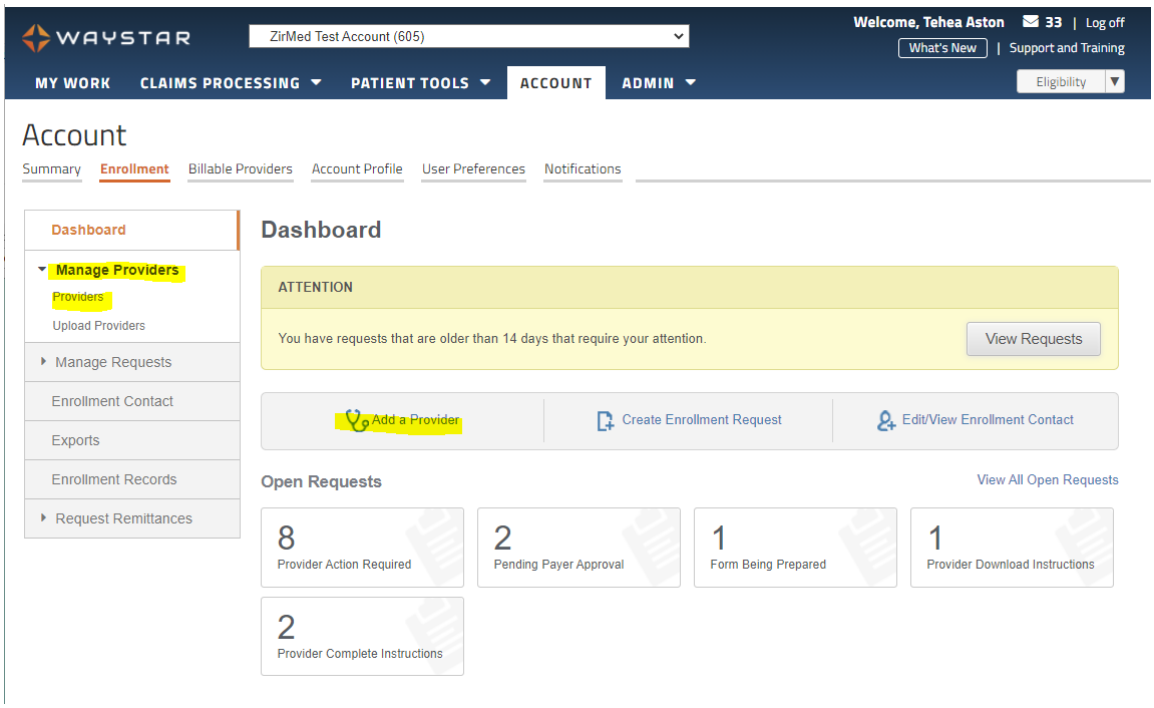
Add and Edit Provider Information on the Waystar Portal

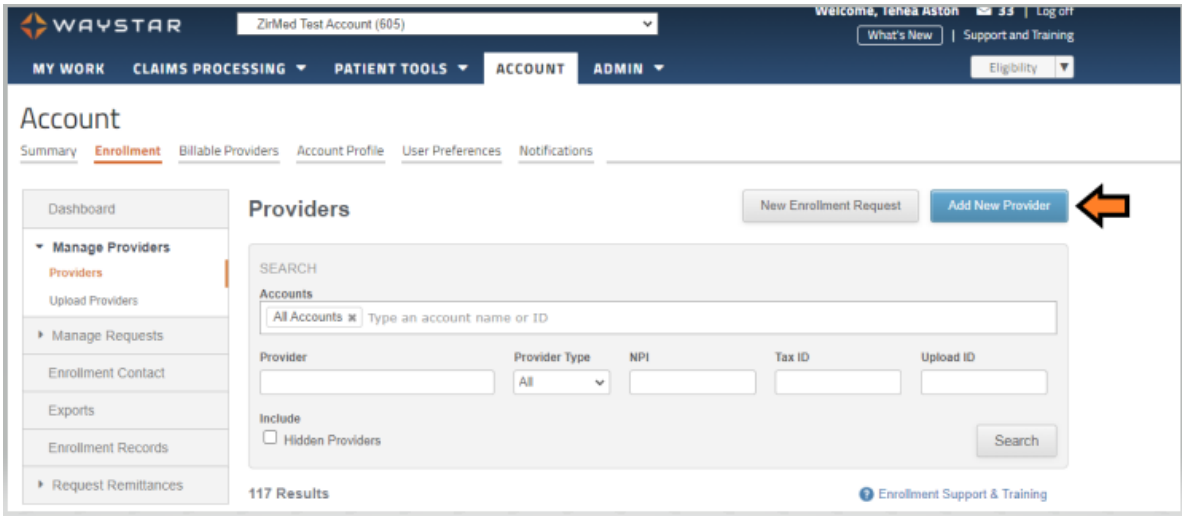
Add a Provider:

Before any enrollments can be made, you must first add the provider information for all billing NPIs that will need enrollments. The provider information entered is used to populate the forms that are created. Please make sure all information entered is up to date and accurate.

1. Log into your Waystar account and choose the **Enrollment** tab. Click **Manage Providers** on the left of the screen, and then click **Providers**. You can also use the **Add a Provider** hyperlink in the Dashboard.

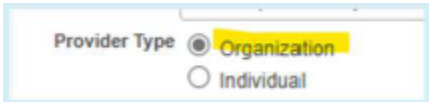


2. Once in the Providers screen you will see any providers that are already in your account. To add a new provider, click the blue Add New Provider button on the top right.



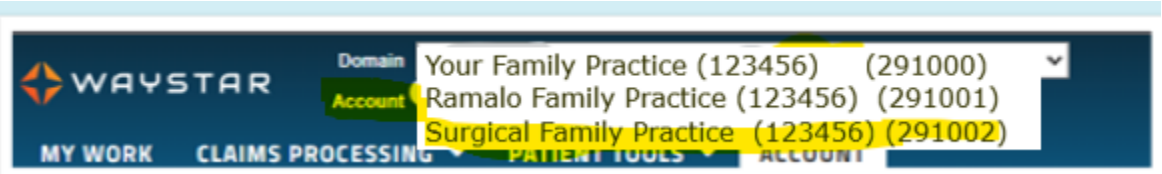
NOTE: The provider you must add here is the provider you need to print in Box 33 on a CMS1500 form. Typically, for most offices this is your group/business name with group NPI number. Waystar calls this **Provider (Organization)**.

Select Organization for your group/business name. Enrollments will be sent with your group NPI.



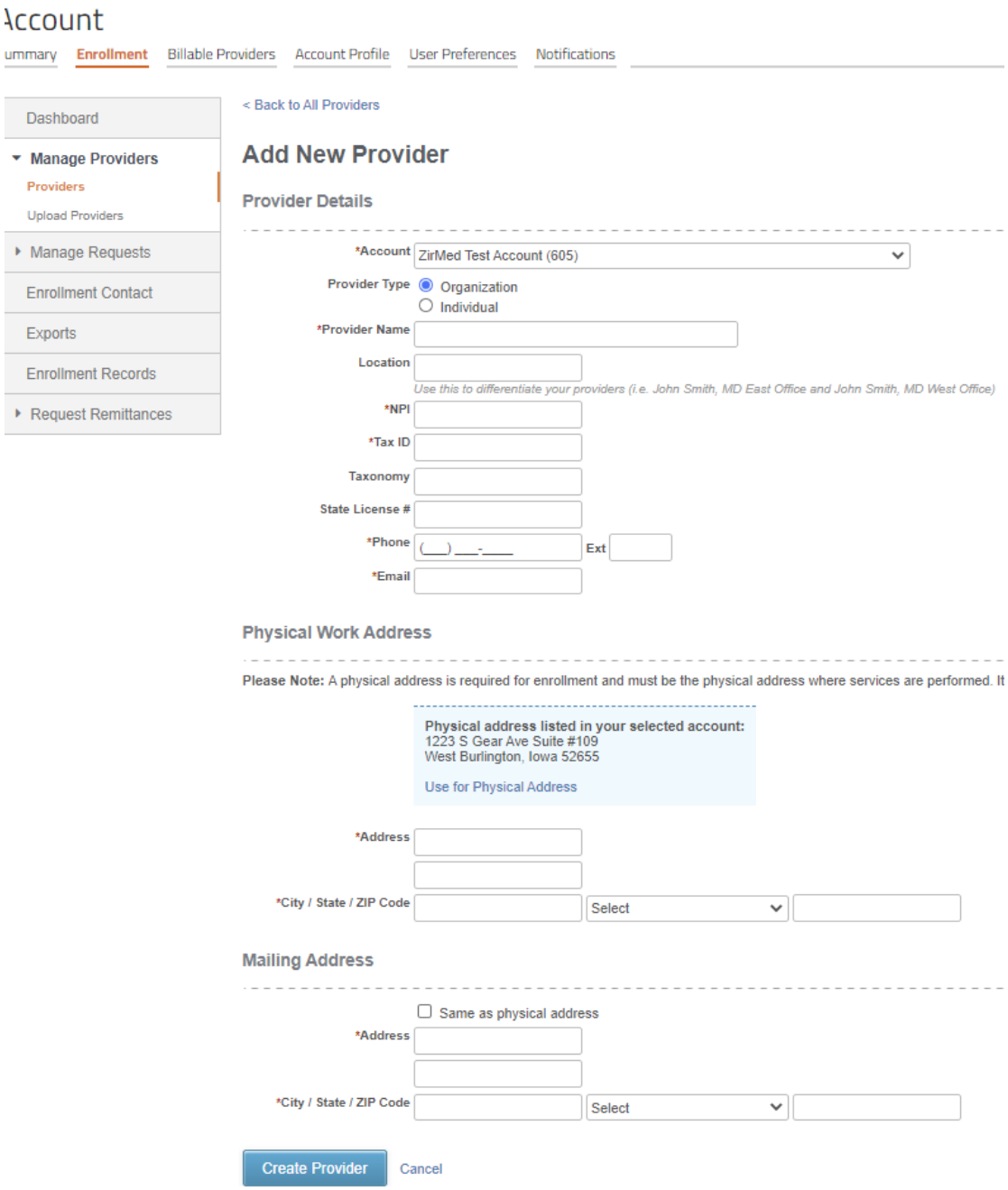
*You only need fill out Individual providers with individual NPI numbers, if you are billing as individual, solo providers.

ALSO NOTE: If you have multiple tax ids – MAKE SURE TO FILL OUT PROVIDERS AND ENROLLMENTS WITH THE CORRECT **ACCOUNT** SELECTED AT THE TOP – each Tax ID has its own Waystar number which is their mailbox number for remittances to auto-download.



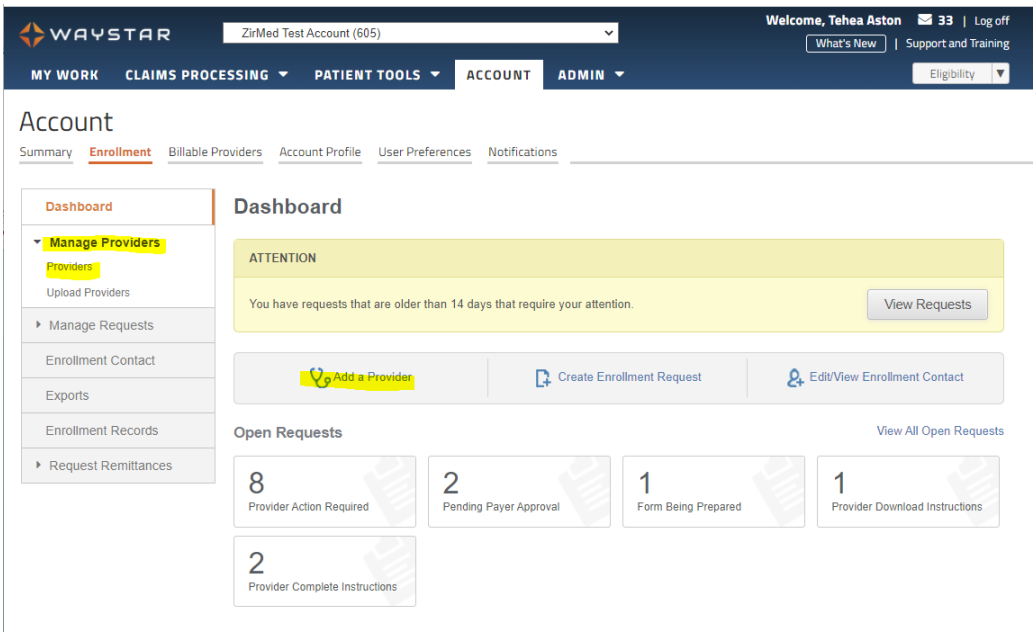
3. This takes you to the Add New Provider screen. Fill in all information marked with the red asterisk *: **Provider Name**, **NPI**, **Tax ID**, **Phone**, **Email**, physical **Address** and **City/ State / Zip Code**, as well as the mailing **Address** and **City/ State / Zip Code** if different from the Physical Work Address. When the information has been entered, click the blue Create Provider button in the bottom left of the screen.

    a. NOTE: The **Location** field is not required. However, if there will be several providers added to the same account, especially if they have the same or similar name, the Location box is very useful. Location can be an easy and quick way to differentiate between providers who at first glance appear to the same. The Location information will not populate on any forms, it is strictly for identification purposes only.

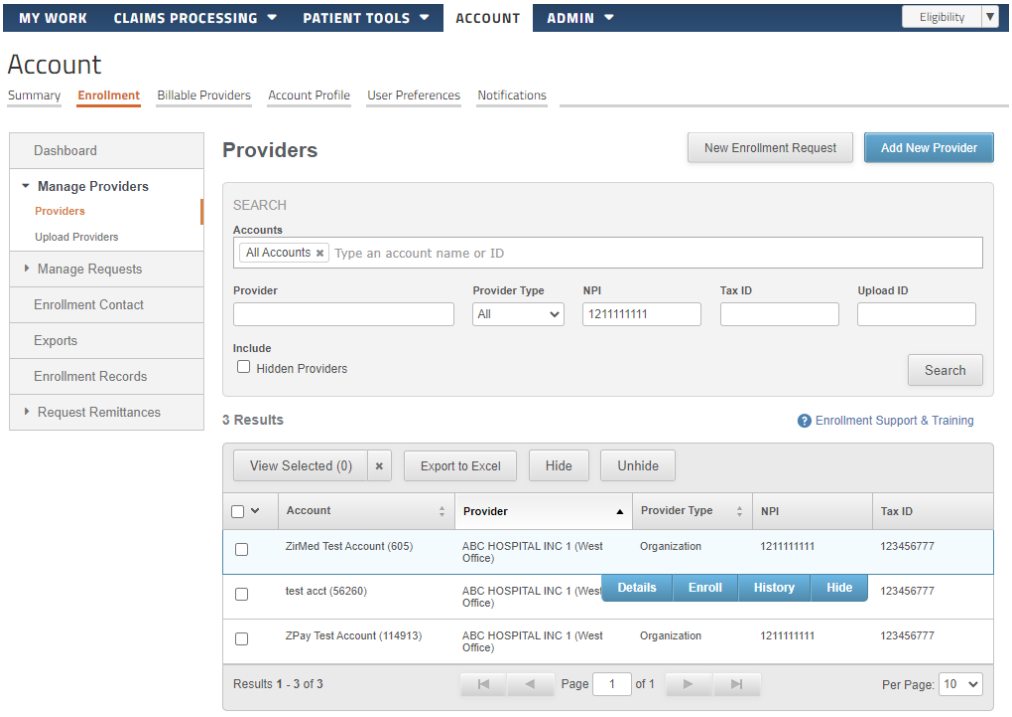


Edit an Existing Provider

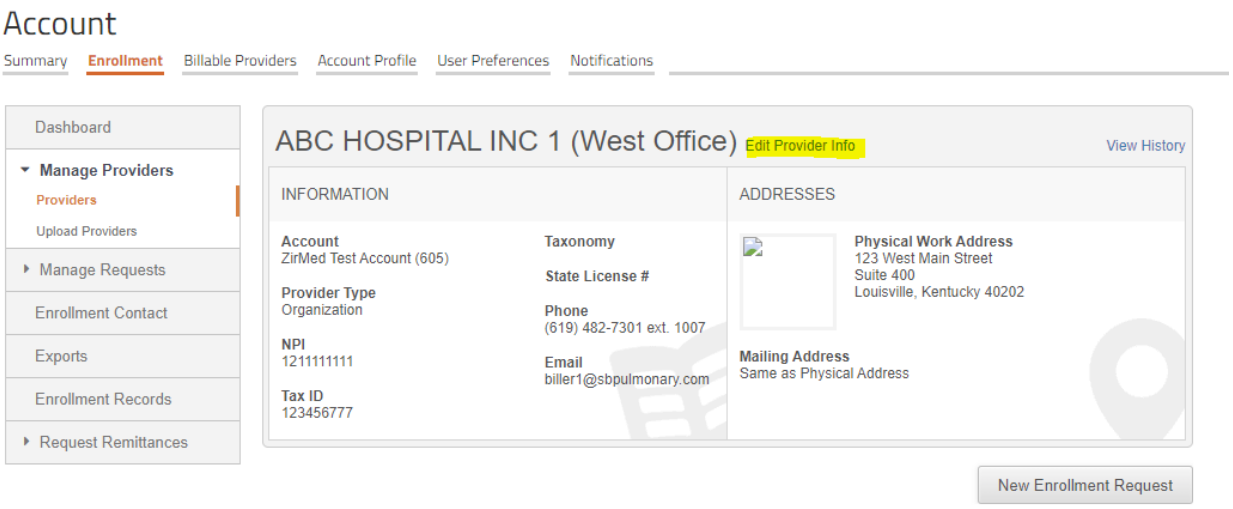
1. Log into your Waystar account and choose the **Enrollment** tab. Click **Manage Providers** on the left of the screen, and then click **Providers**. You can also use the **Add a Provider** hyperlink in the Dashboard.



2. In the Providers screen you will see all providers that are in your account. Choose which provider you need to edit by either using the search box at the top of the screen or scrolling through the providers. Once found, hover of the provider with your mouse so the provider line is highlighted in blue. Click the **Details** tab under the selected provider.



3. This takes you to a screen showing all the existing provider information. Next to the provider's name, and then click **Edit Provider Info**.



4. The Edit Existing Provider screen looks the same as the new provider screen except that it is already populated. Find the line that needs changing (i.e., new address, correcting a typo, new name). Replace the old information with the new, and then click the blue **Save Changes** button at the bottom.