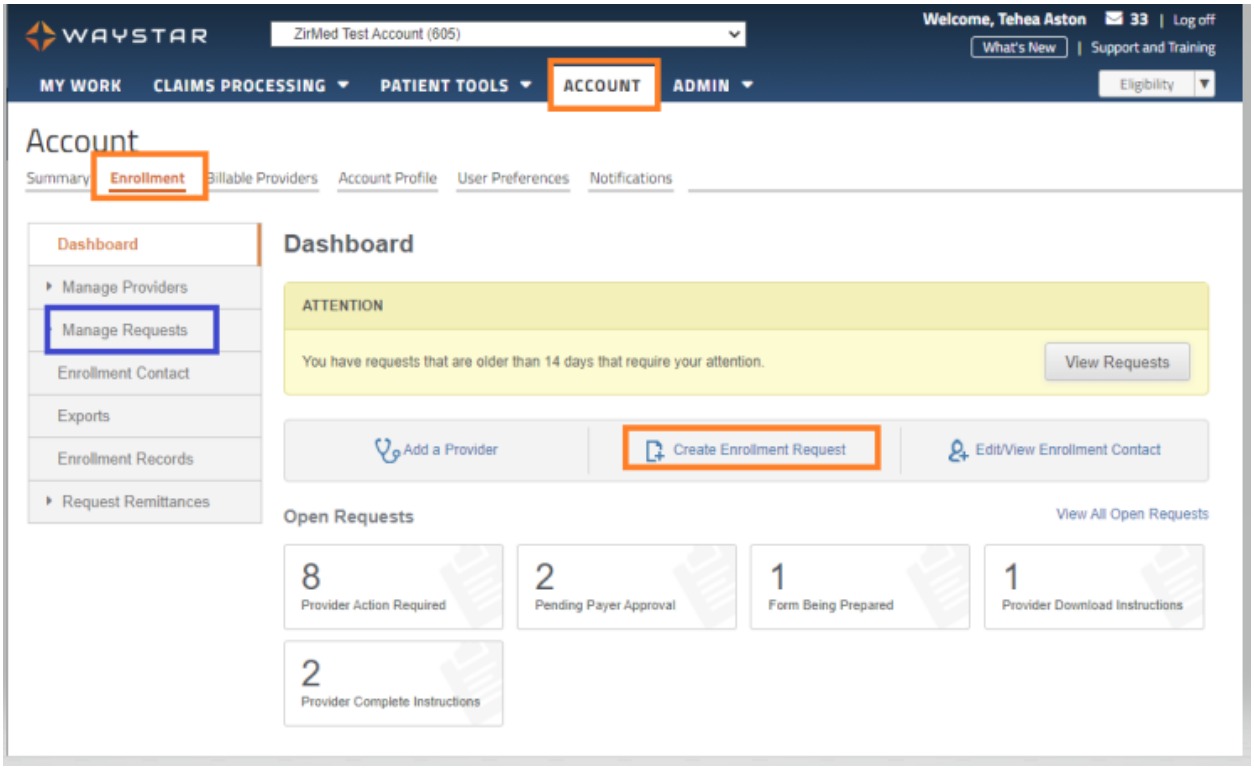
# Create Enrollment Requests on the Waystar Portal

## Create an Enrollment Requests

To create enrollment requests, follow the below steps.

1. Log into your Waystar account. From the Dashboard click the **Create Enrollment Request** hyperlink in the center of the screen. This will take you directly to the New Enrollment Screen. You can also choose **Manage Requests**, and then **Request** from the options on the left of the screen. This will take you to the Request screen. You will need to click the blue **New Enrollment Request** button at the top right of the screen if you take this route.

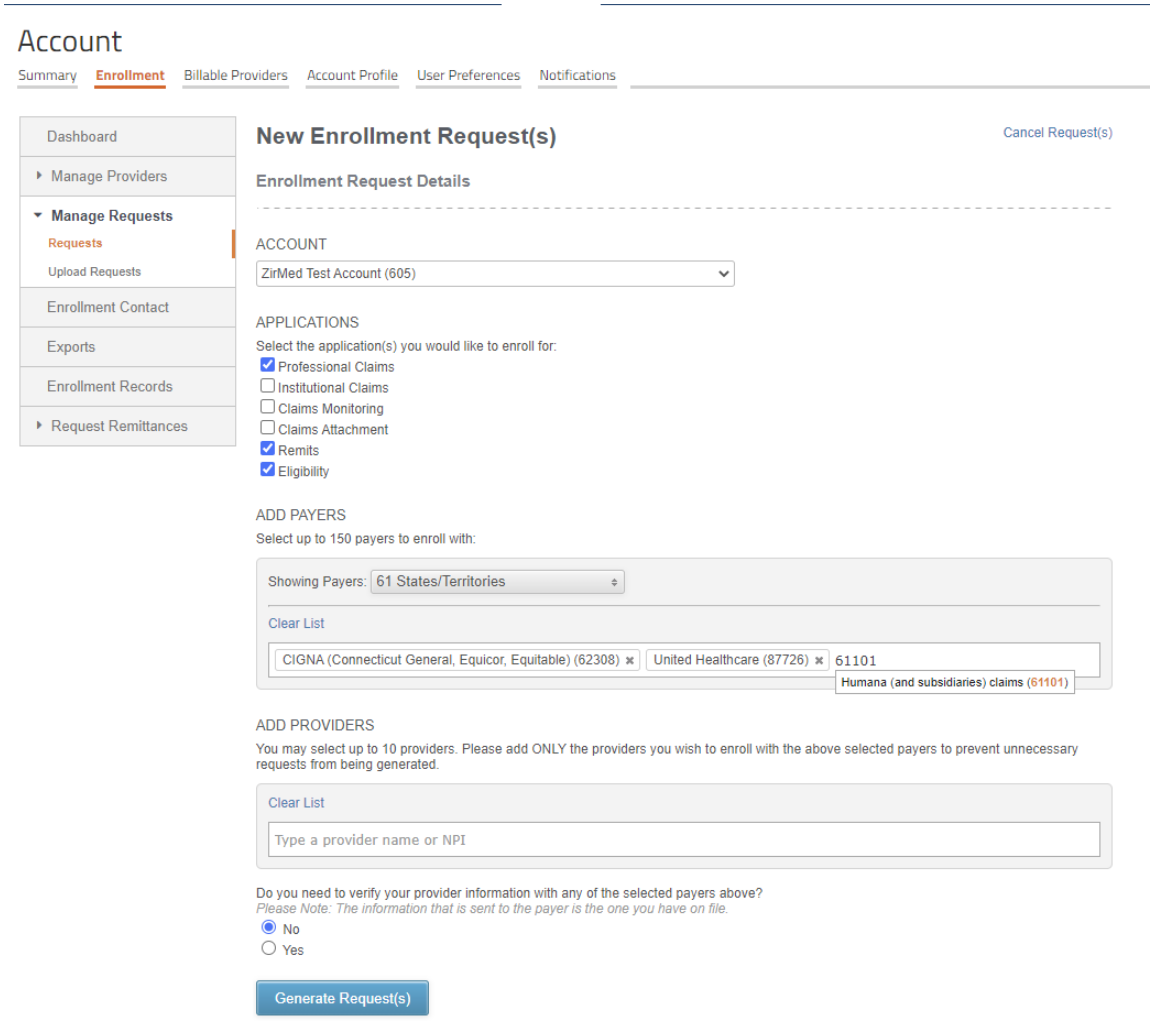


2. In the New Enrollment Request(s) screen:

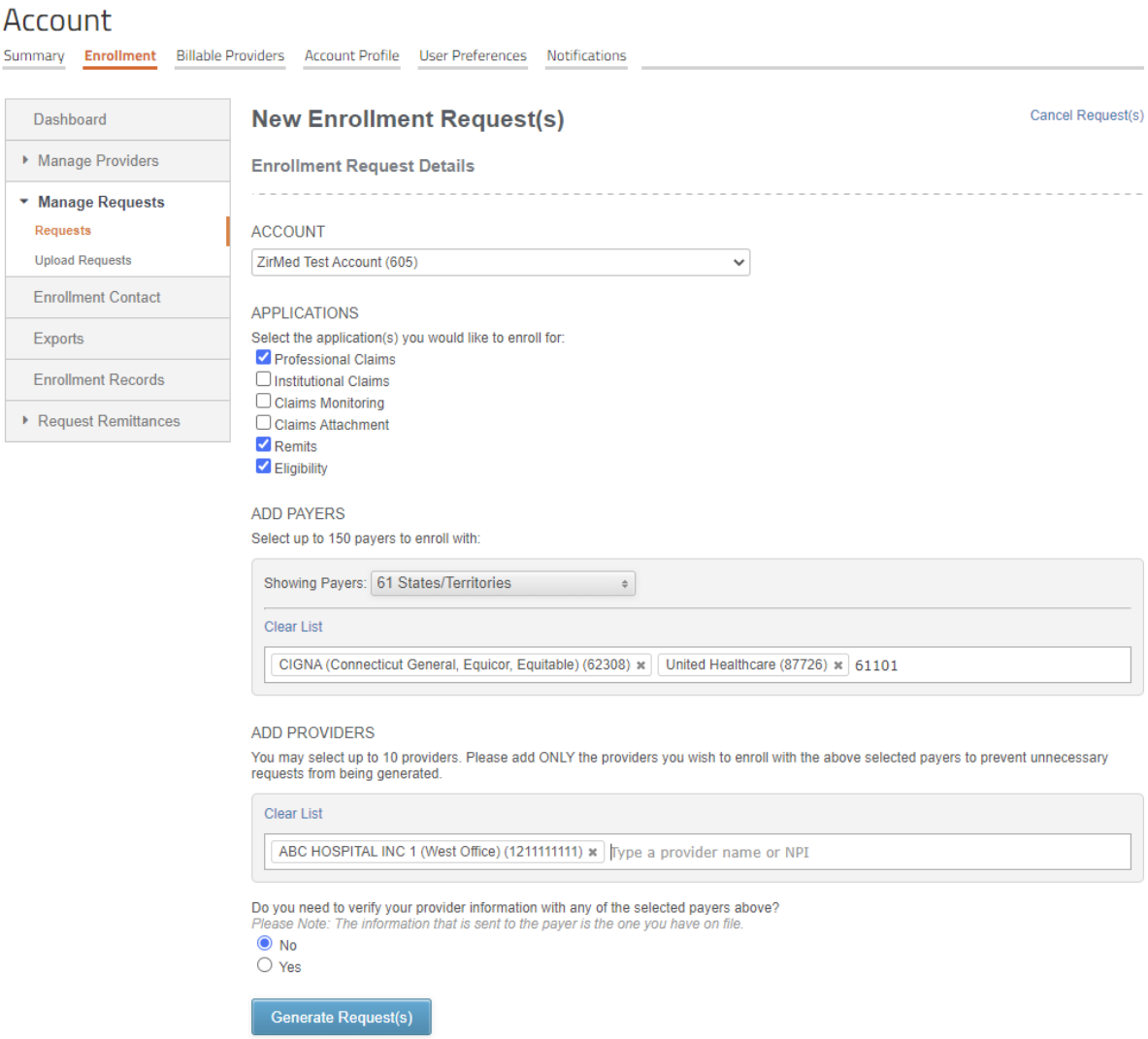
    a. Choose the **Applications** you need for enrollment: **Claims**, **Remits**, and/or **Eligibility**. You can choose more than one at a time.

        i. NOTE: Most payers do not require enrollment for claims or eligibility. However, if you are unsure if enrollment is required, or if you want to request an enrollment for all applications at the same time, it is safe to choose them all at once. Waystar will not create an enrollment request if none are needed.

    b. Add **Payers**: You can add up to 150 at once. Type the payer name, or the Waystar payer number. Suggested payers should auto populate as you are entering the information. Select the appropriate payer from the suggestions, if applicable. The payer will show in a box once selected. Repeat as needed.



c. **Add Providers**: you choose up to 10 providers. If you have more than 10 providers, you will need to repeat the complete enrollment process until all the applicable providers have been added. In the provider box, type the name or NPI of the provider. Suggested provider should auto populate as you are entering the information. Select the appropriate provider from the suggestions. The provider will show in a box once selected. Repeat as needed up to 10 providers.




d. Specify whether you need to verify your address for the selected payers. This defaults to **no** and is there in case a provider has a different address on file with a specific payer.

e. Click the **Generate Request(s)** button.
   i. A confirmation note will pop up reminding that a request will be created for every payer-provider combination. Click **Continue**.

# Create an Enrollment Request via Mass Upload

To upload a spreadsheet with enrollments:
Log into your account. From the Dashboard choose **Manage Requests**, and then **Upload Requests** from the tab on the left of the screen. This will take you to the Upload Requests Screen. Choose **Download Template**.

Open the excel Request Template and complete the following:

Column A: Enter the account number the enrollments will be in.
Column B: Enter the application for the enrollment: Prof=Professional Claims; Inst=Institutional Claims; R=Remits; Elig=Eligibility
Column C: Optional – payer name
Column D: enter the payer ID of the payer
Column E: enter provider type: Organization or Individual
Column F: enter Provider name
Column G-I: if the provider is a rendering provider, enter first name, last name and middle initial.
Column J: enter provider NPI
Column K: if applicable, enter the Provider ID or PTAN for the enrollment

Once completed, save the file.

Back in the Upload Request Screen, choose **Upload a File**. Choose the file. The upload screen will show the status below the search box.

Status: Red Exclamation mark – error
Green check mark: upload completed.

If there are any issues, they will be noted in the Exception File. Download the exception file and see the last column on the right. It will list what error there was with the line that did not upload. Correct any issues, delete the Error/Exception column, and thenresave the document. Upload again until all enrollments have been added.