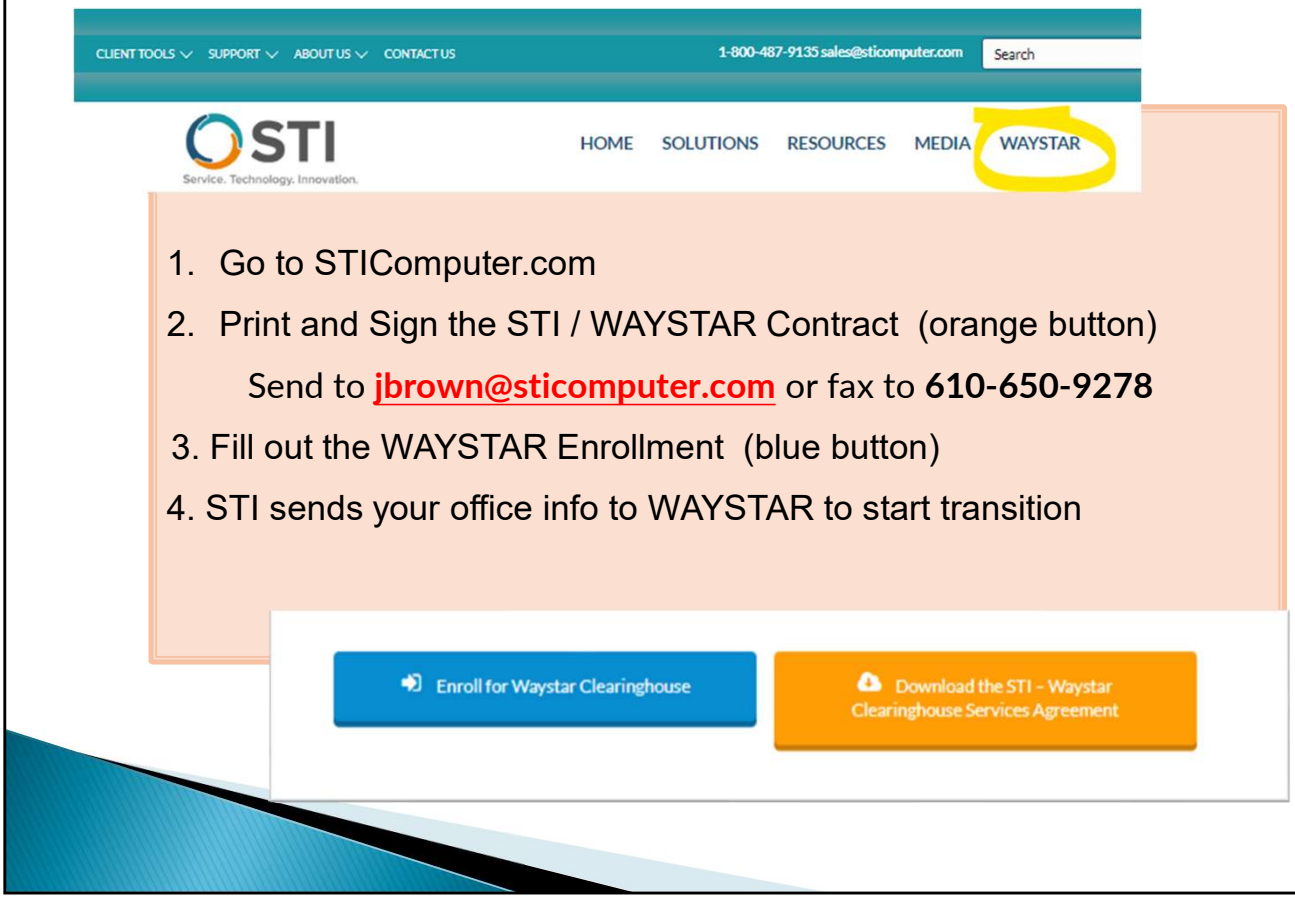


SLIDE 1

Hi good afternoon, my name is Jen Arcaro in our STI Professional Services Team. Welcome to our new clearinghouse, WAYSTAR. While we normally would be able to walk each of you individually through the new process, it's been physically impossible to do so with almost 100% of our providers needing to change their billing setup all at once. We thank you for your patience and attention during this very stressful time.

Today we're reviewing the very first steps you will take to get started – Waystar setup, enrollments and converting your NEIC billing. We're recording this webinar plus these slides will be posted later today. Please type any questions you have along the way into the CHAT section of this GoToMeeting and we'll answer the best we can at the end.

WAYSTAR Contract



SLIDE 2

To begin the process, we'll start on our own STI website. Two things are needed - both the orange button for signing the formal agreement, and the blue button to fill out your practice information. Multiple providers can be on that one enrollment page – but if you have **multiple tax ids those will need to each be on a separate enrollment** page please.

Our STI Team is collecting both items and then submitting a request to WAYSTAR. If you haven't yet signed the professional contract, we haven't been able to send your info to WAYSTAR. As soon as both are received, we can send over.

Processing Time

Both STI and WAYSTAR appreciate the critical timing involved for starting a transition such as this in the middle of the security crisis. We're each processing your information quickly and securely. Timing for submitting to WAYSTAR, and expecting back credentials from them would normally be 5-7 days or so, but with 90% of our clients enrolling all at once, we cannot guess expected time other than ASAP.

Because call wait times for individual support are impossibly long, we need your help. Please read alerts, go through help documents -we must depend on webinars and posts to teach and help as many of you at once, quickly.

THANK YOU FOR YOUR CONTINUED PATIENCE.

SLIDE 3

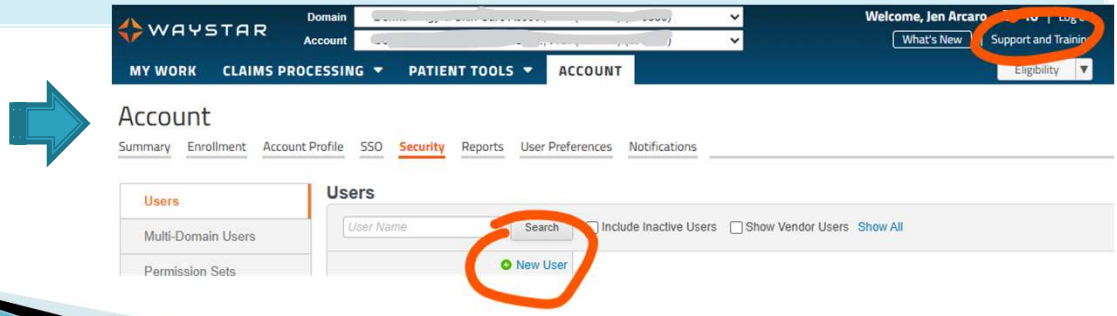
Both STI and WAYSTAR appreciate the critical timing involved for starting a transition such as this in the middle of the cybersecurity crisis. We're each processing your information quickly and securely.

Because call wait times for individual support have been impossibly long, **we need your help**. Please read our alerts, go through the help documents, watch the videos -we must depend on webinars and posts to teach and help as many of you at once, quickly.

Waystar Account Setup

Soon you will receive two emails from waystar@sticomputer.com to setup your WAYSTAR account. Once you activate your account, reference the process outlined below to get started with your WAYSTAR Portal.

1. Log into the portal and you'll be prompted to change your password and setup 2 security questions.
2. Click Account Tab > Security +New User (only if you have multiple staff needing to access this website)
3. Click Support and Training link for access to Help and Videos



SLIDE 4

You'll be receiving two intro emails – one has your new login for accessing the WAYSTAR portal and the 2nd has your temporary password. If you have more staff who will need to access this website to work on claims or remittances, use the blue plus sign for new user and create for your staff to access. Only your original user is set as domain administrator.

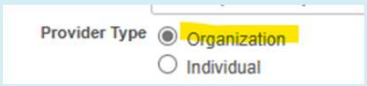
The Support and Training Link, top right on your header – this sometimes is blocked by your browser. Click to Always Allow popups if you need to – it's a safe site.

WAYSTAR Practice Setup

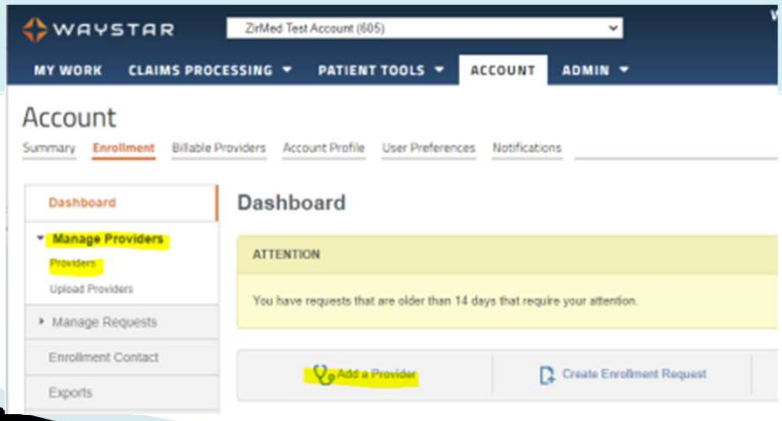
1. Log into your WAYSTAR account and choose the Enrollment tab. Click Manage Providers on the left of the screen, and then click Providers.

   **website will prompt you to setup Enrollment Contact first

2. Select “Organization” for your Group/Business Name



**ONLY if billing as solo provider do you need to fill out Individual



SLIDE 5

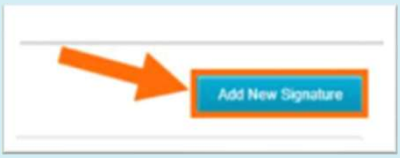
Once you’re in the portal, your first step will be to setup your practice information, which will be used for enrollments. Click on the **Enrollment Tab**, then **Manage Providers**. At first you’ll be prompted to setup an Enrollment Contact - this is the person is who will receive all communication from WAYSTAR. It can be the same person as you’ve already set for us as WAYSTAR ADMINISTRATOR – or it could be your main billing person.

At Manage Providers (in yellow here) - Click **Add Provider**. WAYSTAR is directing us to have you setup your group name – you’ll select **Organization for provider type**– and if you bill all insurances as that group name and group NPI, there’s no need to fill out each individual provider. Enrollments will all be sent as your group.

If, though, you bill as a **solo provider** (not using a group NPI) then please do continue to fill out each individual provider with each individual NPI and information.

Electronic Signatures

E-signatures are accepted by most insurances.



- Go to Account > **Enrollment** to access
- Enter authorized signer
- Upload image (take a picture of a signature on white paper) OR open website on a tablet or phone to use finger or pen to sign directly
- MUST assign this signature to a provider – go to **Manage Providers > Provider >** Edit provider
- Note: Once signature is saved, it cannot be edited.



- https://waystar.my.site.com/s/article/EnrollmenteSignOverview

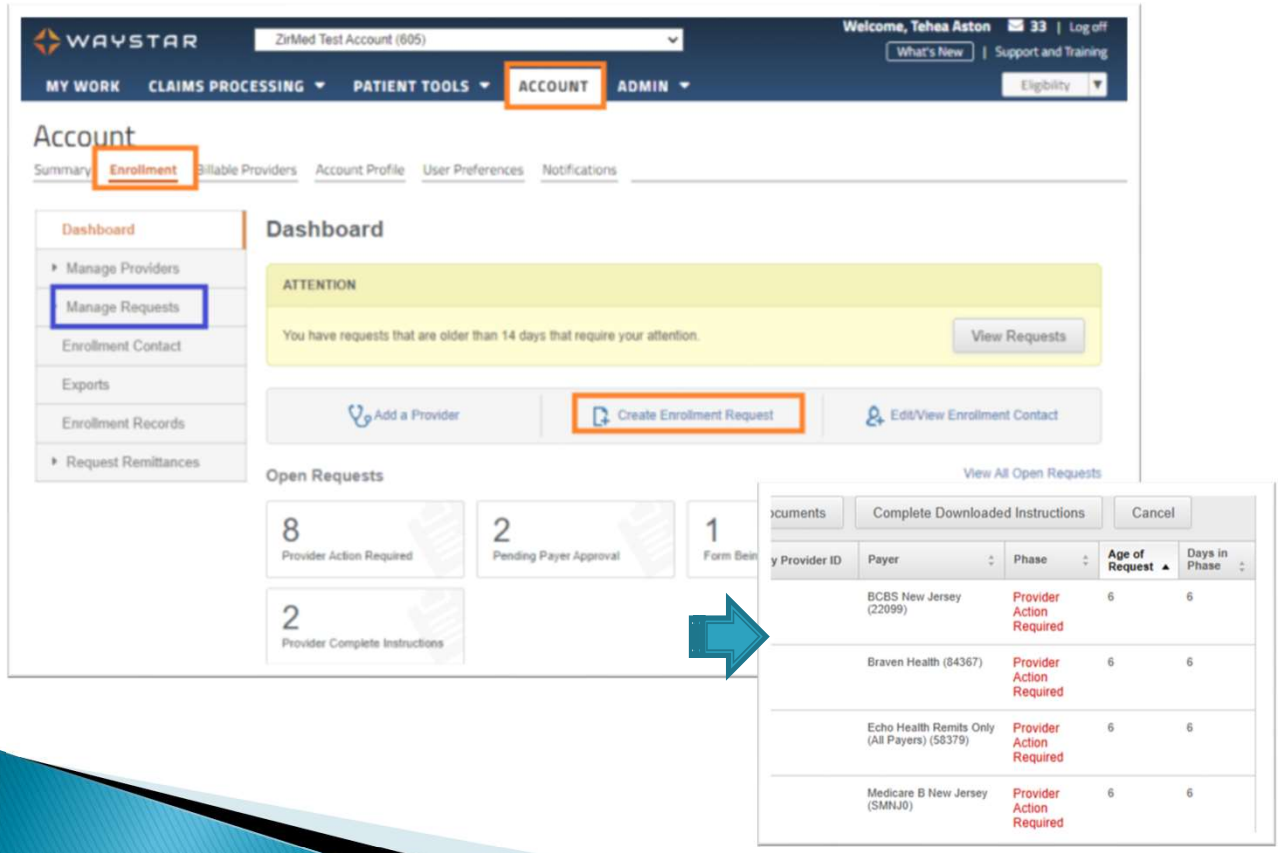
SLIDE 6
Many of the quick forms that require authorized signatures seem to allow an electronic one to be attached here. This is NOT REQUIRED. Any form can be printed for your signature if you choose.

Setup one signature per provider, or you can assign a manager signature to multiple providers at one on the same pages – there's an Assign Signature button at top of list showing all providers.
MAKE SURE you're using an approved signer – whomever you have set for each insurance.

The video on Waystar is in orange here https://waystar.my.site.com/s/article/EnrollmenteSignOverview

Some payers, like Medicare, require an original signature – in this case, you'll be directed to print the form on the Enrollment screen and mail it to Waystar. These all include instructions with how to complete and return the form.

Waystar Enrollments

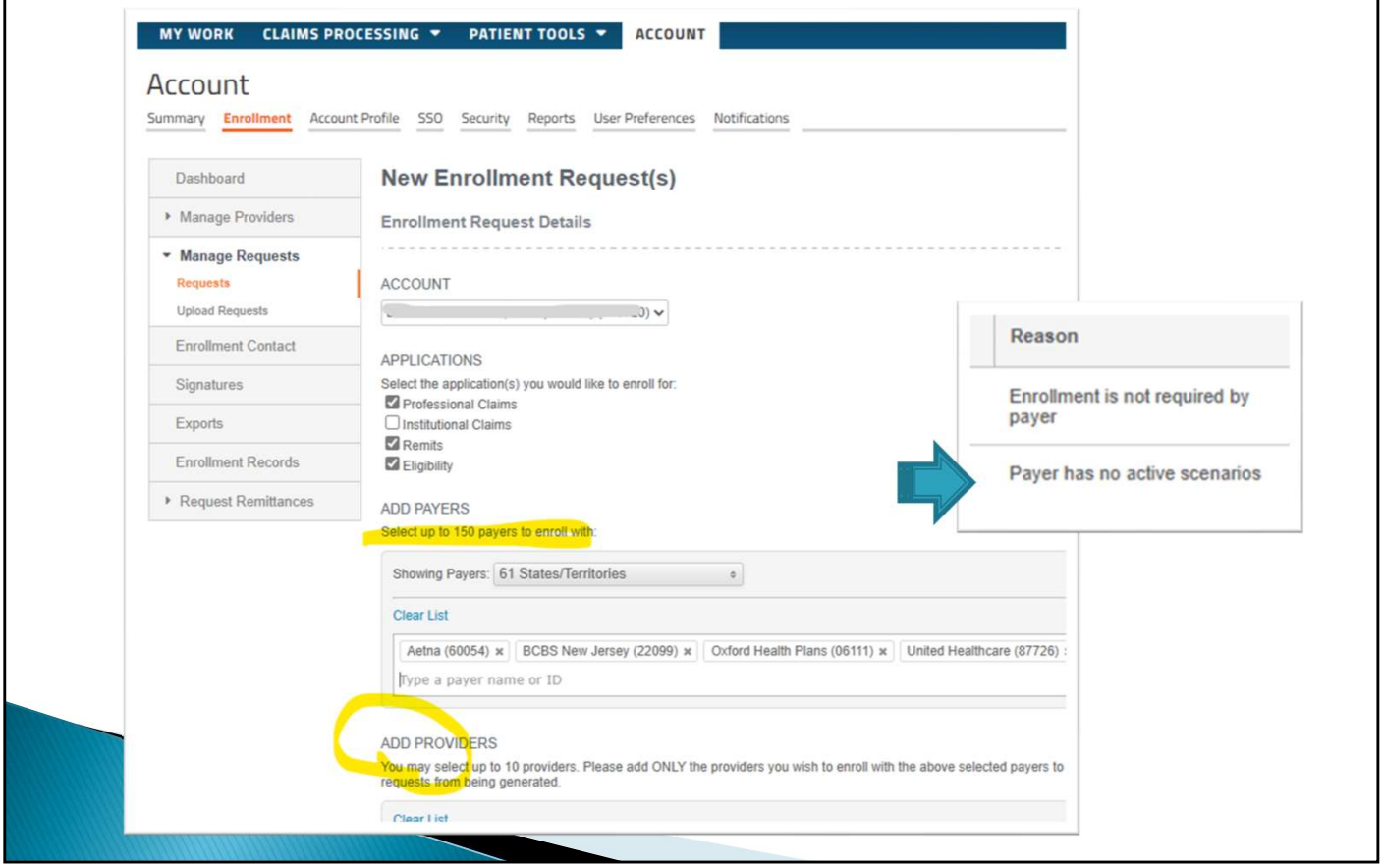


SLIDE 7

OK Finally! To create enrollment requests, first Log into your Waystar account. Click **Account and Enrollment header**. This Dashboard keeps track for you how many enrollments have been created and what's their status. You can click on the box to see what's needed, click the red link for more details. Those will clearly state if you need the e-signature or you need to print. Waystar has a great USER GUIDE for enrollments with lots of details – I'll show you how to search for that on our last page.

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.

Enrollments



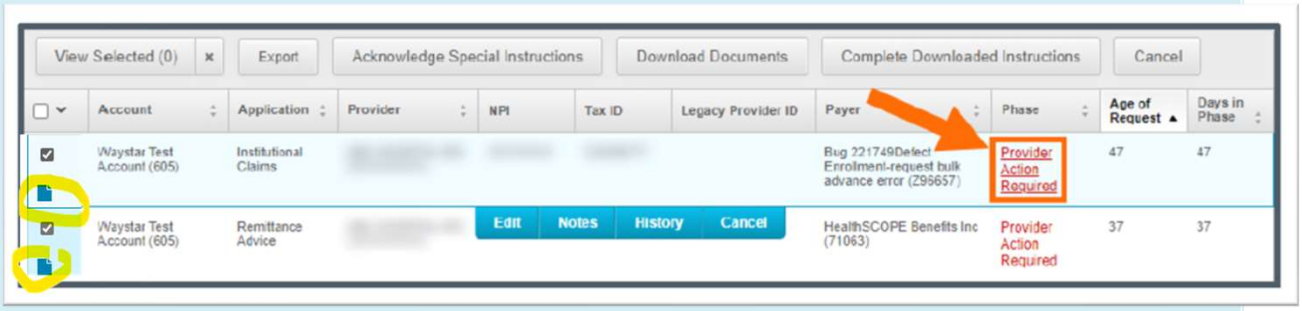
SLIDE 8

We recommend you click all the boxes at once – claims, remit, eligibility. The insurances don't have to be similar – the way you'll organize this page is BY PROVIDER. Start with all insurances you bill by GROUP. Search the group name at the bottom by typing a few letters and then click on your group, and as many insurances you want to type in the middle. Search by payer id is quicker but also can search by name.

Save that and then repeat - Do any which you know need to be billed by solo provider, such as NY Medicaid. If you're unsure how you bill, refer to your EOBs to see what NPI is the payment directed to or find your original paperwork when you became par with that insurance.

After you click GENERATE REQUESTS – the page shows how many enrollments it's creating and how many are not needed with the reason why. Most are because no enrollment is needed. One message is saying PAYER HAS NO ACTIVE SCENERIOS – this means we cannot enroll right now. We're seeing that for Horizon NJ Health **22326**, and it seems to mean that the payer is still routed to WedMD which goes thru CHC, and they're literally waiting on CHC to come back up fully, which hasn't yet happened.

Extras



Blue page icon is full requirements by payer – download and follow steps. Then go back to Waystar to mark 'Instructions Completed'.

Notifying Waystar of Completed Enrollment Instructions

- Login to Waystar and confirm the enrollment instructions have been completed.
  - Once logged in, click Account > Enrollment > Provider Complete Instructions > Click 'Edit' on the corresponding request > Click 'Instructions Completed'

Important: You must complete this step in Waystar in order for your enrollment to be processed.

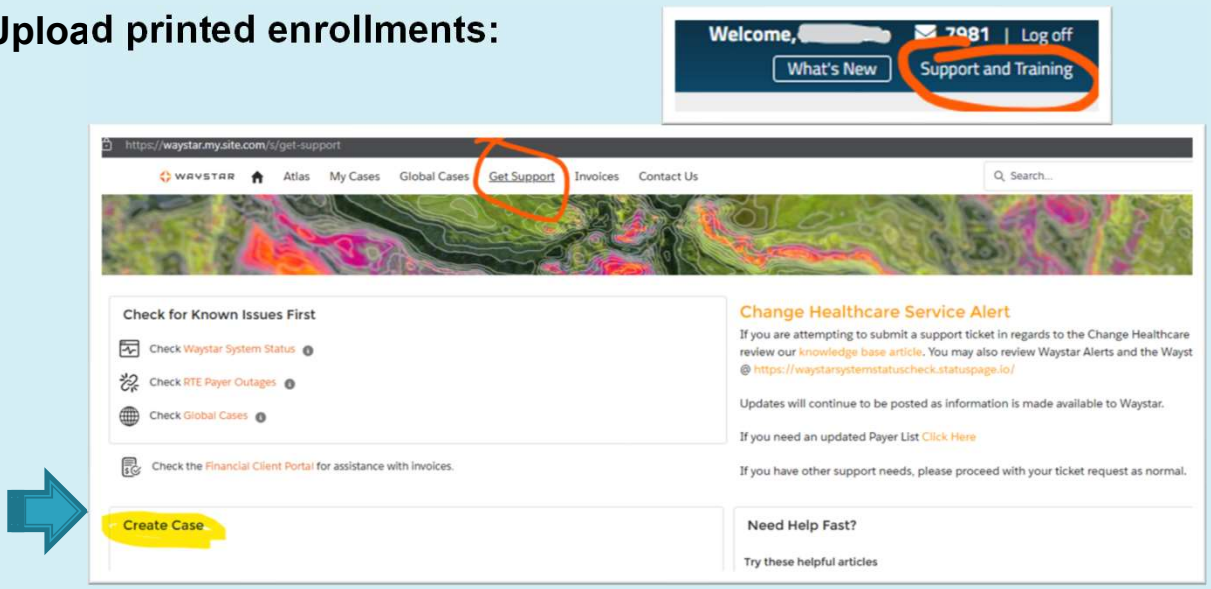
SLIDE 9

Now for the nitty-grity. Of course, not all insurances like to make this easy for us. This page is organized really well, and it's very clearly pointed to your items to do. Red links, click on those for details. Blue page links, click those too. ESPECIALLY those – they're either forms you need to manually sign, or instructions for outside websites such as Zelis, Optum Health, PaySpan. Very detailed steps, with links to the website you need so it's easily used on the computer but of course you can print them too.

Please notice the last bit of directions may explain how to either click the line item itself and mark it as "INSTRUCTIONS COMPLETED" OR…

Enrollment Cases

Upload printed enrollments:



Alternate (slower) method –Enrollment Forms can be faxed to 1-678-221-0557

**ADD YOUR WAYSTAR CLIENT ID# with name/best phone#

SLIDE 10

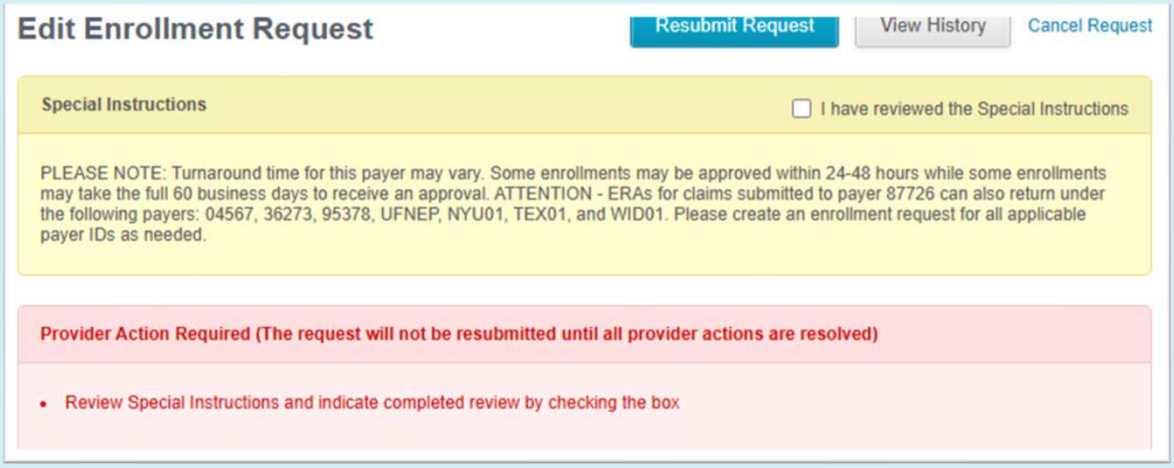
For the **little blue paper icon,** when it's a form to sign, print, have your doc sign and then scan in all pages including signature page. To get it back to Waystar in a case– start by clicking the **SUPPORT and TRAINING link** on their portal to get to the help pages. Now click **GET SUPPORT** and scroll down to **Create a Case.**

Gov't payers (and more) will have **both a claims and remit line**, please make sure to **sign BOTH and return both**.

In case you don't have a scanner, Waystar did give us a fax #. Please believe me though, if you send them duplicate faxes or cases and call about it, this takes up more of their resources and we're finding even longer delays. Trust the process – we're all working as fast as we can. As long as the enrollment isn't pointing at Provider then we just wait.

Extras

Example of United Healthcare (87726) ERA enrollment:



Gov't payers (and more) will have both a claims and remit line, please sign BOTH and return both.



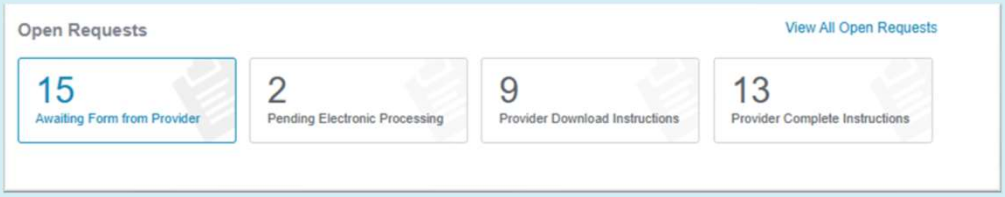
SLIDE 11

Here's a quick example of one I cringed thinking it's more work but really it was super helpful, plus easy. United Healthcare has a red link for more instructions – that shows like this top screenshot. They explain that UHC sends back ERAs under different payers, and lists the payer ids so that you can setup enrollments those also. Copy/paste directly on the instructions in yellow. Then all that's needed to finish this one is to click the box saying you did indeed read that tip.

ERA Processing Time

Enrollments are dependent on each individual insurance. The top of each form shows the processing time. Ex: Tricare East 5 days, Humana 21 days, Magnacare 60 days

Please check your Dashboard for boxes showing what's pending and if you need to take any action.



THANK YOU for your continued patience and attention to detail as we're all learning this at lightening speed.

SLIDE 12

How long will these all take? You already know the answer – we're at the mercy of each individual insurance. Although Waystar really has these organized well, for the insurances who use other websites (such as Zelis) there is nothing Waystar or STI as your vendor can do to change that. Many are a quick 5 days but some are 30 days or even up to 90 days. Check your DASHBOARD every few days for any changes – any item with the word Provider has something for you to do.

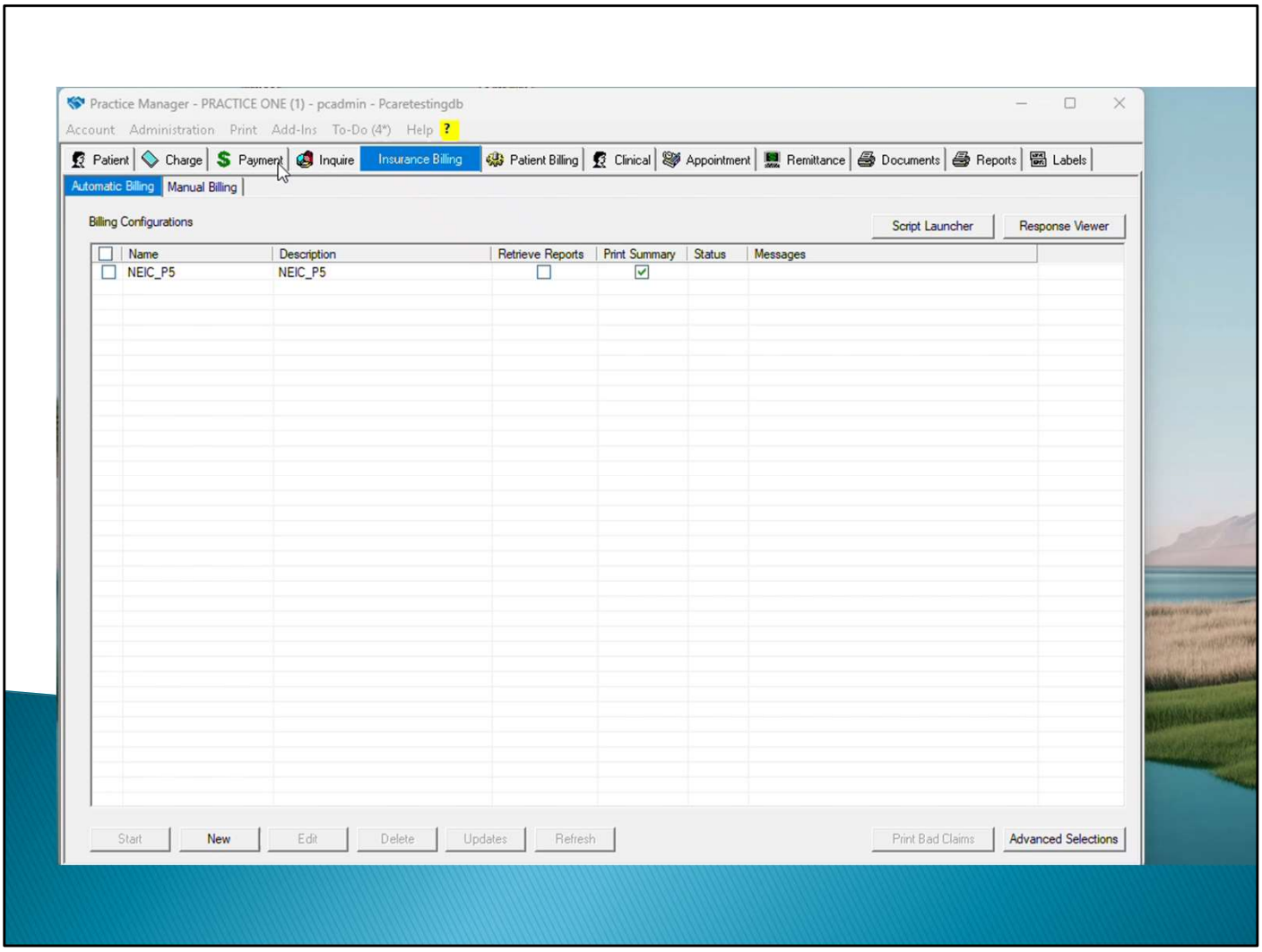
Practice Manager: Billing Prep

Before sending claims :

1. Update to Practice Manager **version 6.7.9.454** or greater.
   (STI handles the upgrade for Cloud offices.)
2. Run Billing Component Manager (Add-ins, Ins Billing, BCM, click OK)
3. Your SFTP credentials need to be created by your Domain user.
   Watch Billing Conversion video: https://youtu.be/ScID7rVWgR4
   (first 10min, after is good Q&A)
   - **a.** Generate the SFTP Password on Waystar portal **(at minute 1.38)**
   - **b.** Run wizard – at end enter SFTP #s and Waystar account#
   - **c.** Run Billing Component Manager AGAIN (Add-ins, Ins Billing, BCM)

SLIDE 13
In order to help streamline this transition, STI Development has made necessary changes for the new vendor, plus created a great wizard to copy your existing NEIC billing setup. This will automatically create a new WAYSTAR setup with a just a few clicks. To use that wizard you will need to update your Practice Manager to the newest version 6.7.9 released last week. For cloud offices we had been running upgrades every night in batches. If you host your own server you can download that release from our website as usual.

We recorded a full webinar of the conversion – I've added the link to this slide here. Watch the first 10 min to review that. Continue watching if you want to hear the Q&A portion.



SLIDE 14

Here's a quick video of the conversion – this will take you literally a minute. It's copying all the behind-the-scenes setup of new billing programs.

On the next page I'll show you where to get your user# from Waystar portal.

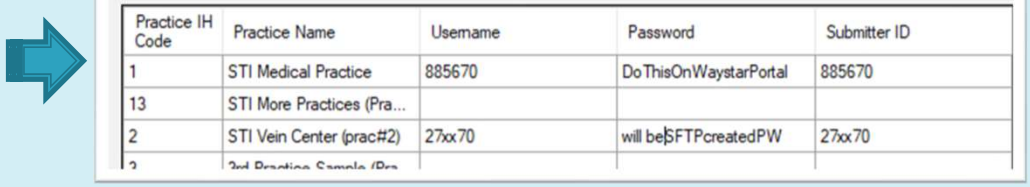
Highlight your NEIC line, click refresh at the bottom. It's done.

Double-Check

Check your credentials in Practice Manager:
Click **Add-ins>** Ins Billing> Other Configurations> Waystar Clearinghouse > Credentials



Username and Submitter ID will be the same# - your Waystar account #



Note: if Submitter ID column is all dark gray, you did not yet RUN the conversion.

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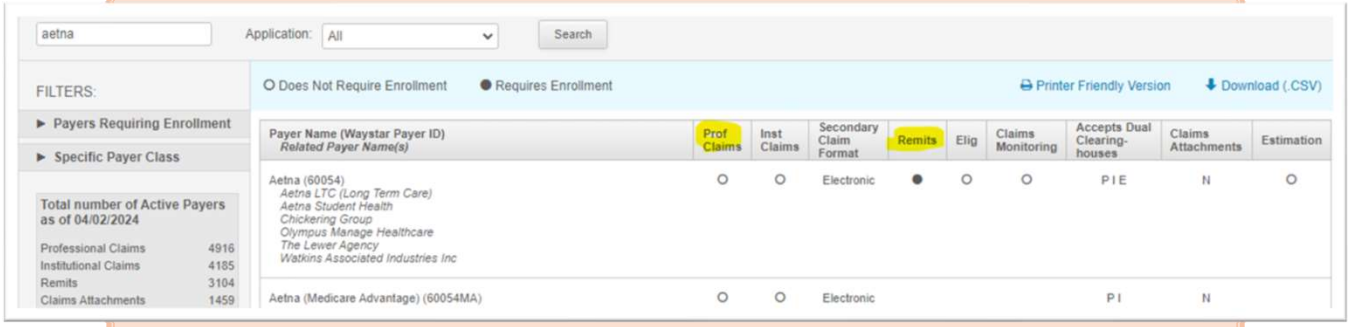
After running the conversion, or to double check #s if someone else ran it already. This dark blue is the top of your page of Waystar. After your office name, the first # is your STI account# and the 2nd in yellow is your new Waystar account#.
Back in Practice Manager, Click your **Add-ins option on top tool bar >** Ins Billing> Other Configurations> Waystar Clearinghouse > Credentials . The grid will show each practice you have on a line. Username and Submitter id will be the same #, your Waystar account. The password you've created will be different for each practice (if you have multiple). If this screen is all gray – it means you did not yet run the conversion.

Waystar – Search Payers

Full payer list with description of what's required here:
https://login.zirmed.com/ui/Payers



Or search directly in the Enrollment window.



SLIDE 16
This is Waystar's full payer list- You can see if official enrolment is required for claims or Remits.
Or the faster way is directly in your enrollment request. From your **dashboard**, you have the white button "Create Enrollment Request" and from the **Manage Request** page you have the teal button Most functions in the Waystar portal seem to have multiple ways to get to where you want.

Payers – continued

These payers included in the Billing Conversion:

Note these will be updated for you while running the PM Conversion wizard.

Insurance Payer	Waystar Payer ID	CHC Payer ID
AmeriHealth HMO	95044	SX055
DME MAC A	DMEA	SDMEA
DME MAC B	DMEB	SDMEB
DME MAC C	DMEC	SDMEC
DME MAC D	DMED	SDMED
Highmark Senior Health Company	15460	95462
Independence Blue Cross	54704	SX083
Keystone Health Plan East	7417	SX055
Medicaid New York	SKNY1	SKNY0
Medicaid NY Outpatient – Institutional	SKNY6	12K35
Medicaid Vermont	SKVM0	SKVT0
Medicare B New York Upstate	SB807	SMNY1
Tricare East (Tricare North & South)	TREST	68299
Tricare for Life	TDDIR	SX176
Tricare West Region	TRICW	SCWI0
Univera Healthcare – Managed Care	16107	SX087
Univera PPO	UNINW	SX091
Value Options PA Behavioral Health	Z96315	SX173
Wellcare Health Plans	14163	26141

SLIDE 17

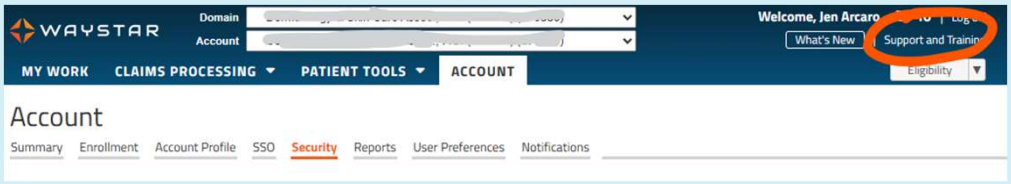
Here is the list of payer ids which we programed to update automatically as well. Check this list for any you are needing to enroll, in case you're not finding on the main list.

***This IS NOT a full list of the it#s which are different from what you have now in Practice Manager, its simply the main ones we found and could get in quickly for the automatic update. You can and will always have the ability to change your own insurance payer ids under **Administration > Transaction Tables > Insurance.**

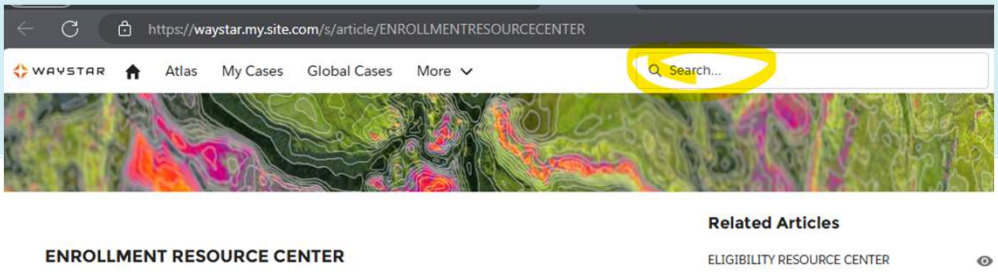
Resources

First log in to WAYSTAR:

https://login.zirmed.com/ui – then click Support and Training



This opens a new page with a great "search" bar to find exactly what you need.



SLIDE 18

Both STI and Waystar websites have multiple links for videos and documentation needed to review for your staff. We're watching the same videos in order to learn how to help. As you can imagine or have experienced, our call queue for Support Staff to help each of you individually through each step has been too too long. We must triage issues overall and these webinars should be just right for the basic steps and FAQs.

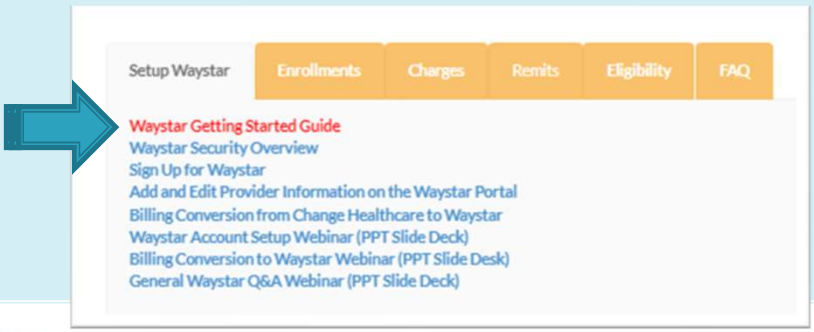
Waystar's website has this Support and Training link (top right circled in orange)– this opens to a new page with a great search bar to find exactly what you need. Documents, videos, lots of resources.

Going Forward

While you're waiting:

- Continue sending claims any alternate way you have setup with us
  - **Novitas (DE, MD, NJ, & PA Medicare)** - Claims uploaded via the Novitasphere portal
  - **New York Medicare** - Claims can be manually entered via the Connex portal.
  - **Availity Essentials** - Eligible commercial claims uploaded via this portal.

STI Website >
Waystar page



SLIDE
If you haven't yet gotten your logins from us yet for the Waystar portal or are waiting for an upgrade for Practice Manager to the newest version, you can continue to bill any alternate way you have setup in the meantime: Availity, Novitasphere portal, NY providers using the Connex portal, etc. Right now we're seeing some delays on Medicare enrollments, some states seem to be very overwhelmed – so it's recommended you continue sending your Medicare claims as you have recently, until both the claims and remit enrollments get approved with Waystar.

On our STI website, scroll down on our Waystar page. We have a new GETTING STARTED GUIDE, it's showing in red. That gives your soup-to -nuts steps with links to each video or extra help.



Thank you again for your time and attention today. We're in this together, truly. We'll be publishing this webinar later today, with the slidedeck and when you open it, you'll find it easy to click on a link if you'd like to watch one of the recorded trainings listed here on the last page.

Now we'll have Chris Fisher read any questions in our chat and our team will answer the best we can.