ONLINE

EFT (Electronic Funds Transfer) and ERA (Electronic Remittance Advice) Enrollment Form

INSTRUCTIONS

- This is a fillable form. Type your information into the form on your screen, or print the form and fill in the information.
- Complete all sections that apply to your enrollment choice *(EFT, ERA, or both EFT and ERA)*.
- Enrollments are handled at the TAX ID level. All NPIs associated with the specified TIN will be automatically enrolled.
- If your TAX ID would like to receive payments via more than one bank account, please contact EDI@EchoHealthinc.com.
- Be sure to sign the form. Postal mail *OR* submit the form via the ECHO secure portal. Postal mail: ECHO Health, Inc., 810 Sharon Drive, Westlake, Ohio 44147. Or, submit via secure portal: https://edi.echohealthinc.com/new-ticket.
- For information about the status of your enrollment, or for any other questions, please contact ECHO® at 440.835.3511 or EDI@EchoHealthinc.com.

You will need to contact your financial institution to arrange for delivery of CORE-required Minimum CCD+ Data Elements necessary for successful reassociation.

Payer / Insurance Company Name: _____
(Please specify only one Payer per form)

For security purposes, please supply an ECHO Draft Number and matching Draft Amount to validate against your Tax ID. The Draft Number will be a 9 or 10-digit payment number beginning with a 1, 2 or a 3. NOTE: For ERA only, Draft Number and Draft Amount are not required.

ECHO Draft Number _____ **ECHO Draft Amount $** _____

1-Form select *(Required)*

◯ EFT & ERA ◯ EFT Only ◯ ERA Only

2-Provider Information *(Required)*

Provider Name:
(Complete legal name of institution, corporate entity, practice or individual provider)

Street:
(The number and street name where a person or organization can be found)

City:
(City associated with provider address field)

State/Province: Choose one
(ISO-3166-2 Two-character Code associated with the State/Province/Region of the applicable Country.)

Zip Code/Postal Code:
(System of postal-zone codes [zip stands for "zone improvement plan"] introduced in the U.S. in 1963 to improve mail delivery and exploit electronic reading and sorting capabilities.)

3-Provider Identifiers Information *(Required)*

Provider Identifiers

Provider Federal Tax Identification Number (TIN) or Employer Identification Number (EIN):
(A Federal Tax Identification Number, also known as an Employer Identification Number [EIN], is used to identify a business entity)

Does provider have a National Provider Identifier (NPI) Number? ◯ Yes ◯ No

If "Yes" enter NPI, National Provider Identifier (NPI):

(A Health Insurance Portability and Accountability Act (HIPAA) Administrative Simplification Standard. The NPI is a unique identification number for covered healthcare providers. Covered healthcare providers and all health plans and healthcare clearinghouses must use NPIs in the administrative and financial transactions adopted under HIPAA. The NPI is a 10-position, intelligence-free numeric identifier (10-digit number). This means that the numbers do not carry other information about healthcare providers, such as the state in which they live or their medical specialty. The NPI must be used in lieu of legacy provider identifiers in the HIPAA standards transactions.

4-Provider Contact Information *(Required for **EFT Only** or for **EFT & ERA** "Form Select" choice)*

Provider Contact Name:
(Name of contact in provider office for handling EFT issues)

Telephone Number: *(Associated with contact person)*
E-mail Address: *(An electronic mail address at which the health plan might contact the provider)*

4A-Provider Contact Information *(Required for **ERA Only** or for **EFT & ERA** "Form Select" choice)*

Provider Contact Name:
(Name of contact in provider office for handling ERA issues)

Telephone Number: *(Associated with contact person)*
E-mail Address: *(An electronic mail address at which the health plan might contact the provider)*

5-Provider Agent Information *(If applicable and you selected **EFT Only** or **EFT & ERA** "Form Select" choice)*

Provider Agent Name:
(Name of provider's authorized agent)

Provider Agent Contact Name:
(Name of contact in agent office for handling EFT issues)

Telephone Number: *(Associated with contact person)*
E-mail Address: *(An electronic mail address at which the health plan might contact the provider)*

5A-Provider Agent Information *(If applicable and you selected **ERA Only** or **EFT & ERA** "Form Select" choice)*

Provider Agent Name:
(Name of provider's authorized agent)

Provider Agent Contact Name:
(Name of contact in agent office for handling ERA issues)

Telephone Number: *(Associated with contact person)*
E-mail Address: *(An electronic mail address at which the health plan might contact the provider)*

6-Financial Institution Information *(Required for **EFT Only** or for **EFT & ERA** "Form Select" choice)*

Financial Institution Name:
(Official name of the provider's financial institution)

Financial Institution Routing Number:
(A 9-digit number of the financial institution where the provider maintains an account to which payments are to be deposited)

Type of Account at Financial Institution:
(The type of account the provider will use to receive EFT payment, e.g. Checking, Saving)

Provider's Account Number with Financial Institution:
(Provider's account number at the financial institution to which EFT payments are to be deposited)

Account Number Linkage to Provider Identifier. Select one option below.
(Provider preference for grouping [bulking] claim payments – must match preference for v5010 X12 835 advice)

◯ **Provider Tax Identification Number (TIN)** ◯ **National Provider Identifier (NPI)**

7-Electronic Remittance Advice Information *(Required for **ERA Only** or **EFT & ERA** "Form Select" choice)*

Preference for Aggregation of Remittance Data (e.g., Account Number Linkage to Provider Identifier)
(Provider preference for grouping [bulking] claim payment remittance advice – must match preference for EFT payment)

Does provider have a National Provider Identifier (NPI) Number? ◯ **Yes** ◯ **No**

Provider Tax Identification Number (TIN): _____
(Required if NPI is not applicable)

National Provider Identifier (NPI): _____
(Required if TIN is not applicable)

Method of Retrieval: _____
(The method in which the provider will receive the ERA from the health plan [e.g., download from health plan website, clearinghouse, etc.])

8-Electronic Remittance Advice Clearinghouse Information *(Required for **ERA Only** or **EFT & ERA** "Form Select" choice)*

Clearinghouse Name: _____
(Official name of provider's clearinghouse)

Clearinghouse Contact Name: _____
(Name of a contact in the clearinghouse office for handling ERA issues)

Clearinghouse Telephone Number: _____
(Telephone number of contact)

Clearinghouse E-mail Address: _____
(An electronic mail address at which the health plan might contact the provider's clearinghouse)

9-Electronic Remittance Advice Vendor Information *(Required for **ERA Only** or **EFT & ERA** "Form Select" choice)*

Vendor Name: _____
(Official name of provider's vendor)

Vendor Contact Name: _____
(Name of contact in vendor office for handling ERA issues)

Vendor Telephone Number: _____
(Telephone number of contact)

Vendor E-mail Address: _____
(An electronic mail address at which the health plan might contact the provider's vendor)

10-Submission Information *(Required)*

Reason for Submission: ◯ **New Enrollment:** ◯ **Change Enrollment:** ◯ **Cancel Enrollment:**

Printed Name of Person Submitting Enrollment: _____
(The printed name of the person signing the form; may be used with electronic and paper-based enrollment)

Submission Date *(YYYYMMDD):* _____
(The date on which the enrollment is submitted)

Authorized Signature *(The signature of an individual authorized by the provider or its agent to initiate, modify or terminate an enrollment. May be used with electronic or paper-based manual enrollment.*

☐ By signing below, provider acknowledges that the provider has read, agrees that is it subject to and agrees to comply with all terms and conditions, including those relating to the delivery of the services, which can be found at:

https://enrollments.echohealthinc.com/termandcondition.aspx

Signature of Person Submitting Enrollment: _____

(A [usually cursive] rendering of a name unique to a particular person used as confirmation of authorization and identity)

Postal mail OR submit form via the ECHO secure portal. See page 1 of this form for instructions.

CLEAR PRINT