

# ERA TRANSFER LETTER INSTRUCTIONS AND TEMPLATE



If 835s/ERAs have been sent to Office Ally by the Insurance Company (Payer) and were previously being routed to another account, but now need to be routed to a different account **OR** if ERAs are not being routed to any account and need to be linked to an account, an **ERA Transfer Letter** is required.

This document explains how to submit an **ERA Transfer Letter** and also contains a template letter for your convenience. *This document is NOT an ERA enrollment for any payers, simply to transfer the ERAs currently being received from one account to another.*

## INSTRUCTIONS:

To transfer/hardcode ERAs to an Office Ally account, an ERA Transfer Letter is required.

A template letter that can be filled out electronically, and then printed on your letterhead, can be found on the next page.

The letter **must** meet the following requirements in order to be processed:

- Must be printed on the letterhead of the Provider/Group/Company/Practice whom the ERAs are for
- Must contain:
  - Name of Provider/Group/Company/Practice whom the ERAs are for
  - Office Ally Username/ Clearinghouse Name that ERAs are to be transferred or linked to
  - Statement requesting ERAs be moved/linked to Username indicated
  - Tax ID the ERAs are for
  - NPI the ERAs are for
  - Email address for confirmation of approval or denial
  - Effective Date for Transfer/Link
  - Statement that Signer is an Authorized Individual who can sign on behalf of the Provider/Group
  - Signature of Authorized Individual
  - Printed Name of Authorized Individual
  - Title of Authorized Individual

**\* The individual signing must have a title of one of the following: Owner, Co-Owner, CEO, CIO, CFO, COO, Vice President or President.**

**\* If this is a non-profit organization, the title must be one of the following: Director, Executive Director, Interim Director, Provost or Administrator.**

Once the ERA Transfer Letter has been (1) completed, (2) printed on letterhead and (3) signed by the Authorized Individual; it must be submitted to Office Ally via one of the following methods:

Fax to: 360-896-2151      Scan and Email to: [Support@OfficeAlly.com](mailto:Support@OfficeAlly.com)

Once received and reviewed you should be notified of a denial or approval+transfer/link within 2-3 business days.  
**Please note, it is recommended that this letter is sent separately from any ERA enrollment forms for individual payers.**

**For questions regarding ERA Transfers  
Please contact us at [Support@OfficeAlly.com](mailto:Support@OfficeAlly.com) or (360) 975-7000 option 1.**

RE: ERA Transfer Letter ***(Must be printed on Provider/Group/Company/Practice Letterhead)***

To Whom It May Concern:

I hereby authorize Office Ally to link any and all 835s/ERAs for the **Provider/Group** listed below, having the **Tax ID** and/or **NPI** below, to the **Username/Clearinghouse** listed below:

**Provider/Group Name:** \_\_\_\_\_

**Tax ID:** \_\_\_\_\_

**NPI:** \_\_\_\_\_

**ERAs to be linked to:** \_\_\_\_\_

***(MUST BE ADMIN/PARENT USERNAME, NOT SA ACCOUNT)***

**Email Address:** \_\_\_\_\_

*(List email address for confirmation of approval+transfer or denial)*

**Please move all ERAs over to this new account as of this date:** \_\_\_\_\_

*NOTE: If you want us to transfer old ERAs to the new username, please list the date to go back to above.*

By signing below, I certify that I am an authorized individual for the Provider/Group, Tax ID(s) and NPI(s) listed above and that I am authorized to sign on their behalf.

\_\_\_\_\_  
**Authorized Individual's Signature**

\_\_\_\_\_  
**Printed Name of Authorized Individual**

**Title of Authorized Individual** (circle one): **Owner, Co-Owner, CEO, CIO, CFO, COO, President, Vice President, Director, Executive Director, Interim Director, Provost or Administrator.**

**Please note: the main reasons for denial is lack of letterhead, a missing or lack of *HAND WRITTEN* signature and an invalid title of authorized individual. Please be aware of this to prevent denial of transfer letter.**