Office Ally

SMART DATA SOLUTIONS (SDS) ERA-ENROLLMENT INSTRUCTIONS

WHICH FORMS SHOULD I COMPLETE?

- **Online Enrollment** (Instructions begin on pg. 2)

    o Select **Office Ally** as your **Clearinghouse**

HOW DO I CHECK STATUS?

- If you have issues/questions with completing your enrollment, or need to check status of the enrollment, send an email to stream.support@sdata.us.
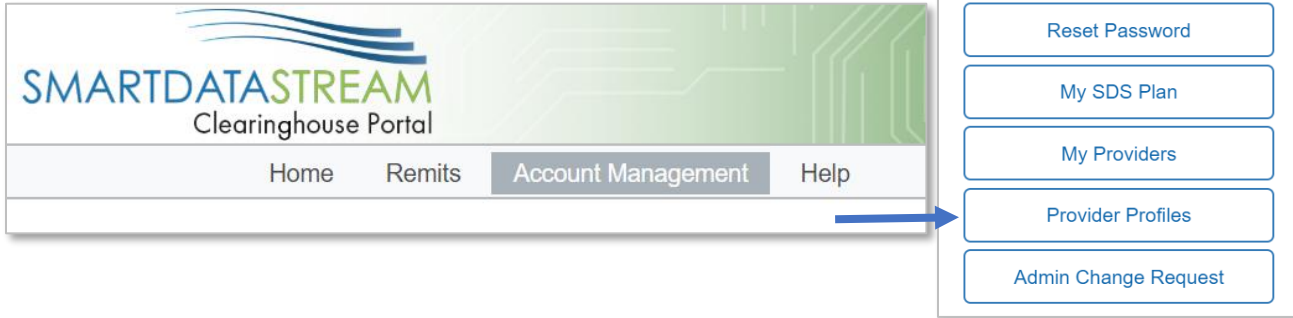
ERA ENROLLMENT

- There are several different methods for starting an ERA account with Smart Data Solutions depending on which payer you are enrolling for. If you have an account that doesn't include ERA enrollment already, or if you have a specific ERA account and would like access to additional payer's ERAs, please contact us as stream.support@sdata.us for more information.
- Providers can create an account with this link – SDS Account Creation

STARTING ERA ENROLLMENT

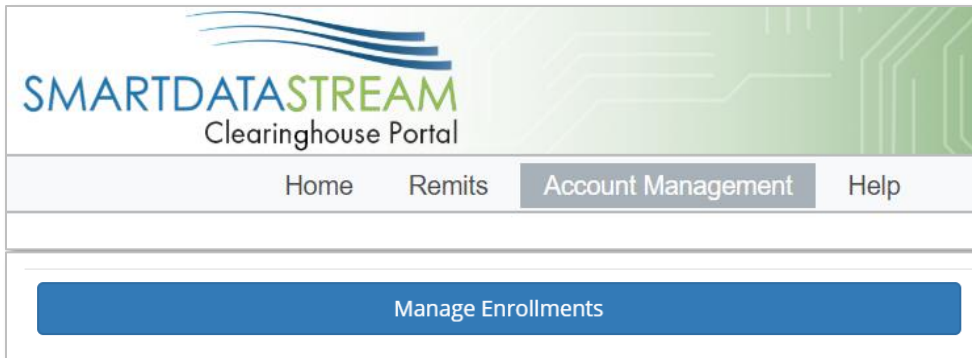- After you've logged in and changed your password, you should be immediately prompted to start your ERA enrollment.
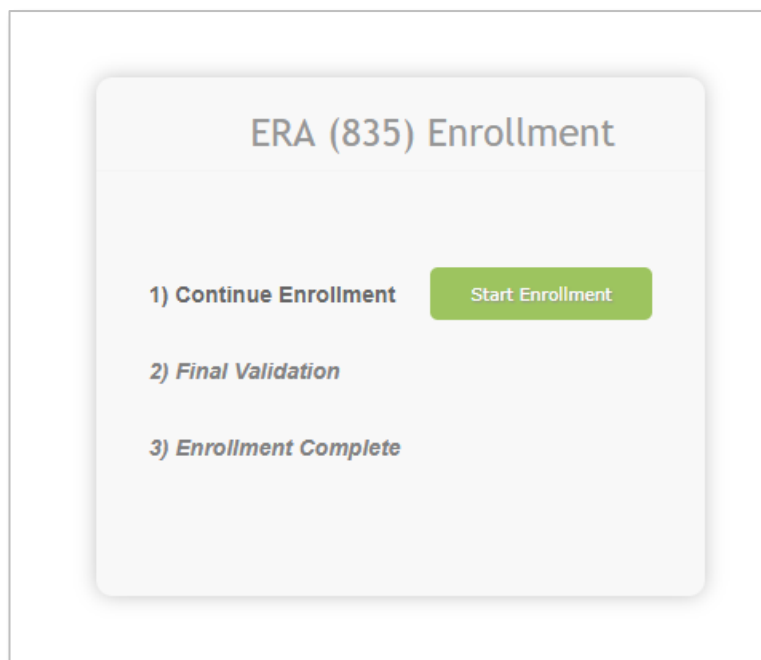
- If the above screen does not automatically appear you can select Account Management at the top bar. Then select Provider Profiles

OR

- Select Remits at the top bar then Manage Enrollments

ENROLLMENT FORM

Profile

Profile Nickname

Profile Name will not affect your ERAs and is only for labeling enrollments on your account

Provider Information

* Name
Test Provider T1000

Doing Business As (DBA)

* Address Line 1

Address Line 2

Provider Identifiers Information

* Tax Identification Number (TIN) ⓘ

Verify TIN:
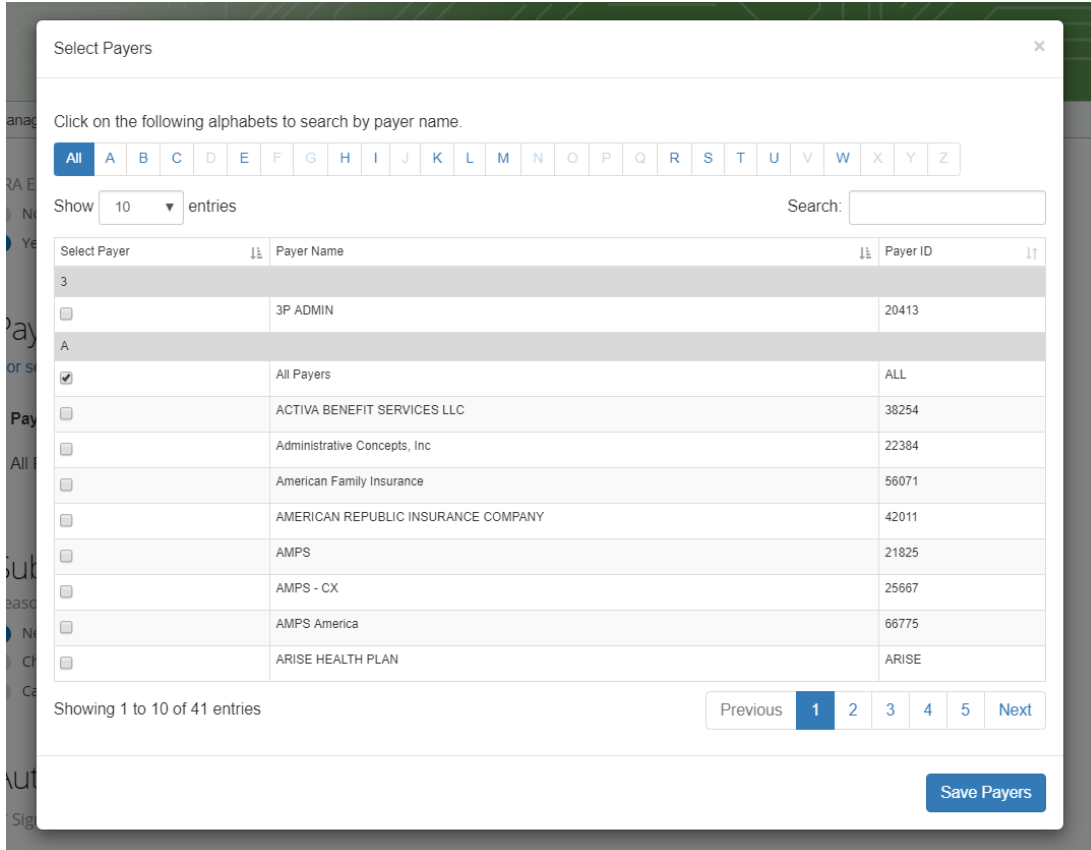
Don't forget to verify your tax ID

National Provider Identifier (NPI)

Verify NPI:

NPI is not required for your ERA enrollment. If left blank, you will receive ERAs for all NPIs associated with the Tax ID you enroll

Trading Partner ID ⓘ

Provider Contact Information

* Last Name
test

* First Name
test

* Contact Phone
(651) 555-5555 x55555

Trading Partner ID is not required if you do not have one

Contact Fax

Fax may be left blank if unavailable

- Under Payer Selection select "or select individual payers" You will then see the screen below:

- Select Clearinghouse

- Select "Apply All" to the right of the Clearinghouse Name and you will see the following result

- The form will automatically have New Enrollment selected. If you click Save Progress and then come back to it, it will say Change Enrollment.
  - This does not affect your enrollment and only indicates that this is no longer the first time you are accessing this form.
- Type in your name for the signature.
- For the effective date, the soonest date available will be three days after the submission date. Any payments you receive after that submission date will have a corresponding ERA sent to your account.
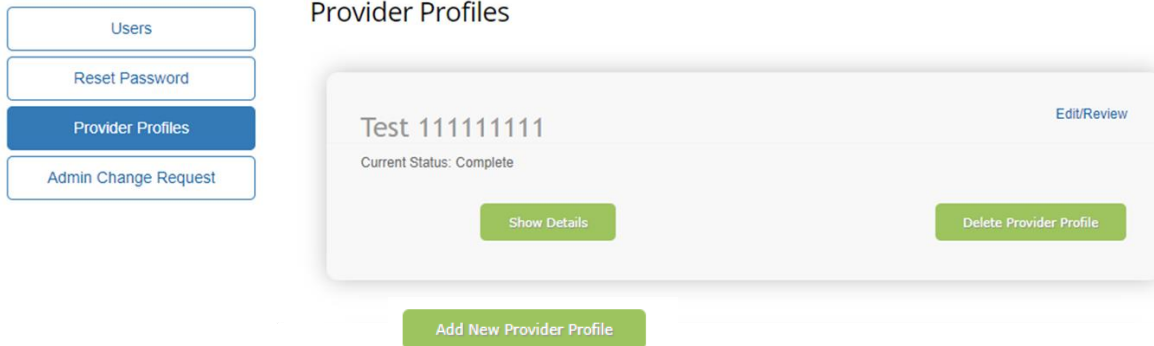
- After you click Submit it will redirect you to a page that looks like this. If you see this page, you have successfully submitted your ERA enrollment.

Account Management

This page is for maintaining account wide preferences such as viewing or re-issuing your API key, or managing payment methods.

Users

Reset Password

Provider Profiles

Admin Change Request

Provider Profiles

Test 111111111   Edit/Review

Current Status: Complete

Show Details   Delete Provider Profile

Add New Provider Profile

Edit/Review

Add New Provider Profile
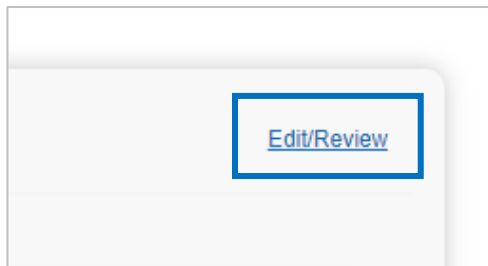
- To change contact information, add or remove payers, change retrieval method, or cancel your enrollment you can click on Edit/Review
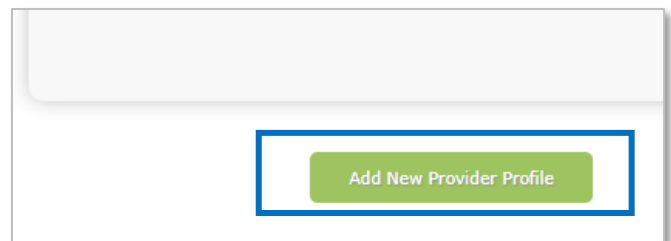
- To enroll additional tax ID's or NPI's click Add New Provider Profile