

UPDATE COMPANY INFORMATION/ AUTHORIZED CONTACTS ON FILE



UPDATE: This document explains how to submit changes to Company Information and Authorized Contacts that Office Ally has on file*. In order to update the information on your actual accounts, consult your Security Administrator**.

* To view the current Company Information and Authorized Contacts on file for your account follow the steps below, while logged into an account with Administrative Rights:

Practice Mate or EHR 24/7: Manage Office > Company Settings > Company Information
Service Center: My Settings > Admin Section > Company Information

** The Security Administrator account is now able to update the contact information of all the other accounts (including the Administrator/Admin Account). To do this, the Security Administrator would follow these steps below:

Practice Mate or EHR 24/7: Manage Office > List Maintenance > Provider List > 'Edit' > Make desired changes > 'Update'
Service Center: My Settings > Admin Section > Manage Users > 'Edit' > Make desired changes > 'Update'

Office Ally maintains the Company Information as well as a list of Authorized Contacts on all accounts. The Company Information is used for informational purposes and tracking. Authorized Contacts can receive invoices as well as make most changes to the account. Note: The President/Owner/CEO of the Entity that owns the Office Ally account is authorized to make all changes to the account. There are two ways (Email or Written) to update the Company Information or the Authorized Contacts on file for your account; both are explained below. Once submitted, please allow 48 hours for your change request to be processed. Once your change request has been approved or denied you will be notified via email.

A template that can be filled out electronically, and then printed on your letterhead and submitted via email or fax, can be found on the last page of this document.

EMAIL CHANGE REQUEST

To update the Company Information or Authorized Contacts on your account, send an email to enrollmentadmin@officeally.com from email address of one of the Authorized Contacts currently on file with Office Ally. The email request must contain the following:

- **Office Ally Username**
- **Contact phone number** (in case Office Ally has questions regarding the request)
- **Name of person requesting the change** (in case Office Ally has questions regarding the request)
- **Change(s) requested:** (clearly state what you updating, using the terms: 'Company' or 'Authorized Contacts')
 - ✓ **Update Company Name, Company Phone/Fax or Company Address**
Authorized Contacts and/or the President/CEO/Owner of Entity who owns the Office Ally Account can change this information.
 - ✓ **Add/Update/Remove Authorized Contact(s)**
Only the President/CEO/Owner of Entity who owns the Office Ally Account can **remove** an Authorized Contact.
 - **To add an Authorized Contact** you must include: First Name, Last Name, Email Address, Phone Number, and indicate whether or not they should receive invoices.
 - **To remove an Authorized Contact** you must include: First Name and Last Name and/or Email Address of the contact you want to remove. Note: At least one Authorized Contact must be set to receive invoices.

Request examples: "Please update the **Company** Address for Username: TestUser to 123 Main Street, Hometown, CA 99999", "Please add John Doe jdoh123@gmail.com 999-555-1234 as an **Authorized Contact** for Username: TestUser".

WRITTEN CHANGE REQUEST

To update the Company Information or Authorized Contacts on your account, you can also send a letter via email to enrollmentadmin@officeally.com or via fax it to (360) 314-2184. It must be on the letterhead of the entity/company that owns the Office Ally account. A template that can be filled out electronically, and then printed on your letterhead, can be found on the next page. Note: It must be printed on company letterhead to be accepted. The letter must contain the following:

- **Office Ally Username**
 - **Contact phone number** (in case Office Ally has questions regarding the request)
 - **Name of person requesting the change** (in case Office Ally has questions regarding the request)
 - **Change(s) requested:** (clearly state what you updating, using the terms: 'Company' or 'Authorized Contacts')
 - ✓ **Update Company Name, Company Phone/Fax or Company Address**
Authorized Contacts and/or the President/CEO/Owner of Entity who owns the Office Ally Account can change this information.
 - ✓ **Add/Update/Remove Authorized Contact(s)**
Only the President/CEO/Owner of Entity who owns the Office Ally Account can **remove** an Authorized Contact.
 - **To add an Authorized Contact** you must include: First Name, Last Name, Email Address, Phone Number, and indicate whether or not they should receive invoices.
 - **To remove an Authorized Contact** you must include: First Name and Last Name and/or Email Address of the contact you want to remove. Note: At least one Authorized Contact must be set to receive invoices.
- Request examples:** "Please update the **Company** Address for Username: TestUser to 123 Main Street, Hometown, CA 99999", "Please add John Doe jdoe123@gmail.com 999-555-1234 as an **Authorized Contact** for Username: TestUser".
- **Signature***
 - **Name of signer***
 - **Title of signer***

*The letter must be signed by one of the Authorized Contacts or the President, CEO, or Owner of the entity who owns the Office Ally account.

ADDITIONAL INFORMATION:

Updating your Company Information and/or Authorized Contacts with us will only change the information we have on file for you. If your company information has changed, you will still need to notify the insurance companies of your new information (if necessary) and update your stored information in your billing software to reflect the new address.

Updating the information on your account only affects the contact information and DOES NOT affect the ownership of the account. If your intent was to transfer ownership of the account from one entity/company to another, please refer to the Transfer of Ownership instructions located [here](#).

RE: Update Company Information/Authorized Contact Request (*Print on Company Letterhead*)

Today's Date: _____
Office Ally Username & User ID #: _____
Contact/Requestor Name: _____
Contact Phone Number: _____
Contact Email Address: _____

Please **UPDATE** the Company Information of the Office Ally Username/User ID # above as follows:

- UPDATE** Company Name to be: _____
Note: this is not a Transfer of Ownership, only a change in Company Name, the Owner remains the same.
- UPDATE** Company Phone to be: _____
- UPDATE** Company Fax to be: _____
- UPDATE** Company Address to be:
Street Address: _____
City, State Zip: _____

Please update the Authorized Contact(s) of the Office Ally Username/User ID # above as follows:

- UPDATE** current Authorized Contact: _____ with the new information below:
- ADD** an Authorized Contact with the information below:

First and Last Name: _____
Email Address: _____
Phone Number: _____
Reset Password and Security Question? Yes No
Send Invoices to this Authorized Contact? Yes No

- REMOVE** current Authorized Contact:

First and Last Name: _____
Email Address: _____

Note: Only the President/CEO/Owner of Entity who owns the Office Ally Account can remove an Authorized Contact and at least one Authorized Contact must be set to receive invoices.

**Signature of Authorized Contact, President,
CEO, or Owner of the Entity who owns the
Office Ally account being updated**

Printed Name of Signer

Title of Signer

Date Signed: