Checklist for a Successful InstaMed ERA/EFT Enrollment

- Please **complete all fields**.
    - Incomplete forms will not be accepted and will delay your enrollment. InstaMed is not authorized to alter enrollment forms for you.

- A note about the **Customer Legal Name** field: Please reference your IRS Tax Letter to complete the legal name fields on pages 1 AND 2.

- Please have the **signer initial all corrections**.
    - This includes any alterations, cross outs, white outs, etc. This will indicate that the form was altered by an authorized party and that the information provided is accurate.

- Please have someone who physically works at the office **sign and date the form**.
    - Electronic signatures will only be accepted if the Adobe watermark and timestamp are visible.

- Please include either a **voided check or bank letter** so that we may verify the account and routing numbers listed on the form.
    - Voided checks should be non-starter checks
    - Name on the check should match Customer Legal Name or DBA name on the form
    - Voided checks should not cover the terms and conditions and can be sent on a separate sheet of paper if necessary.
    - Bank letters must be on bank letterhead, signed in ink by a bank representative and dated within the last 12 months

- Please do not send multiple forms for multiple NPIs
    - If you are unable to fit all your NPIs on the form, please list the group/organization NPI on the form and attach an Excel spreadsheet with additional billing NPIs.
    - If you only bill under the group NPI you do not need to include the individual NPIs.

- If you have more than one bank account, please send one **full** form per bank account. Please note that each bank account should have corresponding NPI(s).