



# Broker/Agent Electronic Payment Authorization Agreement

If you have any questions completing this form, please contact Optima Finance at [EFT\\_ERA\\_INQUIRY@sentara.com](mailto:EFT_ERA_INQUIRY@sentara.com)

\* An asterisk denotes required information

## Broker Information

\* Broker Name

## Broker Identifiers Information

\* Broker Federal Tax Identification Number (TIN)  
or Employer Identification Number (EIN)

\* National Producer Number (NPN)

## Broker Contact Information

\* Broker Contact Name

\* Address

\* City  \*State  \*Zip

\* Telephone Number

\* Email Address

\* Broker Vendor ID

## Financial Institution Information

\* Financial Institution Name

\* Financial Institution  
Routing Number

\* Type of Account at  
Financial Institution  Checking  Savings

\* Broker/Agent's Account Number  
with Financial Institution

## Electronic Remittance Advice Information

Please note that by choosing to receive your payments electronically, remits will also be delivered electronically and you must have a Broker Login ID in order to see your statements on OptimaHealth.com.

Login ID of the person or agent who will access commission statements.

\* OptimaHealth.com Broker Login ID:

**Broker's Please Note:** If you do not have a Login ID for optimahealth.com please contact Broker Services 757-552-7217 or [brokerservices@optimahealth.com](mailto:brokerservices@optimahealth.com) to complete a Portal User Profile form.

## Submission Information

\* Reason for Submission  New Enrollment  Change Enrollment  Cancel Enrollment

Voided Check

A voided check is attached to provide confirmation of Identification/Account Number

Bank Letter

A letter on bank letterhead that formally certifies the account owners routing and account numbers is attached.

With your Signature, you are certifying that the account is drawn in the name of the Broker or the Legal Business. The Broker has sole control of the account to which EFT deposits are made in accordance with all applicable Federal regulations and instructions. All arrangements between the Financial Institution and the Broker are in accordance with all applicable Federal regulations and instructions with the effective date of the EFT authorization. You must notify Optima Health in writing in regards to any changes in the account in sufficient time to allow the contractor and the Financial Institution to act on the change.

The EFT Authorization must be signed by the Broker or an individual authorized by the Broker to initiate, modify, or terminate an enrollment.

\* Signature of Person  
Submitting Enrollment

\* Submission Date

\* Requested EFT Start/  
Change/ Cancel Date

Please email completed form to [EFT\\_ERA\\_INQUIRY@sentara.com](mailto:EFT_ERA_INQUIRY@sentara.com)