

NextGen Pay *powered by InstaMed* for NextGen Office

Here's what's next

Congratulations. You've signed on for NextGen® Pay *powered by InstaMed*, which means you are just a few steps away from processing more payments faster than ever before.

First up: Documentation review

You will start by submitting all the necessary documentation.

Your submitted documents will go through a brief review process by J.P. Morgan where they will review and verify:

- Documentation through their Healthcare Payments Contracting team.
- Financial documentation through their Healthcare Payments Underwriting team.
- FinCen information from the KYC form through their Wholesale KYC Operations team.

Once these three teams approve, merchant IDs (MIDs) will be created, and your account will move onto on to implementation.

Next up: Implementation

Implementation occurs in 4 easy steps.

- ① **NextGen Office will complete your payment processing setup** and email you training materials and the next steps.
- ② **Complete your NextGen Office Training.** This training covers how to take a payment, how to save a card on file, and how to post payments into your NextGen Office system.
- ③ **After completion of NextGen Office you then complete training with InstaMed.** This training covers InstaMed reporting tools and non-integrated payment processing, user set-up, receipt configuration, and credit card device setup and testing if devices have been purchased already.
- ④ **Finally, go live!** You are now ready to start processing payments at a new speed with NextGen Office.



BELIEVE IN BETTER.®

Contact us at **877-523-2120** or email ngosalesteam@nextgen.com

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