How to Combine Insurance Carriers

Do you have multiple insurance carriers with the same address? You can remove the clutter by combining them and removing the duplicates. All patients, history, employees, and plans will be transferred to one carrier, and the duplicate carrier will be removed. Here's how:

- You must have the user privilege "User is allowed to purge old data."
- On the *Main Menu*, click **Search** and type **Insurance**.
- Click **Remove duplicate insurance carriers**.
- Note that once completed, the process can't be reversed. Click **Continue…**
- Click the carrier that you want removed. The *This insurance carrier will be removed* window will open.
- Click **Choose new carrier for plans, patients and history**. This is the carrier that the data will be moved to.
- Click the carrier for the data to be transferred to.
- Carefully review the carrier to be removed and the carrier to transfer the information to.
- Click **Transfer plans, employees, patients, and history**.
- The data will be transferred and you will return to the *Remove duplicate insurance carriers* screen.

Questions? Contact the staff at Datacon for help.
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