



## Insurance Carrier Clean Up

### De-Activating Insurance Carriers

If you have insurance carriers that you are no longer going to use do not delete them. On the insurance carrier definition screen just mark them as "Not Active". This is because they may still be on past patient records and/or their ledgers.

Insurance Carrier Definitions

Carrier Number: 00004  NO Not Active

Carrier Name: AETNA LIFE & CASUALTY

Address: P.O. BOX 6610  
8700 STATE LINE RD

City: LEAWOOD State: KS Zip Code: 66206

Telephone 1: 800 541-3682

Telephone 2:

EMAIL Addr:

Web Site:

Comments:

Check if this Insurance Carrier is to be Ignored on Family Style Patient Statements

Buttons: Save, List Search, Get Num, Add One, Literals, Provider Numbers, Delete, Undo, EXIT

### Finding Duplicate Entries

You can easily spot duplicate entry by using the Reports Menu, "Alpha List Insurance Carrier" option, and checking the Zip Code sequence box.

### Deleting Duplicate Entries

If you find you have a duplicate entry, the same carrier with the same address in the system more than once you can eliminate any duplicates. To do this you would decide which carrier number you wish to keep and run a special utility option that will change all the patient's records and historical records to reflect this number. Select the "Utility Menu", then "Global Changes", then the "Change Insurance Carriers" option.

In the example to the right, you would be changing all references to carriers 151, 33, and 67 on patient records to the new number 81. Then you could actually delete the carriers 151, 33, and 67.

Change Insurance Carrier Numbers

Old Insurance Carrier Numbers: 151 33 67

New Insurance Carrier Number: 81

Also Change Ledger Entries

Buttons: Change Now, Exit