DataTec EasyDent

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.

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.