Removing One Provider and Adding Another

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In the event you need to change/swap one provider for another or remove a provider, you will need to work with your account manager to complete the change.
You can set this up several weeks in advance, but please allow a minimum of **three business days** to process the request. Here are some steps to take to have the process flow as smoothly as possible.

- All claims for the outgoing provider need to be submitted in bulk or individually. If this is not done before removing the provider, the practice will not be able to work outstanding claims.
- Any staff members under the existing provider need to be moved to another provider. The staff member will no longer be able to login into the system if this is not done before removing the provider.
- All future appointments under the existing provider need to be changed to another provider. Please see our article on running a report of future appointments. If this is not done before removing the provider, the appointments will be removed from the calendar.
- If the existing provider is the primary provider for any office, another provider will need to be selected as the primary provider for that office. The practice will not be able to complete this action if it is not completed before removing the provider.
- Ensure all clinical notes for the existing provider are signed and locked. If this is not done before removing the provider, the practice will not be able to lock the notes of the provider that has been removed.
- Providers will need to have the share patients permission enabled. Or you will need to manually move the exiting provider's patients to a remaining provider if the practice still needs to access the exiting provider's patients. If this is not done before removing the provider the practice will no longer be able to access the patient list of the provider that has been removed.

Note: All clinical/billing information input by all providers at the practice will always be accessible via the specific patient chart. We never delete or remove any of this information.

Should you have any questions, please reach out to your account manager.