Request a Data Copy

Data Copy services retrieve **Patient Demographics**, **Codes (ICD, HCPCS, CPT, and Fee Schedules)**, **Appointments**, **Payers**, **Referring Provider Lists**, and **Facility** data and copy the data from one customer to another customer. Data copies **do not include** rendering/attending providers, billing providers, claims, financial data, pending information (appts., etc.), notes (e.g. patient notes, claim notes, etc.), or patient balance. Data copies do not replace existing data. Data copies can take anywhere from 3 - 5 business days to be processed.

🪄 **Note:** Remittance codes included in a data copy will copy over any actions associated with the code

If you're the Auth Rep, follow the steps below to request a Data Copy:

1. Select **Account Administration** > **Services**.

2. Click the **Request Button** next to Data Copy.

3. Use the drop-down menu to **select the Customer to transfer the data from**

4. Use the radio button to select the **data copy package**.

5. If you need to **Copy Data to a customer in the same account** check the option.

    1. Use the drop-down menu to select the **Customer to transfer the data to**.

6. If you need to **Copy Data to a customer in a different account** check the option.

    1. Enter the receiving **Account #**.

    2. Enter the receiving **Customer #**.

7. Click **Save**.