

Request to Close Main Account

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Please contact your Customer Success Manager to discuss your pricing options, or request to cancel via the steps below in the CollaborateMD platform. If you decide to close your account, we're here to make the process as smooth as possible.

Important:

- Account closure requests must be submitted with a minimum of **30 days' notice**. Requests received mid-month will take effect on the last Friday of the following month.
- Account closures are processed and completed at 12:00 PM (Eastern Standard Time) on the last Friday of each month.
- A final invoice will be generated for activity used through your last month of service.
- Once your account is closed, it is no longer accessible by you or any other user; you won't be able to access account history (including patients, claims, payments, etc.), print reports, or a monthly invoice.
- If you decide later that you need access, you will need to reactivate your account, and a \$150 fee will be assessed. [Click here](#) to learn more about our Reactivation process.

Follow the steps below to request to close the main account.

1. Select **Account Administration > Account Management**.
2. Click the **Close Main Account** link.
3. Read the disclaimer and click **Continue**.
4. In the **Reason for Closing Account** field, type a brief description of why you are requesting to close the account.
5. Place a check in the **"I Agree"** box to confirm that you have read and understand the closure terms and conditions.
6. Click the **Submit** button.

For more information related to Accounting and Closing your Main Account, please reference the [Accounting Agreement](#).

We recommend collecting any applicable information required by your business before you ask us to close it. You can do this by running and printing/exporting applicable reports or requesting a **Data Snapshot**. Please make sure you are securely storing your files based on your internal processes and policies regarding HIPAA and ePHI.

- Document Imaging files will be permanently deleted after **90 days of closure**.
 - Mailbox Files will be permanently deleted after **180 days of closure**. Mailbox files include:
 - Clearinghouse Reports (CA, EC)
 - Payer Reports (RE, RR, SR, SE, etc.)
 - Remittance Files (R5)
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