Request a Data Move

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Data Move services take all data, including patient demographics and financials, and moves the data from ne customer database/account to a different customer database/account. Any images uploaded using emote Document Imaging will remain in our cloud and will be available once the move is complete by re-nabling the Add-on service. This service is only provided upon the consent and approval of all related ccount Admins / Authorized Reps. Once the request is received, the accepting party will receive an email pecifying which party will pay for this service. Data Moves can take anywhere from 7-10 business days to e processed after payment has been received.

⚠ If moving data to a new account, a new account must be created first. Please contact accounting.collaboratemd.com to get your new account created.

Please read the following information before submitting a Data Move:

- **Before the CRXM Team can send the customer the wizard to create a new account, we need confirmation that the releasing data customer auth rep has approved the Data Move (please see the following process):**
  1. **Once the releasing Customer Account's Auth Rep has approved the Data Move, please notify our CRXM Team via email at accounting@collaboratemd.com.**
  2. **Our CRXM Team will reach out to you to go over any pricing questions you may have. The CRXM Team will send a BPC email for the customer to complete and accept all acknowledgments before we send the new account wizard.**
  3. **After completing the new account wizard, you will need to provide the releasing Account rep (Auth Rep of the account that is releasing the data) with your CMD Account # (6-digit # assigned when your main account was created).**
  4. **The customer releasing the data will need to log into their CMD account and follow the below "Request a Data Move" steps. This will send in the request to our CRXM team.**
  5. **After we receive the request for the data move from the releasing customer, we will send our internal request for the data to be moved to the receiving customer's new account.**
  6. **After the receiving customer's acknowledgment, we will move the customer account provided by the releasing account's Auth Rep to the new account.**
  7. **Once moved, the CRXM Team will notify the receiving customer so that they may start using the moved customer account. Once the new main account is created, you will need to close the placeholder account that was created via the wizard process. https://help.collaboratemd.com/help/close-a-customer**

f you're the Auth Rep, follow the steps below to request a Data Move (**This must be requested by the**

ccount that will be releasing the data).

1. Select **Account Administration** > **Services**.
2. Click the **Request Button** next to Data Move.
3. Use the drop-down menu to **Select one or more Customers to be moved.**
4. Enter the **receiving Account #.**
5. Enter the **receiving Account Name.**
6. Enter the **Authorized Release Date.**
7. Read the acknowledgment to release ownership of the data, and click **Acknowledge.**