

Merging Guarantors

Last Modified on 31/03/2019 1:27 pm ACDT

This article is part of the systems administration guide. You will require administration access to view the pages mentioned in this article.

Some merges involve all the members transferring from the old fund to the new fund and the old fund ceasing to exist. Typically this would involve the member getting a new membership with the remaining fund when their existing membership with the old fund ends. Once that transition period is over, the old fund should be made inactive.

Other merges can involve one of the funds joining the other, but remaining as a separate fund name

Things to consider when Health funds merge:

- Rates - there are 3 possibilities when funds merge
 - The merging funds are already be using the same rate - no action required.
 - The merging funds will continue using separate rate - no action required.
 - One of the funds will change it's rate to that of the other fund - need to go into Administration>Accounting>Guarantors and change rate on the fund.
- HCP statutory reporting
 - Most times there is no change to the fund ID.
 - In the case of a fund joining the AHSA group.
 - Got to Administration>Accounting>Guarantors.
 - Edit the record for the merging fund.
 - In the 'Health Fund Details' section, change the Grouping to 'Member of Groups of Funds'.
 - A new field Member of Group of Funds appears, set it to 'Australian Health Services Alliance' or AHPRA.

Note: Don't forget to confirm if the fund will need to report separately - if so, ensure that you have checked 'report separate to fund group on HCP report'
