

Pre-Conversion Document

This document explains Open Dental's conversion process to help you create a successful conversion plan. It also collects data that Open Dental needs. It is important and required that you review, understand, and complete this entire document, then return it to your conversion specialist BEFORE the final conversion date.

General Information	
Practice Name:	
Phone Number(s):	
Staff Contact Name and Job Title: Designate a staff member who will be in charge of the conversion process for your office and our main point of contact.	
Do you have an IT professional helping you? If yes, provide their name and phone number:	Yes No
What software are you converting from? (indicate version if known)	
How will you handle images (e.g. x-rays, radiographs, scanned documents)?	
Will you bridge to another software for digital radiography?	Yes No
If yes, what is the name of the software?	
Do scanned documents and/or patient pictures need to be converted? This is a separate image conversion process and has a separate fee.	Yes No
I have checked that bridges to digital imaging software work in the test conversion.	Yes No
Conversion Process: Write the date each step is completed.	Date Completed
1. Open Dental ran a test conversion and installed it on my server.	
2. I have checked and verified test conversion data.	
3. I have scheduled a date and time for the final conversion. <i>(Do this at least one week in advance of the date and time you prefer)</i>	
4. My staff has been trained: <ul style="list-style-type: none"> - They understand how to complete daily processes in Open Dental. - They have practiced entering data into the test conversion database (e.g. schedule appointments, create/complete procedures, create claims, receive payments, create clinical notes). Resources for free training include the web manual and webinars (www.opidental.com). Online training is \$50 per hour. Call us at least 48 hours in advance to schedule.	
5. I have signed up for Open Dental support and prepaid for the final conversion. <i>(Do this at least 3 days prior to the final conversion)</i>	
6. The latest full version of Open Dental is installed on my server and workstations. <i>(Contact an Open Dental support technician for assistance)</i>	
Check Test Conversion Data: Complete all steps and answer all questions. You are responsible for checking the test conversion data. If you discover an issue, contact a conversion specialist.	
1. Verify Account Balances are accurate	
a) Enter Total Accounts Receivable, including negative balances (in current software): <i>Enter the amount calculated at the time the data was collected for the conversion.</i>	\$
b) Enter Total Accounts Receivable (in test conversion): <i>Click Reports, Monthly Aging of A/R Report. Check 'Include Negative Balances' and click OK. [If payment plans were converted, also run the Payment Plan report. Add the Total amounts of both reports to get your total accounts receivable balance.]</i>	\$
c) The account balances in the test conversion are correct (total balance for all families).	Yes No
d) During the final conversion, do you want to zero-out account balances for all patients? <i>(Set A/R to zero) This is common if you do not own the A/R, or if you are buying the practice. Let the conversion specialist know if you are buying the practice (it will affect your taxes).</i>	Yes No

2. Check other important data. See Test Data Conversion for more guidance.		
a) Patient demographics (name, address, birth date, etc.)	Yes	No
b) Family information (marital status, guarantor, family positions, etc.)	Yes	No
c) Insurance plans (carriers, employers, group numbers, etc.)	Yes	No
d) Payments (dates, amounts, notes, etc.)	Yes	No
e) Adjustments (dates, amounts, notes, etc.)	Yes	No
f) Procedures (procedure status, dates, amounts, notes, etc.)	Yes	No
g) Clinical notes (progress notes)	Yes	No
h) Insurance carriers (name, address, etc.)	Yes	No
i) Employers (name)	Yes	No
j) Appointments (dates, time, length, operatory, notes, etc.)	Yes	No
k) Other (anything else that is important to your office)	Yes	No
<p>3. Make plans for how you will handle insurance, claims, and billing after the final conversion.</p> <p>How will you enter and verify missing insurance benefit information?</p> <p><input type="checkbox"/> Enter and verify it a few patients at a time (e.g. as patients have upcoming appointments).</p> <p><input type="checkbox"/> Enter and verify it for all patients within the first 30 days.</p> <p>How will you enter outstanding claims?</p> <p><input type="checkbox"/> Enter claims a few patients at a time (e.g. as claim payments come in).</p> <p><input type="checkbox"/> Enter claims within in 30 days using an outstanding insurance report from our old software.</p> <p>How will you handle billing?</p> <p><input type="checkbox"/> I will verify insurance for every patient and enter all outstanding claims within 30 days, then run the Billing List.</p> <p><input type="checkbox"/> I will verify insurance and enter claims a few patients at a time, and only send individual statements to families who claims created or received in Open Dental.</p>		
ACKNOWLEDGEMENTS		
I understand there is a data conversion fee. Any fee changes will be communicated in writing or via e-mail. Fee info: http://opidentalsoft.com:1942/ConversionList/ConversionList.aspx .	Yes	No
I understand that conversion of scanned documents and patient pictures is a separate image conversion process with a separate fee and I must pre-arrange an image conversion and prepay all fees.	Yes	No
I have checked the test conversion data and am satisfied with the results.	Yes	No
I understand that claims and assigned benefits will not convert and that I will need to enter claims and benefit information manually. <i>(For Dentrix and EZ Dental primary claims are converted)</i>	Yes	No
I understand that after the final conversion, I am responsible for checking all beginning account balances for accuracy.	Yes	No
I understand that the final conversion will be a new database. After the final conversion, I will only enter data in the new database. I will not enter new data in any other database (test or prior software).	Yes	No
I understand that for 1 – 2 weeks following the final conversion, we need to schedule fewer patients or staff more heavily to set up and clean up our data. See Post Conversion Checklist .	Yes	No
I understand that am I responsible for contacting third party companies to notify them I am converting to Open Dental (e.g. Claim Connect, Tesia, Emdeon, Trojan, Demand Force, claim clearinghouses, etc.).	Yes	No
I understand that after the final conversion there will be no further enhancements to my data.	Yes	No

We recommend that you do not delete your old software so it is available for reference.

By signing below, I acknowledge that the information provided is accurate and complete, and that I am authorized to approve and proceed with the Final Conversion.

Print Name, Job Title

Signature

Date