

Merging Databases Checklist

A database merge is performed when the data from two (or more) databases needs to be consolidated into a single database. Merges can be performed on multiple databases, including other software systems which can be converted to Open Dental.

This document explains Open Dental's process when merging a database. It is important and required that you understand and complete this document, then scan and email it to your conversion specialist BEFORE scheduling your final merge.

How a database merge works:

- One database is marked as the "superior" database and all other databases are marked as "inferior".
- Sometimes there are values and settings that are ambiguous in both databases. In these cases, the "superior" database values are chosen over the equivalent values in the "inferior" database. Examples: practice address, the default provider for the practice, county names, and codes. More important information (e.g. patient accounts, charting) are never ambiguous, so the resulting merge will contain all critical data from each database.

Patient Numbers and Digital Imaging Software: During the merge, patients in the 'inferior database' will receive new patient numbers to avoid duplication. If the digital imaging software uses patient number to open the patient's x-rays, you will need to renumber the patients in the imaging software.

After two or more databases are merged and the resulting database has been in use, it is NOT possible to reverse the merge and change the live database back to the original databases. In effect, database merges are permanent.

General Information	
Practice Name:	
Phone Number(s):	
Staff Contact Name and Job Title: Designate a staff member who will be in charge of the process for your office and our main point of contact.	
What version of Open Dental are you using?	
Do you have an IT professional helping you? If yes, provide their name and phone number:	<input type="checkbox"/> Yes <input type="checkbox"/> No
Do you have multiple locations that will use this database? If yes	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
<ul style="list-style-type: none"> • Have you discussed multiple location options with a conversion specialist? • List how you will access the database (e.g. VPN, RDP, etc). 	
How do you want to merge the databases?	<input type="checkbox"/> With clinics <input type="checkbox"/> without clinics
What is the name of the superior database?	
In what order should we merge the databases? (e.g. 1=North, 2=South, 3=East)	
Do the databases being merged currently use an OpenDentImages folder (AtoZ folders)? This is where scanned documents and images are stored.	<input type="checkbox"/> Yes <input type="checkbox"/> No
<p>If Yes, the conversion team will require access to all OpenDentImages folders for all databases to be merged, at the time of the merge. Do you have a copy of all OpenDentImages folders to be merged?</p> <p>*We recommend storing the files on a thumbdrive, saving to an external directory, etc. They must be located at the location of the 'superior' database.</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No

Digital Imaging Software (x-rays)

What digital imaging software does each database use? _____

What digital imaging software will the merged database use? _____

Merge Process: Write the date each step is completed.	Date Completed
1. Open Dental ran a test merge and installed it on my server.	
2. I have checked and verified the merge data.	
ACKNOWLEDGMENTS	
I understand there is a database merge fee. Any fee changes will be communicated in writing or via email. See http://www.opendental.com/site/conversions.html	<input type="checkbox"/> Yes <input type="checkbox"/> No
I have checked the test merge data and am satisfied with the results.	<input type="checkbox"/> Yes <input type="checkbox"/> No
(eService users only) I understand that I will lose eService settings in all inferior databases. This includes Appointment Confirmed definitions, settings found in eServices Setup, and text / email templates. I must verify all settings after the merge with the help of an Open Dental eService technician.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
I understand that after the final merge, I am responsible for checking all beginning account balances for accuracy.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand that duplication may occur after a merge and that it is my responsibility to clean up duplicates (e.g. duplicate patients, fee schedules, providers, etc).	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand that patient numbers in the 'inferior' database will be renumbered to avoid duplication. It is my responsibility to contact my digital imaging software and update patient numbers if needed. *We can provide a spreadsheet of all patients and their patient numbers in the merged database.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand that the final merge will be a new database. After the final merge, I will only enter data in the new database. I will not enter new data in the test merge.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand that after the final merge there will be no further enhancements to my data.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand that I must contact any third-party vendors who may be affected by the merge (e.g. Scheduling services, Review generation, etc).	<input type="checkbox"/> Yes <input type="checkbox"/> No

We recommend that you do not delete your old database 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 merge.

 Print Name, Job Title

 Signature

 Date