Opendental software

+1 503.363.5432 conversions@opendental.com
+1 833.423.7836 opendental.com

Pre-Data Conversion Checklist

Review and complete this entire document, once completed and returned, a conversion specialist will reach out to schedule your final conversion. If you have questions or need assistance, contact support.

General Information

Practice Name: _____

Phone Number(s): _____

Staff Contact Name & Job Title: _____
Designate a staff member who will oversee the conversion process and be the main point of contact.

Do you have an IT Professional helping you with the conversion? ○ Yes ○ No

If yes, provide their name and phone number: _____

What software are you converting from? _____
Include version number

Which installation of Open Dental will you be using?
Note: Open Dental Cloud is a cloud-based server hosted by Open Dental. There are additional service fees and steps required
○ Open Dental office-hosted server
○ Open Dental Cloud

Would you like more information on Open Dental eServices or eRx? ○ Yes ○ No

Digital Imaging Software (X-Rays & Radiographs)

What digital imaging software do you use with your current software? _____

What digital imaging software will you use with Open Dental? _____

Will you bridge to the imaging software? ○ Yes ○ No

Scanned Documents

Would you like Open Dental to convert your scanned documents and/or patient pictures into Open Dental (if possible)? ○ Yes ○ No
(This is a separate process and fee)

Note: Scanned images may not retain category organization in Open Dental. After a conversion, you may need to re-organize images into the appropriate Imaging Module categories.

Practice Ownership

Select One:

- ○ I own (or will own) the practice and outstanding account balances. Please include the family account balances during the final conversion (when possible).
- ○ I own (or will own) the practice and outstanding account balances. I do not want to convert the outstanding A/R during the final conversion, so please zero out all patient balances.
- ○ I own (or will own) the practice, but I do not (or will not) own the outstanding account balances. Please zero out all patient balances during the final conversion.
- ○ All patient balances are being set to zero because of limitations with the conversion.

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Test Conversion Review

Use this checklist to help you check and review test conversion data. Compare patient accounts in current software and test conversion. We recommend choosing at least ten patients who have a balance and insurance. Try to include at least two patients with negative balances as well. Check off each item as it is completed:

☐ **Family Module:**
Patient Information (name, position, birthdate, address)
Guarantor
Insurance Plan (employer, carrier information, group numbers, benefits)

☐ **Account Module:**
Payments (dates, amounts, notes) Adjustments
(dates, amounts, notes) Completed procedures
(dates, fees, notes)

☐ **Appointments Module:**
Appointments (dates, times, length, notes, procedures, operatory)

☐ **Chart Module:**
Procedures (correct procedure status, dates, fees, notes)
Tooth graphics (accurate display, correct dentition) Clinical
notes / progress notes
Note: Primary dentition is not converted. Temporary codes replace copyrighted codes (i.e., CDT codes) in the test conversion.

☐ **Main Menu:**
Lists (procedure codes – fee schedules, insurance carriers, insurance plans, employers, problems, medications, referrals

☐ **Imaging:**
If bridging to a third party, test the bridge.
If using the Open Dental application to take and store radiographs, test your sensors to make sure they are using a compatible TWAIN driver.

☐ I acknowledge that I have verified the test conversion database and I am satisfied with the results. I understand that regardless of what I may have been told verbally, the final data conversion will not be materially different from the test conversion.

Test A/R Balances

Note: You can find these values in the body of the email with the attached documents.

In your current software, what is the total A/R balance at the time the data was collected for the test conversion? Include negative balances/credits. $_____

In the test conversion, what is the beginning Total A/R balance? $_____
In Open Dental, click Reports, Monthly Aging of A/R Report, include negative balances.

☐ I acknowledge that if the accounts receivable totals (before/after) differ after the final is complete, the office is responsible for reviewing and correcting any inaccurate patient balances and has a plan in place to address and resolve any incorrect balance totals once the final is completed.

Test Conversion Review Opt-Out (Optional - Not Recommended)

☐ I am choosing to opt out of reviewing my test conversion for accuracy. I understand that this checklist is intended to help verify that the test conversion was completed accurately and that all information was converted correctly. By checking this box, I acknowledge that I am choosing not to verify the test conversion results. I understand that any errors, discrepancies, or issues identified after the final conversion will be my responsibility to correct manually. If I check this box, I am not required to complete this page. However, I
understand that all remaining pages of this document must still be completed for the document to be considered complete.

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Acknowledgments

Check each box as you review and acknowledge each statement.

- ☐ I understand all conversion paperwork must be completed, signed, and sent back to the Conversion Department prior to scheduling a final conversion.
- ☐ I have received the Conversion Quote and agree to the fees. Any changes must be made in writing.
- ☐ I understand that Open Dental is only supported on some Windows operating systems. Supported operating systems are listed on the Computer Requirements page.
- ☐ I understand that I must contact Open Dental after I schedule the final conversion to update Open Dental to the latest full version.
- ☐ I understand that I must install the Open Dental application on all workstations prior to the final conversion.
- ☐ I have reviewed Open Dental Training Resources provided through Open Dental. My staff and I have been trained (or will be trained) on how to complete the daily processes in Open Dental.
- ☐ I understand that after the final conversion Open Dental will make no further enhancements to the conversion results.
- ☐ I understand that claims and assigned benefits will not convert and that I will need to enter claims and benefit information manually. (For Dentrix and EZ Dental primary claims are converted)
- ☐ I understand that reports in Open Dental must be run using the date after the final conversion and forward. Reports that need to be run prior to the conversion date must be run in the old software until no longer relevant. We may also print our old reports to have a hard copy for our records.
- ☐ For 1 – 2 weeks following the final conversion, I understand we need to schedule fewer patients or staff more heavily to set up and clean up our data. See Post-Data Conversion Checklist.
- ☐ I am responsible for contacting third-party companies to notify them of our conversion to Open Dental (e.g., clearinghouses, electronic eligibility).
- ☐ 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 the test database or prior software.
- ☐ I understand that I am responsible for creating a suitable backup plan for my office. I understand that Open Dental does not backup or maintain my database. I understand that I am responsible for making backups of my production database immediately following my final conversion and thereafter.
- ☐ I understand that I am responsible for checking beginning account balances in the final conversion for accuracy.
- ☐ I understand that my aging report (0-30, 31-60, 61-90 day totals) will not be identical after my final conversion between Open Dental and my current software. This occurs because the two software applications are not identical, so there is no way to match the aging report precisely.
- ☐ I understand that individual family member balances may not be identical to my old software after the final conversion is complete (even though the total family balances may be accurate). Line-item accounting can be used in Open Dental, and a process called the Family Balancer Tool is run at the time of the conversion. The Family Balancer Tool attempts to clean up family accounts, and it associates payments and adjustments chronologically to the oldest owing procedures within each family.
- ☐ If converting from a cloud-based software, I am responsible for providing Open Dental with a recent backup of the database at the time of the final conversion. If converting from a server-based software, I must provide Open Dental with access to the server where the data is stored at the time of the final conversion.

Scheduling the Final Conversion

Consider the following when scheduling the final conversion:

- Do you pay your providers by income?
  If yes, the best time to convert might be at the end of a pay period.

- Does your current software force you to close out at the end of a month?
  If yes, the best time to convert might be after you have run the end-of-month processes.

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.

Name, Job Title	Signature	Date