

Splitting Database Checklist

A database split may be necessary when one or more providers are leaving a practice and want to take data belonging to their patients with them. This document explains Open Dental's process when splitting a database. Database splits can be performed by provider or by clinic.

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 split.

Notes:

- Splitting the OpenDentImages folder is optional. You may split the folder (for an additional fee), or make a copy for the new location.
- Open Dental cannot change x-ray information. Contact your digital imaging software for options.

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
Confirm how the database will be split? (check one)	<input type="checkbox"/> Settings Only (no patient data)	<input type="checkbox"/> By Provider List Provider Names:	<input type="checkbox"/> By Clinic
Digital Imaging Software (x-rays): What digital imaging software does the current database use? What digital imaging software will the split database use?			
Split Process: Write the date each step is completed.			Date Completed
1. Open Dental has run a test split and installed it on my server.			
2. I have checked the data in the split and verified that it is as accurate as possible.			
OpenDentImages Folder (Scanned Documents)			
You have three options for managing the OpenDentImages folder.			
<input type="checkbox"/> I want to split the OpenDentImages folder. I understand there is an additional fee for this service.			
<input type="checkbox"/> I want to make a copy of the OpenDentImages folder. I understand that I am responsible for placing the copy at the new location.			
<input type="checkbox"/> I do not need historical scanned documents.			
Aging Information			
It is recommended that you zero out account balances at the time of the split. Family members, bulk checks, claims, and patient balances will be split out, causing data to be inaccurate in the split database.			
Do you want to zero out the account balances for all patients?			<input type="checkbox"/> Yes <input type="checkbox"/> No

Check Split Data: Complete all steps and answer all questions.	
You are responsible for checking the split data. If you discover an issue, contact a conversion specialist.	
1. Check that all settings carried over correctly (e.g. schedules, users, providers, operatories).	
2. (Only fill out this information if you have chosen not to zero out the account balances for all patients) Check family balances by provider or clinic. Compare the Aging of A/R in the current database at time of split with the same report run in the test split. Run the report by provider or clinic and include negative balances.	
a) Enter Total Aging of A/R in the current Open Dental database at the time of the split.	\$
b) Enter Total Aging of A/R in the test split.	\$
c) Are the account balances in the test split as accurate as possible (total balance for all families)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
ACKNOWLEDGMENTS	
I understand there is a database split fee as well as an optional OpenDentImages fee. Any fee changes will be communicated in writing or via e-mail. See http://www.opendental.com/site/conversions.html	<input type="checkbox"/> Yes <input type="checkbox"/> No
When splitting by provider or clinic, I understand the following may occur: <input type="checkbox"/> Settings will be brought over. <input type="checkbox"/> Aging of A/R will be inaccurate. <input type="checkbox"/> Insurance plans may be dropped. <input type="checkbox"/> Bulk checks may be wrong or split. <input type="checkbox"/> Patients may be split from family.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand it is my responsibility to contact my digital imaging software and set up the software in the split database.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I have checked the test split data and am satisfied with the results.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand that after the final split there will be no further enhancements to my data.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand that the final split will be a new database. After the final split, I will only enter data in the new database. I will not enter new data in the test split.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand that after the final split, I am responsible for reviewing patient accounts and making adjustments as needed.	<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 Conversion.

Print Name, Job Title

Signature

Date