Opendental

Dentrix / EZ Dental Conversions

This document explains what data is converted to Open Dental and each practice's cleanup and setup responsibilities. Review this document, sign below to acknowledge you understand it, then scan and email it to a conversion specialist with the Pre-Conversion Document before the final conversion.

FEES FOR A DENTRIX OR EZ DENTAL CONVERSION

We can only convert unencrypted information. If your information is encrypted, contact your current software to decrypt it.

Test Data Conversion	FREE
<u>Final Data Conversion</u> Dentrix, EZ Dental	$800
Dentrix Enterprise	$800
Conversion of Scanned Documents (Document Center)	$500 - $1000
Conversion of Patient Pictures (Document Center)	$100
Open Dental Support (basic)	$169 per month per location or office (up to 3 providers)
Online Training	$50 per hour

Other Products or Services to Consider

- Digital imaging / x-ray software
- Clearinghouse / NEA Fast Attach
- Credit card processing
- eServices

- EHR Incentive Program
- Automated reminders, online scheduling, etc.
- Insurance benefit information
- Other supplemental services

**** Have your x-ray solution in place by your final conversion date ****

What IS converted?

Family information
- Patient info (name, contact info, age, status, gender, SSN, provider, etc.)
- Patient plans (insurance plans)
- Benefit percentages
- Patient notes (Chart, Account, Family, Financial, Medical)
- Referrals
- Recall (auto-generated)

Appointment information
- Appointments
- Operatories
- Alerts (problems)

Chart information
- Treatment planned procedures
- Completed procedures
- Clinical notes (procedure notes)
- Perio chart
- Medical alerts
- Prescriptions
- Medication list (master and patient list)
- Disease list (master and patient list)
- PM notes

Account information
- Claims (primary only)
- Payments
- Adjustments
- Payment plans

Other
- Providers
- Employees
- Employers
- Fee schedules
- Insurance carriers
- Insurance plans
- Lab cases / Laboratories
- Task List (appointment notes)

What is NOT converted?

* **We do not convert x-rays.** You need to identify which x-ray solution you will bridge to. For a list of digital imaging programs we bridge to, see Program Bridges.

* **We do not convert secondary claims or preauthorizations.** You must manually enter outstanding secondary claims prior to billing in Open Dental.

* **We do not convert the questionnaire.**

* **We do not convert forms, autonotes, treatment plans (not to be confused with treatment planned procedures), or custom recall intervals.**

Additional Information
Account Balances: When checking account balances, run both the Aging of A/R and Payment Plan reports, then total the amounts to get the total account balance.
Hygiene appointments After setting up providers and operatories, run the Update Provs on Future Appts tool. This will update the provider and hygienist on future appointments to match the operatory's scheduled provider and hygienist. Right-click on an operatory and select Update Provs on Future Appts. Do this for each operatory.

Procedures codes:
 	
    • **Explosion Codes:** Explosion codes are converted as Procedure Buttons, but attached procedure codes will not be D-codes. To use you will need to set them up again with the correct procedure codes.
 	
    • **Recall procedures:** Existing recall appointments will not have D-code procedures attached. You will need to edit the appointment and attach the correct procedures. We recommend creating Appt Quick Proc Add groups in Definitions (Setup, Definitions).

Income transfers: Open Dental associates payments with individual patients who had work done. This can result in individual family members having offsetting negative and positive balances, even if the family balance is 0.
 	
    – **For family balances that are 0 at the time of conversion** we automatically create conversion payment transfers to make patient balances 0. (We do this so you don't have to manually transfer amounts). A line item will show in the account. These payments will also show in the Production and Income report if the date range includes the conversion date, resulting in inaccurate numbers.
 	
    – **For family balances that are not 0 at the time of conversion** (they show on the Aging of A/R report), we do not create automatic conversion payment transfers. Instead, your staff will have to manually create income transfer payments as payments are made and family balances reach 0. This will reallocate the funds among family members and providers so individual balances become 0. Make sure to back date these income transfer payments to the date of the conversion so they do not affect reports. See Income Transfers.

Reports: Do not run reports in Open Dental for historical information. Run historical reports in Dentrix or EZ Dental through the date of the conversion. Open Dental reports will accurately reflect information entered the day after the final conversion and forward.
If bridging to Dexis: You can manually renumber patients, or we can provide a spreadsheet with patient numbers so Dexis can renumber.

By signing below, I acknowledge that I understand what data is / is not converted from Dentrix / EZ Dental to Open Dental. I also understand my practice's responsibilities after the final conversion.

_____
Print Name, Job Title   Signature   Date

_____
Practice Name   Doctor Name   Phone #