SoftDent Conversion

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-Data Conversion Checklist before scheduling your final conversion.

What is Converted?

Family Information
- Patient Info (name, contact info, age, status, gender, SSN, provider, etc.)
- Patient Insurance Plans
  - Bluebook Fees (as hidden fee schedules)
  - Benefit Percentages
- Referrals
- Recall (auto-generated)

Appointment Information
- Appointments
- Operatories
- TeamTalk (as Popups)

Chart Information
- Explosion Codes (as Procedure Buttons)
- Treatment Planned Procedures
- Completed Procedures
- Procedure Notes
- Perio Chart (and bleeding)
- Missing Teeth
- Medical Alerts
- Prescriptions
- Medications
- Disease / Condition List
- Disease-to-Patient Association
- Clinical Notes (SoftDent notes)

Account Information
- Beginning Balances
- Payments
- Adjustments
- Contacts (as Commlog)
- Procedures

Other
- Providers
- Employees
- Employers
- Fee Schedules
- Insurance Carriers
- Insurance Plans
- Lab Cases / Laboratories
- Pharmacies
- Daily Memos (as Tasks)

What is not Converted?

X-Rays: Open Dental is only capable of converting x-rays from certain software applications. If your practice does not already have an x-ray software that has a compatible bridge with the Open Dental application, then you will need to choose an x-ray software that has a compatible bridge (if you want it bridged with Open Dental). If your radiograph sensors are using a compatible TWAIN driver, then the Open Dental application can be used to take and store radiographs (as another option). See Sensor Compatibility for more information.

Open Dental can also bridge to a number of third-party x-ray software. For a list of digital imaging programs we bridge to, see Program Bridges.

Claims and Preauthorizations: Outstanding claims must manually be entered prior to billing in Open Dental.

Miscellaneous: Forms, auto notes, treatment plans, and custom recall intervals.

Additional Information

Appointments: Offices using certain versions of Softdent 15 (or greater) that contain an "ngappt.dat" file will have issues with the conversion related to appointments and treatment planned procedures. All appointments will be 30 minutes long, some appointments might be missing, and they will be missing treatment planned procedures. This will need to be manually fixed in Open Dental. Offices will want to set aside a resource after the conversion to clean up future appointments.

Guarantors and Duplicate Patients: Because of how SoftDent assigns guarantors, there may be duplicate guarantor accounts in Open Dental. In Open Dental, the guarantor does not need to be separate from the patient account. Use the Conv – Duplicate Patients query to identify any duplicates, then merge them using Open Dental's merge tool. See After a Conversion: Duplicate Patients.

Hygiene appointments: After setting up providers and operatories, run the Update Provs on Future Appts tool on each operatory. This will update the provider and hygienist on future appointments to match the operatory's scheduled provider and hygienist.

Adjustment to Insurance Benefit: For each patient with insurance, add an adjustment to insurance used to reduce the benefit remaining amount (Adjustments to Insurance Benefits on the Edit Insurance Plan window).

Reports: Do not run reports in Open Dental for historical information. Run historical reports in SoftDent through the date of the conversion. Open Dental reports will accurately reflect information entered the day after the final conversion and forward.

By signing below, I acknowledge that I understand what data is / is not converted from SoftDent 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 #