





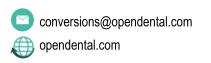
## **Pre-Data Conversion Checklist**

Review and complete this entire document, then return it to your conversion specialist before the final conversion. If you have questions or need assistance, contact technical 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 the main point	of contact.)			
	Do you have an IT Professional helping you with the conversion?	O Yes	O No		
	If yes, provide their name and phone number:		<del></del>		
	What software are you converting from?(Include version number)		<del></del>		
	Which installation of Open Dental will you be using?  Open D  (default)	ental office-hoste	ed server		
	Open D  (Open dental-hosted, cloud-based server. There will be additionally a control of the con	ental Cloud itional service fees ar	nd steps required.)		
	Will you be utilizing Open Dental eServices?	O Yes	O No		
	Digital Imaging Software (X-Rays & Ra	diographs)			
	What digital imaging software do you use with your current software	92			
	What digital imaging software will you use with Open Dental?		· · · · · · · · · · · · · · · · · · ·		
	Will you bridge to the imaging software? O Yes	No			
	Scanned Documents / Patient Pic	ctures			
	Do you scan documents in your current software? OYes	O No			
	Do you want an Image Conversion to convert your Scanned documents and/or patient pictures?  (This is a separate process and fee)	O No			
	Note: Scanned images will not retain folder organization in Open Dental. After a conversion the appropriate Imaging Module categories.	, you will need to re-	organize images into		
	Practice Ownership				
	Select One:				
С	I own (or will own) the practice and outstanding account balances. Please balances during the final conversion (when possible).	e include the fam	ily account		
С	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.				
С	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.				
С	All patient balances are being set to zero because of limitations with the	conversion.			







## Test A/R Balances

rest A/R balances	
(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.)	
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 ten patients who have a balance and insurance. Try to include two patients with negative balances.	
Check each item as it is completed:	
<ul> <li>☐ Family Module:         <ul> <li>Patient Information (name, position, birthdate, address)</li> <li>Guarantor</li> <li>Insurance Plan (employer, carrier information, group numbers, benefits)</li> </ul> </li> </ul>	
<ul> <li>Account Module:</li> <li>Payments (dates, amounts, notes)</li> <li>Adjustments (dates, amounts, notes)</li> <li>Completed procedures (dates, fees, notes)</li> </ul>	
<ul> <li>□ Appointments Module:</li> <li>• Appointments (dates, times, length, notes, procedures, operatory)</li> </ul>	
<ul> <li>Chart Module:         <ul> <li>Procedures (correct procedure status, dates, fees, notes)</li> <li>Tooth graphics (accurate display, correct dentition)</li> <li>Clinical notes / progress notes</li> </ul> </li> <li>Note: Temporary codes replace copyrighted codes (i.e., CDT codes) in the test conversion.</li> </ul>	
☐ Main Menu:	
<ul> <li>Lists (insurance carriers, insurance plans, employers, problems, medications, referrals)</li> </ul>	
<ul><li>☐ Imaging</li><li>• If bridging to a third party, test the bridge.</li></ul>	
Verify Test Conversion Data	
You are responsible for verifying the accuracy of the test conversion data. Confirm the following:	
I have reviewed what converted, verified the test conversion data, 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.	





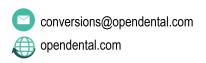


## Planning for the Final Conversion

Enter the date Open Dental ran the test conversion and installed it to your server:					
Document your plan for handling insurance, insurance claims, and billing after the final conversion.					
How will you enter and verify missing insurance benefit information?					
O Enter and verify a few patients at a time (e.g., as patients have upcoming appointments).					
O Enter and verify all patients within the first 30 days.					
How will you enter outstanding claims?					
O Enter claims a few patients at a time (e.g., as claim payments come in).					
O Enter claims within 30 days using an outstanding insurance report from the old software.					
How will you handle billing?					
O I will verify insurance and enter claims a few patients at a time, and only send individual statements to families who have claims created or received in Open Dental.					
O I will verify insurance for every patient and enter all outstanding claims within 30 days, then run the billing list.					
Scheduling the Final Conversion					
Consider the following when scheduling the final conversion:					
<ul> <li>Do you pay your providers by income?</li> <li>If yes, the best time to convert might be at the end of a pay period.</li> </ul>					
<ul> <li>Does your current software force you to close out at the end of a month?</li> <li>If yes, the best time to convert might be after you have run the end-of-month processes.</li> </ul>					
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 have reviewed the Open Dental Computer Requirements. I understand Open Dental can't be used with Windows XP, Windows Server 2003, Windows 8, or Windows Server 2008, and that Open Dental is operational on Windows 7, but not supported.					
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 <u>Training Resources</u> provided through Open Dental. My staff and I have					







		Acknowledgements	(Continued)
	I understand that after to conversion results.	he final conversion Open Dental w	ill make no further enhancements to the
		s and assigned benefits will not cou ually. (For Dentrix and EZ Dental)	nvert and that I will need to enter claims and primary claims are converted)
	forward. Reports that n		g the date after the final conversion and on date must be run in the old software until ave a hard copy for our records.
		ng the final conversion, I understar t up and clean up our data. See <u>Pc</u>	nd we need to schedule fewer patients or ost-Data Conversion Checklist.
	I am responsible for con (e.g., clearinghouses, e		otify them of our conversion to Open Dental
			ase. After the final conversion, I will only n the test database or prior software.
	Open Dental does not be	packup or maintain my database. I	packup plan for my office. I understand that understand that I am responsible for making my final conversion and thereafter.
	I understand that I am raccuracy.	esponsible for checking beginning	account balances in the final conversion for
	conversion between Op		totals) will not be identical after my final e. This occurs because the two software the aging report precisely.
	final conversion is compaccounting can be used time of the conversion.	olete (even though the total family I in Open Dental, and a process ca The Family Balancer Tool attempt	not be identical to my old software after the balances may be accurate). Line-item alled the Family Balancer Tool is run at the set to clean up family accounts, and it he oldest owing procedures within each
		Opt-Out (Optional - Not	Recommended)
	a guide to verify the tes box, I am skipping the	t conversion and ensure informati	necklist. I understand this checklist is used as on has converted correctly. By checking this Conversion. I understand that any errors or illity to fix manually.
	ng below, I acknowledge and proceed with the Fi		curate and complete, and that I am authorized to
· <del>-</del>	Name, Job Title	Signature	Date