

## Post-Data Conversion Checklist

This document is a guide to help ensure that Open Dental is set up properly after a data conversion. If you have a Post Conversion Setup appointment scheduled, most of the items listed will be addressed during that appointment. Our support team is also available to help with each of these topics.

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### Account Balances

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- Compare A/R balance in Open Dental with A/R balance in old software.
  - Verify that the beginning total account balance in Open Dental is correct.
    - From your old software: Use the accounts receivable report, with credit balances included, run on the day of conversion.
    - In Open Dental: Run the [Aging of A/R report](#), include negative balances. If payment plans were converted, also run the [Payment Plan Report](#) (don't limit by date range), then combine reports to get the total beginning account balance.
  - Compare the total account balance in each report. They should match. Keep a copy of the reports for your records.
  - Your aging report (0-30, 31-60, 61-90 day totals) will not be identical after your final conversion between Open Dental and your old software.
  - Individual family member balances may not be identical to your old software after the final conversion is complete (even though the total family balances may be accurate).

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### General Setup

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Review general Open Dental setup. Check each item as it is reviewed. Click the corresponding link for additional details.

- [Registration Key](#): Verify the registration key entered matches the registration key entered in your welcome email.
- [Show Features](#): Turn on any necessary features (e.g., Clinics, Super Families, Medical Insurance, etc.).
- [Program Links](#): On each workstation, verify bridges are working (e.g., to digital imaging software).
- [Clinic Setup](#): If using clinics, verify names, addresses, default providers, etc.
- [Practice Setup](#): Verify practice name, address, default provider, etc.
- [Procedure Code List](#): Verify each fee schedule is entered with fees. Ensure hygiene procedures are marked as *Is Hygiene procedure*. Add alternate codes (e.g., for merchandise).
- [Provider List](#): Verify provider names, IDs, appointment colors, default fee schedules. Move or reassign patients if needed.
- [Employee List](#): Verify employee names. Add new employees and hide past employees.
- [Operatory Setup](#): Verify assigned dentists, hygienists, and clinics.
- [Schedule Setup](#): Set up provider schedules.
- [Appointment Views](#): Set up appointment views.
- [Recall Types](#): Verify default recall types. (**Advanced**)
- [Recall List Defaults](#): Set recall list default settings.

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## General Setup (Continued)

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- Preferences:** Set default preferences for each module and set other miscellaneous preferences.
- Security:** Assign users to user groups, set user permissions, restrict access, change password requirements.
- Time Card Setup:** Define pay periods and rules so employees can use the time clock.
- Claim Form Setup:** Set the default claim form for printed claims.
- Clearinghouse Setup:** Enable the default clearinghouse for electronic claims.
- Electronic Claims:** Verify electronic claims send successfully to the clearinghouse.
- Printer Setup:** Set default printers on each workstation.
- Scanning Defaults:** Set scanner defaults on each workstation.

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## Conversion Cleanup

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Some cleanup is involved after a conversion. Check each item as it is completed. The queries discussed below are saved as Query Favorites in Open Dental.

- Conversion Specific Cleanup:** Refer to your Conversion Specific Document to view any cleanup items specific to your conversion.
- Outstanding Claims:** Create outstanding claims that were not converted (use the outstanding insurance report from your old software).
- Perio vs. Propy:** Use the *Conv-Perio Patients* query to see which patients are set as Perio. Change as needed.
- Verify Patient Insurance:** Verify patient insurance benefits using the Insurance Verification List. We recommend working on patients with upcoming appointments first.
- Overlapping Appointments:** Run the *Conv-Future Apts by Operatory* query to find patients in an 'Unassigned' or 'Extra' operatory. Move those patients to the correct operatory then hide the unassigned/extra operatory.
- Update Providers on Future Appointments:** Future hygiene appointments sometimes have hygienist assigned as the primary provider. Once providers and operatories are set up, make sure the correct dentist and hygienist are assigned.
- Future Appointments:** Check that future appointments have the correct procedures attached.
- Duplicate Patients:** Run the *Conv-Possible Duplicate Patients* query to identify duplicate patients, then merge them.
- Unassigned Clinics:** If using clinics, run the *Conv-Patients in Unassigned Clinic* query to find patients with no default clinic and assign one to them.
- Graphical Tooth Chart:** Verify graphical tooth charts are accurate (e.g., missing teeth, movements, paint types).



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## Other Recommended Setup

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- Billing:** Follow your plan for billing.
  - Option 1: If you are incrementally verifying insurance and creating claims, only send statements to families who have claims entered.
  - Option 2: Once all insurance is verified and all claims are entered, run a Billing List to generate statements.
- Procedure Buttons:** Set up buttons that allow quick entry of commonly used procedures.
- Procedure Code Notes:** Enter default notes for treatment planned or completed procedures.
- Auto Notes:** Create templates for complex notes entered frequently (e.g., exams, root canals).
- Employer List:** Review employers, remove duplicates, add new.
- Insurance Plan List:** Review insurance plans, remove or combine duplicates. **(Advanced)**
- Insurance Carrier List:** Review insurance carrier information, combine duplicates, add new. **(Advanced)**
- Allergy List:** Review allergies in the master list, remove duplicates, add new
- Problem List:** Review problems in the master list, remove duplicates, add new.
- Medication List:** Review medications in the master list, remove duplicates, add new.
- Referral List:** Review referrals in the master list, remove duplicates, add new.
- Laboratories:** Review dental laboratories in the master list, remove duplicates, add new.
- Prescription Templates:** Create prescription templates for printed Rx.
- Pharmacy List:** Review pharmacy information for printed Rx, remove duplicates, add new.
- Definition Setup:** Customize options and colors for backgrounds, text, and notifications.
- Backups:** Work with your IT to create a backup plan suitable for your office.
- eServices:** Open Dental has several eServices to help your office run efficiently. Contact support for details.

**(Advanced)** We recommend contacting Open Dental support for assistance with changes to advanced features.

Open Dental offers many resources to help you continue learning about Open Dental and its many capabilities.  
See [Learning Resources](#).

For help addressing HIPAA security requirements, see [Security Issues](#).