

Database Merge Checklist

A database merge is performed when the data from two (or more) databases needs to be consolidated into a single database. Merges can be performed on multiple databases, including other software systems which can be converted to Open Dental.

How a database merge works:

- One database is marked as the "superior" database and all other databases are marked as "inferior".
- Sometimes there are values and settings that are ambiguous in both databases. In these cases, the "superior" database values are chosen over the equivalent values in the "inferior" database. Examples: practice address, the default provider for the practice, county names, and codes. More important information (e.g., patient accounts, charting) are never ambiguous, so the resulting merge will contain all critical data from each database.

Patient Numbers and Digital Imaging Software: During the merge, patients in the "inferior" database will receive new patient numbers to avoid duplication. If the digital imaging software uses patient number to open the patient's x-rays, you will need to renumber the patients in the imaging software.

After two or more databases are merged and the resulting database has been in use, it is not possible to reverse the merge and change the live database back to the original databases. In effect, database merges are permanent.

General Information

Practice Name: _____

Phone Number(s): _____

Staff Contact Name & 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? _____

Is there an IT professional helping you? Yes No

If yes, provide their name and phone number: _____

Database Information

Will multiple locations use the merged database? Yes No

If yes:

Have you discussed multiple location options with a multi-location specialist? Yes No

How will users access the database? (e.g., VPN, RDP, etc)? _____

How do you want to merge the databases? With Clinics Without Clinics

What is the name of the superior database? _____

In which order should the databases be merged?
(e.g., 1=North, 2=South, 3=East, etc) _____

Scanned Documents & Digital Imaging (X-Rays)

Do the databases being merged currently use an OpenDentImages folder (AtoZ folder)? This is where scanned documents and images are stored. Yes No

If Yes, the conversion team will require access to all OpenDentImages folders for all databases to be merged, at the time of the merge.

Do you have a copy of all OpenDentImages folders to be merged? Yes No

*We recommend storing the files on an external drive or directory, etc.

They must be accessible at the location of the "superior" database.

