

## After a Final Conversion Checklist

Use this checklist as a guide to help you complete setup and cleanup steps after a final conversion.  
For help addressing HIPAA security requirements, see [Security Issues](#).

✓ CHECK BEGINNING ACCOUNT BALANCE	
Compare A/R balance in Open Dental with A/R balance in old software	<p>Verify that the beginning total account balance in Open Dental is correct.</p> <ul style="list-style-type: none"> <li>From your old software: Use the accounts receivable report, with credit balances included, run on the day of conversion.</li> <li>In Open Dental: Run the <a href="#">Aging of A/R report</a>, include negative balances. If payment plans were converted, also run the <a href="#">Payment Plan report</a> (don't limit by date range), then combine reports to get the total beginning account balance.</li> </ul> <p>Compare the total account balance in each report. They should match. Keep a copy reports for your records.</p>
✓ GENERAL SETUP	
<a href="#">Show Features</a>	Turn on features (e.g. Clinics, Medical, EHR).
<a href="#">Program Bridges</a>	On each workstation, verify that bridges work (e.g. to digital imaging software).
<a href="#">Clinic Setup</a>	If using clinics, verify names, addresses, default providers, etc.
<a href="#">Practice Setup</a>	Verify practice name, address, default provider, etc.
<a href="#">Provider List</a>	Verify provider names, IDs, appointment colors, default fee schedules. Move or reassign patients if needed.
<a href="#">Employee List</a>	Verify employee names; add new or hide past employees.
<a href="#">Operatory Setup</a>	Check the setup of operatories (assign dentists, hygienists, clinics).
<a href="#">Schedule Setup</a>	Set up provider schedules. Affects open/close times in the Appointment schedule and Recall.
<a href="#">Appointment Views</a>	Set up views in the appointment schedule for different situations (e.g. HIPAA view). Choose operatories, set where and what information shows.
<a href="#">Procedure Code List</a>	Verify each fee schedule and its fees. Make sure hygiene procedure codes are marked as "Is Hygiene Procedure". Add alternate codes, substitution codes, or non-standard codes (e.g. for merchandise).
<a href="#">Recall Types</a>	Verify default recall types. ( <b>Advanced</b> )
<a href="#">Recall List Defaults</a>	Set defaults for the recall list.
<a href="#">Module Preferences</a>	Set default preferences for each module.
<a href="#">Miscellaneous Setup</a>	Set the title bar, language options, and task list defaults
<a href="#">Security</a>	Assign users to user groups, set user permissions, restrict access, change password requirements.
<a href="#">Time Card Setup</a>	Define pay periods and rules so employees can use the Time Clock.
<a href="#">Claim Form Setup</a>	Set the default claim form for printed claims.
<a href="#">E-Claims</a>	Verify that e-claims send successfully to the clearinghouse.
<a href="#">Printer Setup</a>	Set default printers.
<a href="#">Scanning Defaults</a>	Set default scanning options.
✓ CLEANUP	
<b>Queries referred to below are saved in your Query Favorites</b>	
<a href="#">How to Handle Claims</a>	Create outstanding claims that were not converted (use the outstanding insurance report from your old software).
<a href="#">Perio vs Prophy</a>	Use the <b>Conv-Perio Patients</b> query to see which patients are set as Perio. Change as needed.
<a href="#">Verify Patient Insurance</a>	Verify patient insurance benefits using the Insurance Verification List. We recommend working on patients with upcoming appointments first.

✓ CLEANUP CONT.		
<a href="#">Clean up Overlapping Appointments</a>	Run the <b>Conv-Future Apts by Operatory</b> query to find patients in an 'Unassigned or 'Extra' operatory. Move those patients to the correct operatory then hide the unassigned/extra operatory.	
<a href="#">Verify providers on future hygiene Appointments</a>	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. For each operatory: <ol style="list-style-type: none"> <li>1. Right click on the operatory.</li> <li>2. Click Update Provs on Future Appts</li> </ol>	
Future Appointments	Check future appointments and ensure the correct treatment planned procedures are attached.	
<a href="#">Duplicate Patients</a>	Run the <b>Conv-Possible Duplicate Patients</b> query to identify duplicate patients, then merge them.	
<a href="#">Unassigned Clinics</a>	If using clinics, run the <b>Conv-Patients in Unassigned Clinic</b> query to find patients with no default clinic and assign one to them.	
<a href="#">Income Transfers</a>	As payments are made and balances change, run the query <b>Conv–Accounts Needing a Non-Income Transfer</b> to determine which family balances equal 0, then clean up income transfers.	
<a href="#">Graphical Tooth Chart</a>	Verify graphical tooth charts are accurate. (e.g. missing teeth, movements, paint types)	
✓ OTHER RECOMMENDED SETUP		
<a href="#">Billing</a>	Follow your plan for billing. <b>Option 1:</b> If you are incrementally verifying insurance and creating claims, only send statements to families who have claims entered. <b>Option 2:</b> Once all insurance is verified and all claims are entered, run a Billing List to generate statements.	
<a href="#">Procedure Buttons</a>	Set up buttons that allow quick entry of commonly used procedures.	
<a href="#">Procedure Code List</a>	Enter default notes that automatically copy to treatment planned or completed procedures.	
<a href="#">Auto Notes</a>	Create templates for complex notes entered frequently (e.g. exams, root canals).	
<a href="#">Employer List</a>	Review employers, remove duplicates, add new.	
<a href="#">Insurance Carrier List</a>	Review insurance carrier information, remove or combine duplicates, add new. <b>(Advanced)</b>	
<a href="#">Insurance Plan List</a>	Review insurance plans, remove or combine duplicates, add new. <b>(Advanced)</b>	
<a href="#">Allergy List</a>	Review allergies in the master list, remove duplicates, add new.	
<a href="#">Problem List</a>	Review problems in the master list, remove duplicates, add new.	
<a href="#">Medication List</a>	Review medications in the master list, remove duplicates, add new.	
<a href="#">Referral List</a>	Review referrals in the master list, remove duplicates, add new.	
<a href="#">Dental Laboratories</a>	Review laboratories in the master list, remove duplicates, add new.	
<a href="#">Prescription Templates</a>	Create prescription templates for printed Rx.	
<a href="#">Pharmacy List</a>	Review pharmacy information for printed Rx, remove duplicates, add new.	
<a href="#">Definition Setup</a>	Customize options and colors for backgrounds, text, and notifications.	
<a href="#">eServices</a>	Open Dental has several eServices to help your office run efficiently, including texting, online appointment scheduling, automated appointment reminders and confirmations, Mobile Web, and Patient Portal. 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 [Open Dental – Learning Resources](#).