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Post Conversion Checklist

Use this checklist as a guide to help 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	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.
✓	GENERAL SETUP	
	Registration Key	Verify the registration key entered matches the registration key entered in your welcome email.
	Show Features	Turn on features (e.g. Clinics, Medical, EHR).
	Program Bridges	On each workstation, verify that bridges work (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 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).
	Provider List	Verify provider names, IDs, appointment colors, default fee schedules. Move or reassign patients if needed.
	Employee List	Verify employee names; add new or hide past employees.
	Operatory Setup	Check the setup of operatories (assign dentists, hygienists, clinics).
	Schedule Setup	Set up provider schedules. Affects open/close times in the Appointment schedule and Recall.
	Appointment Views	Set up views in the appointment schedule for different situations (e.g. HIPAA view). Choose operatories, set where and what information shows.
	Recall Types	Verify default recall types. (**Advanced**)
	Recall List Defaults	Set defaults for the recall list.
	Module Preferences	Set default preferences for each module.
	Miscellaneous Setup	Set miscellaneous preferences such as the title bar, languages used by patients, and theme.
	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.
	E-Claims	Verify that e-claims send successfully to the clearinghouse.
	Printer Setup	Set default printers. This needs to be completed on each workstation.
	Scanning Defaults	Set default scanning options. This needs to be completed on each workstation.
✓	CLEANUP	**Queries referred to below are saved in your Query Favorites**
	Conversion Specific Cleanup	Refer to your Conversion Specific Document to view any cleanup specific to your conversion.

	How to Handle Claims	Create outstanding claims that were not converted (use the outstanding insurance report from your old software).
	Perio vs Prophy	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.
	Clean up 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.
	Verify providers on future hygiene 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. For each operatory: 1. Right-click on the operatory. 2. Click Update Provs on Future Appts
	Future Appointments	Check future appointments and ensure the correct treatment planned procedures are 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)
	Clean up families with unearned income	Run the Net Unearned Income report to track families with credits and edit as needed.
✓	**OTHER RECOMMENDED SETUP**	
	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 List	Enter default notes that automatically copy to 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, remove or 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.
	Dental Laboratories	Review 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 Open Dental – Learning Resources.