

Post-Data Conversion Checklist

Use this checklist as a guide to help complete setup and cleanup steps after a final conversion.

Account Balances

- 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).

General Setup

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.

General Setup (Continued)

- 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.

Conversion Cleanup

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. 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.
- 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).

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 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](#).