

EagleSoft Conversions

This document explains what data is converted to Open Dental and each practice's cleanup and setup responsibilities. Review this document, sign below to acknowledge you understand it, then scan and email it to a conversion specialist with the Pre-Conversion Document before the final conversion.

FEES FOR A EAGLESOFT CONVERSION

Test Data Conversion	FREE
Final Data Conversion	\$800
Conversion of Scanned Documents	\$500 - \$1000
Open Dental Support (basic)	\$169 per month per location or office (up to 3 providers)
Online Training	\$50 per hour

Other Products or Services to Consider

- Digital imaging / x-ray software
- Clearinghouse / NEA Fast Attach
- Credit card processing
- eServices
- EHR Incentive Program
- Automated reminders, online scheduling, etc.
- Insurance benefit information
- Other supplemental services

**** Have your x-ray solution in place by your final conversion date ****

What IS converted?

<p>Family information</p> <ul style="list-style-type: none"> • Patient info (name, contact info, age, status, gender, provider, etc.) • Patient insurance plans • Benefits • Referrals • Recall (auto-generated) <p>Appointment information</p> <ul style="list-style-type: none"> • Appointments • Operatories • Popups 	<p>Chart information</p> <ul style="list-style-type: none"> • Treatment planned procedures • Completed procedures • Procedure notes • Existing restorations • Missing teeth • Perio chart • Patient medical alerts • Prescriptions <p>Account information</p> <ul style="list-style-type: none"> • Payments • Adjustments • Payment plans (outstanding contract amount) • PM notes (Commlog) • Payment plan splits by provider 	<p>Other</p> <ul style="list-style-type: none"> • Clinics • Providers • Employees • Employers • Fee schedules • Insurance carriers • Insurance plans • Pharmacies • Lab cases / Laboratories • Auto letters (letters)
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What is NOT converted?

1. **We do not convert x-rays.** They are proprietary to EagleSoft. You should have an imaging solution in place for the final conversion so you have access to historical x-rays and are able to take new x-rays. We bridge to most imaging solutions. See [Program Bridges](#).

If your office is using Eaglesoft practice management software for imaging, you will need to seek an option prior to final so you won't be without an x-ray solution.

Options:

- Buy a new imaging solution such as Apteryx, XDR, or Sirona and have them do an image conversion so your Eaglesoft Images are available to bridge to using that software.
- Buy a new imaging solution (any) and do not do an image conversion. View historical images out of Eaglesoft and take new images using your solution.

If you are already bridging to a third party solution from Eaglesoft you can keep doing that in the same way but from Open Dental; however, you should make sure that works before your final conversion.

2. **We do not convert outstanding claims or preauthorizations.** You must manually enter outstanding claims prior to billing in Open Dental.
3. **We do not convert forms, autonotes, treatment plans (not to be confused with treatment planned procedures), or custom recall intervals.**

Additional Information

Account Balances: When checking account balances, run both the Aging of A/R and Payment Plan reports, then total the amounts to get the total account balance.

Hygiene appointments: After setting up providers and operatories, run the Update Provs on Future Appts tool. This will update the provider and hygienist on future appointments to match the operator's scheduled provider and hygienist.

Right-click on an operatory and select Update Provs on Future Appts. Do this for each operatory.

Income transfers: Open Dental associates payments with individual patients who had work done. This can result in individual family members having offsetting negative and positive balances, even if the family balance is 0.

- **For family balances that are 0 at the time of conversion** we automatically create conversion payment transfers to make patient balances 0. (We do this so you don't have to manually transfer amounts). A line item will show in the account. These payments will also show in the Production and Income report and Payment reports if the date range includes the conversion date, resulting in inaccurate numbers.
- **For family balances that are not 0 at the time of conversion** (they show on the Aging of A/R report), we do not create automatic conversion payment transfers. Instead, your staff will have to manually create income transfer payments as payments are made and family balances reach 0. This will reallocate the funds among family members and providers so individual balances become 0. Make sure to back date these income transfer payments to the date of the conversion so they do not affect reports. See [After a Conversion - Income Transfers](#).

Occasionally "Standard Services" fees may be wrong in the conversion if old fees were not marked inactive. A manual fix is required after the conversion.

Adjustment to Insurance Benefit: For each patient with insurance, add an adjustment to insurance used to reduce the benefit remaining amount (Adjustments to Insurance Benefits on the [Edit Insurance Plan window](#)).

Reports: Do not run reports in Open Dental for historical information. Run historical reports in EagleSoft through the date of the conversion. Open Dental reports will accurately reflect information entered the day after the final conversion and forward.

By signing below, I acknowledge that I understand what data is / is not converted from EagleSoft to Open Dental. I also understand my practice's responsibilities after the final conversion.

Print Name, Job Title	Signature	Date
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Practice Name	Doctor Name	Phone #
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