

PracticeWorks 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, and then scan and email it to a conversion specialist with the Pre-Conversion Document before the final conversion.

FEES FOR A PRACTICEWORKS CONVERSION

Test Data Conversion	FREE
Final Data Conversion	\$800
Conversion of Scanned Documents and Patient Pictures (PWImages directory)	\$500
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 (a good option is a bridge to Kodak Trophy Enhanced)
- 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, SSN, provider, etc.) • Patient insurance plans • Benefits (most) • Referrals • Recall (auto-generated) • Sticker notes <p>Appointment information</p> <ul style="list-style-type: none"> • Appointments • Operatories • Blockouts 	<p>Chart information</p> <ul style="list-style-type: none"> • Charting (some) • Procedures (most) • Procedure notes • Perio chart • Missing teeth • Prescriptions (version 7 only) • Disease / condition list • Disease to patient association 	<p>Account information</p> <ul style="list-style-type: none"> • Beginning balances • Payments • Adjustments <p>Other</p> <ul style="list-style-type: none"> • Providers • Employees • Employers • Fee schedules • Insurance carriers • Insurance plans • Lab cases / Laboratories • Pharmacies (version 7 only)
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What is NOT converted?

- * **We do not convert x-rays.** You need to identify a new x-ray solution. A good option is a bridge to Kodak (Trophy Enhanced) in numbered mode. For a list of digital imaging programs we bridge to, see [Program Bridges](#).
- * **We do not convert claims or preauthorizations.** You must manually enter outstanding claims prior to billing in Open Dental.
- * **Missing transactions:** There will likely be missing transactions because of the way PracticeWorks stores data in a deprecated file structure. This is unavoidable. When a patient has missing transactions, we will set a beginning balance.
- * **We do not convert forms, autonotes, treatment plans, custom recall intervals, or medications.**

Additional Information

Treatment planned procedures: On some conversions there may be duplicate treatment planned procedures that need to be manually removed. Some of the treatment planned procedures may already be complete.

Fee schedules: During the conversion, the following changes take place to fee schedules and insurance plans.

- In PracticeWorks, fee schedules are stored by employer. In Open Dental they are stored by carrier. Thus, after conversion you will have multiple fee schedules in your fee schedule list (named by employer) – often hundreds. In the conversion we mark all employer fee schedules as hidden. You can create new fee schedules named by carrier (then import fees or manually enter them) or rename existing fee schedules for a carrier (and unhide them).
- All fee schedules are set as 'normal' types.
- All insurance plans are set as category percentage plan types with 'none' as the fee schedule (indicates the fee schedule of the provider). To set all plans as another plan type (e.g. PPO), you must let us know before or after the final conversion.

After conversion you will need to clean up fee schedules and insurance plans:

1. Add new fee schedules or rename and unhide fee schedules you want to keep (Setup, [Fee Schedules](#)).
2. Combine duplicate employers (Lists, [Employers](#)).
3. Combine duplicate insurance carriers (Lists, [Insurance Carriers](#)).
4. Combine duplicate insurance plans (Lists, [Insurance Plans](#)).
5. For each patient, verify insurance (plan type, fee schedule, and benefit information).
 - a) Open the [Edit Insurance Plan window](#).
 - b) Check the Plan Type and edit as needed (e.g. PPO).
 - c) Check the Fee Schedule and edit as needed. For PPO plan types, the Fee Schedule should be the carrier's fee schedule.
 - d) Check the benefits and edit as needed.
 - e) When all items are verified, uncheck the Pending box (so you know it has been verified).
 - f) To apply these changes to all subscribers on the plan, check the radio button for 'Change Plans for All Subscribers'. If this only applies to this subscriber, check 'Create new Plan if needed'. Click OK.

To apply changes to treatment planned procedures you have two options: update fees by patient (Treatment Plan module, Update Fees) or update fees for all patients at once using Fee Tools (Lists, Procedure Codes, Fee Tools, Update).

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 operatory'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 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 [Income Transfers](#).

Reports: Do not run reports in Open Dental for historical information. Run historical reports in PracticeWorks 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 PracticeWorks to Open Dental. I also understand my practice's responsibilities after the final conversion.

Print Name, Job Title

Signature

Date

Practice Name

Doctor Name

Phone #