

Dentrix / EZ Dental Conversion

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-Data Conversion Checklist before you schedule your final conversion.

What is Converted?

Family Information

- Patient Info (name, contact info, age, status, gender, SSN, provider, etc.)
- Patient Insurance Plans
- Benefit Percentages
- Patient Notes (Chart, Account, Family, Financial, Medical)
- Referrals
- Recall (auto-generated)

Appointment Information

- Appointments
- Operatories
- Alerts (problems)

Chart information

- Treatment Planned Procedures
- Completed Procedures
- Clinical Notes (procedure notes)
- Perio Chart
- Medical Alerts
- Prescriptions
- Medication List (Master and Patient List)
- Disease List (Master and Patient List)
- PM Notes

Account information

- Claims (primary only)
- Payments
- Adjustments
- Payment Plans (remaining balance)

Other

- Providers
- Employees
- Employers
- Most Fee Schedules (Normal and Allowed)
- Insurance Carriers
- Insurance Plans
- Lab Cases / Laboratories
- Task List (Appointment Notes)

What is not Converted?

X-rays: If the practice does not already have one, you will need to identify which x-ray program you will use. For a list of digital imaging programs Open Dental bridge to, see [Program Bridges](#).

Secondary Claims and Preauthorizations: Outstanding secondary claims must manually be entered prior to billing in Open Dental.

Miscellaneous: Forms, auto notes, treatment plans, questionnaire, and 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.

Payment Plans: When Open Dental converts payment plans, it only brings over the remaining balance and payment schedule. You will need to review payment plans. If needed, edit or recreate the payment plan.

Hygiene Appointments: After setting up providers and operatories, run the [Update Provs on Future Appts](#) tool on each operatory. This will update the provider and hygienist on future appointments to match the operatory's scheduled provider and hygienist.

Additional Information (continued)

Procedures Codes:

- Explosion Codes: Explosion codes are converted as [Procedure Buttons](#), but attached procedure codes will not be D-codes. To use you will need to set them up again with the correct procedure codes.
- Recall procedures: Existing recall appointments will not have D-code procedures attached. You will need to edit the appointment and attach the correct procedures. We recommend creating [Appt Procs Quick Add](#) groups in Definitions (Setup, Definitions).

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

Image Conversion (scanned documents): You will need to contact Dentrix / EZ Dental and request decrypted scanned document backup to be available for your final.

Bridging to Dexis: You can manually renumber patients, or Open Dental can provide a spreadsheet with patient numbers so Dexis can renumber.

By signing below, I acknowledge that I understand what data is / is not converted from Dentrix / EZ Dental 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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