

## SoftDent 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 SOFTDENT CONVERSION		
Test Data Conversion	FREE	
Final Data Conversion	\$800	
Conversion of Scanned Documents & 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	
<b>Other Products or Services to Consider</b>		
<ul style="list-style-type: none"> <li>- Digital imaging / x-ray software (a good option is a bridge to Kodak Trophy Enhanced)</li> <li>- Clearinghouse / NEA Fast Attach</li> <li>- Credit card processing</li> <li>- eServices</li> <li>- EHR Incentive Program</li> <li>- Automated reminders, online scheduling, etc.</li> <li>- Insurance benefit information</li> <li>- Other supplemental services</li> </ul>		
**** 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"> <li>• Patient info (name, contact info, age, status, gender, SSN, provider, etc.)</li> <li>• Patient insurance plans                             <ul style="list-style-type: none"> <li>- Bluebook fees (as hidden fee schedules)</li> <li>- Benefits</li> </ul> </li> <li>• Clinical notes (SoftDent notes)</li> <li>• Referrals</li> <li>• Recall (auto-generated)</li> </ul> <p>Appointment information</p> <ul style="list-style-type: none"> <li>• Appointments</li> <li>• Operatories</li> <li>• TeamTalk (as popups)</li> </ul>	<p>Chart information</p> <ul style="list-style-type: none"> <li>• Explosion codes</li> <li>• Treatment planned procedures</li> <li>• Completed procedures</li> <li>• Procedure notes</li> <li>• Perio chart (and bleeding)</li> <li>• Missing teeth</li> <li>• Medical alerts</li> <li>• Prescriptions</li> <li>• Medications</li> <li>• Disease / condition list</li> <li>• Disease to patient association</li> </ul>	<p>Account information</p> <ul style="list-style-type: none"> <li>• Beginning balances</li> <li>• Payments</li> <li>• Adjustments</li> <li>• Contacts (as commlog)</li> <li>• Procedures</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Providers</li> <li>• Employees</li> <li>• Employers</li> <li>• Fee schedules</li> <li>• Insurance carriers</li> <li>• Insurance plans</li> <li>• Lab cases / Laboratories</li> <li>• Pharmacies</li> <li>• Daily memos (as Tasks)</li> </ul>
What is NOT converted?		
<ul style="list-style-type: none"> <li>* <b>We do not convert x-rays.</b> 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 <a href="#">Program Bridges</a>.</li> <li>* <b>Missing appointments:</b> There may be missing appointments if converting from SoftDent version 15 or later.</li> <li>* <b>We do not convert claims or preauthorizations.</b> You must manually enter outstanding claims prior to billing in Open Dental.</li> <li>* <b>We do not convert forms, autonotes, treatment plans (not to be confused with treatment planned procedures), or custom recall intervals.</b></li> </ul>		

## Additional Information

**Guarantors and duplicate patients:** Because of how SoftDent assigns guarantors, there may be duplicate guarantor accounts in Open Dental. In Open Dental, the guarantor does not need to be separate from the patient account. Use the Conv – Duplicate Patients query to identify any duplicates, then merge them using Open Dental's merge tool. See [After a Conversion: Duplicate Patients](#).

**Fee Schedules:** After conversion, fee schedules and insurance plans may require significant cleanup. Because of how SoftDent creates fee schedules, a conversion may generate thousands of "Blue Book" fee schedules. The naming convention is: ("employer name, ' ', planid, ' ', groupnumber" plus an "\_Allowed" or "\_CoPay"). After conversion, if the fee schedules for a carrier don't already exist, you will need to create new fee schedules. Then use the converted employer fee schedules to manually copy the fees to the new carrier fee schedules and attach the new carrier fee schedules to insurance plans as needed.

**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 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](#).

**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 SoftDent 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 SoftDent to Open Dental. I also understand my practice's responsibilities after the final conversion.

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