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Change of Ownership: Setting Balances to Zero

Offices currently using Open Dental may need to zero out the account balances when a Change of Ownership has taken place. There is a fee of \$100 to modify the data within your database.

When to Fill Out This Form

- If you bought the practice and want the patient balances to be set to zero (i.e., A/R was not included in the sale).
- If a database split was completed to separate a provider from the practice, and you want to start patients with a zero balance on their accounts.
- If you have converted from another software and payments were not entered into your old software, so your aging balance is unreasonably large.

If A/R is Not Included in the Sale

This is a common scenario during a change of ownership, and usually means that patients owe the outgoing dentist money. The new owner needs to decide how to handle outstanding claims and patient balances. We recommend that all patient balances be set to zero.

If outgoing dentist and new dentist both use Open Dental:

We will make a backup of an existing Open Dental database, then set all patient balances and outstanding claim balances to zero. Patient charts will remain the same.

If converting from another software to Open Dental:

If you request this prior to the final conversion, the patient balances will be set to zero at the time of the conversion.

What is modified in the database?

- Adjustments are made in each account to bring the balance to zero as of the date the script is run.
- All outstanding claims are marked as received with a zero-dollar payment.
- All payment plans are deleted.

If A/R is Included in the Sale

When A/R is included in the sale, patient and outstanding claim balances do not need to be set to zero. You do not need to fill out this form or go through a conversion unless you are converting to Open Dental from another software.

Training and Cleanup

We offer several different types of training for customers on support. See [Training](#) for options.

If the new owner treated any patients before zeroing the A/R, you will need to clean up those patient accounts. Manually create adjustments to each account to accurately reflect the balance owed.

When running historical reports, do not include the day the A/R was set to zero because the reports will not be accurate. When running current reports, start the report date on the day after the A/R was set to zero.

For more information, see [Practice Changing Ownership](#).

Selling Provider's Name: _____

Individual Making Request: _____

Buying Provider's Name: _____

Contact Phone #: _____

Open Dental Version In Use: _____

Acknowledgements (Initial and Date):

- I am aware of what zeroing the A/R does to the Open Dental database. _____
- The new owner is aware of the training options available and of the cleanup steps involved with a zeroed database. _____
- I have contacted Open Dental support to transfer the ownership of my account and the new owner has received the Welcome to Open Dental email. _____

By signing

below, I acknowledge that the information provided is accurate and complete, and that I am authorized to approve and proceed with the request to modify the database.

Print Name, Job Title

Signature

Date

Page | 1 of 1

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