Database Merge Checklist

A database merge is performed when the data from two (or more) databases needs to be consolidated into a single database. Merges can be performed on multiple databases, including other software systems which can be converted to Open Dental.

How a database merge works:
- One database is marked as the "superior" database and all other databases are marked as "inferior".
- Sometimes there are values and settings that are ambiguous in both databases. In these cases, the "superior" database values are chosen over the equivalent values in the "inferior" database. Examples: practice address, the default provider for the practice, county names, and codes. More important information (e.g., patient accounts, charting) are never ambiguous, so the resulting merge will contain all critical data from each database.

Patient Numbers and Digital Imaging Software: During the merge, patients in the "inferior" database will receive new patient numbers to avoid duplication. If the digital imaging software uses patient number to open the patient's x-rays, you will need to renumber the patients in the imaging software.

After two or more databases are merged and the resulting database has been in use, it is not possible to reverse the merge and change the live database back to the original databases. In effect, database merges are permanent.

General Information

Practice Name: _____

Phone Number(s): _____

Staff Contact Name & Job Title: _____
Designate a staff member who will be in charge of the process for your office and our main point of contact

What version of Open Dental are you using? _____

Is there an IT professional helping you?   ◯ Yes   ◯ No

If yes, provide their name and phone number:_____

Database Information

Will multiple locations use the merged database?   ◯ Yes   ◯ No

If yes:

Do you understand the logistics involved in managing multiple locations within a single database?   ◯ Yes   ◯ No

How will users access the database? (e.g., VPN, RDP, etc)? _____

How do you want to merge the databases?   ◯ With Clinics   ◯ Without Clinics

What is the name of the superior database? _____

In which order should the databases be merged?
(e.g., 1=North, 2=South, 3=East, etc)   _____

Do any of the databases being merged need to have their patient balances zeroed out?   ◯ Yes   ◯ No

If yes, which database(s):_____

Scanned Documents & Digital Imaging (X-Rays)

Do the databases being merged currently use an OpenDentImages folder (AtoZ folder)? This is where scanned documents and images are stored.   ◯ Yes   ◯ No

If Yes, the conversion team will require access to all OpenDentImages folders for all databases to be merged, at the time of the merge.

Do you have a copy of all OpenDentImages folders to be merged?   ○ Yes   ○ No

*We recommend storing the files on an external drive or directory, etc.
They must be accessible at the location of the "superior" database.*

Digital Imaging Software (X-Rays)

Which digital imaging software does each database use? _____

Which digital imaging software will the merged database use? _____

Will you require a digital image renumbering?   ○   Yes   ○   No

Merge Process

Write the date each step is completed.

Date Completed

Open Dental ran a test merge and installed it on my server.   _____

I have reviewed and verified the merge data.   _____

Acknowledgments

☐ I understand there is a database merge fee. Any fee changes will be communicated in writing or via email. See **Conversions** for Merge fees.

☐ I have reviewed the test merge data and am satisfied with the results.

☐ I understand that after the final merge, I am responsible for checking all beginning account balances for accuracy.

☐ I understand that duplication may occur after a merge and that it is my responsibility to clean up duplicates (e.g., duplicate patients, fee schedules, providers, etc).

☐ I understand that patient numbers in the "inferior" database will be renumbered to avoid duplication. It is my responsibility to contact my digital imaging software and update patient numbers if needed.
Open Dental can provide a spreadsheet of all patients and their patient numbers in the merged database.

☐ I understand that the final merge will be a new database. After the final merge, I will only enter data in the new database. I will not enter new data in the test merge.

☐ I understand that after the final merge there will be no further enhancements to my data.

☐ I understand that I must contact any third-party vendors who may be affected by the merge (e.g., Scheduling services, Review generation, etc).

☐ I understand if any of the databases being merged use any of the following eServices, I'm responsible for contacting Open Dental support after the merge is complete to avoid service downtime, as billing will continue for all affected databases: DoseSpot eRx, Ensora eRx (formerly NewCrop eRx), ODTouch, eServices Bundle, eClipboard, eConfirmations, eReminders, General Messages, Automated Thank-You, Integrated Texting, Secure Email, ODMobile/Mobile Web, Patient Portal, Payment Portal, Message-To-Pay, Web Forms, Web Sched Recall, Web Sched New Patient, Web Sched Existing Patient, or Web Sched ASAP.

Open Dental recommends that you do not delete your old databases, so that they are available for reference.

By signing below, I acknowledge that the information provided is accurate and complete and that I am authorized to approve and proceed with the final merge.

_____   _____   _____

Print Name, Job Title   Signature   Date

_____   _____   _____

Practice Name   Doctor Name   Phone #