

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: Open Dental is only capable of converting x-rays from certain software applications. If your practice does not already have an x-ray software that has a compatible bridge with the Open Dental application, then you will need to choose an x-ray software that has a compatible bridge (if you want it bridged with Open Dental). If your radiograph sensors are using a compatible TWAIN driver, then the Open Dental application can be used to take and store radiographs (as another option). See [Sensor Compatibility](#) for more information.

Open Dental can also bridge to a number of third-party x-ray software. For a list of digital imaging programs we 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.



Additional Information (continued)

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.

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).
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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.

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

Practice Name

Doctor Name

Phone #