

STANDARD DATA CONVERSION MAPPING

System Source: CareStack

Extraction Process: Cloud data, images and documents will be provided via SFTP by the legacy PMS IT Team.

| Patient Demographics | Status |
|-------------------------------------|--------|
| Title | ✗ |
| First Name | ✓ |
| Last Name | ✓ |
| Middle Initial | ✓ |
| Marital Status | ✗ |
| Nickname | ✗ |
| Birthdate | ✓ |
| Full Address | ✓ |
| Patient ID | ✓ |
| Social Security Number | ✓ |
| Assigned Location | ✓ |
| Patient Comments – Alerts | ✓ |
| Gender Information | ✓ |
| Patient Status | ✓ |
| Home Phone | ✓ |
| Cell Phone | ✓ |
| Work Phone | ✓ |
| Email | ✓ |
| Relationships – Responsible Parties | ✓ |
| Patient Recalls | ✓ |

KEY

Data Field Converted: ✓

Data Field Not Converted, Not Available: ✗

| Responsible Party | Status |
|------------------------|--------|
| First Name | ✓ |
| Last Name | ✓ |
| Full Address | ✓ |
| Social Security Number | ✓ |
| Gender Information | ✓ |
| Birthdate | ✓ |
| Email | ✓ |
| Home Phone | ✓ |
| Cell Phone | ✓ |
| Work Phone | ✓ |
| Marital Status | ✗ |

| Person Contact Info | Status |
|---------------------|--------|
| Phone Numbers | ✓ |
| Email Addresses | ✓ |
| Physical Addresses | ✓ |

| Practice/Appointments | Status |
|-----------------------|--------|
| Schedule Views | ✓ |
| Location | ✓ |
| Appointments (Future) | ✓ |
| Appointments (Past) | ✓ |

| Ledger History | Status |
|---------------------|--------|
| Transaction History | ✗ |
| Contracts | ✗ |
| Aging | ✗ |
| AR Reports Match? | ✗ |

KEY

Data Field Converted:



Data Field Not Converted, Not Available:



| Treatment Card | Status |
|----------------|--------|
| TC Columns | ✗ |
| TC Entries | ✗ |
| TC Notes | ✗ |
| TC Plan | ✗ |

| Organization & Insurance | Status |
|-------------------------------------|--------|
| Employers (for Responsible Parties) | ✗ |
| Employer Addresses | ✗ |
| Employer Contact Info (Phone) | ✗ |
| Insurance Companies | ✗ |
| Insurance Addresses | ✗ |
| Insurance Contact Info (Phone) | ✗ |
| Insurance Comments | ✗ |
| Insurance Claims (ADA Claims) | ✗ |
| Patient Insurance Policies | ✗ |

| Organization | Status |
|---|--------|
| Employees (Orthodontists & Staff) | ✓ |
| Employee Addresses (Orthodontists & Staff) | ✗ |
| Employee Contact Info (Orthodontists & Staff) | ✗ |
| Employee To-Dos | ✗ |

| Questionnaires | Status |
|--|--------|
| Questionnaires (Setup) | ✗ |
| Question Categories (Setup) | ✗ |
| Questions | ✗ |
| Answers | ✗ |
| Historical Patient Questionnaires | ✗ |
| Historical Patient Questionnaire Answers | ✗ |

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Data Field Converted: ✓

Data Field Not Converted, Not Available: ✗

| Setup Types | Status |
|---|--------|
| Appointment Types | ✓ |
| Patient Statuses – Active and Inactive | ✓ |
| Relationship Types | ✓ |
| Employee Types | ✗ |
| Contact Info Types – Uses Cloud 9 Types | ✓ |
| Transaction Types | ✗ |

| Scanned Documents | Status |
|-------------------|--------|
| Scanned Documents | ✓ |

KEY

Data Field Converted: ✓

Data Field Not Converted, Not Available: ✗

NOTE: Historically, we have converted these items from this software. However, every version is different and some offices place information in different fields. We cannot guarantee that every field will convert until we see your trial data.