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STANDARD DATA CONVERSION MAPPING

System Source: **Open Dental**

Extraction Process: Local server-based data will be extracted by Planet DDS Conversion Technician.

Patient Demographics	Status
Title – Imports distinct titles from Patient and Referral	✔️
First Name	✔️
Last Name	✔️
Middle Initial	✔️
Nickname	❌
Birthdate	✔️
Full Address	✔️
Patient ID	✔️
Social Security Number	✔️
Assigned Location	✔️
Patient Comments – Alerts - Open Dental: Patient Notes, Appointment Notes, CommLog Notes, Medical Alerts, Ortho Notes, and Pop-ups	✔️
Gender Information	✔️
Patient Status – Imports additional status types from Open Dental: Patient, Nonpatient, Archived, Deleted, Inactive, Deceased, Prospective	✔️
Home Phone	✔️
Cell Phone	✔️
Work Phone	✔️
Email	✔️
Relationships – Responsible Parties, Siblings: Included in relationships, Professionals (Dr/Dentists): Imports all records in Open Dental Referrals, Other Referrals: Imports all records in Open Dental Referrals	✔️
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 — This conversion has a transaction history with a 0 balance. The transaction history is brought over for viewing but the AR will be 0.	✔
Contracts	✖
Aging	✖
AR Reports Match	✖

KEY   Data Field Converted: ✔   Data Field Not Converted, Not Available: ✖

Treatment Card	Status
TC Columns – Currently Text-Specific: Archwires, Elastics, Next Visit, O.H., Orthodontist Name, Assistant, Chart Notes, Last Prophy/Exam Date, Adjustment Number	✔
TC Entries – Currently Text-Specific: Archwires, Elastics, Next Visit, O.H., Orthodontist Name, Assistant, Chart Notes, Last Prophy/Exam Date, Adjustment Number	✔
TC Notes – Converts Notes from chart.	✔
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) – Only Providers	✔
Employee Addresses (Orthodontists/Staff) – Only Providers	✔
Employee Contact Info (Phone) – Only Providers	✔
Employee To-Dos	✘

Questionnaires	Status
Questionnaires (Setup)	✘
Question Categories (Setup)	✘
Questions	✘
Answers	✘
Historical Patient Questionnaires	✘
Historical Patient Answers	✘

KEY	Data Field Converted: ✔	Data Field Not Converted, Not Available: ✘

Setup Types	Status
Appointment Types	✔
Patient Statuses — Imports additional status types from Open Dental: Patient, Non-Patient, Archived, Deleted, Inactive, Deceased, Prospective	✔
Relationship Types — Open Dental relationship types from Patient Plan and Guardian tables	✔
Employee Types — Imports types: General, Hygienist, Endodontics, Pediatric, Perio, Prosth, Ortho, Denturist, Surgery, Assistant, LabTech, Pathology, PublicHealth , and Radiology	✔
Contact Info Types — Use Cloud 9 Phone Types	✔
Transaction Types — Open Dental Procedure codes, C9O default Charge type, General Payment and Adjustment 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.

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