

## STANDARD DATA CONVERSION MAPPING

# System Source: OrthoWare

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

| 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   | ✓      |
| Work Phone   | ✓      |
| Email  | ✓      |
| Relationships – Responsible Parties, Professionals (Dr/Dentists) | ✓      |
| Patient Recalls  | ✓      |

| Responsible Party | Status |
|-------------------|--------|
| First Name        | ✓      |
| Last Name         | ✓      |
| Full Address      | ✓      |

**KEY**

Data Field Converted: ✓ Data Field Not Converted, Not Available: ✗

| Responsible Party (continued) | Status |
|-------------------------------|--------|
| Cell Phone                    | ✓      |
| Social Security Number        | ✗      |
| Gender Information            | ✗      |
| Birthdate                     | ✗      |
| Email                         | ✓      |
| Home 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?   | ✓      |

\* This is a balance forward conversion. It retains the ledger history for viewing purposes only and cannot be queried for reporting. You must obtain all reports prior to conversion to Cloud 9 from your previous software.

**KEY**

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| Treatment Card                    | Status |
|-----------------------------------|--------|
| TC Columns – Uses Cloud 9 Default | ✓      |
| 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 (Phone)            | ✗      |
| Employee To-Dos                          | ✗      |

| Questionnaires  | Status |
|---|--------|
| Questionnaires (Setup)                                      | ✓      |
| Question Categories (Setup)                                 | ✗      |
| Questions – Patient Diagnosis only                          | ✓      |
| Answers   | ✗      |
| Historical Patient Questionnaires – Patient Diagnosis only  | ✓      |
| Historical Patient Answers – Patient Diagnostic Result only | ✓      |

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| Setup Types        | Status |
|--------------------|--------|
| Appointment Types  | ✓      |
| Patient Statuses   | ✓      |
| Relationship Types | ✓      |
| Employee Types     | ✗      |
| Contact Info Types | ✗      |
| Transaction Types  | ✓      |

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

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**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.