

Conversion to Open Dental

Conversions are our favorite things to do because it is so rewarding for us to hear the frequent, “Wow! I had no idea we could do that!” and “Wow! That really is a lot easier!”

Keep in mind that our enthusiasm for Open Dental is based upon the positive experiences our clients have, not because we receive anything from Open Dental. We are completely independent and all other companies. We receive no financial compensation from anyone other than our clients.

We have found the steps below to be useful during the conversion process:

1. Evaluate hardware:
 - a. As a general rule, if you old practice management runs on your existing hardware and network, Open Dental will run
 - b. Check hardware requirements here:
<http://www.opendental.com/manual/computerrequirements.html>
2. Trial Conversion & Install:
 - a. Before you “play” too much with trial conversion, let us show you how to run some useful reports for a “snapshot” of the practice
 - b. Check accuracy of converted data (open dental conversion checklist)
 - c. Dentist and staff should play with converted data
 - d. Walk a new patient through the first appointment process with Open Dental
3. Watch:
 - a. “Open Dental Basics” webinar (<http://www.opendental.com/manual/webinarbasics.html>)
 - i. Open Dental has many very useful webinars but this one is a “must” for doctor and all staff
 - b. “Modern Practice Management in 9 Minutes” (<https://youtu.be/Z8HatSunnOI>)
 - i. Our overview of some Open Dental attributes to consider
4. Pick you conversion date:
 - a. Need to schedule about one week ahead with Open Dental Conversions
 - b. Office computers will probably be done for 2-4 hours during final conversion
 - c. After conversion, no more transactions should be entered in old practice management software although that software will continue to run and be available exactly as it was before conversion
5. One week before conversion:
 - a. Schedule two one-hour sessions with Linda for key office staff on Open Dental
 - b. Check with Linda to be sure she will be available “on-call” for the first day using Open Dental so she can answer critical questions / solve any problems



Conversion to Open Dental

6. First day after conversion:
 - a. Expect some questions
 - b. Both Linda and Open Dental should be available

7. First week after conversion:
 - a. Run Open Dental management reports
 - b. Determine which areas of practice need most improvement
 - c. Establish training and implementation plans for Open Dental
 - i. Our New Patient Flowsheet may be helpful
 - d. Implement eclaims, statements and eligibility through DentalXChange (<http://www.dentalxchange.com/home/Home>)

8. First month after conversion:
 - a. Monitor critical indicators; should see immediate increase in all of them
 - b. Repeat all steps in #7 above

9. Each month after conversion:
 - a. Evaluate potentially useful supplemental software and services
 - i. Payment Options (<http://www.todaysdentalconsulting.com/paymentoptions/>)
 - ii. Call tracking and insurance eligibility and benefits (<http://hrdsq.com/>)
 - iii. Repeat all steps in #9 above

