

STANDARD DATA CONVERSION MAPPING

System Source: Dentrix Enterprise

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

Patient Demographics	Status
Title	✗
First Name	✓
Last Name	✓
Middle Initial	✓
Nickname	✓
Birthdate	✓
Full Address	✓
Patient ID	✓
Social Security Number	✓
Assigned Location	✓
Patient Comments – Alerts	✓
Gender Information	✓
Patient Status – Active and Inactive Only	✓
Home Phone	✓
Cell Phone	✓
Work Phone	✓
Email	✓
Relationships – Responsible Parties, Siblings (Converted as Family Members), Professionals (Dr/Dentists), Other Referrals.	✓
Patient Recalls	✓

Responsible Party	Status
First Name	✓
Last Name	✓

KEY

Data Field Converted: ✓

Data Field Not Converted, Not Available: ✗

Responsible Party (continued)	Status
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 – Use Cloud 9 Defaults	✗
TC Entries – Based on Appointments and Clinical Notes	✓
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)	✗

KEY

Data Field Converted: ✓

Data Field Not Converted, Not Available: ✗

Questionnaires (continued)	Status
Questions	✗
Answers	✗
Historical Patient Questionnaires	✗
Historical Patient Questionnaire Answers	✗

Setup Types	Status
Appointment Types	✓
Patient Statuses - Only Active & Inactive Patient Status	✓
Relationship Types - Default Cloud 9 Relationship Types	✗
Employee Types - Default Cloud9 Employee Types	✗
Contact Info Types - Default Cloud9 Contact Info Types	✗
Transaction Types	✓

Scanned Documents	Status
Scanned Documents - Scanned Documents must be decrypted by Dentrix Enterprise before we can convert.	✓

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.