

STANDARD DATA CONVERSION MAPPING

System Source: Orthotrac

Extraction Process: Local server-based data will be extracted by Planet DDS Conversion Technician; 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, Siblings, 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	✓
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 - Live Ledger Conversion	Status
Transaction History	✓
Contracts	✓
Aging	✓
AR Reports Match?	✓
AR Difference Report – Available based on date of data pull.	✓

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 (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	✓
Relationship Types	✓
Employee Types	✓
Contact Info 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.