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STANDARD DATA CONVERSION MAPPING

System Source: **TOPS**

Extraction Process: All 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	✖
Nickname	✖
Birthdate	✔
Full Address	✔
Patient ID	✔
Social Security Number	✔
Assigned Location	✔
Patient Comments – Alerts – Patient Comments are converted but are not set to prompt/alert.	✔
Gender Information	✔
Patient Status	✔
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	✔
Contracts – Insurance contracts are put as one (1) charge and the total amount on the first insurance tied to the patient. The Tops data makes it impossible to tie the contract to specific insurance or break out payments and charges.	✔
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. Insurance contract charges/payments may be shown on the responsible party.

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

Ledger History (Continued)	Status
AR Difference Report – Cloud 9 Conversion can provide an AR difference report based on the converted data.	✔
Legacy Payment Processor Tokens	✖

Treatment Card	Status
TC Columns – Treatment Card entries will be converted into the default Historical Cloud 9 Treatment Card and columns.	✔
TC Entries	✔
TC Notes	✔
TC Plan – Treatment plan text is currently converted into treatment card plan notes and steps (to the right of the Steps field in the Treatment Plan tab of the Treatment Card).	✔

Organization & Insurance	Status
Employers (for Responsible Parties)	✔
Employer Addresses	✖
Employer Contact Info (Phone)	✖
Insurance Companies	✔
Insurance Addresses	✔
Insurance Contact Info (Phone)	✖
Insurance Comments – Comments are converted into organization insurance plan comments. The comment will include (if available) lifetime maximum benefit amount, payment percentage, how down/monthly payment is determined, dependent age limit, deductible amount, and employer policy notes.	✔
Insurance Claims (ADA Claims)	✖
Patient Insurance Policies	✔

Organization	Status
Employees (Orthodontists & Staff)	✔
Employee Addresses (Orthodontists & Staff)	✖
Employee Contact Info (Orthodontists & Staff)	✖
Employee To-Dos	✖

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

Questionnaires	Status
Questionnaires (Setup) – Conversion creates a default Exam questionnaire.	
Question Categories (Setup)	
Questions – For Tops questionnaires, we get Exam information only.	✔️
Answers	✔️
Historical Patient Questionnaires – Only patients with Exam info are linked to the default Exam questionnaire.	✔️
Historical Patient Questionnaire Answers	✔️

Setup Types	Status
Appointment Types	✔️
Patient Statuses	✔️
Relationship Types	✔️
Employee Types	✖️
Contact Info Types	✔️
Transaction Types	✔️

Scanned Documents	Status
Letters, Letter Templates, and Emails	✖️
Scanned Documents: Only scanned documents that are stored in the iPortfolio folder will 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.

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