planet DDS | cloud 9

STANDARD DATA CONVERSION MAPPING

System Source: **Focus**

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	✔️
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 (Converted as Family Members), Professionals (Dr/Dentists), Other Referrals.	✔️
Patient Recalls	✔️

Responsible Party	Status
First Name	✔
Last Name	✔
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	✔
Aging	✔
AR Reports Match? – AR difference report is available based on date of data pull.	✔
Legacy Payment Processor Tokens	✔

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

Treatment Card	Status
TC Columns	✔️
TC Entries	✔️
TC Notes	✔️
TC Plan – Treatment plan text is currently converted into treatment card plan notes (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	✖️
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)	✖️
Questions	✔️
Answers	✔️
Historical Patient Questionnaires	✖️
Historical Patient Questionnaire 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.