

STANDARD DATA CONVERSION MAPPING

System Source: CareStack

Extraction Process: 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	✓
Patient Recalls	✗

KEY

Data Field Converted: ✓

Data Field Not Converted, Not Available: ✗

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?	✗
Legacy Payment Processor Tokens	✗

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 (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 – Active and Inactive	✓
Relationship Types	✓
Employee Types	✗
Contact Info Types – Uses Cloud 9 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.