Dental Software Switching Checklist

Run the reports before you switch. Ask every vendor the same questions.

PRACTICE NAME

CURRENT SYSTEM

VENDOR

DATE

1 · REPORTS TO RUN BEFORE YOU SWITCH

From your current system, while you still have full access. Save each one with the date you ran it.

- [ ] Patient list with contact details
  Active and inactive patients
- [ ] Accounts receivable aging
  Including credit balances
- [ ] Outstanding insurance claims
- [ ] Payment plans
  With the balance left on each
- [ ] Future appointments
- [ ] Unscheduled and pending treatment plans
- [ ] Recall and hygiene due list
- [ ] Fee schedules
- [ ] Insurance plans and their fee schedules
- [ ] Production and collections for the last closed month
- [ ] A count of perio charts, images and documents
  To check against once the data has moved

NOTES

2 · QUESTIONS TO ASK ANY VENDOR

Ask each vendor the same questions and write the answers down. One copy per vendor.

- [ ] Which data converts?
  - [ ] Ledger history
  - [ ] Clinical notes
  - [ ] Perio charts
  - [ ] Images
  - [ ] Documents
- [ ] Who performs the conversion, and how long does it take?
- [ ] What does the conversion cost?
- [ ] How is the converted data checked against our old system?
- [ ] How much downtime should we expect?
- [ ] What training is included, and for which roles?
- [ ] What are the support hours, and how do we reach support?
- [ ] How long is the contract?
- [ ] How do we get our data out if we leave?