TDO Data Import (PBS & EndoVision)

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Overview

We have the ability to import data from PBS Endo® (Essentials and Enterprise) and EndoVision®.
Any other softwares will need a data import investigation to see what fields, if any, can be imported.

For pricing, please contact sales@tdo4endo.com.

Fields That Can Be Imported

Duplicate & Inaccurate Data

If your current database has any duplicates or inaccurate data, that data will also be duplicated in the TDO database. This is applicable to all fields imported.

The following fields are eligible to be imported. Fields imported can be limited upon request.

- **Practice Doctors:** Full name, tax ID, license #, email
- **Referring Doctors:** Full name, address, phone, cell, fax, email
- **Patients:** Full name, salutation, address, phone (home/work/cell), sex, birth date, referring doctor, SSN, nickname, chart #
- **Clinical Notes:** Text-based notes
- **Digital images saved within the PMS:** Images/xrays (JPG only) saved within the PMS patient folder will be available in the TDO patient folder. Images/xrays saved externally outside the program cannot be imported.
  Images that cannot be imported directly can easily be added to TDO by dragging or uploading into the Acquire window to save.
- **Documents:** Documents saved within the PMS patient folder will be available in the TDO patient folder. Externally saved documents cannot be imported.
- **Appointments:** Patient, start and end time, notes. To avoid duplicates, appointments will be imported the day before going live. Additional fields not imported need to be entered manually before seeing patients.
- **Insurance Carriers:** Insurance company name, address, phone. Will require additional adjustments adding Payer ID and removing unneeded insurance profiles. Patient insurance settings cannot be imported.
- **Ledger:** A reference copy of the patient ledger will be saved to the patient chart as a CSV/Excel file. Due to the inherent riskiness and complexity of migrating financials, we do not do a direct ledger import.

Data that can't be imported:

- **Images saved in Dexis, Schick, Carestream, etc.:** Images need to be saved directly in the PMS for us to import.
- **Fees:** Will need to be added manually, UCR and contracted rates.
- **Patient insurance settings:** The office will need to manually select the patient's insurance and will not import active claims.
- **CBCTs:** CBCTs cannot be imported

Import Process:

- **Install TDO:** TDO needs to be fully installed before data is imported.
- **Import 1:** The bulk of the data is transferred to TDO, saving on setup time and allowing the office to train with their data.
- **Training:** The office completes setup items and trains on TDO.
- **Import 2:** The final import will pull any new data that was added since the first import. This is done the day before you go live. Appointments will need some final adjustments before seeing patients.
- **Go Live:** The office goes live right after the second import with their data in TDO.

Reference

To request more information on data import in TDO, please check our website at: Data Import

Online URL: https://kb.tdo4endo.com/article.php?id=679