



Dental Software Implementation Checklist 2026: Data Migration & Training

Pre-Implementation Planning & Software Selection

Defining practice requirements, evaluating vendor capabilities, and establishing a project timeline and budget.

Project Start Date

Project Lead Name

Required Software Features

- ☐ Cloud-Based Access
- ☐ Integrated Digital Imaging
- ☐ Automated Patient Reminders
- ☐ E-Prescribing Capabilities
- ☐ Advanced Reporting & Analytics

Software Selection Criteria & Justification

Write something...

Estimated Software Budget (\$)

Enter a number...

Software Vendor Comparison Sheet

 Upload File

Final Approval Signature



Data Audit & Cleaning

Reviewing legacy patient records, verifying accuracy of existing contact information, and purging duplicate or obsolete files.

Audit Completion Status

- ☐ In Progress
- ☐ Completed
- ☐

Total Records Audited

Enter a number...

Data Cleanup Tasks Performed

- ☐ Removing Duplicate Patient Profiles
- ☐ Updating Expired Contact Information
- ☐ Verifying Insurance Details
- ☐ Standardizing Address Formats
- ☐ Archiving Inactive Records

Data Discrepancies Noted

Write something...

Audit Completion Date

Enter date...

Auditor Verification

Data Migration & Mapping

Mapping data fields from the old system to the new software, managing file transfers, and validating integrity during the import process.

Data Migration Start Date

Enter date...

Source System Type

- ☐ Legacy Desktop Software
- ☐ Cloud-Based Platform
- ☐

Data Modules to Migrate

- ☐ Patient Demographics
- ☐ Clinical Notes & Charting
- ☐ Treatment History
- ☐ Billing & Ledger Data
- ☐ Imaging & X-Rays

Data Mapping Discrepancies & Notes

Write something...

Data Migration Validation Report

 Upload File

Data Integrity Verification Sign-off

Hardware & Infrastructure Readiness

Ensuring computers, scanners,-peripherals, and network bandwidth meet the technical specifications for the new software.

Required Hardware Verified

- ☐ Workstations/Computers
- ☐
- ☐ Intraoral Camera Connectivity
- ☐ Network/Wi-Fi Stability
- ☐ Backup Server/Cloud Storage Access

Network Speed Status

- ☐ Optimal
- ☐ Sufficient (No Upgrades Needed)
- ☐ Insufficient (Upgrade Required)

Hardware Upgrade Notes

Write something...

Hardware Audit Completion Date

Enter date...

IT Coordinator Approval

System Configuration & Customization

Setting up practice-specific templates, appointment types, insurance plans, and automated notification workflows.

Appointment Template Setup Status

- ☐ Not Started
- ☐ In Progress
- ☐ Completed

Configured Modules

- ☐ Patient Scheduling
- ☐ Clinical Charting
- ☐ Billing & Claims
- ☐ Inventory Management
- ☐ Imaging Integration
- ☐ Patient Communication/SMS

Customized Workflow Notes

Write something...

Configuration Completion Date

Enter date...

Updated Workflow Documentation



Upload File

IT Lead/Manager Approval

Staff Training & Competency Assessment

Conducting role-specific training sessions for front-desk and clinical staff, and verifying proficiency in core software modules.

Training Modules Completed

- ☐ Patient Scheduling & Check-in
- ☐ Insurance Verification & Claims Entry
- ☐ Digital Imaging & X-ray Integration
- ☐ Clinical Charting & Notes
- ☐ Billing & Payment Processing

Training Completion Date

Enter date...

Staff Member Competency Level

- ☐ Beginner (Requires Supervision)
- ☐ Intermediate (Can Work Independently)
- ☐ Advanced (Can Train Others)

Competency Notes & Areas for Improvement

Write something...

Staff Member Acknowledgment

Integration & Peripheral Connectivity

Testing connections between the dental software and external tools like digital X-rays, intraoral cameras, and payment processors.

Connected Peripherals

- ☐ Digital X-Ray Sensors
- ☐ Intraoral Cameras
- ☐ Digital Sensor Software
- ☐ Payment Terminals/Card Readers
- ☐ Document Scanners
- ☐ Dental 3D/CBCT Imaging
- ☐ Digital Impression Scanners

Peripheral Driver Version

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Integration Status

- ☐ Fully Functional
- ☐ Testing in Progress
- ☐ Failed/Requires Troubleshooting

Connectivity Troubleshooting Notes

Write something...

Integration Completion Date

Enter date...

IT Lead Verification

Post-Go-Live Support & Monitoring

Establishing a period of intensive oversight, troubleshooting immediate bugs, and scheduling follow-up vendor support.

Go-Live Date

Software Vendor Support Tier

- ☐ Standard Support
- ☐ Premium/Priority Support
- ☐ On-site Support

Identified Post-Launch Issues

- ☐ Data Discrepancies
- ☐ Hardware Connectivity
- ☐ User Access/Permission Errors
- ☐ Workflow Inefficiency
- ☐ Integration/Plugin Failure

Issue Resolution Log & Notes

Write something...

IT Manager/Implementation Lead Sign-off

Documentation & Standard Operating Procedures (SOPs)

Updating the practice manual with new workflows, login protocols, and error-handling instructions for the new system.

Updated Workflow Title

Write something...

Step-by-Step Procedure Details

Write something...

Applicable Departments

- ☐ Front Desk / Administration
- ☐ Clinical / Dental Assistants
- ☐ Dental Hygienists
- ☐ Billing / Office Manager
- ☐ Dentist / Owner

Upload New SOP Document

 Upload File

Document Effective Date

Enter date...

Manager Approval Signature

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✓ Finish

 Generate Sample Report