General Setup after a Conversion

Use this checklist after a final conversion to set up and clean up your new Open Dental database.

We provide several queries to help you clean up and verify your converted data. They are located in your Query Favorites, preceded by 'Conv'. These queries are referred to in the steps below.

- **Future Apts by Operatory:** Lists appointments in an Unassigned or Extra operatory due to overlapping.
- **Patients in Unassigned Clinic:** Lists any patients not assigned to a clinic (only if using Clinics).
- **Pending Ins Flag by Date:** Lists all patients who need insurance verified, for a date range.
- **Perio Patients:** Lists all patients set as a Perio patient for recall.
- **Possible Duplicate Patients:** Lists any remaining duplicate patients based on last/first name.
- **Accounts Needing a Non-Income Transfer:** Identify families that need income transfer cleanup (balance = 0)

BEFORE YOU BEGIN		**Web Manual Link**	✓
Check Account Balances	Compare the total account balance in your old software with the total account balance in Open Dental's final test database. **They should match.** To find the account balance in Open Dental, run the Aging of A/R report and include negative balances. If payment plans were converted, also run the Payment Plan report (don't limit by date range). Combine report total amounts. Keep a copy of reports for your records.	Aging of A/R report Payment Plan report	
HIPAA	Ensure computer systems are HIPAA-compliant.	Security Issues	
INITIAL SETUP			
General Practice Information	Turn on extra features (e.g. Medical, EHR, Clinics). If using EHR, contact Open Dental to sign an EHR Contract.	Show Features	
	On each workstation, verify that bridges to digital imaging software work. Set up bridges to other software as needed (e.g. credit card processing, reminders, insurance benefit information).	Program Bridges	
	If using clinics, verify clinic names, addresses, etc.	Clinic Setup	
	Verify practice name, address, etc.	Practice Setup	
	Verify provider names, IDs, appointment colors, default fee schedules. Move or reassign patients if needed.	Provider List	
	Verify employee names; add new or hide past employees.	Employee List	
	Check the setup of operatories (assign dentists, hygienists, clinics).	Operatory Setup	
	Set up provider schedules. This affects open/close times in the Appointment schedule.	Schedule Setup	
	In the Procedure Code List: ☐ Verify fee schedules and all fees in each. ☐ Verify that hygiene procedure codes are marked as "Is Hygiene Procedure". ☐ Add alternate codes, substitution codes, or non-standard codes (e.g. for merchandise).	Procedure Code List	
	Recall: ☐ Run the **Conv-Perio Patients** query to see which patients are set to Perio. Change recall as needed. ☐ Verify default recall types (**This is advanced. Do not alter unless you understand what you are doing**). ☐ Set defaults for the recall list.	Perio vs Prophy Recall Types Recall List Defaults	
	Set up appointment schedule views for different situations (e.g. HIPAA view). Choose operatories, set where and what information shows.	Appointment View Setup	

INITIAL SETUP CONTINUED		Web Manual Link	✓
	Customize options that show in various windows (e.g. payment types, procedures added to appointments (appt proc quick add), billing options).	Definition Setup	
	Printing and Scanning: ☐ Set default printers. ☐ Set default scanning options.	Printer Setup Imaging Setup	
	Define pay periods and rules so employees can use the Time Clock.	Time Card Setup	
INSURANCE			
Verify Insurance	Run the **Conv-Pending Ins Flag by Date** query. Use the results to verify insurance benefit information patient by patient. We recommend working on patients with upcoming appointments first. As you go, uncheck the Pending checkbox on the Edit Insurance Plan window. For efficiency, check patient family members while there.	Verify Insurance	
APPOINTMENTS			
Hygiene Appointments	Contact Open Dental to run a hygiene query. Future hygiene appointments may have the hygienist assigned as the primary provider. Once providers and operatories are setup, we can automatically change these appointments to the dentist and hygienist assigned to the appointment's operatory.		
Overlapping Appointments	Run the **Conv-Future Apts by Operatory** query to find patients in an 'Unassigned or 'Extra' operatory. Move those patients to the correct operatory then hide the unassigned/extra operatory.	Clean up Overlapping Appointments	
Future Appointments	Check future appointments and ensure the correct treatment planned procedures are attached.	Appointment Edit	
CLAIMS AND BILLING			
Claims / Clearinghouse	☐ Create outstanding claims that were not converted (use the outstanding insurance report from your old software). ☐ For printed claims, set the default claim form. ☐ For e-claims, check that e-claims send successfully to the clearinghouse.	How to Handle Claims Claim Form Setup Send Claims	
Billing	Follow your plan for billing. **Option 1:** If you are incrementally verifying insurance and creating claims, only send statements to families who have claims entered. **Option 2:** Once all insurance is verified and all claims are entered, run a Billing List to generate statements.	Billing	
CHARTING			
Procedure Buttons	Set up buttons that allow quick entry of commonly used procedures.	Procedure Button Setup	
Auto Codes	Verify automated codes that validate procedure codes. (**This is advanced. Do not alter unless you understand what you are doing**).	Auto Codes	
Auto Notes	Create templates for complex notes entered frequently (e.g. exams, root canals, materials, post op instructions).	Auto Note Setup	
Procedure Notes	Enter default notes that automatically copy to completed procedures.	Procedure Code Edit	

Preferences & Customization		Web Manual Link	✓
By Module	Set default preferences for each module.	Module Preferences	
Miscellaneous	Set the title bar, language options, and task list defaults.	Miscellaneous Setup	
Colors	Define custom background, text, and notification colors.	Definition Setup	
Clean Up			
Master Lists	Clean up master lists (review, remove duplicates/combine, enter new). ☐ Employers ☐ Insurance Carriers: Make sure to review electronic IDs. ☐ Insurance Plans: You may also set benefit information in the most common plans. ☐ Allergies ☐ Problems ☐ Medications ☐ Referrals (to and from) ☐ Dental labs you send Lab Cases to ☐ If you will write paper prescriptions: - Create templates for commonly prescribed medications - Maintain a master list of pharmacies.	Employer List Insurance Carrier List Insurance Plan List Allergy List Problem List Medication List Referral List Dental Laboratories Prescription Setup Pharmacy List	
Fix Duplicate Patients	Run the **Conv-Possible Duplicate Patients** query to identify duplicate patients, then merge them.	Duplicate Patients	
Income Transfers	Run the query **Conv–Accounts Needing a Non-Income Transfer** to determine which family balances equal 0, then clean up income transfers.	Income Transfers	
Patients not Assigned to a Clinics	If using clinics, run the **Conv-Patients in Unassigned Clinic** query to find patients not assigned to a clinic. Assign them to the correct clinic.	Unassigned Clinics	

For more guidance on using Open Dental, see Using Open Dental After a Conversion.
For a complete list of all Open Dental setup options, see Open Dental Setup.