

## General Setup of a Blank Database

Use this checklist after installing the full version of Open Dental as a quick start guide to setting up your database.

BEFORE YOU BEGIN		Web Manual Link	✓
<b>HIPAA</b>	Ensure computer systems are HIPAA-compliant.	<a href="#">Security Issues</a>	
<b>Data Paths</b>	Make sure the paths to Open Dental folders work on all computers.	<a href="#">Data Path Setup</a>	
<b>Bridges:</b> - Digital Imaging - Other	Bridges need to be set up on the server and workstations. <input type="checkbox"/> Select the <b>digital imaging software</b> you will bridge to. <input type="checkbox"/> Determine what <b>other third party software</b> you will bridge to (e.g. credit card processing, reminders, insurance benefit info).	<a href="#">Program Bridges</a> <a href="#">Supplemental Services &amp; Products</a>	
<b>Clearinghouse</b>	Select the clearinghouse you will send e-claims to, then set it up.	<a href="#">E-Claims</a>	
INITIAL SETUP			
<b>General Practice Information</b>	Turn on extra features (e.g. Clinics, Medical, EHR). If using EHR, contact Open Dental to sign an EHR Contract.	<a href="#">Show Features</a>	
	If using clinics, enter clinic names, addresses, defaults.	<a href="#">Clinic Setup</a>	
	Enter practice name, address, default providers.	<a href="#">Practice Setup</a>	
	Set up dentists and hygienists.	<a href="#">Provider List</a>	
	Enter employee names.	<a href="#">Employee List</a>	
	Set up operatories (assign dentists, hygienists, clinics).	<a href="#">Operatory Setup</a>	
	Set up provider schedules. This affects open/close times in the Appointment schedule.	<a href="#">Schedule Setup</a>	
	In the Procedure Code List: <input type="checkbox"/> Create fee schedules. <input type="checkbox"/> Enter fees. <input type="checkbox"/> Mark hygiene procedure codes as "Is Hygiene Procedure". <input type="checkbox"/> Add alternate codes, substitution codes, or non-standard codes (e.g. for merchandise).	<a href="#">Procedure Code List</a>	
	Customize options that show in various windows (e.g. payment types, procedures added to appointments (appt proc quick add), billing options).	<a href="#">Definition Setup</a>	
	Printing and Scanning: <input type="checkbox"/> Set default printers. <input type="checkbox"/> Set default scanning options.	<a href="#">Printer Setup</a> <a href="#">Imaging Setup</a>	
Define pay periods and rules so employees can use the Time Clock.	<a href="#">Time Card Setup</a>		
APPOINTMENTS			
<b>Views</b>	Set up appointment schedule views for different situations (e.g. HIPAA view). Choose operatories, set where and what information shows.	<a href="#">Appointment View Setup</a>	
<b>Recall</b>	Verify default recall types. ( <b>This is advanced. Do not alter unless you understand what you are doing.</b> )	<a href="#">Recall Types</a>	
	Set defaults for the recall list.	<a href="#">Recall List Defaults</a>	

CHARTING		Web Manual Links	✓
<b>Procedure Buttons</b>	Set up buttons that allow quick entry of commonly used procedures.	<a href="#">Procedure Button Setup</a>	
<b>Auto Codes</b>	Verify automated codes that validate procedure codes. <b>(This is advanced. Do not alter unless you understand what you are doing).</b>	<a href="#">Auto Codes</a>	
<b>Auto Notes</b>	Create templates for frequently entered, complex notes (e.g. exams, root canals, materials, post op instructions).	<a href="#">Auto Note Setup</a>	
<b>Procedure Notes</b>	Enter default notes that automatically copy to completed procedures.	<a href="#">Procedure Notes</a>	
PREFERENCES & CUSTOMIZATION			
<b>By Module</b>	Set default preferences for each module.	<a href="#">Module Preferences</a>	
<b>Miscellaneous</b>	Set the title bar, language options, and task list defaults.	<a href="#">Miscellaneous Setup</a>	
<b>Claim Forms</b>	For printed claims, set the default claim form.	<a href="#">Claim Form Setup</a>	
<b>Colors</b>	Define custom background, text, and notification colors.	<a href="#">Definition Setup</a>	
OPTIONAL			
<b>Master Lists</b>	<p>Many of these lists will auto-populate as you enter data. You can also directly enter data in each list.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Employers</li> <li><input type="checkbox"/> Insurance Carriers</li> <li><input type="checkbox"/> Insurance Plans</li> <li><input type="checkbox"/> Allergies</li> <li><input type="checkbox"/> Problems</li> <li><input type="checkbox"/> Medications</li> <li><input type="checkbox"/> Referrals (to and from)</li> <li><input type="checkbox"/> Dental labs you send Lab Cases to</li> <li><input type="checkbox"/> For paper prescriptions: <ul style="list-style-type: none"> <li>- Create templates for commonly prescribed medications</li> <li>- Pharmacies.</li> </ul> </li> </ul>	<a href="#">Employer List</a> <a href="#">Insurance Carrier List</a> <a href="#">Insurance Plan List</a> <a href="#">Allergy List</a> <a href="#">Problem List</a> <a href="#">Medication List</a> <a href="#">Referral List</a> <a href="#">Dental Laboratories</a> <a href="#">Prescription Setup</a> <a href="#">Pharmacy List</a>	
<b>Communication</b>	Set up eServices. <ul style="list-style-type: none"> <li><input type="checkbox"/> Patient Portal</li> <li><input type="checkbox"/> eReminders and eConfirmations</li> <li><input type="checkbox"/> Mobile Web</li> <li><input type="checkbox"/> Web Sched</li> <li><input type="checkbox"/> Web Forms</li> </ul>	<a href="#">eServices</a>	
	Set up E-mail.	<a href="#">E-mail</a>	
	Set up messaging for inter-office communication.	<a href="#">Messaging</a>	
	Create task lists and inboxes	<a href="#">Tasks and Task Lists</a>	
<b>Forms, letters, labels</b>	Customize templates for forms, letters, labels, and statements. These templates can be used to gather and send information electronically	<a href="#">Sheets</a>	

For more guidance on using Open Dental, see [Using Open Dental \(Blank Database\)](#).  
 For a complete list of all Open Dental setup options, see [Open Dental Setup](#).