# Opendental software

## **Customer Onboarding Checklist**

We understand that choosing a new practice management software is a big decision with many considerations and we are here to make this process as seamless as possible. While navigating through the Conversion process you will have access to our team of Onboarding Coordinators who are happy to assist and answer any questions you may have. Please don't hesitate to reach out if you would like to review your questions with an Onboarding Coordinator.

Onboarding Coordinators (503)363-5432 new.customers@opendental.com

#### Before the Test Conversion

- Review Computer Requirements and Install the Trial Version of Open Dental.
- Sign and return your <u>Data Access Permission Form</u> Please return the completed form to <u>conversions@opendental.com</u> prior to your Test Conversion appointment.
- Open Dental Demo Our friendly and experienced support technicians are available to provide a demonstration of the software and answer any questions you may have.
- Request a backup or copy of your data from your current practice management software If your software requires this, you will be provided instructions from our Conversions Team at the time of scheduling your Test Conversion.

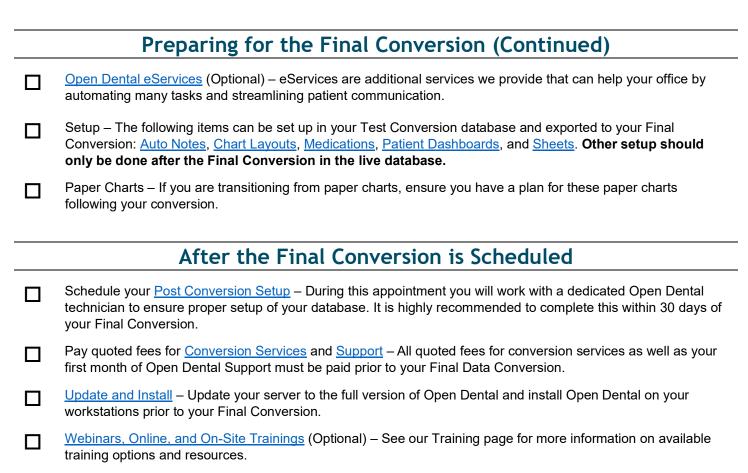
### After the Test Conversion

- Review the Test Conversion database thoroughly and completely Complete your <u>Pre-Data Conversion</u> <u>Checklist</u> and the Conversion Packet sent to your office.
- Open Dental Cloud (Optional) If you are interested in Open Dental Cloud, please complete the Open Dental Cloud Questionnaire to determine if Open Dental Cloud is a good fit for your practice. This is required for offices planning to use cloud.
- <u>Test bridges</u> Test the bridges and program links in your Test Conversion to ensure they are compatible and functioning properly before scheduling your Final Conversion.

#### Preparing for the Final Conversion

- Clearinghouse for eClaims Open Dental does not have a built-in Clearinghouse so you will need to sign up with an external Clearinghouse after your conversion.
- Set Up Integrated Credit Card Payments (Optional) Prior to using an integrated payment processor with Open Dental, your practice must sign up with a merchant.
- Review our Vendors Supplemental Services and Products List (Optional) Review our list of products and services provided by third-party companies that can enhance your Open Dental experience.

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Offices Migrating to <u>Open Dental Cloud</u> – If your office will be using Open Dental Cloud review the <u>necessary</u> requirements and process.

# After the Final Conversion is Complete

- Using Your Converted Database See our manual page for resources and instructions to help you and your office begin using Open Dental.
- Post Conversion Checklist In addition to your Post Conversion Setup appointment, our Post Conversion Checklist has a list of setup and cleanup to help guide you through beginning to use Open Dental.
- Open Dental Support Our support technicians are available via phone, chat, and email for assistance. We are always happy to support you and your staff!