

## Blank Database Setup

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

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### Before You Start

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- Data Paths:** Make sure the paths to Open Dental folders work on all computers.
- Program Bridges:** Determine what third-party software you will bridge to (e.g., payment processor, digital imaging, etc).
- Clearinghouse:** Select the clearinghouse you will use to send e-claims, then set it up.

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### Initial Setup

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- Show Features:** Enable or disable features (e.g., Medicaid, Public Health, Clinics etc) as needed by your practice.
- Providers:** Set up dentists and hygienists.
- Practice Setup:** Enter the practice name, address, phone, number, default provider, etc.
- Clinic Setup:** If using Clinics, add the clinic names, addresses, and defaults.
- Operatory Setup:** Create and set up operatories (assign providers, clinics, etc)
- Appointment Views:** Set up views for the Appointments Module.
- Employee Setup:** If using the Time Clock, enter employee information.
- Security:** Create users, assign user groups, set user permissions, restrict access, create and change password requirements.
- Schedule Setup:** Set up provider schedules. This affects open/close time in the Appointments Module.
- Time Card Setup:** Define pay periods and rules, so employees can use the Time Clock.
- Printer Setup:** On each workstation, set up default printers.
- Imaging Setup:** Set up default scanning options

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### Fees Setup

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- Fee Schedules:** Create fee schedules for office fees, insurance fees, etc.
- Procedure Code List:** Enter fees for procedure codes for various fee schedules.
- Edit Procedure Codes:** Mark hygiene procedures as "Is Hygiene procedure", add default notes, etc.
- Add Procedure Codes:** Add alternate codes, substitution codes, or non-standard codes (e.g., for merchandise).

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## Appointments Setup

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- [Recall Types](#): Verify default recall types (procedures on appointment, triggers, etc.) (**Advanced**)
- [Recall List Defaults](#): Set defaults for the recall list.

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## Chart Setup

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- [Procedure Buttons](#): Set up buttons for quick entry of commonly-used procedures.
- [Auto Notes](#): Create templates for frequently-entered, complex notes (e.g., exams, root canal, materials, post-op instructions, etc.)

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## Preferences & Customization

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- [Preferences](#): Set default preferences for modules and other miscellaneous settings.
- [Claim Forms](#): For printed claims, set the default claim form. (**Advanced**)
- [Definitions](#): Customize various options in the program (e.g., payment types, appt proc quick add, billing types, colors, etc.).

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## Optional Setup

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**Master Lists**: Many of the following lists will auto-populate as you enter data for the first time. You can also enter data directly into each list.

- [Allergy List](#): Allergies must be added to the master list before they can be added to a patient's [Medical Chart - Allergies](#) tab.
- [Problem List](#): New problems can be added to the master list from the patient's [Medical Chart – Problems](#) tab.
- [Medication List](#): New medications can be added to the master list from the patient's [Medical Chart – Medications](#) tab.
- [Referral List](#): New referral sources can be added from the Family Module.
- [Dental Laboratories](#): Dental laboratories must be added to the master list before creating a [lab case](#).

### Forms, letters, and labels

- [Sheets](#): Customize templates for forms, letters, labels, and statements. These templates can be used to gather and send information electronically.

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## Optional Setup (cont'd)

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### Communication

- [eServices](#): Sign up for and set up eServices.
  - [eClipboard](#)
  - [Automated Messaging](#): eReminders, eConfirmations, Automated Thank-Yous, Arrivals, and General Messages
  - [ODMobile](#)
  - [Patient Portal](#)
  - [Payment Portal](#): If using an [integrated processor](#) for credit card payments
  - [Web Forms](#)
  - [Web Sched Recall](#)
  - [Web Sched Existing Patient & Web Sched New Patient](#)
  - [Web Sched ASAP](#)
  - [Secure Email](#)
  - [ODTouch](#)
  
- [Email](#): Set up email addresses to send and receive email in Open Dental.
  
- [Tasks and Task Lists](#): Create task lists and inboxes for staff communication.

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**(Advanced)** We recommend contacting Open Dental support for assistance with changes to advanced features.

For help addressing HIPAA security requirements, see [Security Issues](#).

For more guidance on using Open Dental, see [Using Open Dental \(Blank Database\)](#).