

Post Merge Checklist

Use this checklist as a guide to help you complete setup and cleanup steps after a Database Merge. For help addressing HIPAA security requirements, see [Security Issues](#).

✓ GENERAL SETUP	
Practice Setup	Verify practice name, address, default provider, etc.
Clinic Setup	If using clinics, verify names, addresses, default providers, etc.
Employee List	Verify employee names; add new or hide past employees.
Operatory Setup	Check the setup of operatories (assign dentists, hygienists, clinics).
Schedule Setup	Set up provider schedules. Affects open/close times in the Appointment schedule and Recall.
Appointment Views	Set up views in the appointment schedule for different situations (e.g. HIPAA view). Choose operatories, set where and what information shows.
Security	Assign users to user groups, set user permissions, restrict access, change password requirements.
Clearinghouse	Verify clearinghouse setup. If using clinics, ensure credentials are entered for each location.
E-Claims	Verify that e-claims send successfully to the clearinghouse.
eServices	If using eServices, log into the eService Signup Portal to verify correct services are selected. Verify eService settings, including appointment confirmed definitions, settings found in eServices Setup, and text / email templates. Is using clinics, verify these settings in each clinic.
✓ CLEANUP	Queries referred to below are saved in your Query Favorites
Clean up 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.
Duplicate Patients	Run the Conv-Possible Duplicate Patients query to identify duplicate patients, then merge them.
Unassigned Clinics	If using clinics, run the Conv-Patients in Unassigned Clinic query to find patients with no default clinic and assign one to them.
Provider List Provider Merge	Verify provider names, IDs, appointment colors, default fee schedules. Merge Duplicate providers. Move or reassign patients if needed.
Program Bridges	On each workstation, verify that bridges work (e.g. to digital imaging software). Patient's may need renumbered in selected Imaging Bridge for program to open correctly.
✓ OTHER RECOMMENDED CLEANUP	
Employer List	Review employers, remove duplicates, add new.
Insurance Carrier List	Review insurance carrier information, remove or combine duplicates, add new. (Advanced)
Insurance Plan List	Review insurance plans, remove or combine duplicates, add new. (Advanced)
Allergy List	Review allergies in the master list, remove duplicates, add new.
Problem List	Review problems in the master list, remove duplicates, add new.
Medication List	Review medications in the master list, remove duplicates, add new.
Referral List	Review referrals in the master list, remove duplicates, add new.
Dental Laboratories	Review laboratories in the master list, remove duplicates, add new.
Pharmacy List	Review pharmacy information for printed Rx, remove duplicates, add new.

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

Open Dental offers many resources to help you continue learning about Open Dental and its many capabilities. See [Open Dental – Learning Resources](#).