

Blank Database Setup

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

Before You Start

- [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.

Initial Setup

- [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)
- [Employee Setup](#): Enter employee information. Required to use the Time Clock.
- [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

Fees Setup

- [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).

Appointments Setup

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

Chart Setup

- [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.)

Preferences & Customization

- [Preferences](#): Set default preferences for each module.
- [Miscellaneous](#): Set the title bar, language, popup, and other defaults.
- [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).

Optional Setup

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](#).

Communication

- [eServices](#): Sign up for and set up eServices.
 - [eClipboard](#)
 - [Automated Messaging](#): eReminders, eConfirmations, Automated Thank-Yous, Arrivals, and General Messages
 - [Open Dental Mobile](#)
 - [Patient Portal](#)
 - [Web Forms](#)
 - [Web Sched Recall](#)
 - [Web Sched Existing Patient & Web Sched New Patient](#)
 - [Web Sched ASAP](#)
 - [Secure Email](#)
- [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.

Forms, letters, and labels

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

(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 \(Blank Database\)](#).