

Post-Merge Checklist

Use this checklist as a guide to help you complete setup and cleanup steps after a Database Merge.

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 former employees.
- Operatory Setup:** Check the setup of operatories (assign dentists, hygienists, clinics).
- Schedule Setup:** Set up provider schedules.
- Appointment Views:** Set up views for the Appointments Module.
- 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.
- Electronic Claims:** Verify that electronic 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. If using clinics, verify these settings for each clinic.

Cleanup

- 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:** Verify provider names, IDs, appointment colors, etc. Move or reassign patients if needed.
- Program Bridges:** On each workstation, verify that bridges work (e.g., to digital imaging software). Patients 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 info, 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.
- Laboratories:** Review dental 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](#)