

Post-Merge Checklist

This document is a guide to help ensure that Open Dental is set up properly after a database merge. If you have a Post Conversion Setup appointment scheduled, most of the items listed will be addressed during that appointment. Our support team is also available to help with each of these topics.

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](#)