

General Setup of a Blank Database

Use this checklist after installing the full version of Open Dental as a quick start guide to setting up your database.
 For help addressing HIPAA security requirements, see [Security Issues](#).

BEFORE YOU BEGIN		Web Manual Link	✓
Data Paths	Make sure the paths to Open Dental folders work on all computers.	Data Path Setup	
Bridges: - Digital Imaging - Other	Program Bridges need to be set up on the server and workstations. <input type="checkbox"/> Select the digital imaging software you will bridge to. <input type="checkbox"/> Determine what other third-party software you will bridge to (e.g. credit card processing, reminders, insurance benefit info).	Program Bridges Supplemental Services & Products	
Clearinghouse	Select the clearinghouse you will send e-claims to, then set it up.	E-Claims	
INITIAL SETUP			
General Practice Information	Turn on features (e.g. Clinics, Medical, EHR).	Show Features	
	Set up dentists and hygienists.	Provider List	
	If using clinics, enter clinic names, addresses, defaults.	Clinic Setup	
	Enter practice name, address, default providers.	Practice Setup	
	Enter employee names.	Employee List	
	Set up operatories (assign dentists, hygienists, clinics).	Operatory Setup	
	Set up provider schedules. This affects open/close times in the Appointment Module.	Schedule Setup	
	In the Procedure Code List: <input type="checkbox"/> Create fee schedules. <input type="checkbox"/> Enter fees. <input type="checkbox"/> Mark hygiene procedure codes as "Is Hygiene Procedure". <input type="checkbox"/> Add alternate codes, substitution codes, or non-standard codes (e.g. for merchandise).	Procedure Code List	
	Customize options that show in various windows (e.g. payment types, procedures added to appointments (appt proc quick add), billing options).	Definition Setup	
	Printing and Scanning: <input type="checkbox"/> Set default printers. <input type="checkbox"/> Set default scanning options.	Printer Setup Imaging Setup	
Create users, assign user groups, set user permissions, restrict access, create and change password requirements.	Security		
Define pay periods and rules so employees can use the Time Clock.	Time Card Setup		
APPOINTMENTS			
Views	Set up appointment schedule views for different situations (e.g. HIPAA view). Choose operatories, set where and what information shows.	Appointment View Setup	
Recall	Verify default recall types. (Advanced)	Recall Types	
	Set defaults for the recall list.	Recall List Defaults	

CHARTING		Web Manual Links	✓
Procedure Buttons	Set up buttons that allow quick entry of commonly used procedures.	Procedure Button Setup	
Auto Notes	Create templates for frequently entered, complex notes (e.g. exams, root canals, materials, post op instructions).	Auto Note Setup	
Procedure Notes	Enter default notes that automatically copy to completed procedures.	Procedure Notes	
PREFERENCES & CUSTOMIZATION			
By Module	Set default preferences for each module.	Module Preferences	
Miscellaneous	Set the title bar, language options, and task list defaults.	Miscellaneous Setup	
Claim Forms	For printed claims, set the default claim form. (Advanced)	Claim Form Setup	
Colors	Define custom background, text, and notification colors.	Definition Setup	
OPTIONAL			
Master Lists	<p>Many of these lists will auto-populate as you enter data. You can also directly enter data in each list.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Allergies <input type="checkbox"/> Problems <input type="checkbox"/> Medications <input type="checkbox"/> Referrals (to and from) <input type="checkbox"/> Dental labs you send Lab Cases to 	Allergy List Problem List Medication List Referral List Dental Laboratories	
Communication	Set up eServices. <ul style="list-style-type: none"> <input type="checkbox"/> Patient Portal <input type="checkbox"/> Mobile Web <input type="checkbox"/> Web Sched New Patient <input type="checkbox"/> Web Sched Recall <input type="checkbox"/> Web Forms <input type="checkbox"/> Integrated Text Messaging <input type="checkbox"/> eConfirmations <input type="checkbox"/> eReminders <input type="checkbox"/> eClipboard 	eServices	
	Set up E-mail.	E-mail	
	Create task lists and inboxes	Tasks and Task Lists	
Forms, letters, labels	Customize templates for forms, letters, labels, and statements. These templates can be used to gather and send information electronically	Sheets	

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

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