Opendental software

+1 503.363.5432   service@opendental.com

Customer Onboarding Checklist

We understand that choosing a new practice management software is a big decision with many considerations and we are here to make this process as seamless as possible. While navigating through the Conversion process you will have access to our team of Onboarding Coordinators who are happy to assist and answer any questions you may have. Please don't hesitate to reach out if you would like to review your questions with an Onboarding Coordinator.

Click here to find a playlist of webinars related to the topics discussed in this checklist.

Onboarding Coordinators
(503)363-5432
new.customers@opendental.com

Before the Test Conversion

☐ Review Computer Requirements and Install the Trial Version of Open Dental.

☐ Sign and return your Data Access Permission Form – Please return the completed form to conversions@opendental.com prior to your Test Conversion appointment.

☐ Open Dental Demo – Our friendly and experienced support technicians are available to provide a demonstration of the software and answer any questions you may have.

☐ Request a backup or copy of your data from your current practice management software – If your software requires this, you will be provided instructions from our Conversions Team at the time of scheduling your Test Conversion.

After the Test Conversion

☐ Review the Test Conversion database thoroughly and completely – Once you have decided how you want to handle your A/R, complete your Pre-Data Conversion Checklist and the Conversion Packet sent to your office.

☐ Open Dental Cloud (Optional) – If you are interested in Open Dental Cloud, please complete the Open Dental Cloud Questionnaire to determine if Open Dental Cloud is a good fit for your practice. This is required for offices planning to use cloud.

☐ Test bridges – Test the bridges and program links in your Test Conversion to ensure they are compatible and functioning properly before scheduling your Final Conversion.

Preparing for the Final Conversion

☐ Clearinghouse for eClaims – Open Dental does not have a built-in Clearinghouse for sending claims electronically, so you will need to sign up with one after your conversion. We recommend DentalXChange and Electronic Dental Services, though we do support other integrations.

☐ Set Up Integrated Credit Card Payments (Optional) – Prior to using an integrated payment processor with Open Dental, your practice must sign up with a merchant.

☐ Review our Vendors - Supplemental Services and Products List (Optional) – Review our list of products and services provided by third-party companies that can enhance your Open Dental experience.

Preparing for the Final Conversion (Continued)

☐ Open Dental eServices (Optional) – eServices are additional services we provide that can help your office by automating many tasks and streamlining patient communication.

☐ Open Dental eRx Companies (Optional) – There are two electronic prescription companies that we integrate with and provide support for the integration. If you are interested in Ensora please call our support line. To sign up for DoseSpot please fill out the DoseSpot Registration Form.

☐ Setup – The following items can be set up in your Test Conversion database and exported to your Final Conversion: Auto Notes, Chart Layouts, Medication Lists, Patient Dashboards, and Sheets. **Other setup should only be done after the Final Conversion in the live database.**

☐ Paper Charts – If you are transitioning from paper charts, ensure you have a plan for these paper charts following your conversion.

After the Final Conversion is Scheduled

☐ Schedule your Post Conversion Setup – During this appointment you will work with a dedicated Open Dental technician to ensure proper setup of your database. It is highly recommended to complete this within 30 days of your Final Conversion.

☐ Pay quoted fees for Conversion Services and Support – All quoted fees for conversion services as well as your first month of Open Dental Support must be paid prior to your Final Data Conversion.

☐ Update and Install – Update your server to the full version of Open Dental and install Open Dental on your workstations prior to your Final Conversion. You are encouraged to call Open Dental support for assistance.

☐ Sheet Design – Fill out this form if you're interested in receiving a quote for Open Dental to create your custom forms for you. Only available for customers that have already signed up for support.

☐ Webinars, Online, and On-Site Trainings (Optional) – See our Training page for more information on available training options and resources.

☐ Offices Migrating to Open Dental Cloud – If your office will be using Open Dental Cloud review the necessary requirements and process.

After the Final Conversion is Complete

☐ Using Your Converted Database – See our manual page for resources and instructions to help you and your office begin using Open Dental.

☐ Open Dental Support – Our support technicians are available via phone, chat, and email for assistance. We are always happy to support you and your staff!