



## 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)
- [Appointment Views](#): Set up views for the Appointments Module.
- [Employee Setup](#): If using the Time Clock, enter employee information.
- [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

- [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 modules and other miscellaneous settings.
- [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](#).

## Forms, letters, and labels

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



---

## Optional Setup (cont'd)

---

### Communication

- [eServices](#): Sign up for and set up eServices.
    - [eClipboard](#)
    - [Automated Messaging](#): eReminders, eConfirmations, Automated Thank-Yous, Arrivals, and General Messages
    - [ODMobile](#)
    - [Patient Portal](#)
    - [Payment Portal](#): If using an [integrated processor](#) for credit card payments
    - [Web Forms](#)
    - [Web Sched Recall](#)
    - [Web Sched Existing Patient & Web Sched New Patient](#)
    - [Web Sched ASAP](#)
    - [Secure Email](#)
    - [ODTouch](#)
  - [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.
- 

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