



PRACTICE SOLUTIONS

# Open Dental Training

Front Desk Team

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# OVERVIEW

01

Welcome to the Open Dental training program! This training is designed to equip you with the essential skills and knowledge to efficiently manage the front desk operations using Open Dental. As a key team member, you'll play a crucial role in scheduling, accounts, payments, treatment planning, and ensuring smooth communication with patients. This packet outlines your comprehensive training path, which covers everything from patient management to insurance processing, helping you become proficient in daily tasks while maximizing the capabilities of the software.

# OBJECTIVES

02

By the end of this training, you will be able to:

- Accurately manage patient records, including adding new patients, updating information, and handling family accounts.
- Efficiently schedule appointments, manage recalls, and optimize provider schedules to ensure smooth patient flow.
- Verify insurance coverage, submit claims, and address common claim denials to streamline revenue cycle management.
- Post patient and insurance payments, generate patient statements, and manage accounts receivable to keep the office's finances on track.
- Create, present, and manage treatment plans while clearly communicating options and financial estimates to patients.
- Run key reports and execute daily workflows, ensuring end-of-day tasks, accounts receivable tracking, and appointment management are handled efficiently.

Through hands-on exercises and practical applications, this training will help you develop a deep understanding of Open Dental's features, empowering you to perform your role with confidence and precision. We encourage you to actively engage, take notes, and ask questions to ensure you gain the most from this program.



**SCHEDULING**



**ACCOUNTING**



**TREATMENT PLANNING**

01

Introduction to Open Dental  
Youtube Demo

02

Scheduling & Appointments  
SKF Intro to Appointment Module  
SKF Broken Appointments  
Open Dental Appointment Module

03

Family Module  
SKF Family Module  
SKF Setting Up Insurance Plans  
Open Dental Family Module

04

Account Module  
SKF Mastering Money  
SKF Account Module Toolbar  
SKF Payment Plans  
SKF Payment Allocation  
SKF Claim Payments  
Open Dental account Module

05

Treatment Plan Module  
SKF Treatment Plan Module  
Open Dental Treatment Plan Module

06

Chart Module  
SKF Perio Charting  
SKF Open Dental Procedure Buttons  
SKF Auto Notes  
Open Dental Chart Module

