



PRACTICE SOLUTIONS

Open Dental Training

Clinical Teams

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OVERVIEW

01

Welcome to the Open Dental training program for clinical teams! This training is designed to equip you with the knowledge and skills needed to confidently manage clinical operations using Open Dental. As a clinical team member, you'll play a vital role in accurate charting, treatment planning, documentation, and ensuring compliance for both patient care and insurance requirements. This packet outlines your training path, covering everything from entering clinical notes to managing imaging, procedures, and treatment presentations—helping you work efficiently while supporting patient outcomes.

OBJECTIVES

02

OBJECTIVES

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

- Accurately chart patient treatment, document procedures, and enter clinical notes in compliance with office protocols.
- Attach and manage digital imaging (x-rays, intraoral photos) within Open Dental for clear and complete patient records.
- Create and manage treatment plans, ensuring providers present accurate clinical and financial details to patients.
- Utilize chart buttons, auto-notes, and procedure codes for efficient clinical documentation.
- Track patient progress, schedule follow-up care, and coordinate with the front desk to ensure continuity of care.
- Apply best practices for clinical documentation to minimize errors, support accurate billing, and strengthen communication with both patients and insurance carriers.

Through guided exercises and real-world application, this training will help your team master Open Dental's clinical features. You'll leave with the confidence and clarity to streamline workflows, support your providers, and enhance patient care. We encourage you to actively practice, ask questions, and take notes so you get the most out of this program.



SCHEDULING



CHARTING



TREATMENT PLANNING

01

Introduction to Open Dental
Youtube Demo

02

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

03

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

04

Chart Module
SKF Perio Charting
Open Dental Perio Charting
SKF Open Dental Procedure Buttons
SKF Auto Notes
Open Dental Chart Notes
Open Dental Chart Module
Entering Treatment
Planned Appointments

05

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

