How to add a new user in Open Dental

This guide shows you how to add a new user in Open Dental. You create the user in the Security window, assign a user group, and set a temporary password. The new user then creates their own password at first login.

Prerequisites

Before you begin, make sure you have the following:

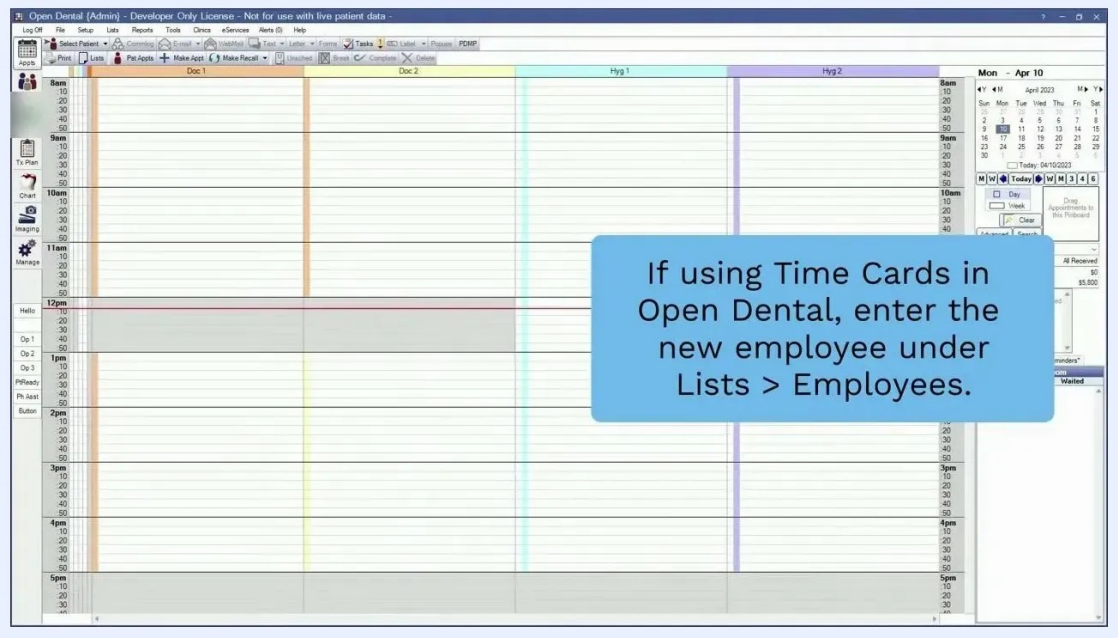
- Administrative privileges in Open Dental.
- A new employee entry under **Lists > Employees**, if your office uses Time Cards. This step is optional otherwise.

Steps

1. (Optional) Add the employee for Time Cards

If you use Time Cards in Open Dental, add the new employee before you create the user.

1. Go to **Lists > Employees**.
2. Enter the new employee's details as required.

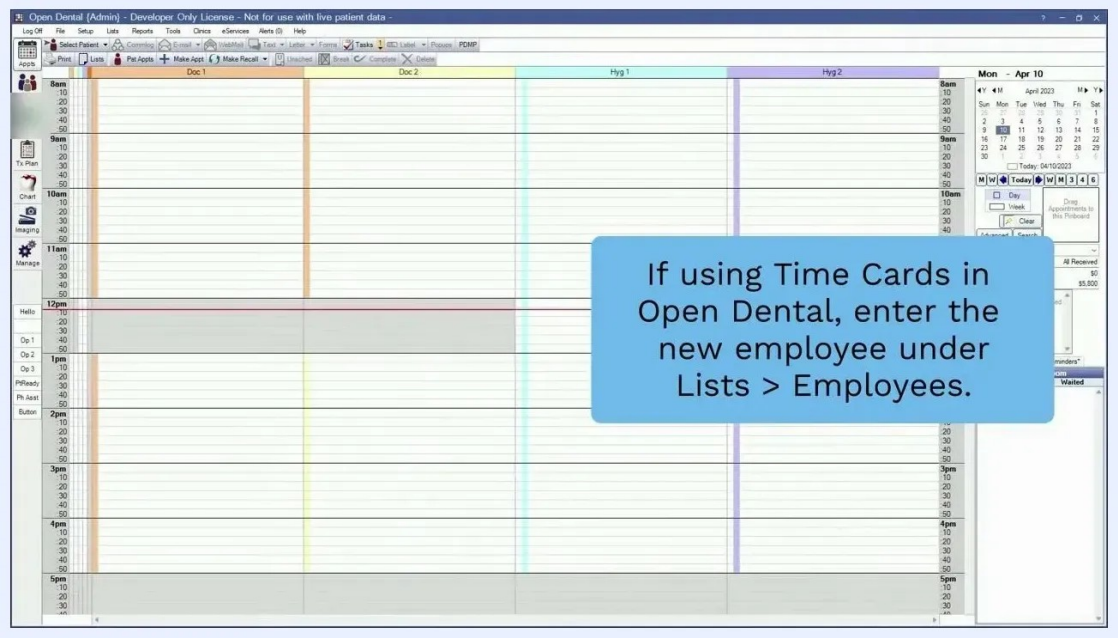


Instruction overlay showing that you enter the new employee under Lists > Employees when using Time Cards

2. Start the process to add a new user in Open Dental

Open the Open Dental software and make sure you are logged in with administrative privileges.

The main schedule screen appears. It shows columns for providers and hygienists, a calendar, and navigation buttons on the left sidebar.



Open Dental main schedule screen with provider columns, calendar, and navigation sidebar

3. Open the user security settings

Open the security settings so you can add the new user.

The **Security** window appears. It shows tabs for User, Clinics, and Alert Subs, along with a list of existing users.

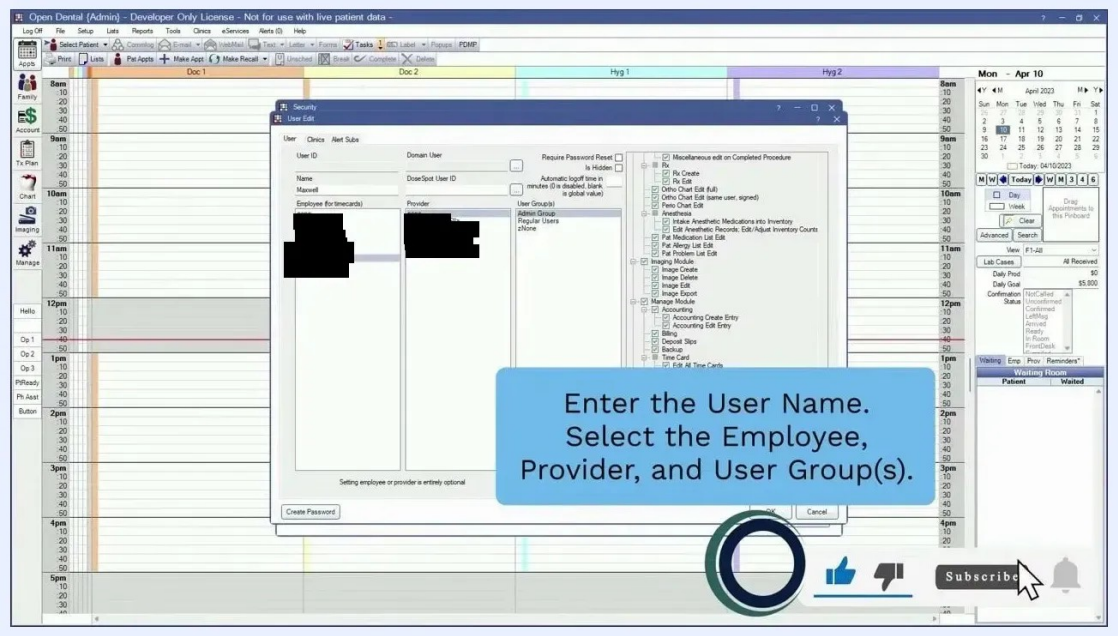
Click **Add User** to begin entering the new user's information.

4. Enter the user details

In the **User Edit** window, enter the following information:

- **User Name**, for example, Maxwell.
- **Employee**, selected from the list, if applicable.
- **Provider**, if applicable.
- **User Group(s)**, for example, Admin Group or Regular Users.

Setting the employee or provider is optional. You must assign a user group, because it determines the user's permissions.

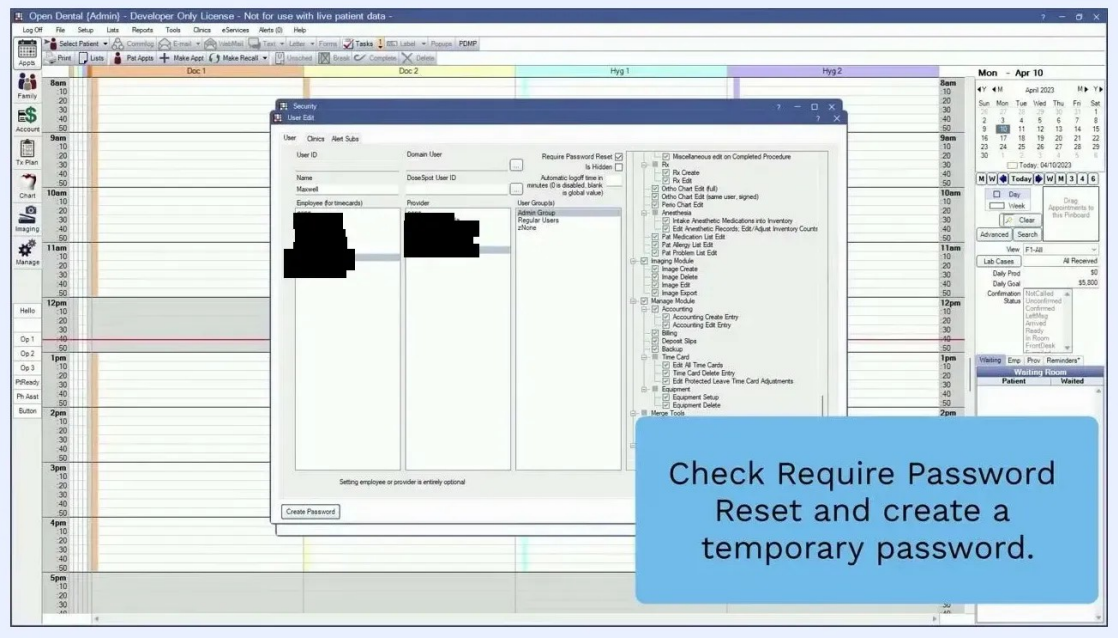


Security window open with user details being entered and an overlay reminding you to enter the User Name and select the Employee, Provider, and User Group(s)

5. Set the password requirements

Select the **Require Password Reset** check box. This makes the new user create their own password at first login.

Click **Create Password** to set a temporary password for the new user.

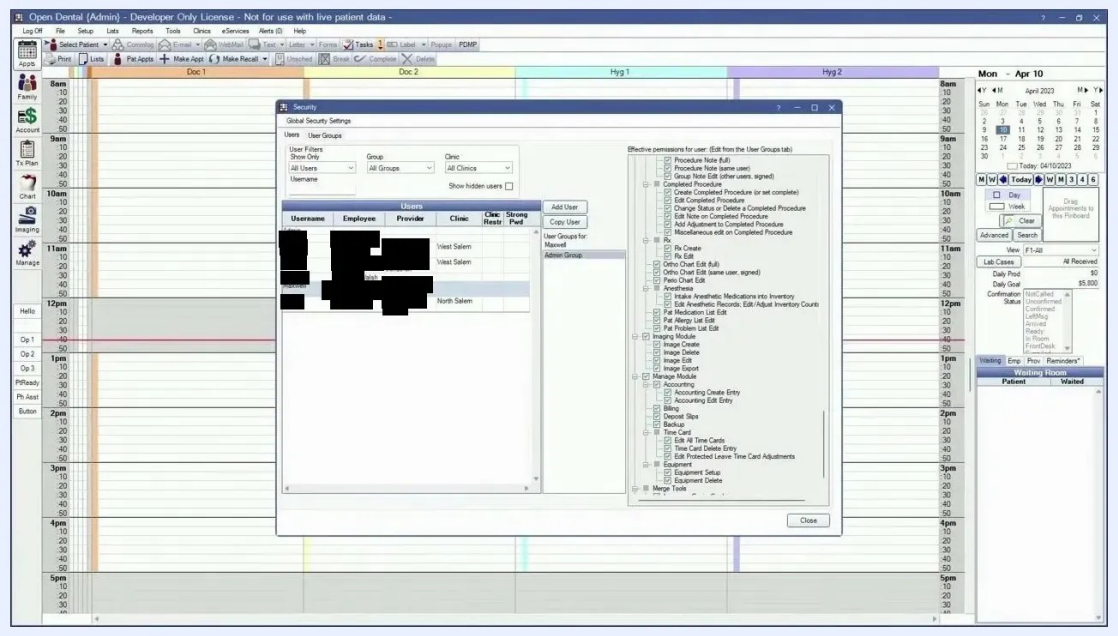


Security window with an overlay reminding you to check Require Password Reset and create a temporary password

6. Review and save the new user

Review the information you entered to confirm it is accurate. Then click **OK** or **Save** to add the new user to the system.

The new user now appears in the list of users, along with their assigned employee, provider, and user group.

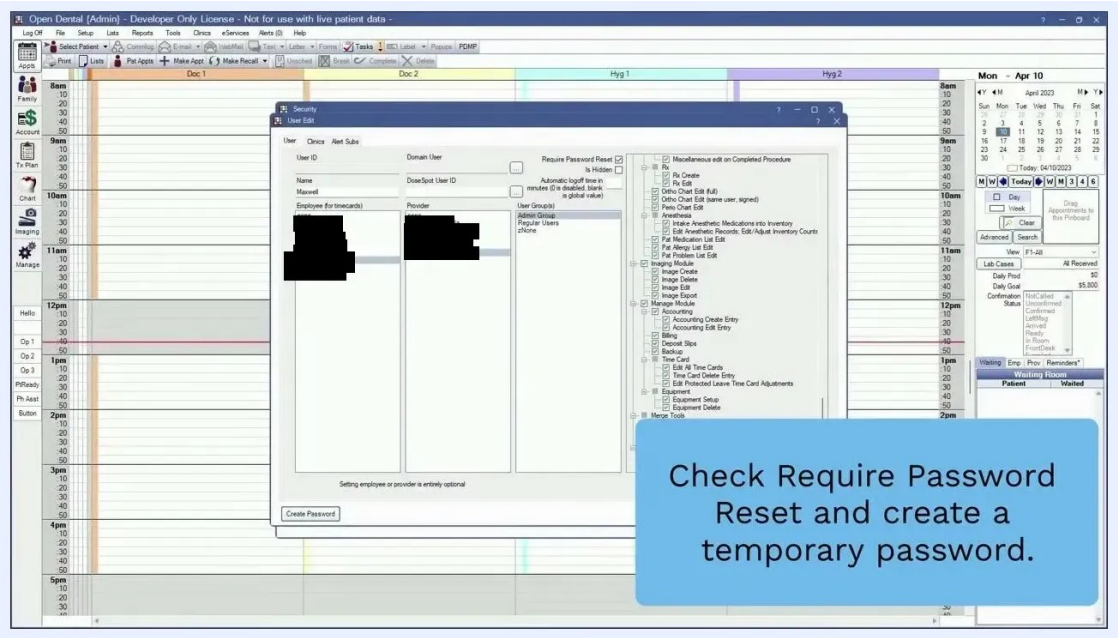


Security window showing the list of users, including the newly added user

7. Complete the first login for the new user

When the new user logs on for the first time, Open Dental prompts them to create a new password. The login screen shows a list of users and a password entry field.

The user enters the temporary password. They then follow the prompt to set a new, secure password.



Login screen with an overlay explaining that the new user is prompted to create a new password at first logon

Summary

You now know how to add a new user in Open Dental. If your office uses Time Cards, add the employee first. Then create the user in the **Security** window, assign a user group, and set a temporary password with **Require Password Reset** selected. The new user replaces the temporary password with their own at first login.