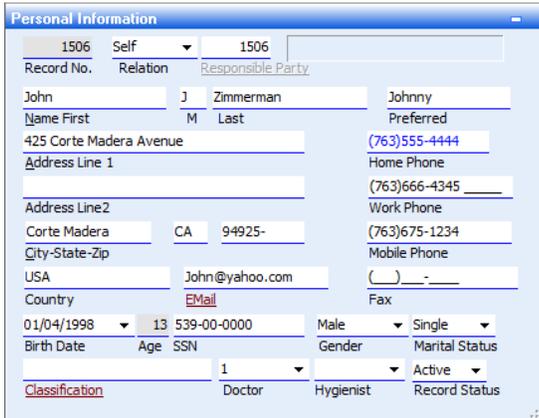


**Patient Information:**



Personal Information

Record No. 1506 Self 1506 Responsible Party

John J Zimmerman Johnny  
Name First M Last Preferred

425 Corte Madera Avenue (763)555-4444  
Address Line 1 Home Phone

(763)666-4345  
Address Line2 Work Phone

Corte Madera CA 94925- (763)675-1234  
City-State-Zip Mobile Phone

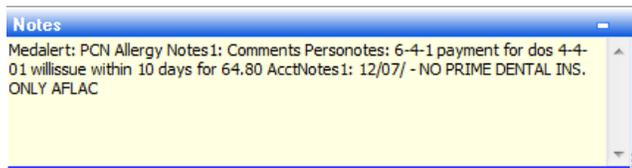
USA John@yahoo.com ( ) - -  
Country Email Fax

01/04/1998 13 539-00-0000 Male Single  
Birth Date Age SSN Gender Marital Status

1 Doctor Hygienist Active  
Classification Record Status

- Patients grouped by responsible party.
- First Name
- Last Name
- Middle Initial
- Preferred Name
- Address 1
- City
- State
- Zip
- Home Phone Number
- Work Phone Number
- Mobile Phone Number
- Email Address
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status

**Notes:**

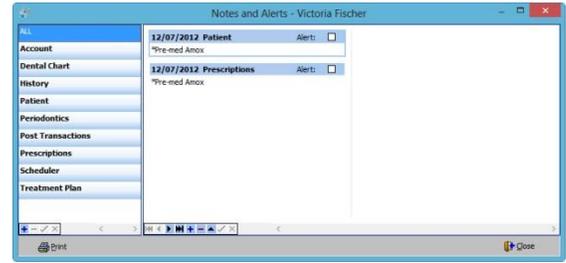


Notes

Medalart: PCN Allergy Notes1: Comments Personotes: 6-4-1 payment for dos 4-4-01 willissue within 10 days for 64.80 AcctNotes1: 12/07/ - NO PRIME DENTAL INS. ONLY AFLAC

- Address Note
- Referred To and Referred By

**Notes and Alerts:**



Notes and Alerts - Victoria Fischer

12/07/2012 Patient Alert:

12/07/2012 Prescriptions Alert:

- Patient Record MedUrg Note will convert to Dental Chart Alert
- Medications will convert to Dental Chart Note
- Diseases will convert to Dental Chart Note
- Family Financial Notes will convert to Account Note
- Medical Summary will convert to Chart Note
- Tooth Chart will convert to Chart Note
- Service Note will convert to Patient Note
- Medical History will convert to Chart Note
- Pop-Up that is disabled will convert to Patient Note
- Pop-Up that is active will convert to Patient Alert

**History Reference Tab:**



Date	Patient Name	Code	Treatment	Tooth	Surface	Value	Provider
01/20/2012	Victoria	150.00	Camp Oral Eval-New Or Estab Patient			\$55.00	2
01/20/2012	Victoria	200.00	Periapical X-ray - First Film			\$27.00	2
01/20/2012	Victoria	330.00	Panoramic Film			\$65.00	2
01/20/2012	Victoria	1203.00	Child Fluoride - No Prophyl			\$41.00	2
01/20/2012	Victoria	1120.00	Prophylaxis-Child			\$51.00	2
02/09/2012	Victoria	2.00	Insurance Check Payment			\$273.28	2
02/09/2012	Victoria	50.90	Participating Insurance Adjustment			(\$1.10)	2
03/07/2012	Victoria	920.00	Analgesia			\$33.00	2
03/07/2012	Victoria	290.00	Resin Composite 1 Surface, Posterior	14	O	\$126.00	2
03/23/2012	Victoria	2.00	Insurance Check Payment			\$162.18	2
04/20/2012	Victoria	150.00	Camp Oral Eval-New Or Estab Patient			\$55.00	2
01/20/2012	Victoria	1203.00	Child Fluoride - No Prophyl			\$41.00	2
01/20/2012	Victoria	330.00	Panoramic Film			\$65.00	2
01/20/2012	Victoria	1120.00	Prophylaxis-Child			\$51.00	2
02/09/2012	Victoria	2.00	Insurance Check Payment			\$245.74	2
02/09/2012	Victoria	50.90	Participating Insurance Adjustment			(\$1.10)	2

- Treatment History – Viewable as History Reference – Does not include deleted transactions [includes Charges, Payments, Debits and Credits]
- Date
- Patient Name
- Code
- Treatment Description
- Tooth
- Surface
- Value
- Provider

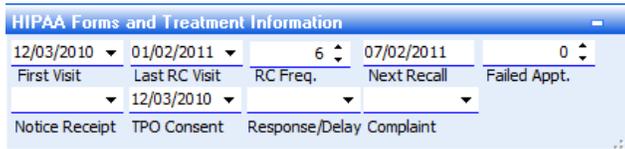
**Financial Information:**



Financial Information window showing account balances and payment history. The balance is \$469.88. Payment history includes a statement sent on 02/16/2012 and payments on 03/14/2008 for \$12.18 and \$138.60. The last patient and insurance payments are both marked as 'Yes'.

- Account Balances -- Aged accordingly based on patient primary doctor.
- Send Statement – Defaults to Yes
- Charge Interest – Defaults to Yes
- Send Dunning – Defaults to Yes

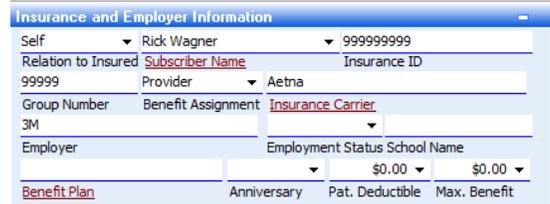
**HIPAA Forms and Treatment Information:**



HIPAA Forms and Treatment Information window showing visit dates and frequencies. The first visit was on 12/03/2010, the last recall visit was on 01/02/2011, and the next recall is scheduled for 07/02/2011. The recall frequency is set to 6 months.

- First Visit Date
- Last Visit Date – taken from last entry in history
- Last Recall Visit
- Recall Frequency
- Next Recall Date – Based on last recall visit date using recall frequency
- TPO Consent

**Insurance and Employer Information:**



Insurance and Employer Information window showing details for Rick Wagner. The subscriber name is Rick Wagner, insurance ID is 999999999, and the provider is Aetna. The insurance carrier is Aetna, and the employer is also Aetna. The insurance plan is 3M.

- Relation to Primary Policy Holder
- Subscriber Name
- Insurance Id – If blank defaults to SSN# if available
- Group Number
- Benefit Assignment
- Insurance Carrier Name
- Employer – Insurance Plan Employer
- Employment Status – Defaults to Full Time
- Patient Deductible – Defaults to 0
- Max Benefit – Defaults to 0

**Insurance Carrier:**



Insurance Carrier window showing details for Cigna. The insurance carrier name is Cigna, address is 5 Po Box 34336, Charlotte, NC 28234. The payer ID is 62308, payer office is NOCD, and the submission type is Electronic. The form type is ADA2012, and the insurance type is Dental.

- Insurance Carrier Name
- Address 1
- Address 2
- City
- State
- Zip
- Phone
- Fax – Defaults to Blank
- Web Address – Defaults to Blank if not supplied
- Email -- Defaults to Blank if not supplied
- Contact – Defaults to Blank if not supplied
- Payer ID – Add after conversion
- Payer Office – Defaults to Blank
- Submission Type – Defaults to Electronic
- Form Type current ADA Form
- Provider ID – Defaults to 1
- Insurance Type – Defaults to Dental

**Appointment Book:**

2	3	4
Tuesday, Mar 2	Tuesday, Mar 2	Tuesday, Mar 2
	Christopher Holbrook Prophylaxis-Adult	Deborah Traczynski Prophylaxis-Adult
	Nancy Brooks Prophylaxis-Adult	Doug Daigle Prophylaxis-Adult
Gary Short Cement Crown Or Bridg	Julie Anderson Prophylaxis-Adult	Gina Kemsley Prophylaxis-Adult

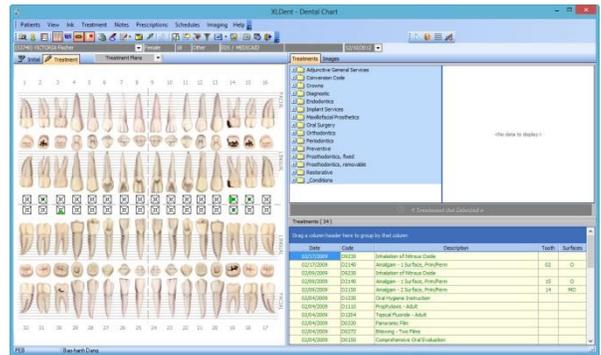
- Practice Appointments will convert to appropriate column
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length – Defaults to 30 minutes unless supplied by office
- Appointment Notes
- All Appointments convert default Prophy Code [D1110 or D1120] depending upon dentist specialty. Operative appointments may need to be modified following conversion.

**Fee Table:**

Internal Code	Abbreviation	Fee	New Fee
BADJ	Bridge Adjustment	\$0.00	
BLEACH	Bleach Tray Delivery	\$0.00	
D0140	Limited Oral Eval-Prob Focused	\$75.00	
D0145	Oral Eval - Patient Under 3yrs	\$45.00	
D0150	Comprehensive Oral Evaluation	\$75.00	
D0160	Detailed Oral Eval-Prob Focus	\$75.00	
D0170	Re-Evaluation - Limited	\$45.00	
D0180	Comprehensive Perio Evaluation	\$110.00	
D0210	Intraoral - Complete Series	\$120.00	
D0220	Intraoral Periapical 1st Film	\$42.00	
D0230	Intraoral - Periapical, Addtl	\$42.00	
D0240	Intraoral - Occlusal Film	\$0.00	
D0250	Extraoral - First Film	\$0.00	

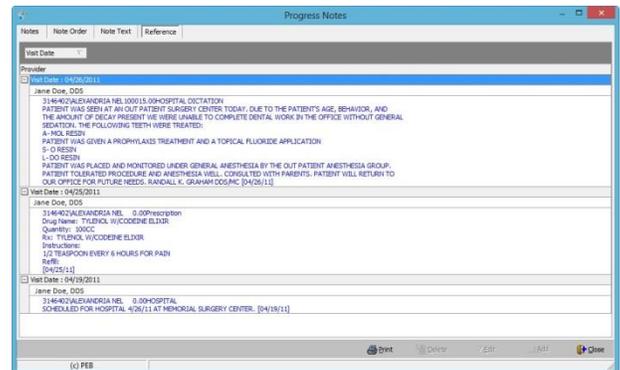
- Procedure Codes
  - ◆ Active ADA Codes
  - ◆ Base Code Abbreviation
- Primary Fee Schedule

**XLChart™:**



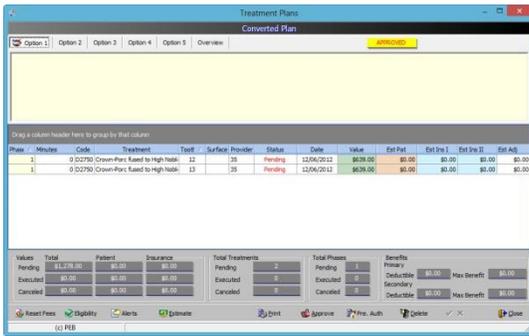
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes. This will be recorded as Initial Treatment in XLChart™
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value
- Provider

**Progress Note Reference Tab**



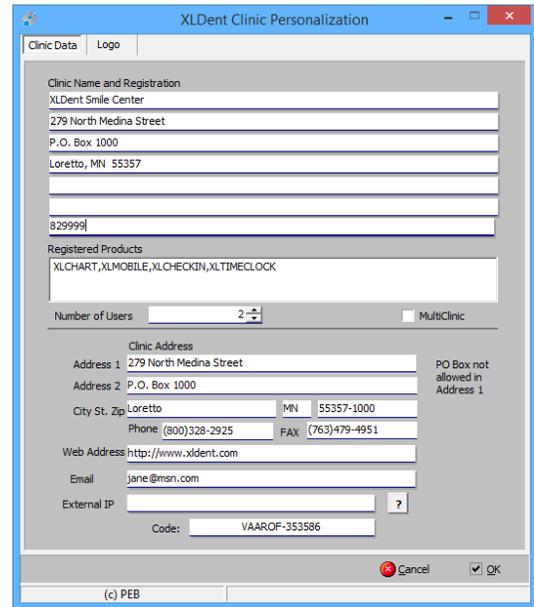
- Clinical Notes
  - ◆ Date
  - ◆ Procedure Code
  - ◆ Tooth
  - ◆ Surface
  - ◆ Note Detail
  - ◆ Provider

**Treatment Plans:**



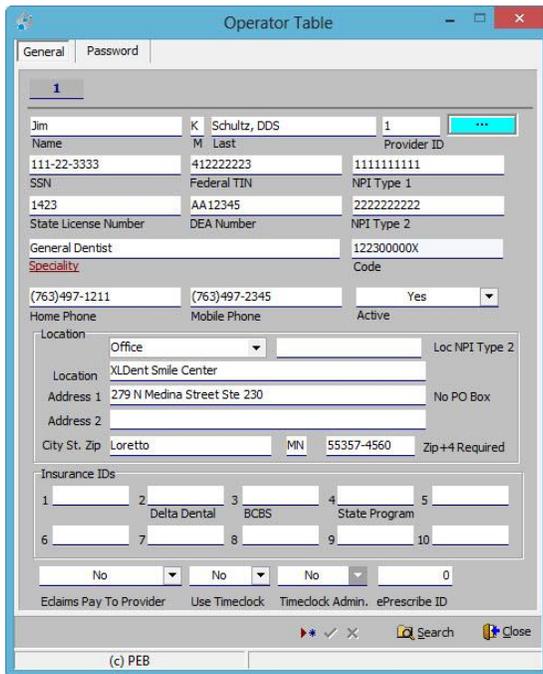
- Accepted and Diagnosed Plans Convert.
- Phase
- Minutes – Defaults to 0
- Code
- Treatment Description
- Tooth
- Surface
- Provider
- Status – Defaults to Pending
- Date
- Value
- Patient Value – Defaults to 0
- Insurance Value I – Defaults to 0
- Insurance Value II – Defaults to 0

**Practice Information**



- Practice Demographic Information
- Clinic Name
- Clinic Address and Phone
- Clinic Logo

**Operator Table:**



- Provider Information for all Doctors and Hygienists
- First Name
- Middle Initial
- Last Name
- Provider ID – Same as previous software
- SSN
- Federal TIN
- NPI Type 1
- State License Number
- DEA Number
- NPI Type 2
- Specialty
- Home Phone
- Mobile Phone
- Active – All convert as Yes
- Location – Defaults to Office Name
- Location Address1 and 2
- Location City, State, Zip
- Insurance ID's – If available

**File Location:**

?:\softdent\ or ?:\program files\softdent

**Files Needed**

?:\Softdent\\*. \* excluding Images folder

Need software and license disks if available.

**Disclaimer:**

The success of the conversion is largely based on the data provided. Please be aware that not all data will be transferred. Information that is incorrect or corrupt in your previous system will not be corrected by the conversion. Therefore, some information will need to be manually entered. Verification of conversion data is dependent on supplied fax documents by end user.

**Special Conversion Considerations:**

Conversions are in constant development, in the event you have questions about data being converted or require special consideration. Please contact your XLDent™ Representative.

**Items that do not convert:**

Specific areas that will not convert include, but are not limited to, the following:

- Periodontal Charting
- Provider Accounts Receivable Distribution
- Payment Plans/Contract Balances
- Outstanding Insurance Claims

**Notes on Conversions:**

- Plan name converts in place of employer name
- Only treatment plans created in the last year (12 months) will convert.
- Appointments will convert with a defaulted prophylaxis code. This can be manually changed after the conversion.
- Progress Note date will convert as the last edited date. This date is not displayed in Open Dental.

Below are some additional notes concerning some of the items that will or will not be converting.

**Patient ID**

A new patient identification number will be assigned for all patients. The patient id number in your previous system will not be converted.

**Gender**

When this is not converted or not entered into current system it will default to Male.

**Marital Status**

When this is not converted or not entered into current system it will default to Other.

**Preferred Dentist**

When this is not converted all patients will be assigned to the default doctor.

### **First Visit Date**

When this is not converted or the patient does not have a first visit date, it will be assigned to the date of the conversion. This is done so the New Patient Report will be accurate for new patients entered into XLDent<sup>TM</sup>. This can be manually changed.

### **Recall Frequency**

When this is not entered into current system it will default to 0. This will have to be manually updated after loading the converted database.

### **Appointment Category on Appointment**

When this is not converted the Appointment Category and Notes area will be blank. This can be manually updated after the conversion.

End of Month and End of Year will be processed during the conversion. You will be starting a new month and a new year after the conversion. You will want to maintain the End of Month and End of Year totals or reports from your previous system. At the end of the actual month and year, you will combine the totals from XLDent<sup>TM</sup> and the totals from your previous system to get an accurate Month to Date and Year to Date total.

**If posting after conversion cutoff date in your existing practice management software, reports will be inaccurate for End of Month and End of Year due to duplicate entry.**

**Actual data varies from dataset to dataset, visual representation may be different.**