XLDent™
SMART TECHNOLOGY. EFFICIENT SOLUTIONS.

Patient Information:

- ☑ Patients grouped by responsible party.
- ☑ First Name
- ☑ Last Name
- ☑ Middle Initial
- ☑ Preferred Name
- ☑ Address 1
- ☑ Address 2
- ☑ City
- ☑ State
- ☑ Zip
- ☑ Home Phone Number
- ☑ Work Phone Number
- ☑ Mobile Phone Number
- ☑ Fax Number
- ☑ Email Address
- ☑ Gender
- ☑ Marital Status
- ☑ Birth Date
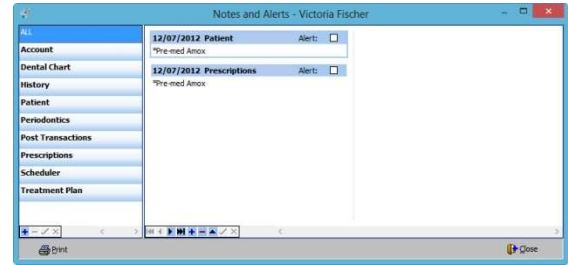- ☑ Patient SSN
- ☑ Doctor of Record
- ☑ Hygienist
- ☑ Record Status

Notes:

- ☑ Medicaid ID Number
- ☑ Driver's License Number
- ☑ Insurance Policy Number

Notes and Alerts:
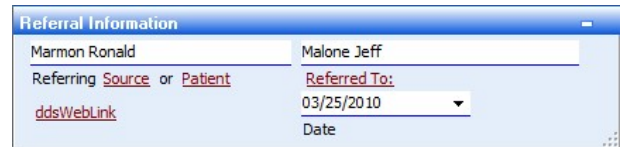
- ☑ Premed converts to Dental Chart and Prescriptions Alert
- ☑ Clinical Notes convert to Dental Chart
- ☑ Insurance Notes convert to Patient as a note
- ☑ Ledger Notes convert to Post Transaction as a note
- ☑ Ledger Line Convert to Post Transaction as a note
- ☑ Account Notes convert to Account as a note
- ☑ Appointment Notes convert to Scheduler as a note
- ☑ RX Notes convert to Prescriptions as a note
- ☑ TX Notes converts to History as a note
- ☑ Statement Notes convert to Account as a note
- ☑ Med Hist Notes convert to Dental Chart as a note
- ☑ Notes on Appointment convert to Scheduler as a note
- ☑ Misc Notes convert to Patient as a note
- ☑ Marketing Code convert to Patient Alert
- ☑ Medical Health Questionnaire convert to Dental Chart Alert

Referral Information:

- ☑ Referring Source
- ☑ Referring Patient
- ☑ Referred To
- ☑ Referred Date
- ☑ Referral Source Table

Prescription Table:

- ☑ Medicine
- ☑ Dosage
- ☑ Despense
- ☑ Refills

Patient Prescriptions:

- ☑ Date
- ☑ Medicine
- ☑ Dosage
- ☑ Dispense Refills
- ☑ Provider
- ☑ eRXStatus

History Reference Tab:

- ☑ 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:

- ☑ Account Balances
- ☑ Send Statement – Defaults to Yes
- ☑ Charge Interest
- ☑ Send Dunning

HIPAA Forms and Treatment Information:

- ☑ First Visit Date
- ☑ Last Visit Date – Pulled from last "D" code
- ☑ Last Recall Visit (Last Cleaning)
- ☑ Recall Frequency
- ☑ Next Recall Date – Based on last recall visit date using recall frequency
- ☑ TPO Consent – Defaults to date of conversion
- ☑ Failed Appointment (No Show)
- ☑ Pre-Med

Insurance and Employer Information:

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

Second Insurance and Employer Information:

- ☑ Relation to Primary Policy Holder
- ☑ Subscriber Name
- ☑ Insurance ID – If Blank pulls from Subscriber
- ☑ Group Number
- ☑ Benefit Assignment
- ☑ Insurance Carrier Name
- ☑ Employer Name
- ☑ Benefit Plan
- ☑ Pat Deductible
- ☑ Max Benefit

Insurance Carrier:

- ☑ Insurance Carrier Name
- ☑ Address 1
- ☑ Address 2
- ☑ City
- ☑ State
- ☑ Zip
- ☑ Phone
- ☑ Fax
- ☑ Email
- ☑ Contact
- ☑ Payer ID
- ☑ Payer Office
- ☑ Submission Type – Defaults to Electronic
- ☑ Form Type current ADA Form
- ☑ Provider ID – Defaults to 1
- ☑ Insurance Type – Defaults to Dental

Benefit Plan:
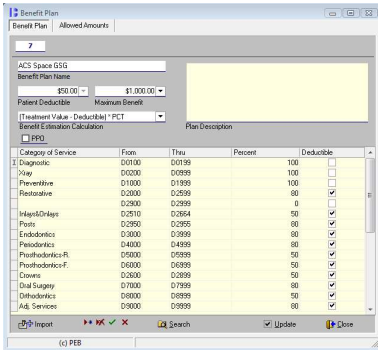
- ☑ Benefit Plan Name
- ☑ Patient Deductible
- ☑ Maximum Benefit
- ☑ Benefit Estimation Calculation – Defaults to (Treatment Value – Deductible) * PCT)

Benefit Plan Allowed Amounts Tab:
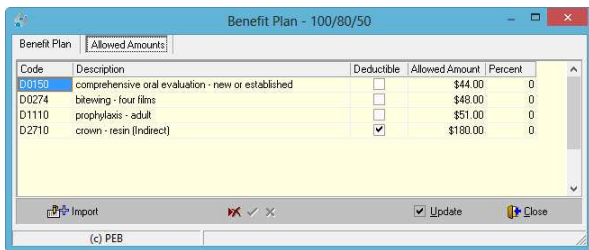
- ☑ Code
- ☑ Description
- ☑ Deductible
- ☑ Allowed Amount
- ☑ Percent

Appointment Book:
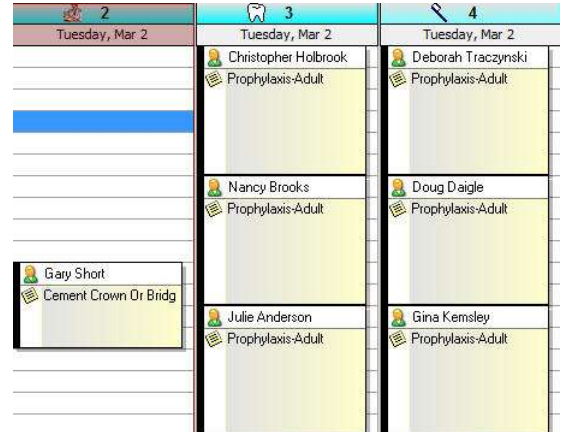
- ☑ Practice Appointments will convert to appropriate column
- ☑ Patient Name
- ☑ Appointment Date
- ☑ Appointment Time
- ☑ Appointment Length
- ☑ Appointment Notes
- ☑ Appointment Details

Fee Table:
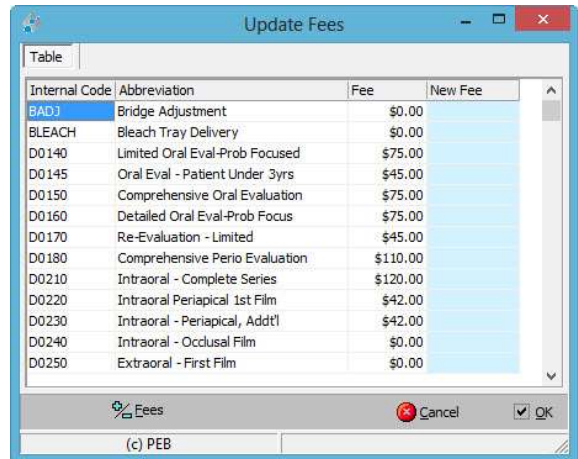
- ☑ Procedure Codes
    - ♦ Active ADA Codes
    - ♦ Base Code Abbreviation
- ☑ Standard Fee

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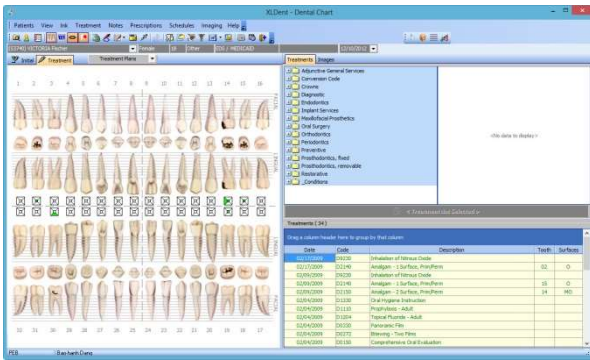
- ☑ Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChart™
- ☑ Date
- ☑ Patient Name
- ☑ Code
- ☑ Treatment
- ☑ Tooth
- ☑ Surface
- ☑ Value
- ☑ Provider

Progress Note Reference Tab
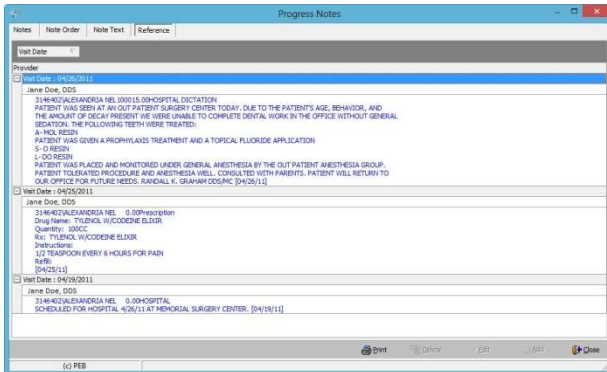
- ☑ Date
- ☑ Note Detail

Treatment Plans:
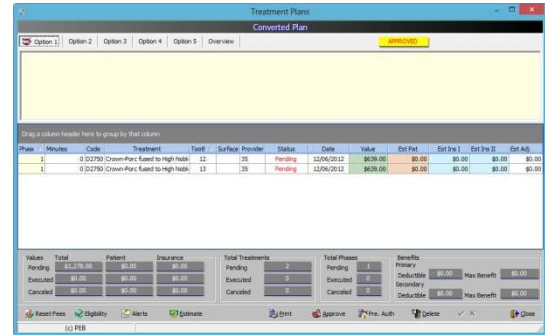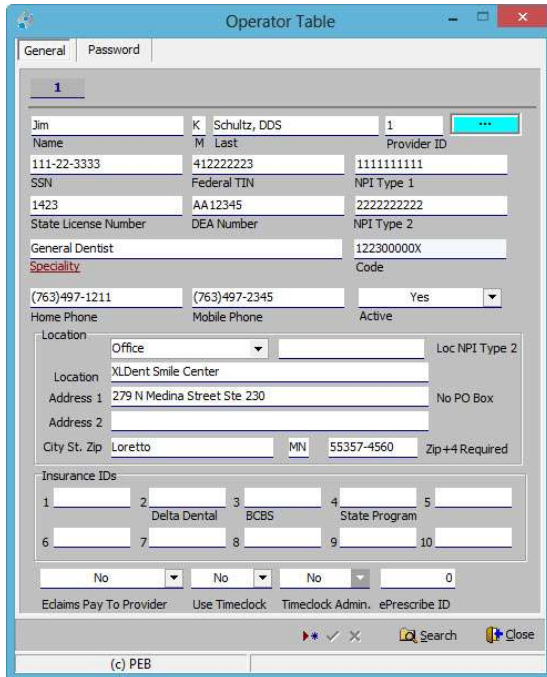
- ☑ Phase – Defaults to 0
- ☑ Minutes – Defaults to 0
- ☑ Code
- ☑ Treatment Description
- ☑ Tooth
- ☑ Surface
- ☑ Provider
- ☑ Status – Defaults to Approved
- ☑ Date
- ☑ Value
- ☑ Patient Value – Defaults to 0
- ☑ Insurance Value I – Defaults to 0
- ☑ Insurance Value II – Defaults to 0

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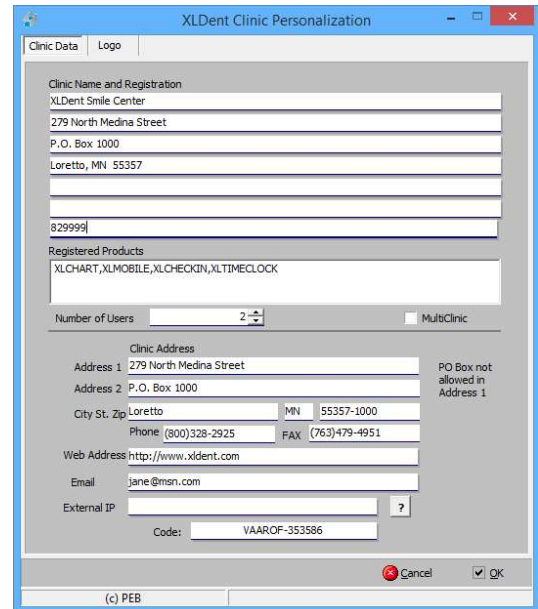
- ☑ Practice Demographic Information
- ☑ Clinic Name
- ☑ Clinic Address and Phone
- ☑ Clinic Logo

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
- ☑ Location – Defaults to Office Name
- ☑ Location Address1 and 2
- ☑ Location City, State, Zip
- ☑ Insurance ID's – If available

Files Needed
?:\dmate\data*.* excluding Images folder or dmback file
Need field.ddf, fieldext.ddf, file.ddf and index.ddf

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.

Duplicate Patients:
Some Practice Management software will allow entry of patients and other information multiple times without warning of duplication. Due to the nature of the database conversion process, there are some items that you should review on the conversion evaluation to identify this duplication. One such item is the duplication of Patient records. To assist you in locating duplicate patients, the XLDent™ Name and Address listing is provided during the evaluation process. Please contact your XLDent™ representative with any questions regarding this process. We look forward to helping you with a smooth transition to XLDent™.

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
- ⊘ Payment Plans/Contract Balances
- ⊘ Outstanding Insurance Claims & Claim Notes
- ⊘ EasyScan Documents
- ⊘ Patients marked as Dead
- ⊘ Inactive Insurance Carriers
- ⊘ Tertiary and Quaternary Insurance
- ⊘ Appointment Blocks
- ⊘ Blank Patient Appointments

Notes on Conversions:
➢ Guarantors will not convert with their original id number. A new number will be re-assigned during the conversion. Guarantors will be linked to the responsible party for family groupings.

➢ Inactive accounts with balances should be reactivated or written off prior to final conversion. This will be determined at the time of preliminary conversion.
➢ Appointments marked as Confirmed will convert as Confirmed Patient.
➢ Appointments with invalid ADA codes will not convert over in the appointment. Ex. 00274

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

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

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

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™. 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.

Patient Treatment Plans
Only the last 12 months of treatment plans will convert.

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™ 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.