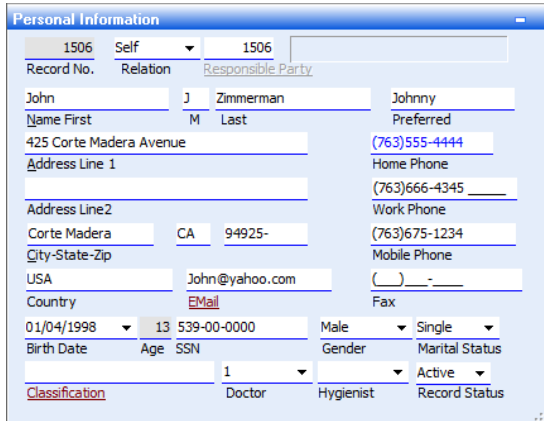


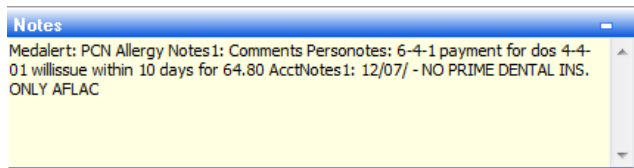
**Patient Information:**



Personal Information window showing fields for Record No., Relation, Responsible Party, Name First, Last, Preferred, Address Line 1, 2, City-State-Zip, Country, Birth Date, Age, SSN, Gender, Marital Status, Classification, Doctor, Hygienist, Record Status, and various phone numbers.

- 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 – Other Number
- Email Address
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status – Active, Inactive

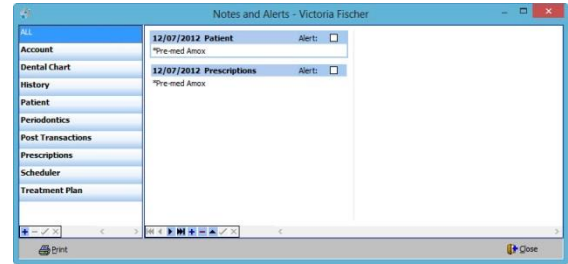
**Notes:**



Notes window showing text: Medialert: PCN Allergy Notes1: Comments Personotes: 6-4-1 payment for dos 4-4-01 willissue within 10 days for 6-4.80 AcctNotes1: 12/07/ - NO PRIME DENTAL INS. ONLY AFLAC

- Other Name, Address, Phone
- Notify Name, Address, Phone
- User Field 1
- Referred By

**Notes and Alerts:**



Notes and Alerts - Victoria Fischer window showing a list of alerts and notes with checkboxes for 'Alert' and 'Prescriptions Alert'.

- Medical Alerts convert to Patient Record Alert and Prescriptions Alert
- Patient Notes convert to Patient Record Notes

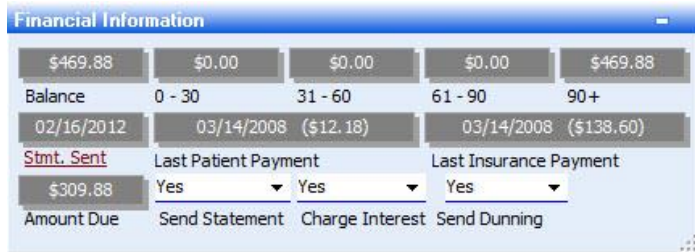
**History Reference Tab:**



Date	Patient Name	Code	Treatment	Tooth	Surface	Value	Provider
01/20/2012	Victoria	150.00	Camp Oral Eval-New Or Estab Patient			\$55.00	I
01/20/2012	Victoria	200.00	Paraspical X-ray - First Film			\$27.00	I
01/20/2012	Victoria	330.00	Parasanc Film			\$55.00	I
01/20/2012	Victoria	1203.00	Child Fluoride - No Prophy			\$41.00	I
01/20/2012	Victoria	1120.00	Prophyseal-Child			\$51.00	I
02/09/2012	Victoria	2.00	Insurance Check Payment			\$279.28	I
02/09/2012	Victoria	50.90	Participating Insurance Adjustment			(\$1.10)	I
03/07/2012	Victoria	6220.00	Analgesia			\$33.00	I
03/07/2012	Victoria	2281.00	Resin Composite-1 Surface, Posterior	14	O	\$126.00	I
03/23/2012	Victoria	2.00	Insurance Check Payment			\$362.38	I
01/20/2012	Victoria	150.00	Camp Oral Eval-New Or Estab Patient			\$55.00	I
01/20/2012	Victoria	1203.00	Child Fluoride - No Prophy			\$41.00	I
01/20/2012	Victoria	330.00	Parasanc Film			\$55.00	I
01/20/2012	Victoria	1120.00	Prophyseal-Child			\$51.00	I
02/09/2012	Victoria	2.00	Insurance Check Payment			\$245.74	I
02/09/2012	Victoria	50.90	Participating Insurance Adjustment			(\$1.10)	I

- 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

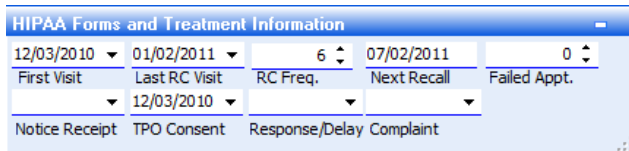
**Financial Information:**



Financial Information window showing account balances and payment history. The window title is "Financial Information". It displays a balance of \$469.88, with columns for aged balances: 0-30 (\$0.00), 31-60 (\$0.00), 61-90 (\$0.00), and 90+ (\$469.88). It also shows the last patient payment on 03/14/2008 for \$12.18 and the last insurance payment on 03/14/2008 for \$138.60. The amount due is \$309.88. There are checkboxes for "Send Statement", "Charge Interest", and "Send Dunning", all of which are checked.

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

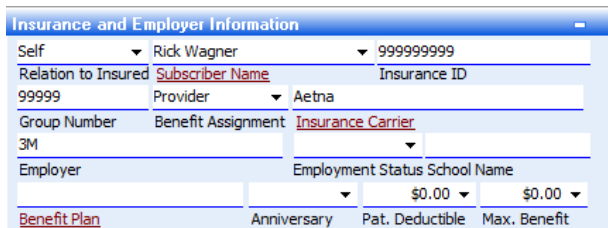
**HIPAA Forms and Treatment Information:**



HIPAA Forms and Treatment Information window showing visit dates and frequencies. The window title is "HIPAA Forms and Treatment Information". It displays fields for First Visit (12/03/2010), Last RC Visit (01/02/2011), RC Freq. (6), Next Recall (07/02/2011), and Failed Appt. (0). There are also checkboxes for "Notice Receipt", "TPO Consent", "Response/Delay", and "Complaint", all of which are checked.

- First Visit Date
- Last Visit Date – Based on last posting code
- Last Recall Visit – Based on next recall date minus recall frequency
- Recall Frequency
- Next Recall Date – Date Due
- TPO Consent- Defaulted to Conversion Date

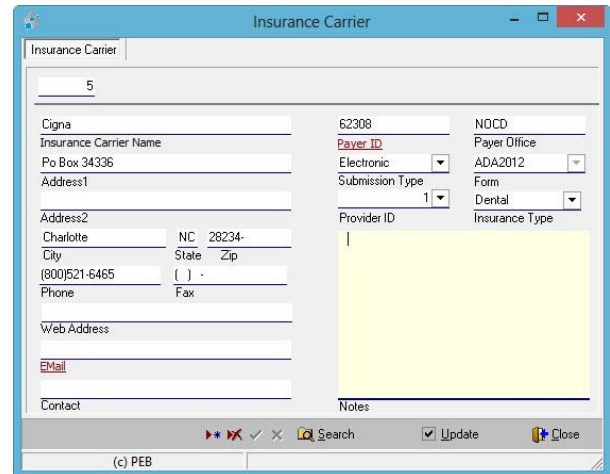
**Insurance and Employer Information:**



Insurance and Employer Information window showing patient and insurance details. The window title is "Insurance and Employer Information". It displays fields for Self (Rick Wagner), Relation to Insured (Subscriber Name), Insurance ID (999999999), Group Number (3M), Benefit Assignment, Insurance Carrier (Aetna), Employer, Employment Status, School Name, Pat. Deductible (\$0.00), and Max. Benefit (\$0.00). There are checkboxes for "Benefit Plan", "Anniversary", "Pat. Deductible", and "Max. Benefit", all of which are checked.

- 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
- Patient Deductible – Defaults to 0
- Max Benefit – Defaults to 0

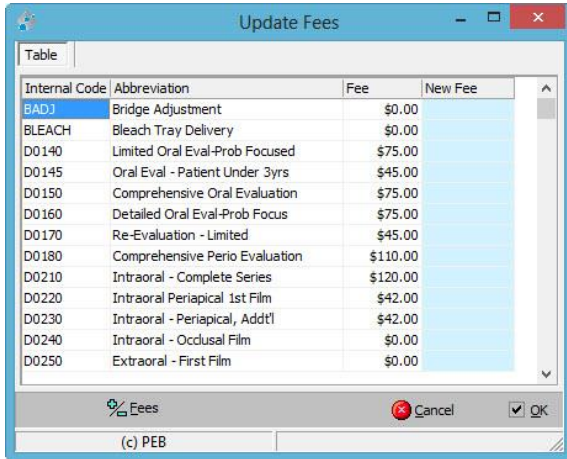
**Insurance Carrier:**



Insurance Carrier window showing carrier details. The window title is "Insurance Carrier". It displays fields for Insurance Carrier Name (Cigna), Payer ID (62308), Payer Office (NOCD), Address1, Address2 (Charlotte, NC, 28234), City, State, Zip, Phone, Fax, Web Address, Email, and Contact. There are dropdown menus for Submission Type (Electronic), Form (ADA2012), and Insurance Type (Dental). There is a large yellowed-out area for Notes. The window has "Update" and "Close" buttons.

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

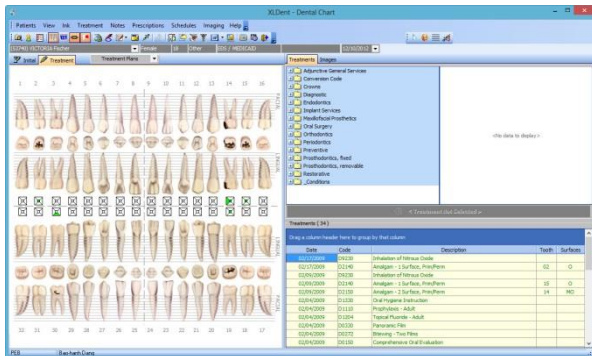
**Fee Table:**



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

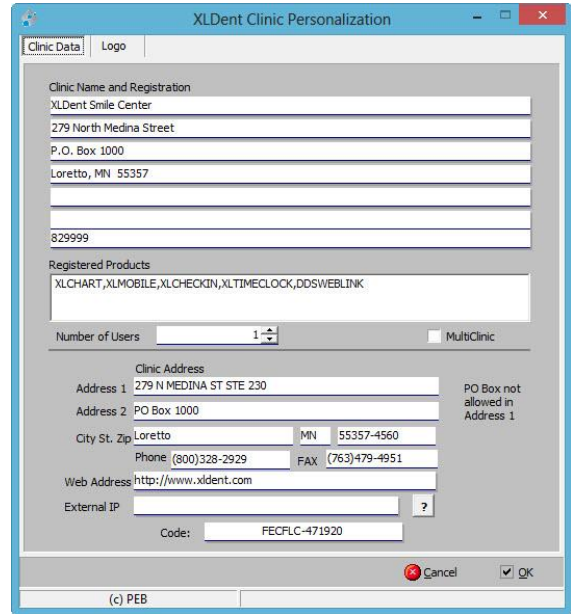
**XLChart™:**



Date	Code	Description	Teeth	Surface
02/17/2009	D0140	Restoration of Silver Crowns	62	
02/17/2009	D0140	Restoration of Silver Crowns	18	
02/17/2009	D0140	Restoration of Silver Crowns	19	
02/17/2009	D0140	Restoration of Silver Crowns	14	MS
02/17/2009	D0110	Prophylaxis - Adult		
02/17/2009	D0104	Deep Prophylaxis - Adult		
02/17/2009	D0100	Periapical Film		
02/17/2009	D0170	Perio - Top Film		
02/17/2009	D0150	Comprehensive Oral Evaluation		

- 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

**Practice Information**



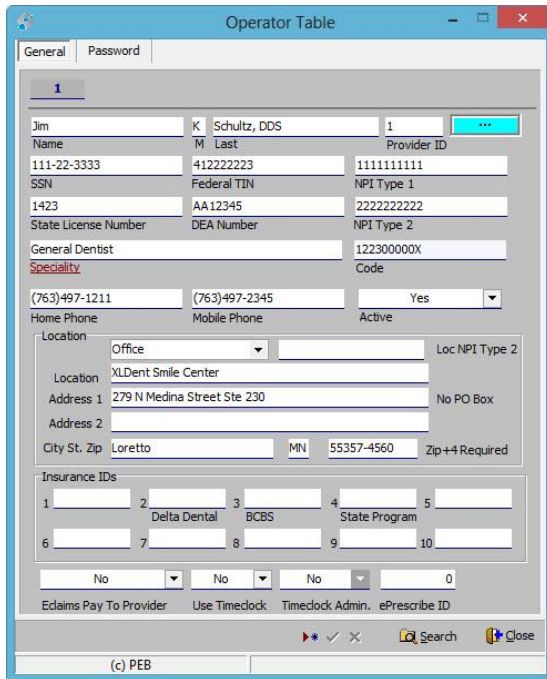
**XLChart™, XLMobile™, XLCheck™, XLTimeClock™, DDSweblink™**

Number of Users: 1  MultiClinic

**Clinic Address**  
 Address 1: 279 N MEDINA ST STE 230  
 Address 2: PO Box 1000  
 City St. Zip: Loretto MN 55357-4560  
 Phone: (800)328-2929 FAX: (763)479-4951  
 Web Address: http://www.xldent.com  
 External IP:  ?  
 Code: FECLC-471920

- 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:

?:\dwwin\

## Files Needed

?:\dwwin\\*. \* 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
- Rx Listing and Patient Rx
- Benefit Plans / Allowed Amounts
- Progress Notes
- Secondary Insurance
- Appointments
- Treatment Plans

## Notes on Conversions:

- General Recall and Will Call Us will default to a six (6) month recall frequency.
- Inactive Records will not convert insurance coverage.
- Primary insurance held by the responsible party will convert linked to patients. If a patient holds the primary insurance for other family members, it will not convert linked to the family members.
- Terminated insurance will not convert.

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>™</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.

### **Patient Status**

Accounts may converted as Inactive based on last visit date. Date is determined as part of end users preliminary data conversion cleanup process.

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>™</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.**