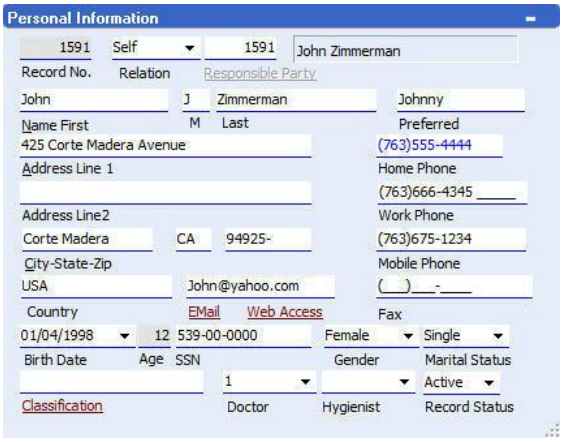
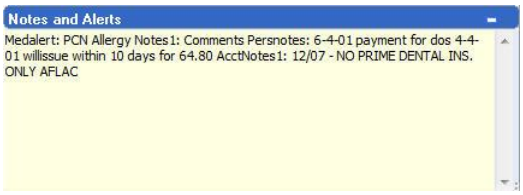
Patient Information:



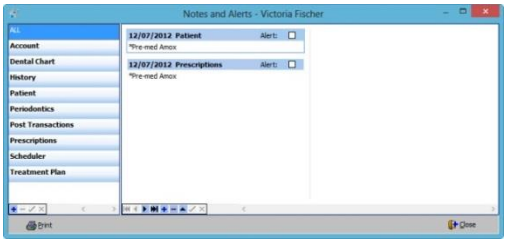
- ☑ Patients grouped by responsible party.
- ☑ First Name
- ☑ Middle Initial
- ☑ Last Name
- ☑ Preferred Name
- ☑ Address 1
- ☑ City
- ☑ State
- ☑ Zip
- ☑ Home Phone Number
- ☑ Work Phone Number
- ☑ Mobile Phone Number
- ☑ Email Address
- ☑ Gender
- ☑ Marital Status
- ☑ Birth Date
- ☑ Patient SSN
- ☑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

Patient Notes Panel:



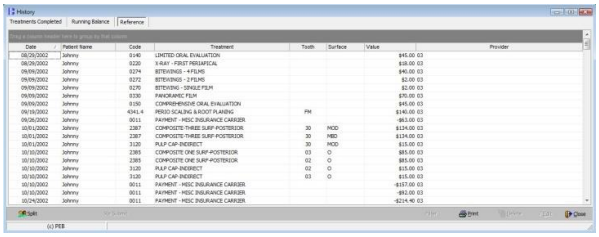
- ☑ Med ID / ID
- ☑ Email / Other field when did not contain @

Notes and Alerts:



- ☑ Medical Alerts convert to Patient Chart Alert

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

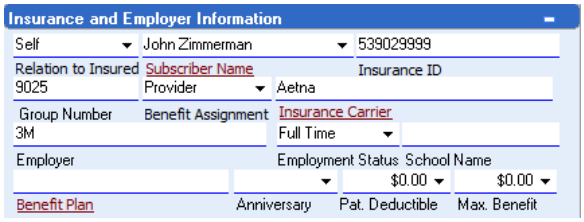
Financial Information:

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

HIPAA Forms and Treatment Information:

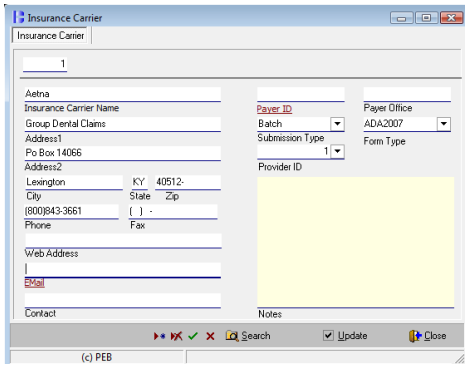
- ☑ First Visit Date uses Setup Date
- ☑ Last Visit Date
- ☑ Last Recall – Based on next recall subtract frequency
- ☑ Recall Frequency
- ☑ Next Recall Date
- ☑ TPO Consent Date (Defaults to date of conversion)

Insurance and Employer Information:



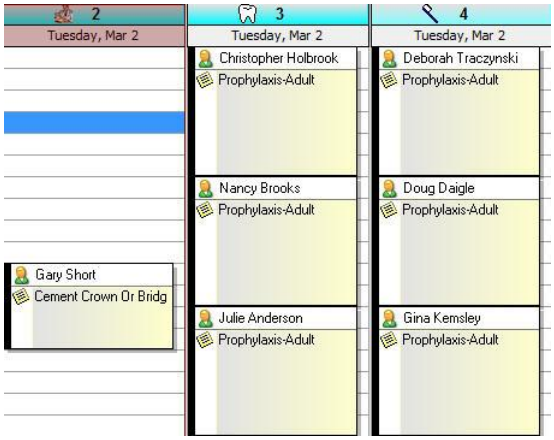
- ☑ Relationship to Primary Policy Holder
- ☑ Subscriber Name
- ☑ Insurance Id – If blank, default SSN# (if available)
- ☑ Group Number
- ☑ Benefit Assignment - Default Provider
- ☑ Insurance Carrier Name
- ☑ Employer (from Insurance Plan Name)
- ☑ Employment Status – Default Full Time
- ☑ Patient Deductible – Default 0
- ☑ Max Benefit – Default 0

Insurance Carrier :



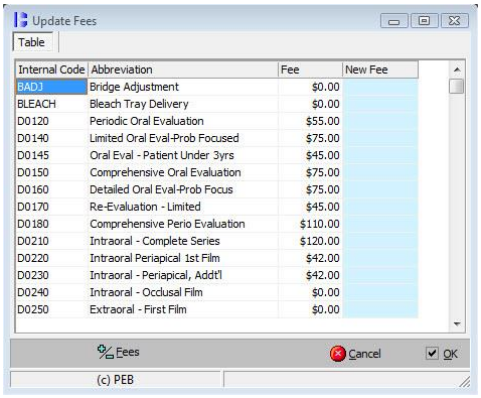
- ☑ Insurance Carrier Name
- ☑ Address 1
- ☑ Address 2
- ☑ City
- ☑ State
- ☑ Zip
- ☑ Phone
- ☑ Payer ID
- ☑ Payer Office
- ☑ Submission Type – Default Electronic
- ☑ Form Type current ADA Form
- ☑ Provider ID – Default 1

Appointment Book:



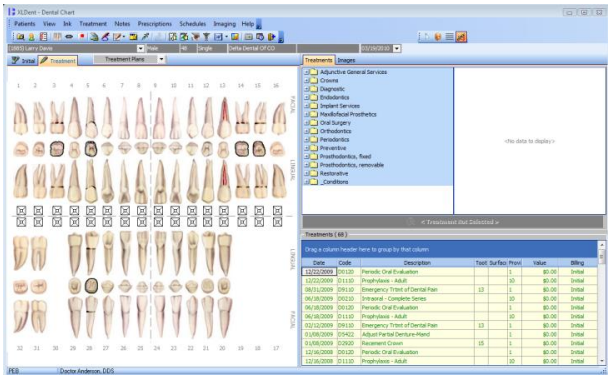
- ☑ Practice Appointments will convert to appropriate column
- ☑ Patient Name
- ☑ Appointment Date
- ☑ Appointment Time
- ☑ Appointment Length
- ☑ All Appointments convert default Prophy Code [D1110 or D1120] depending upon dentist specialty. Operative appointments may need to be modified following conversion.

Fee Table:



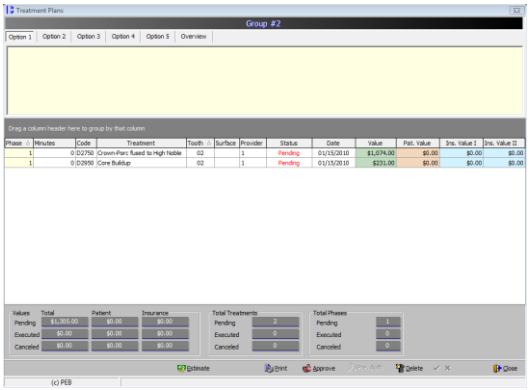
- ☑ Procedure Codes
  - ♦ Active ADA Codes
  - ♦ Base Code Abbreviation
- ☑ Primary Fee Schedule

XLChart™:



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

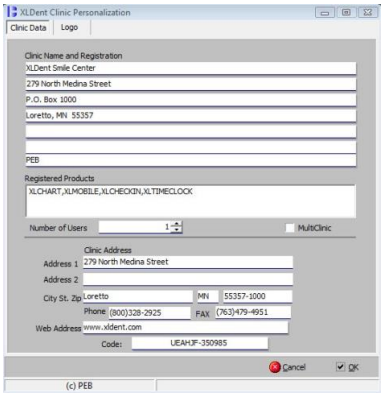
Treatment Plans:



Only plans created in the last 12 months will convert.

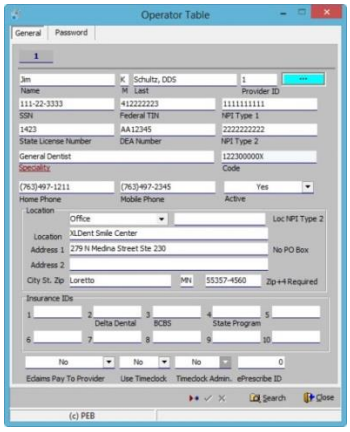
- ☑ Converted Plans are Accepted and Diagnosed
- ☑ Phase
- ☑ Minutes – Default 0
- ☑ Code
- ☑ Treatment Description
- ☑ Tooth
- ☑ Surface
- ☑ Provider
- ☑ Status – Default Pending
- ☑ Date
- ☑ Value
- ☑ Patient Value – Default 0
- ☑ Insurance Value I – Default 0
- ☑ Insurance Value II – Default 0

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

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
- ⃠ Provider Accounts Receivable Distribution
- ⃠ Payment Plans/Contract Balances
- ⃠ Outstanding Insurance Claims
- ⃠ Archival History
- ⃠ Prescription Listing
- ⃠ Patient Prescriptions
- ⃠ Secondary Insurance
- ⃠ Benefit Plans
- ⃠ Referrals
- ⃠ Patient History Comments
- ⃠ Clinical/Progress Notes
- ⃠ Patient Comments
- ⃠ Titles

Notes on Conversions:
- ➢ Marital Status will convert as Other

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.

Patient Preferred Name
When this is not entered into current system it will default to first name.

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™. This can be manually changed.

Recall Frequency
When this is not entered into current system it will default to 6. This will have to be manually updated after loading the converted database.

Patient Status
Active, collection and auxiliary status patients convert to XLDent™. Inactive accounts may convert based on quality 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™ 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.