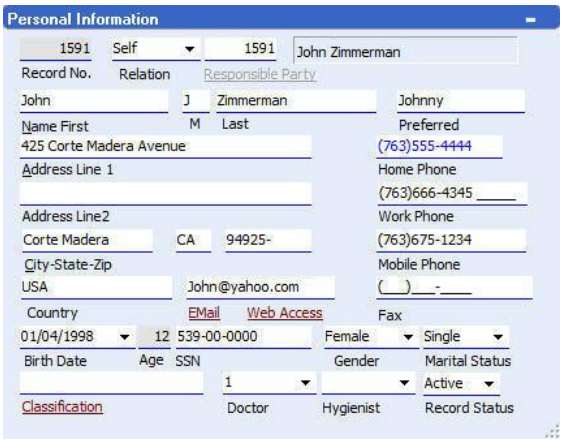
Patient Information:



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

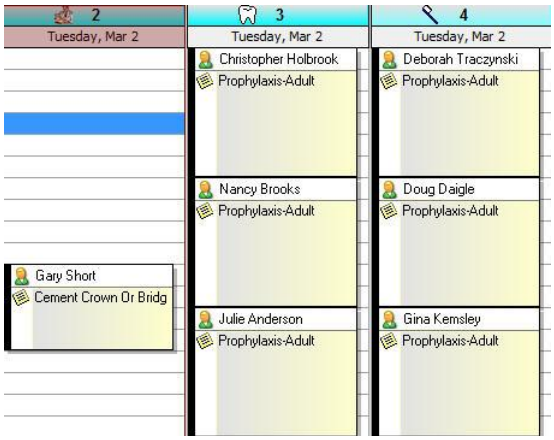
Financial Information:

- ☑ 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:

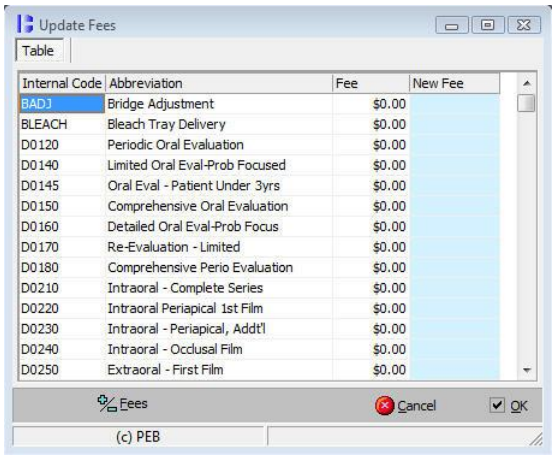
- ☑ First Visit Date
- ☑ Last Recall Visit (Last Treatment in recall System)
- ☑ Recall Frequency - Defaults to 6
- ☑ Next Recall Date – Based on last recall visit date using recall frequency
- ☑ TPO Consent

Appointment Book:



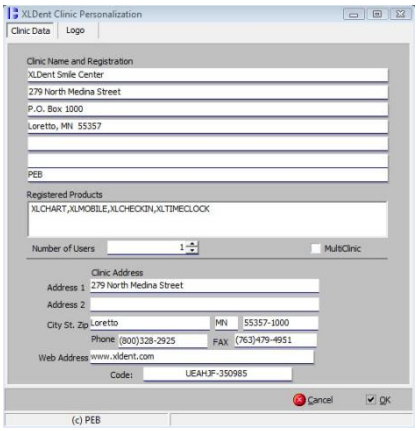
- ☑ Practice Appointments will convert to appropriate column
- ☑ Patient Name
- ☑ Appointment Date
- ☑ Appointment Time
- ☑ Appointment Length
- ☑ Appointment Notes
- ☑ All Appointments convert default Prophy Code [D1110]. Operative appointments may need to be modified following conversion.

Fee Table:



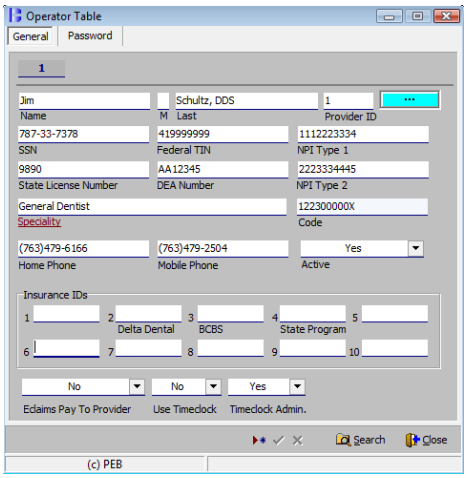
- ☑ Procedure Codes
  - ♦ Active ADA Codes
  - ♦ Base Code Abbreviation
- ☑ Primary Fee Schedule

Practice Information:



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

Operators:



- ☑ 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
- ☑ Insurance ID's – If available

File Location:

?:\mogowin\

?:\Program Files\MOGO Windows 9\

Files Needed

?:\MOGOWIN\SQL-DATA*.mdf & *.ldf

NOTE: Verify software location by right clicking on shortcut and check the properties.

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.

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
- ⃠ Referrals
- ⃠ Prescription Listing
- ⃠ Benefit Plans / Allowed Amounts
- ⃠ Progress Notes
- ⃠ Treatment Plans
- ⃠ Notes
- ⃠ History
- ⃠ Insurance Carrier Listing

Notes on Conversions:

- Appointments will convert with a defaulted prophy code. This can be manually changed after the conversion.

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.

Phone Numbers
Patient's Home Phone is taken from Contact Information Home Tab under Phone. Patient's Business Phone is taken from Contact Information Business Tab under Phone.

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 the creation date is not converted or the patient does not have a creation 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.

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™ 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.