

**Patient Information:**



**Personal Information**

1591 Self 1591 John Zimmerman

Record No. Relation 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 Line 2 Work Phone

Corte Madera CA 94925- (763)675-1234

City-State-Zip Mobile Phone

USA John@yahoo.com ( ) -

Country EMail Web Access Fax

01/04/1998 12 539-00-0000 Female Single

Birth Date Age SSN Gender Marital Status

1 Active

Classification Doctor Hygienist Record Status

- Patients grouped by responsible party.
- First Name
- Last Name
- Middle Initial
- 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:**



**Financial Information**

\$745.00 \$50.00 \$60.00 \$135.00 \$500.00

Balance 0 - 30 31 - 60 61 - 90 90+

Stmnt. Sent Last Patient Payment Last Insurance Payment

Yes Yes Yes

Send Statement Charge Interest Send Dunning

- 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**

02/19/2010 11/14/2008 6 05/14/2009 0

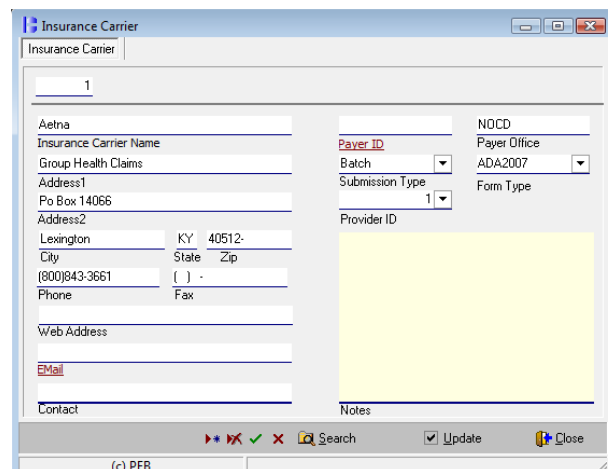
First Visit Last RC Visit RC Freq. Next Recall Failed Appt.

02/19/2010

Notice Receipt TPO Consent Response/Delay Complaint

- First Visit Date
- Last 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

**Insurance Carrier:**



**Insurance Carrier**

1

Aetna

Insurance Carrier Name

Group Health Claims

Address1

Po Box 14066

Address2

Lexington KY 40512-

City State Zip

(800)843-3661 ( ) -

Phone Fax

Web Address

EMail

Contact

NOCD

Payer ID

Payer Office

ADA2007

Batch

Submission Type

Form Type

1

Provider ID

Notes

Update Close

(c) PEB

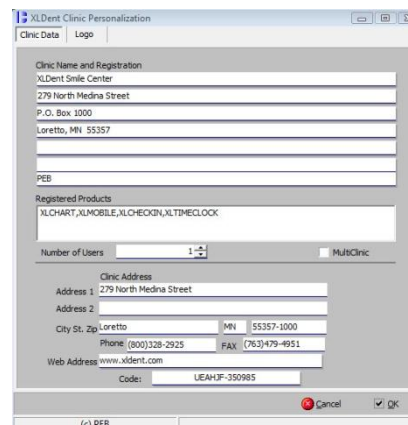
- Insurance Carrier Name – Not Linked to Patients
- Address 1
- Address 2
- City
- State
- Zip
- Phone
- Payer ID – Add after conversion
- Payer Office – Defaults to Blank
- Submission Type – Defaults to Batch
- Form Type current ADA Form
- Provider ID – Defaults to 1

**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
- Appointment Notes
- All Appointments convert default Prophy Code [D1110]. Operative appointments may need to be modified following conversion.

**Practice Information:**



XL Dent Clinic Personalization  
Clinic Data | Logo

Clinic Name and Registration  
XL Dent Smile Center  
279 North Medina Street  
P.O. Box 1000  
Loretto, MN 55357

PEB

Registered Products  
XLCHART, XLMOBILE, XLCHECKIN, ULTIMECLOCK

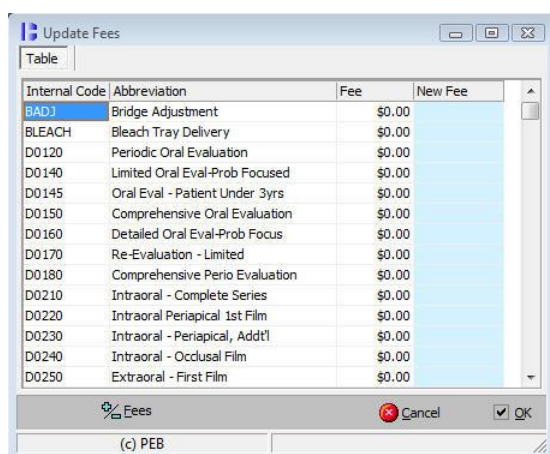
Number of Users: 1-4 | MultiClinic

Clinic Address  
Address 1: 279 North Medina Street  
Address 2:  
City St. Zip: Loretto MN 55357-1000  
Phone: (800)328-2925 FAX: (763)479-4951  
Web Address: www.xldent.com  
Code: UEAHP-350985

(c) PEB | Cancel | OK

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

**Fee Table:**

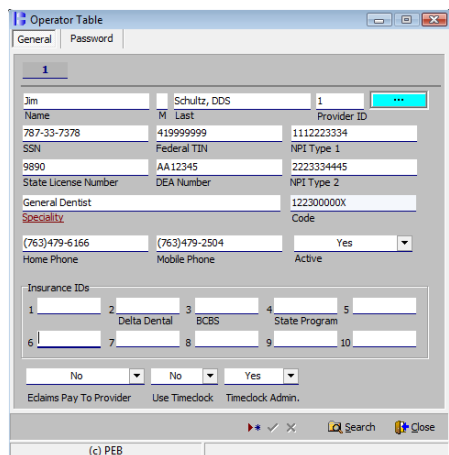


Internal Code	Abbreviation	Fee	New Fee
BADJ	Bridge Adjustment	\$0.00	
BLEACH	Bleach Tray Delivery	\$0.00	
D0120	Periodic Oral Evaluation	\$0.00	
D0140	Limited Oral Eval-Prob Focused	\$0.00	
D0145	Oral Eval - Patient Under 3yrs	\$0.00	
D0150	Comprehensive Oral Evaluation	\$0.00	
D0160	Detailed Oral Eval-Prob Focus	\$0.00	
D0170	Re-Evaluation - Limited	\$0.00	
D0180	Comprehensive Perio Evaluation	\$0.00	
D0210	Intraoral - Complete Series	\$0.00	
D0220	Intraoral Periapical 1st Film	\$0.00	
D0230	Intraoral - Periapical, Addtl	\$0.00	
D0240	Intraoral - Occlusal Film	\$0.00	
D0250	Extraoral - First Film	\$0.00	

(c) PEB | Cancel | OK

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

**Operators:**



The screenshot shows a software window titled "Operator Table" with a "General" tab. It contains a form for entering operator information. Fields include Name (Jim Schultz, DDS), SSN (787-33-7378), Federal TIN (419999999), NPI Type 1 (1112223334), State License Number (9890), AA (AA12345), NPI Type 2 (2223334445), and Specialty Code (122300000X). There are also fields for Home Phone and Mobile Phone, and a section for Insurance IDs (Delta Dental, BCBS, State Program). At the bottom, there are checkboxes for "Edmans Pay To Provider", "Use Timedock", and "Timedock Admin".

- 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 10\

**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
- History

**Notes on Conversions:**

- Appointments will convert with a defaulted prophylaxis 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.**