

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

Address Line 2 Work Phone

Corte Madera CA 94925- (763)666-4345

City-State-Zip Mobile Phone

USA John@yahoo.com () -

Country Email Web Access Fax

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

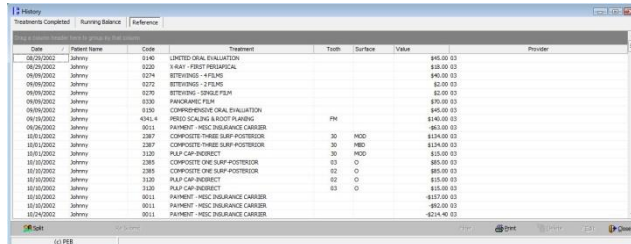
Birth Date Age SSN Gender Marital Status

Classification 1 Active

Doctor Hygienist Record Status

- 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
- Email Address
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status – Active

History Reference Tab:



Date	Patient Name	Code	Treatment	Tooth	Surface	Value	Provider
06/20/2002	Johnny	8148	UNITED ORAL EVALUATION			\$45.00 03	
06/20/2002	Johnny	8220	U-RAY - FIRST PERIAPICAL			\$35.00 03	
06/20/2002	Johnny	8224	STEREOS - 4 FILMS			\$45.00 03	
06/20/2002	Johnny	8222	STEREOS - 2 FILMS			\$25.00 03	
06/20/2002	Johnny	8250	STEREOS - COMPLETE			\$25.00 03	
06/20/2002	Johnny	8330	PANORAMIC FILM			\$35.00 03	
06/20/2002	Johnny	8150	COMPREHENSIVE ORAL EVALUATION			\$45.00 03	
06/20/2002	Johnny	4241.4	PERIODONTAL PROBE PLANNING		PM	\$145.00 03	
06/20/2002	Johnny	8011	PAYMENT - MEDIC INSURANCE CARRIER			\$52.00 03	
06/20/2002	Johnny	2387	COMPOSITE THREE SURF POSTERIOR	30	MBD	\$174.00 03	
06/20/2002	Johnny	2387	COMPOSITE THREE SURF POSTERIOR	30	MBD	\$174.00 03	
06/20/2002	Johnny	2387	COMPOSITE THREE SURF POSTERIOR	03	O	\$85.00 03	
06/20/2002	Johnny	2388	COMPOSITE ONE SURF POSTERIOR	02	O	\$85.00 03	
06/20/2002	Johnny	3120	PALP CAR-INDIRECT	02	O	\$35.00 03	
06/20/2002	Johnny	3120	PALP CAR-INDIRECT	03	O	\$35.00 03	
06/20/2002	Johnny	8011	PAYMENT - MEDIC INSURANCE CARRIER			\$137.00 03	
06/20/2002	Johnny	8011	PAYMENT - MEDIC INSURANCE CARRIER			\$52.00 03	
06/20/2002	Johnny	8011	PAYMENT - MEDIC INSURANCE CARRIER			\$214.00 03	

- Treatment History – Viewable as History Reference – Does not include deleted transactions [includes Charges]
- Date
- Patient Name
- Code
- Treatment Description
- Tooth
- Surface
- Value
- Provider

Financial Information:



Financial Information

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

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

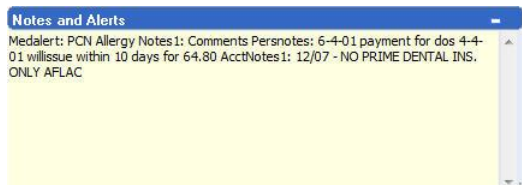
Stmnt. Sent Last Patient Payment Last Insurance Payment

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

Notes:




Notes and Alerts

Medalart: PCN Allergy Notes 1: Comments Persnotes: 6-4-01 payment for dos 4-4-01 willissue within 10 days for 64.80 AcctNotes 1: 12/07 - NO PRIME DENTAL INS. ONLY AFLAC

- Medical Alerts

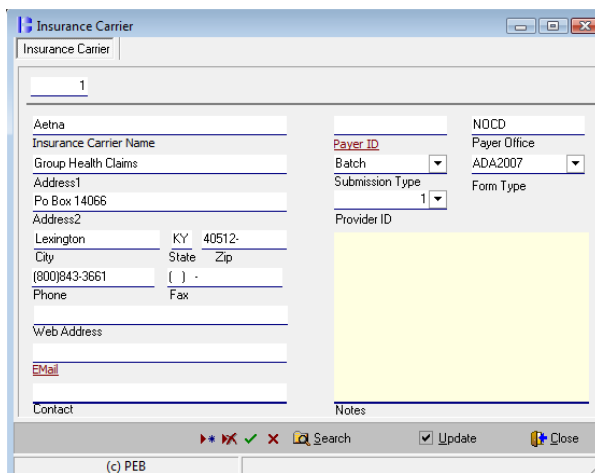
HIPAA Forms and Treatment Information:



The screenshot shows a window titled "HIPAA Forms and Treatment Information" with several input fields and checkboxes. The fields include: 02/19/2010, 11/14/2008, 6, 05/14/2009, 0, First Visit, Last R.C Visit (02/19/2010), RC Freq., Next Recall, Failed Appt., Notice Receipt, TPO Consent, and Response/Delay Complaint.

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

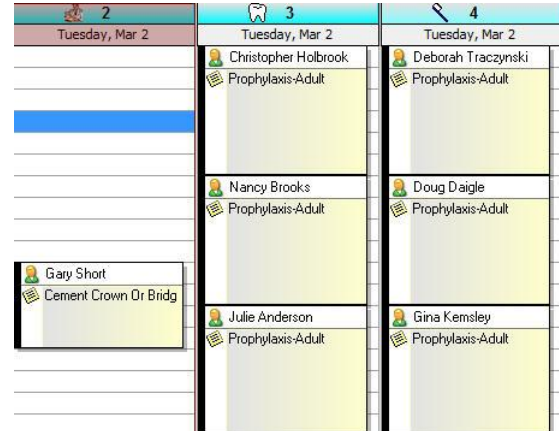
Insurance Carrier:



The screenshot shows an "Insurance Carrier" window with fields for: 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, Payer ID, NOCD, Payer Office, Batch, ADA2007, Submission Type, Form Type, and Provider ID.

- 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

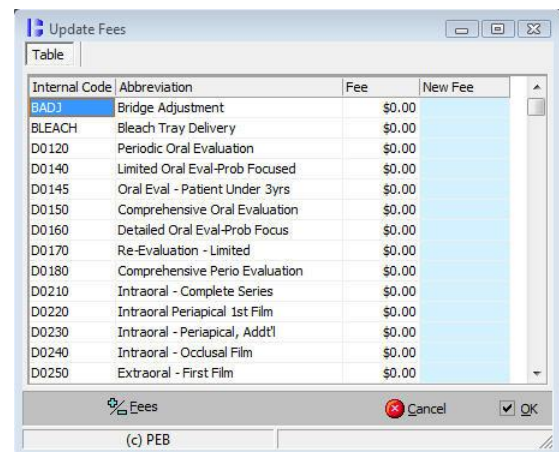
Appointment Book:



The screenshot shows an appointment book grid for Tuesday, Mar 2. The grid has columns for different time slots (2, 3, 4) and rows for different providers. Appointments are listed for Christopher Holbrook, Deborah Traczynski, Nancy Brooks, Doug Daigle, Gary Short, Julie Anderson, and Gina Kemsley, all with the procedure "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.

Fee Table:

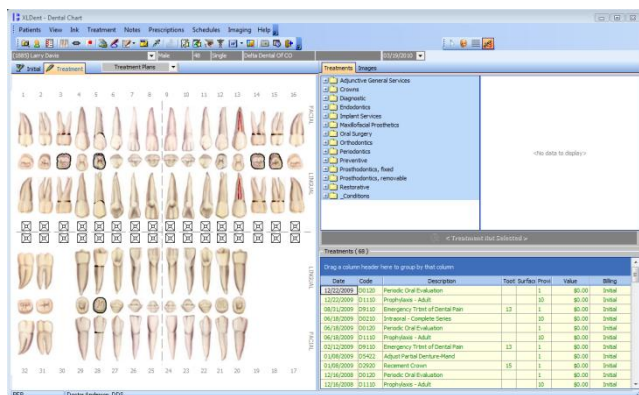


The screenshot shows an "Update Fees" window with a table of procedure codes and fees. The table has columns for Internal Code, Abbreviation, Fee, and New Fee. The data is as follows:

Internal Code	Abbreviation	Fee	New Fee
BJADJ	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, Add'l	\$0.00	
D0240	Intraoral - Occlusal Film	\$0.00	
D0250	Extraoral - First Film	\$0.00	

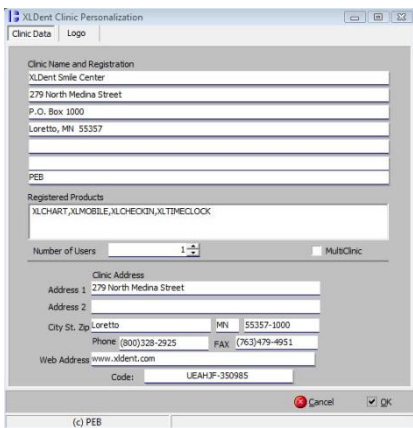
- Procedure Codes
 - ◆ Active ADA Codes
 - ◆ Base Code Abbreviation
- Primary Fee Schedule

XLChart™:



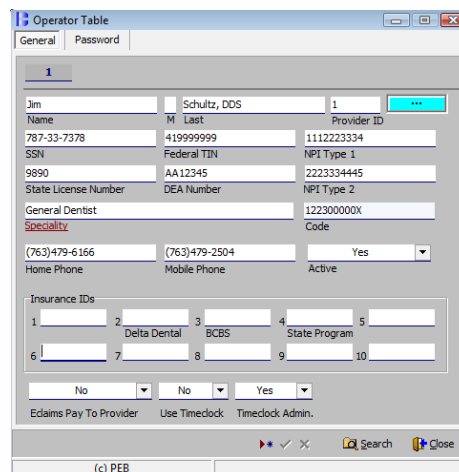
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChart™
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value
- Provider

Practice Information:



- 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 12\

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
- ⊙ Patient Prescriptions
- ⊙ Benefit Plans / Allowed Amounts
- ⊙ Progress Notes
- ⊙ Treatment Plans

Notes on Conversions:

- Appointments will convert with a defaulted prophyl 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.

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.

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.