Patient Information:

☑ Patients grouped by responsible party – If available
☑ First Name
☑ Last Name
☑ Middle Initial
☑ Preferred Name
☑ Address
☑ City
☑ State
☑ Zip
☑ Home Phone Number
☑ Work Phone Number
☑ Mobile Phone Number
☑ Email Address
☑ Gender
☑ Marital Status – Defaults to Other
☑ Birth Date
☑ Patient SSN
☑ Doctor of Record
☑ Record Status – Defaults to Active
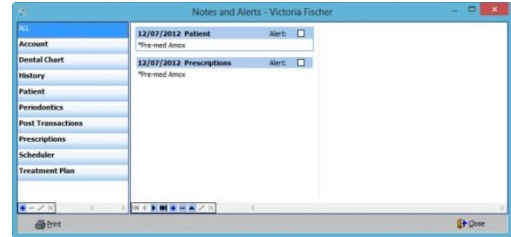
Patient Notes:

☑ RclPrNote
☑ RclexNote
☑ StNote
☑ Memo
☑ School
☑ Group Name

Notes and Alerts:
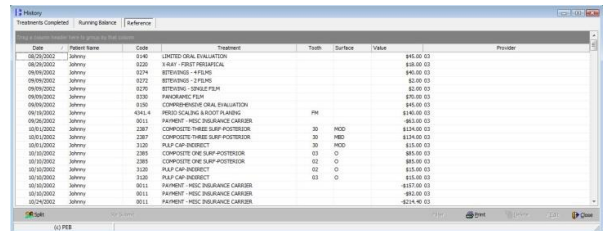
☑ Medical Alert convert to Alert Notes

History Reference Tab:

☑ Treatment History – Viewed as History Reference – Includes Charges, Payments, Debits and Credits [Does not include deleted transactions]
☑ Date
☑ Patient Name
☑ Code
☑ Treatment Description
☑ Tooth
☑ Surface
☑ Value
☑ Provider – Displayed as Provider who performed the service.

Financial Information:
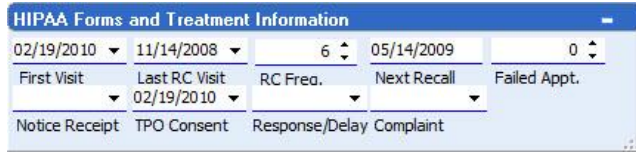
☑ Account Balances -- Aged accordingly based on patient primary doctor. Trainer to manually enter.
☑ Send Statement – Defaults to Yes
☑ Charge Interest – Defaults to Yes
☑ Send Dunning – Defaults to Yes

HIPAA Forms and Treatment Information:

- ☑ First Visit Date
- ☑ Last Visit Date
- ☑ Last Recall Visit
- ☑ Recall Frequency
- ☑ Next Recall Date – Based on last recall visit date using recall frequency
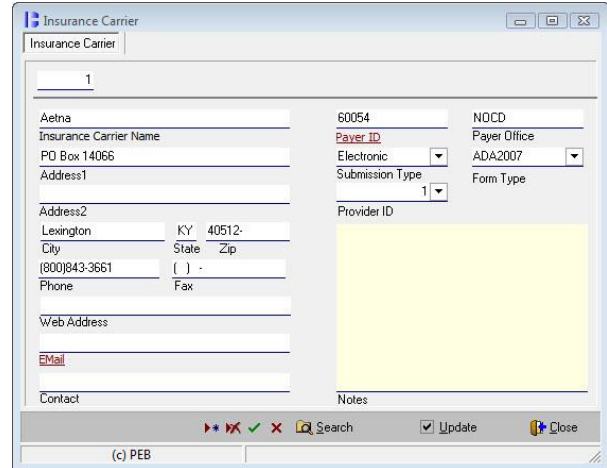
Insurance and Employer Information:

- ☑ Relation to Primary Insured Only on responsible party only.
- ☑ Subscriber Name
- ☑ Insurance Id – If blank defaults to SSN# if available
- ☑ Group Number
- ☑ Benefit Assignment
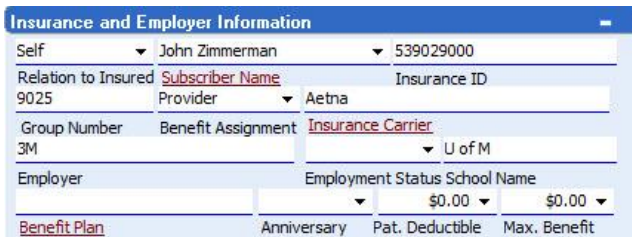- ☑ Insurance Carrier Name
- ☑ Employer Name
- ☑ School Name
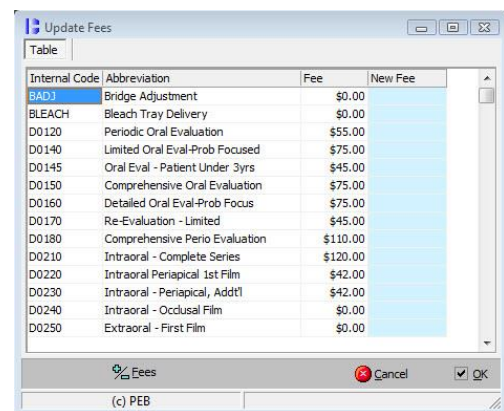
Insurance Carrier:

- ☑ Insurance Carrier Name
- ☑ Address 1
- ☑ Address 2
- ☑ City
- ☑ State
- ☑ Zip
- ☑ Phone
- ☑ Payer ID – Verify after conversion
- ☑ Payer Office Always NOCD
- ☑ Submission Type Always Electronic
- ☑ Form Type current ADA Form
- ☑ Provider ID – Defaults to 1

Fee Table:

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

Practice Information
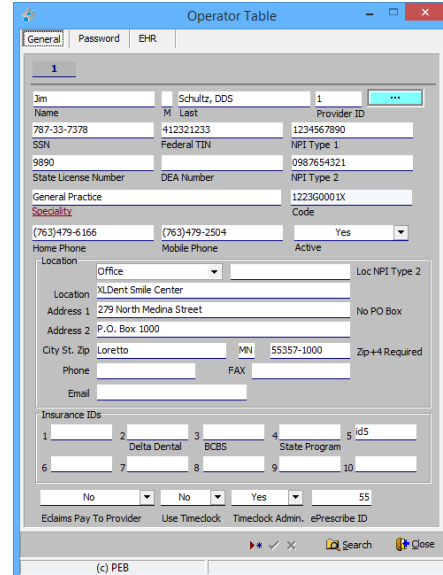
- ☑ Practice Demographic Information
- ☑ Clinic Name
- ☑ Address 1
- ☑ Address 2
- ☑ City, St, Zip+4
- ☑ Phone
- ☑ Fax
- ☑ Web Address – If supplied
- ☑ Email – If supplied
- ☑ External IP – Defaults Blank
- ☑ Clinic Logo

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 – Default Yes
- ☑ Loc NPI Type 2 – Default Blank
- ☑ Location – Clinic Name
- ☑ Address 1
- ☑ Address 2
- ☑ City, St Zip
- ☑ Phone
- ☑ Fax
- ☑ Email – If supplied
- ☑ 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.

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
- ⊘ Treatment Plans
- ⊘ Referrals
- ⊘ Rx Listing
- ⊘ Benefit Plans / Allowed Amounts
- ⊘ Secondary Insurance
- ⊘ Appointment Book

Notes on Conversions:

➢ Patient Insurance may not be converted when linking in existing system is inaccurate or inconsistent.

Below are some 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.

Responsible Party ID#

Responsible party is determined by account number in existing software. If not available, patients will need to be manually transferred to the correct Responsible Party after the conversion.

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[tm]. This can be manually changed.

Recall Frequency

When this is not converted or not entered into current system it will default to 0.

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.

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