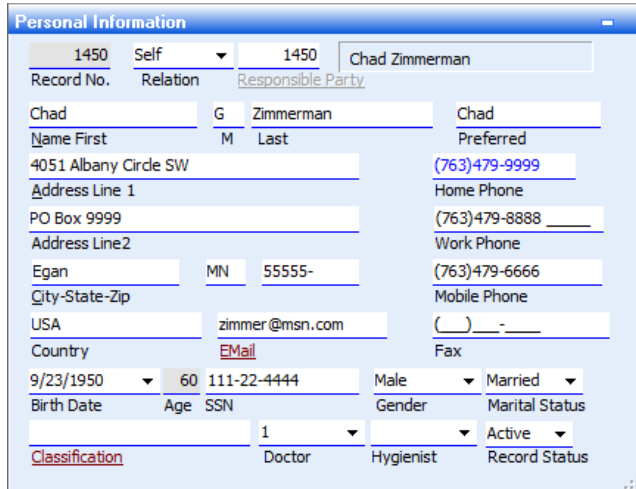


Patient Information:



Personal Information

Record No. 1450 Self Relation 1450 Responsible Party Chad Zimmerman

Name First Chad G Zimmerman Last Chad Preferred

Address Line 1 4051 Albany Circle SW (763)479-9999 Home Phone

Address Line 2 PO Box 9999 (763)479-8888 Work Phone

City-State-Zip Egan MN 55555- Mobile Phone () - -

Country USA zimmer@msn.com Fax () - -

Birth Date 9/23/1950 Age 60 SSN 111-22-4444 Gender Male Marital Status Married

Classification 1 Doctor Hygienist Record Status Active

- Patients grouped by responsible party
- First Name
- Last Name
- Middle Initial
- Preferred Name
- Address Line 1
- Address Line 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
- Hygienist of Record
- Record Status

Notes:

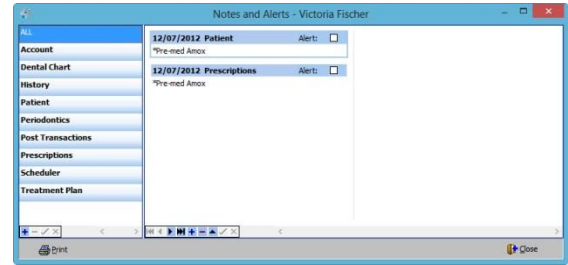


Notes and Alerts

This is a patient Note- Thu - Mar 25, 2010 -sz

- Patient Memo
- Account Notes

Notes and Alerts:



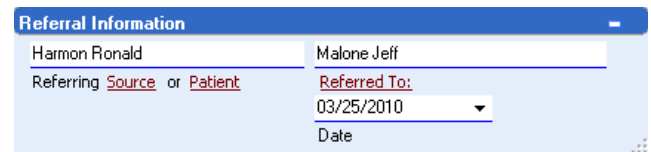
Notes and Alerts - Victoria Fischer

12/07/2012 Patient Alert:

12/07/2012 Prescriptions Alert:

- Patient Alerts convert to Patient Chart Alert
- Account Alerts convert to Account Alert

Referral Information:



Referral Information

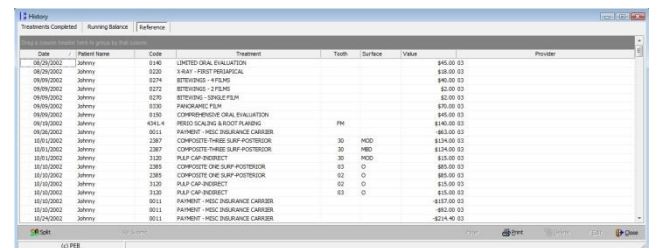
Referring Source or Patient: Harmon Ronald Malone Jeff

Referred To: 03/25/2010

Date

- Referring Patient
- Referring Source
- Referred To
- Referred Date

History Reference Tab:



Date	Patient Name	Code	Treatment	Tooth	Surface	Value	Provider
02/20/2002	Johnny	9140	LIMITED ORAL EVALUATION			\$45.00 03	
02/20/2002	Johnny	9220	FLUORIDE TOOTH PASTA			\$18.00 03	
04/06/2002	Johnny	6274	STRETCHING - 4PLMS			\$45.00 03	
04/06/2002	Johnny	6272	STRETCHING - 2PLMS			\$23.00 03	
04/06/2002	Johnny	6250	STRETCHING - SINGLE FILM			\$2.00 03	
04/06/2002	Johnny	6330	PANORAMIC FILM			\$75.00 03	
04/06/2002	Johnny	6150	COMPREHENSIVE ORAL EVALUATION			\$45.00 03	
04/06/2002	Johnny	49114	PERIO SCALING & ROOT PLANING		PH	\$124.00 03	
04/06/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$62.00 03	
10/01/2002	Johnny	2387	COMPOSITE THREE SLAP POSTERIOR	30	MO	\$174.00 03	
10/01/2002	Johnny	2389	COMPOSITE THREE SLAP POSTERIOR	30	MO	\$174.00 03	
10/01/2002	Johnny	3120	PALP CAP INCORRECT	30	MO	\$15.00 03	
10/01/2002	Johnny	2385	COMPOSITE ONE SLAP POSTERIOR	02	O	\$65.00 03	
10/01/2002	Johnny	3120	PALP CAP INCORRECT	02	O	\$15.00 03	
10/01/2002	Johnny	3120	PALP CAP INCORRECT	03	O	\$15.00 03	
10/01/2002	Johnny	4612	PAYMENT - MEDIC INSURANCE CARRIER			\$177.00 03	
10/01/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$62.00 03	
10/01/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$214.40 03	

- 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:



Financial Information window showing account balances and payment options.

\$745.00	\$50.00	\$60.00	\$135.00	\$500.00
Balance	0 - 30	31 - 60	61 - 90	90+
Stmt. 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
- Charge Interest
- Send Dunning – Defaults to Yes

HIPAA Forms and Treatment Information:

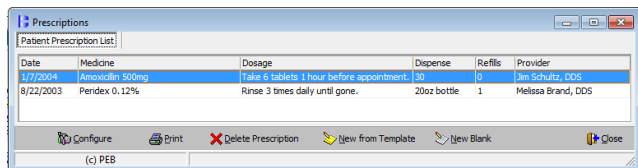


HIPAA Forms and Treatment Information window showing visit dates and frequencies.

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 – Based on Next Recall Date less frequency
- Recall Frequency
- Next Recall Date
- TPO Consent
- Failed Appt

Patient Prescription List:

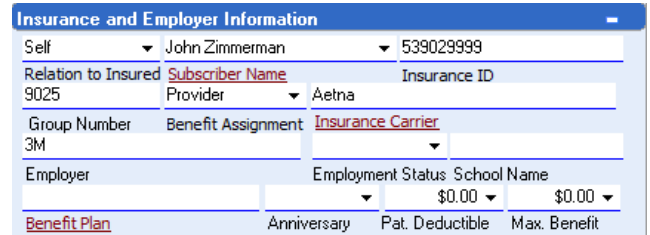


Patient Prescription List window showing a table of prescriptions.

Date	Medicine	Dosage	Dispense	Refills	Provider
1/7/2004	Amoxicillin 500mg	Take 6 tablets 1 hour before appointment.	30	0	Jim Schultz, DDS
8/22/2003	Peridex 0.12%	Rinse 3 times daily until gone.	20oz bottle	1	Melissa Brand, DDS

- Date
- Medicine
- Dosage
- Dispense
- Refills
- Provider

Insurance and Employer Information:

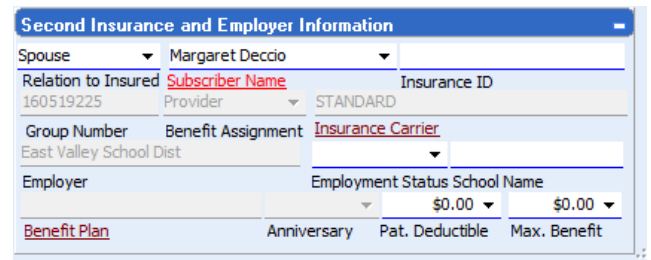


Insurance and Employer Information window showing policy details for John Zimmerman.

Self	John Zimmerman	539029999
Relation to Insured	Subscriber Name	Insurance ID
9025	Provider	Aetna
Group Number	Benefit Assignment	Insurance Carrier
3M		
Employer	Employment Status	School Name
		\$0.00 \$0.00
Benefit Plan	Anniversary	Pat. Deductible Max. Benefit

- Relation to Primary Policy Holder
- Subscriber Name
- Insurance Id – If blank defaults to SSN# if available – Self only
- Group Number
- Benefit Assignment
- Insurance Carrier Name
- Employer Name
- Benefit Plan Name is Insurance Name
- School Name

Second Insurance and Employer Information:



Second Insurance and Employer Information window showing policy details for Margaret Decio.

Spouse	Margaret Decio	
Relation to Insured	Subscriber Name	Insurance ID
160519225	Provider	STANDARD
Group Number	Benefit Assignment	Insurance Carrier
East Valley School Dist		
Employer	Employment Status	School Name
		\$0.00 \$0.00
Benefit Plan	Anniversary	Pat. Deductible Max. Benefit

- Relation to Primary Policy Holder
- Subscriber Name
- Insurance ID – If Blank pulls from Subscriber
- Group Number
- Benefit Assignment
- Insurance Carrier Name
- Employer Name

Insurance Carrier:

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

Benefit Plan:

****Benefit Plan List Only – Not linked to Patients****

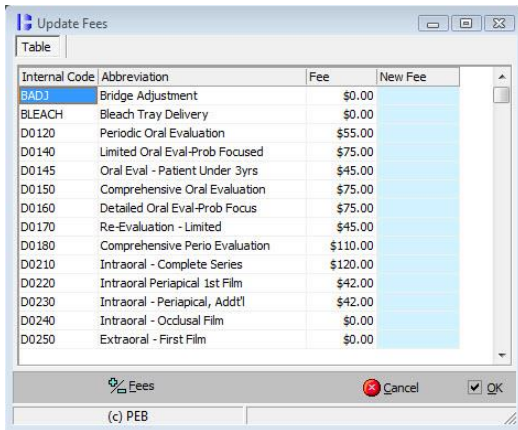
- Benefit Plan Name
- Patient Deductible
- Maximum Benefit
- Benefit Estimation Calculation – Defaults to $(\text{Treatment Value} - \text{Deductible}) * \text{PCT}$
- Category of Service
- Codes From and Thru
- Percent
- Deductible

Appointment Book:

OP-2 Tuesday, March 30	OP-3 Tuesday, March 30	OP-4 Tuesday, March 30
Steighner, Cheryl 7L14 MODL.30L.123	Ruplinger, Linda EX, Pro A	Vedvick, Gerald EX, Pro A
Sledge, Andrea	Markham, Abigail EX, Pro A, FL <26>	DeMarais, Bruce EX, Pro A
Fish, Jill 9 MIF.10 F.14 OL B.3 B 383	Impala, Adam EX, Pro A	Cardin, Susan EX, Pro A
	Sledge, Andrea EX, Pro A	Anning, Richard EX, Pro A

- Practice Appointments will convert to appropriate column
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length
- Appointment Type will convert into Notes
- Appointment Notes
- Appointment Detail

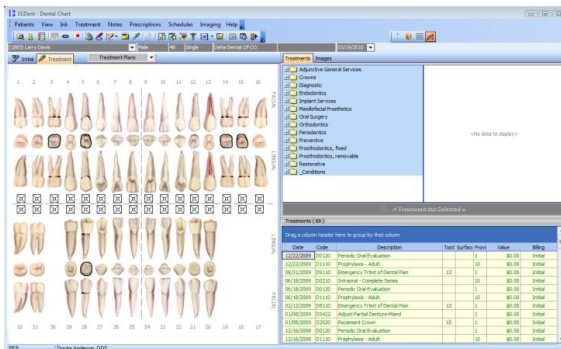
Fee Table:



Internal Code	Abbreviation	Fee	New Fee
BADJ	Bridge Adjustment	\$0.00	
BLEACH	Bleach Tray Delivery	\$0.00	
D0120	Periodic Oral Evaluation	\$55.00	
D0140	Limited Oral Eval-Prob Focused	\$75.00	
D0145	Oral Eval - Patient Under 3yrs	\$45.00	
D0150	Comprehensive Oral Evaluation	\$75.00	
D0160	Detailed Oral Eval-Prob Focus	\$75.00	
D0170	Re-Evaluation - Limited	\$45.00	
D0180	Comprehensive Perio Evaluation	\$110.00	
D0210	Intraoral - Complete Series	\$120.00	
D0220	Intraoral Periapical 1st Film	\$42.00	
D0230	Intraoral - Periapical, Addtl	\$42.00	
D0240	Intraoral - Occlusal Film	\$0.00	
D0250	Extraoral - First Film	\$0.00	

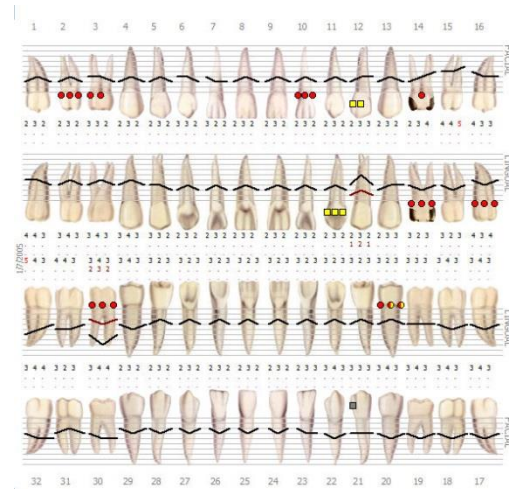
- Procedure Codes
 - ◆ Active ADA Codes
 - ◆ Base Code Abbreviation
- Primary Fee Schedule – Standard Fee Schedule

XLChart™:



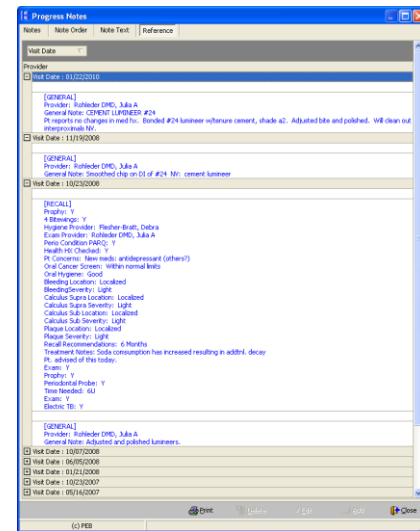
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChart™
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value – Defaults to \$0.00
- Provider

Perio Charting



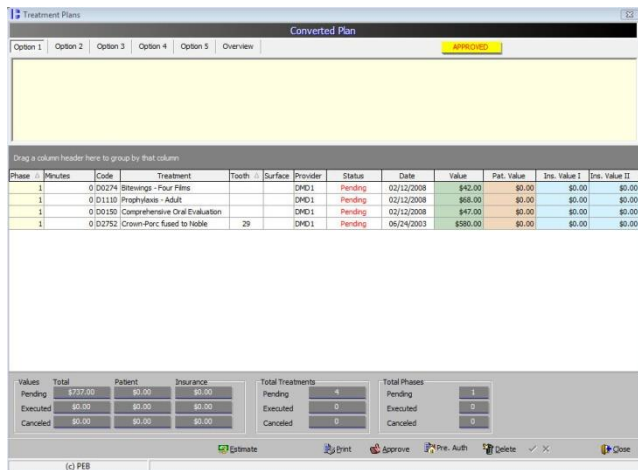
- Pocket
- Recession
- Bleeding
- Suppuration
- Mobility
- Furcation

Progress Note Reference Tab:



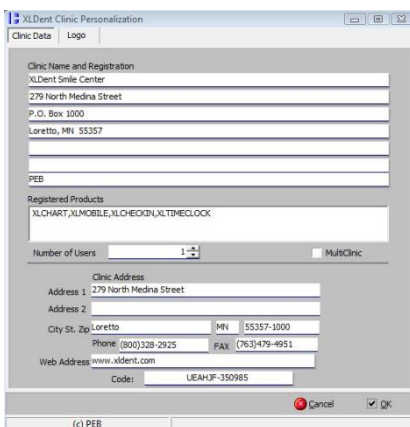
- Patient Notes with a type of Chart, Perio, General, PSR, Image and Rx Writer

Treatment Plans:



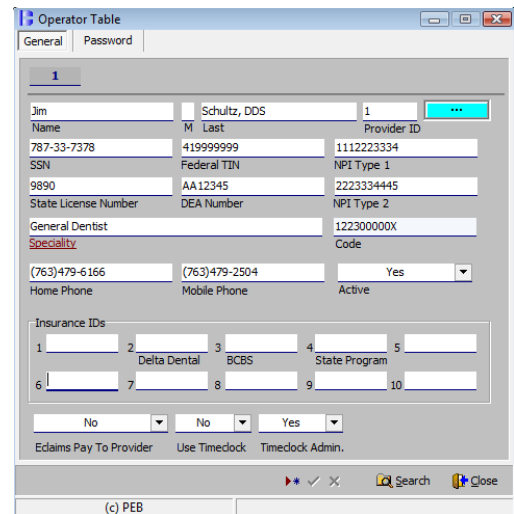
- Phase – Defaults to 1
- Minutes – Defaults to 0
- Code
- Treatment Description
- Tooth
- Surface
- Provider
- Status – Defaults to Pending
- Date
- Value
- Patient Value – Defaults to 0
- Insurance Value I – Defaults to 0
- Insurance Value II – Defaults to 0

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
- Insurance ID's – If available

File Location:

?:\eaglesoft\ or ?:\program files\eaglesoft

Files Needed

?:\eaglesoft\.* excluding Images folder

Need Eaglesoft disks if available.

Reports Needed

Print Off a Accounts Receivable Report – Click Reports → Financial → Click Accounts Receivable by Responsible Party → Click Process → Click Print → Click ok.

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.

Smart Docs:

For an additional fee, we have the ability to convert Smart Docs. Due to changes in Eaglesoft versions, some older PDF documents will not maintain the same naming convention as displayed in Eaglesoft. Document dates are maintained.

Items that do not convert:

Specific areas that will not convert include, but are not limited to, the following:

- ⊙ Provider Accounts Receivable Distribution
- ⊙ Payment Plans/Contract Balances
- ⊙ Outstanding Insurance Claims
- ⊙ Clinical Notes
- ⊙ Class 1 – 5 Filling Indicators
- ⊙ RX Listing
- ⊙ PM Notes
- ⊙ Pager Number
- ⊙ Salutation
- ⊙ Referred In Source - Provider
- ⊙ Benefit Plan Carrier Fee Schedule

Notes on Conversions:

- If a family member has dual insurance from a single subscriber, the secondary insurance carrier will not pull correctly. This must be reviewed after conversion.
- Benefit Plan table converts, but it is not linked to subscriber. This will need to be reviewed and manually updated after conversion.
- Benefit Plan Category of Service Codes will need to be reviewed and manually updated after conversion.
- All chairs, hidden or viewed, will convert. Hidden chairs can be manually updated after conversion.
- Only treatment plans created in the last year (12 months) with a status of Pending will convert.
- All Furcation will convert to facial view.
- Only one Recall Frequency will convert, it may not be correct.
- If multiple Perio Exams on the same date, only one will convert.
- On accounts that have had patients split off, personal payments for multiple family members will not split the payment out. The full payment will go to one account or the other.

Below are some notes concerning some of the items that will or will not be converting.

Patient ID

Eaglesoft Chart # is XLDent™ Record#

Marital Status

Divorced and Unknown defaults to Other

Patient Notes

Patient notes with a note type of Chart™, Perio, General, PSE, Image and RX Writer will convert to XLChart™ progress note reference area. Patient with note type of account will be transferred into the Notes field in the XLDent™ patient screen. During your training, you will be shown how to migrate the notes and alerts into specific areas of reference which utilizes the XLDent™ Alert Feature.

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 converted or not entered into current system it will default to 6.

Patient Status

Only Active and Inactive status patients convert into XLDent™.

Referral Reports

To run reports for converted referred by, please contact XLDent™ Support.

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.