**XLDent™**
SMART TECHNOLOGY. EFFICIENT SOLUTIONS.

## 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 Line2 | | | 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 |
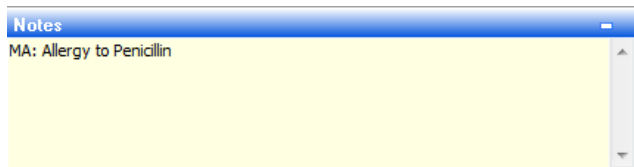
- ☑ Patients grouped by responsible party.
- ☑ First Name
- ☑ Last Name
- ☑ Middle Initial
- ☑ Preferred Name
- ☑ Address 1
- ☑ City
- ☑ State
- ☑ Zip
- ☑ Home Phone Number
- ☑ Work Phone Number
- ☑ Mobile Phone Number- (Beeper Number)
- ☑ Email Address
- ☑ Gender
- ☑ Marital Status
- ☑ Birth Date
- ☑ Patient SSN
- ☑ Doctor of Record
- ☑ Record Status – Active, Auxiliary, Collection

## Notes:



**Notes**
MA: Allergy to Penicillin

- ☑ Medical Alerts
- ☑ Account Notes

## Financial Information:



**Financial Information**

| $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 – Defaults to Yes
- ☑ Charge Interest – Defaults to Yes
- ☑ Send Dunning – Defaults to Yes

## HIPAA Forms and Treatment Information:



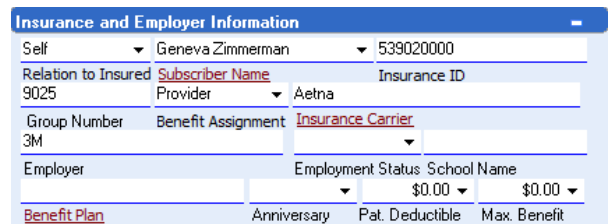**HIPAA Forms and Treatment Information**

| 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 - Defaults to Conversion Date
- ☑ Last Visit Date
- ☑ Last Recall Visit (Last Exam Date)
- ☑ Recall Frequency
- ☑ Next Recall Date – Based on last recall visit date using recall frequency
- ☑ TPO Consent - Defaults to Conversion Date

## Insurance and Employer Information:



**Insurance and Employer Information**

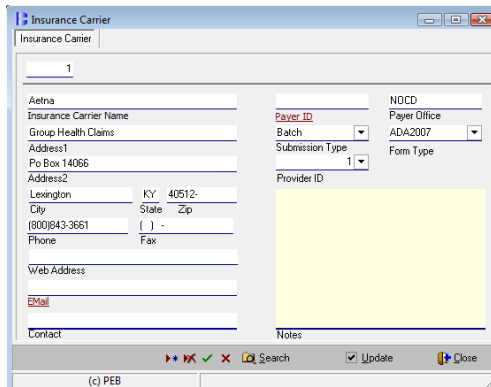| Self | Geneva Zimmerman | 539020000 |
|---|---|---|
| Relation to Insured | Subscriber Name | Insurance ID |
| 9025 | Provider Aetna | |
| Group Number | Benefit Assignment | Insurance Carrier |
| 3M | | |
| Employer | Employment Status | School Name |
| | $0.00 | $0.00 |
| Benefit Plan | Anniversary Pat. Deductible | Max. Benefit |

- ☑ Relation to Primary Policy Holder
- ☑ Subscriber Name
- ☑ Insurance Id –defaults to SSN# on subscriber only
- ☑ Group Number
- ☑ Benefit Assignment
- ☑ Insurance Carrier Name
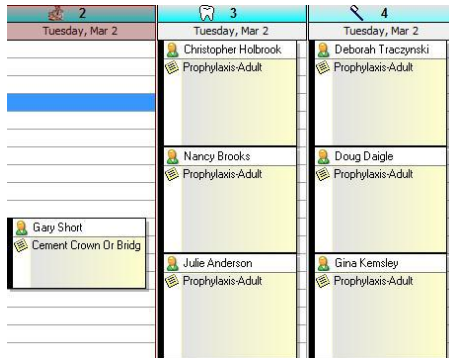- ☑ Employer
- ☑ Employment Status – Defaults to Full Time

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## Insurance Carrier Information:



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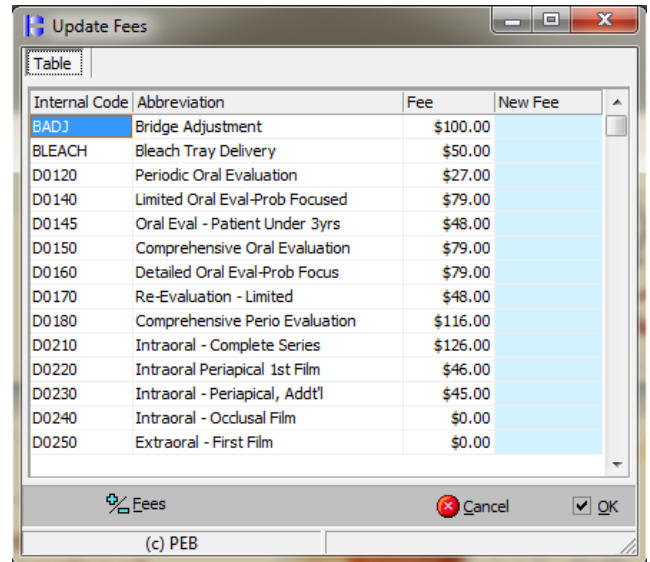- ☑ Form Type current ADA Form
- ☑ Provider ID – Defaults to 1

## 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.
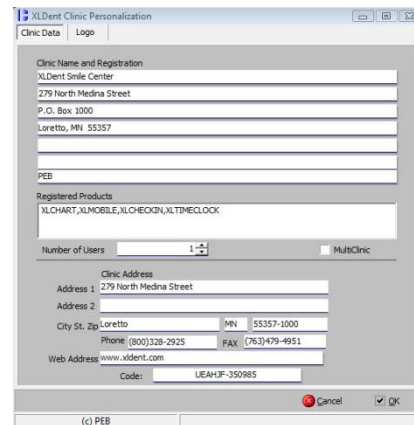
## Procedure Codes:



- ☑ Procedure Codes
  - ♦ Active ADA Codes
  - ♦ Base Code Abbreviation
- ☑ Standard Fee Schedule
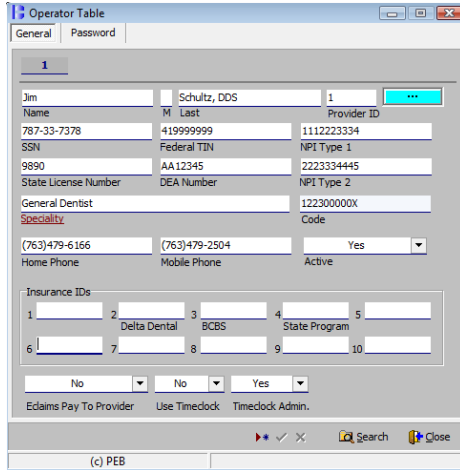
## Practice Information



- ☑ 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:

?:\dental\*.*

?:\ecfcap\*.*

?:\edprogs\*.*

?:\lop6eex\*.*

?:\practman\*.*

?:\dba\*.*

## 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
◌ Referrals
◌ Rx Listing and Patient Rx
◌ Benefit Plans / Allowed Amounts
◌ Progress Notes
◌ Reference History
◌ Secondary Insurance
◌ Treatment Plans

## Notes on Conversions:

➢ Credit balances do not age in XLDent.
➢ Plan name converts in place of employer name
➢ Appointments will convert with a defaulted prophy code. This can be manually changed after the conversion.
➢ New patient appointments will not convert.
➢ If insurance subscriber is not on the same account, insurance linkage will be inaccurate.

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.

### 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 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.

### Patient Status
Active , Auxiliary and collection status patients convert to XLDent™.

### 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 inacurate for End of Month and End of Year due to duplicate entry.**