

Patient Information:



Personal Information

1423 Self 1423 John Zimmerman

Record No. Relation Responsible Party

John J Zimmerman Johnny

Name First M Last Preferred

4051 Albany Circle SW (763)555-4444

Address Line 1 Home Phone

(763)666-4345

Address Line 2 Work Phone

Eagan MN 55555- (763)675-1234

City-State-Zip Mobile Phone

USA John@yahoo.com () -

Country Email Web Access Fax

08/15/1965 44 539-02-9000 Male Other

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
- City
- State
- Zip
- Home Phone Number
- Work Phone Number
- Email Address
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status

Notes:



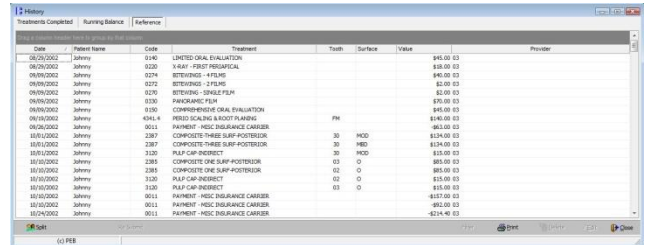
Notes and Alerts

Account Notes

Patient Notes

- Patient Type
- Medical Notes
- User Codes

History Reference Tab:



Date	Patient Name	Code	Treatment	Tooth	Surface	Value	Provider
02/05/2002	Johnny	0140	LIMITED ORAL EVALUATION			\$45.00	03
06/26/2002	Johnny	0220	X-RAY - FIRST PERIODONTAL			\$50.00	03
06/26/2002	Johnny	0224	BITEWING - 4 FILMS			\$60.00	03
06/26/2002	Johnny	0272	BITEWING - 2 FILMS			\$2.00	03
06/26/2002	Johnny	0200	BITEWING - SINGLE FILM			\$2.00	03
06/26/2002	Johnny	0330	PAORALCARE FILM			\$70.00	03
06/26/2002	Johnny	0350	COMPREHENSIVE ORAL EVALUATION			\$140.00	03
06/26/2002	Johnny	4041-R	PERIO SCALING & ROOT PLANING		PH	\$60.00	03
06/26/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$124.00	03
06/26/2002	Johnny	2387	COMPOSITE THREE SURF POSTRESTOR	30	MOD	\$124.00	03
06/26/2002	Johnny	2387	COMPOSITE THREE SURF POSTRESTOR	30	PHD	\$124.00	03
06/26/2002	Johnny	3120	PULP CAP INDIRECT	30	MOD	\$35.00	03
06/26/2002	Johnny	2385	COMPOSITE ONE SURF POSTRESTOR	03	0	\$65.00	03
06/26/2002	Johnny	2385	COMPOSITE ONE SURF POSTRESTOR	02	0	\$65.00	03
06/26/2002	Johnny	3120	PULP CAP INDIRECT	03	0	\$35.00	03
06/26/2002	Johnny	3120	PULP CAP INDIRECT	02	0	\$35.00	03
06/26/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$157.00	03
06/26/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$60.00	03
06/26/2002	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

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

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

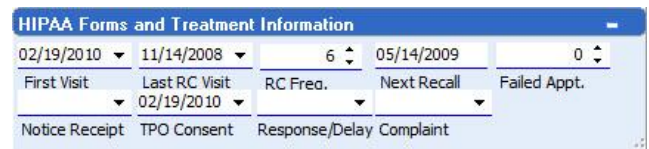
Stmt. Sent Last Patient Payment Last Insurance Payment

Yes Yes Yes

Send Statement Charge Interest Send Dunning

- Account Balances – Listed under current
- 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

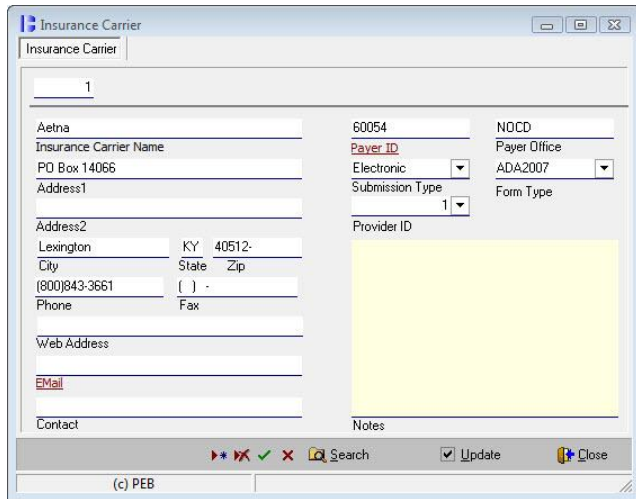
First Visit Last RC Visit RC Freq. Next Recall Failed Appt.

02/19/2010

Notice Receipt TPO Consent Response/Delay Complaint

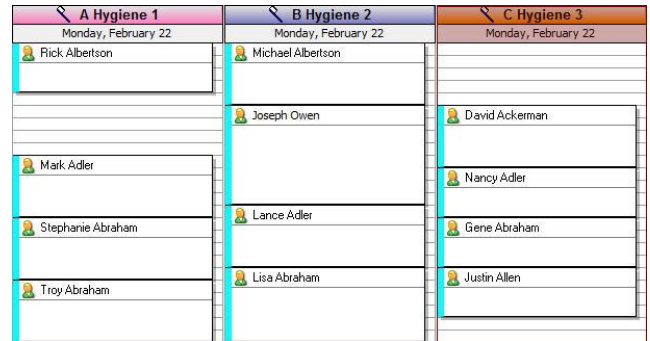
- First Visit Date
- Last Visit Date
- Last Recall Visit - Based on next recall due date minus recall frequency
- Recall Frequency - Defaults to 6
- Next Recall Date
- TPO Consent – Defaults to conversion date

Insurance Carrier:



- Insurance Carrier Name – NOT Linked to Patients
- 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

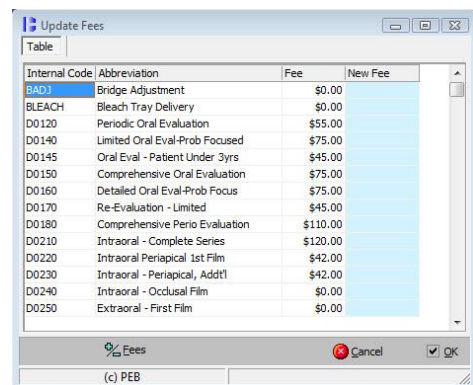
Appointment Book:



A Hygiene 1	B Hygiene 2	C Hygiene 3
Rick Albertson	Michael Albertson	
	Joseph Owen	David Ackerman
Mark Adler		Nancy Adler
Stephanie Abraham	Lance Adler	Gene Abraham
Troy Abraham	Lisa Abraham	Justin Allen

- Practice Appointments will convert to appropriate column
- Assigned to Doctor in the XLDent™ Scheduler, not linked to provider table.
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length
- Appointment Note
- All Appointments convert default Prophy Code [D1110]. Operative appointments may need to be modified following conversion.

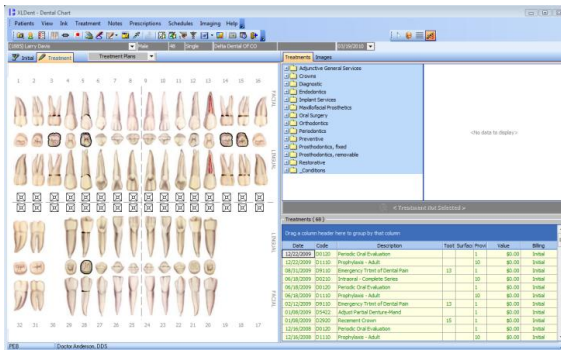
Fee Table:



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	

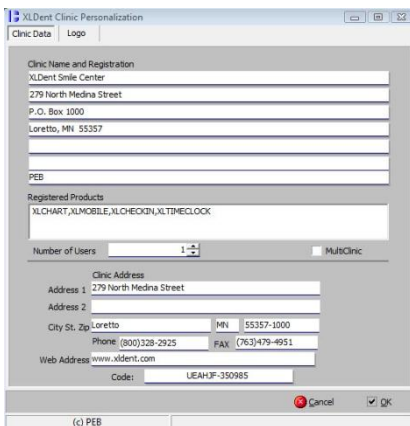
- Procedure Codes
 - ◆ Active ADA Codes
 - ◆ Base Code Abbreviation
- Primary Fee Schedule

XLChart™:



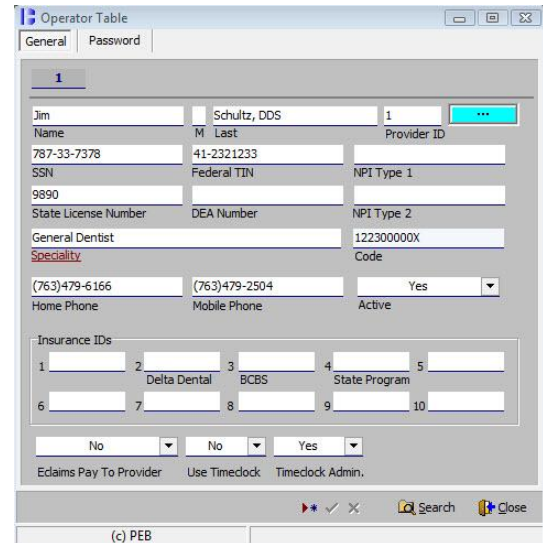
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChart™
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value – Defaults to \$0.00
- Provider

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

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
- ⊙ Prescription Listing
- ⊙ Benefit Plans / Allowed Amounts

Notes on Conversions:

- Appointments will convert with a defaulted prophylaxis code. This can be manually changed after the conversion.

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.

Marital Status

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

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[™]. This can be manually changed.

Appointment Types 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.