

Patient Information:

Personal Information

1423 Self 1423

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	
PO Box 99		(763)666-4345	
Address Line 2		Work Phone	
Eagan	MN	55555-	(763)675-1234
City-State-Zip		Mobile Phone	
USA		John@yahoo.com	
Country	E-Mail	Web Access	Fax
08/15/1965	44	539-02-9999	Male
Birth Date	Age	SSN	Gender
		1	Other
Classification		Doctor	Hygienist
		Record Status	

- 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 – no extension
- Mobile Phone Number
- Fax Number
- Email Address
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status – Active and Auxiliary Only

Notes:

Notes and Alerts

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

- Patient Notes
- Account Notes
- Chart Code
- Other Phone Number

Notes and Alerts:

Notes and Alerts - Dave Jones

ALL

07/26/2011 Patient Alert:

Diabetes

07/26/2011 Prescriptions Alert:

Diabetes

Notes and Alerts - Dave Jones

07/26/2011 Patient Alert:

Diabetes

- Medical Alerts convert to Patient Record Alert and Prescriptions Alert
- Patient Alerts convert to Patient Chart Alert

History Reference Tab:

History

Date	Patient Name	Code	Treatment	Tooth	Surface	Value	Provider
06/20/2002	Johnny	6145	LIMITED ORAL EVALUATION			\$45.00	03
06/20/2002	Johnny	6220	X-RAY - FIRST PERIAPICAL			\$38.00	03
06/20/2002	Johnny	6274	STEREOING - HYGIEN			\$45.00	03
06/20/2002	Johnny	6272	STEREOING - 2 PLNG			\$2.00	03
06/20/2002	Johnny	6276	STEREOING - SINGLE FILM			\$2.00	03
06/20/2002	Johnny	6330	PANORAMIC FILM			\$5.00	03
06/20/2002	Johnny	6150	COMPOSITE ORAL EVALUATION			\$45.00	03
06/18/2002	Johnny	454.4	PERIO SCALING & ROOT PLANING		PH	\$145.00	03
06/20/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$63.00	03
06/10/2002	Johnny	2387	COMPOSITE THREE SURF POSTERIOR	30	MOD	\$124.00	03
06/10/2002	Johnny	2387	COMPOSITE THREE SURF POSTERIOR	30	MOD	\$124.00	03
06/10/2002	Johnny	3120	PULP CAP-INDIRECT	03	O	\$25.00	03
06/10/2002	Johnny	2385	COMPOSITE ONE SURF POSTERIOR	03	O	\$85.00	03
06/10/2002	Johnny	2385	COMPOSITE ONE SURF POSTERIOR	02	O	\$85.00	03
06/10/2002	Johnny	3130	PULP CAP-INDIRECT	02	O	\$35.00	03
06/10/2002	Johnny	3130	PULP CAP-INDIRECT	03	O	\$35.00	03
06/10/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$137.00	03
06/10/2002	Johnny	9011	PAYMENT - MEDIC INSURANCE CARRIER			\$92.00	03
06/10/2002	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 balance categories: \$745.00, \$50.00, \$60.00, \$135.00, \$500.00. Below are sections for 'Stmnt. Sent', 'Last Patient Payment', and 'Last Insurance Payment', each with a 'Yes' dropdown. At the bottom are 'Send Statement', 'Charge Interest', and 'Send Dunning' options.

- 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 window showing fields for 'First Visit' (02/19/2010), 'Last RC Visit' (11/14/2008), 'RC Freq.' (6), 'Next Recall' (05/14/2009), and 'Failed Appt.' (0). It also includes checkboxes for 'Notice Receipt', 'TPO Consent', and 'Response/Delay Complaint'.

- First Visit Date
- Last Visit Date
- Last Recall Visit – Based on Prior Treatment of Prophy
- Recall Frequency – Defaults to 6 months
- Next Recall Date – Based on last recall visit date using recall frequency
- Failed Appointments
- TPO Consent

Insurance and Employer Information:

Insurance and Employer Information window showing fields for 'Self' (Debora Huls), 'Relation to Insured' (Subscriber Name), 'Insurance ID' (MRT04982453W), 'Group Number' (054505), 'Benefit Assignment' (Delta Dental of Arkansas), 'Employer' (Wal-Mart), and 'Employment Status' (Full Time). It also includes 'Pat. Deductible' and 'Max. Benefit' fields.

- Relation to Primary Policy Holder
- Subscriber Name
- Insurance Id – If blank defaults to SSN# if available
- Group Number
- Benefit Assignment – Defaults to Provider
- Insurance Carrier Name
- Employer - Converts from Group Plan

Second Insurance and Employer Information:

Second Insurance and Employer Information window showing fields for 'Spouse' (Margaret Deccio), 'Relation to Insured' (Subscriber Name), 'Insurance ID' (160519225), 'Group Number' (East Valley School Dist), and 'Employer'. It also includes 'Pat. Deductible' and 'Max. Benefit' fields.

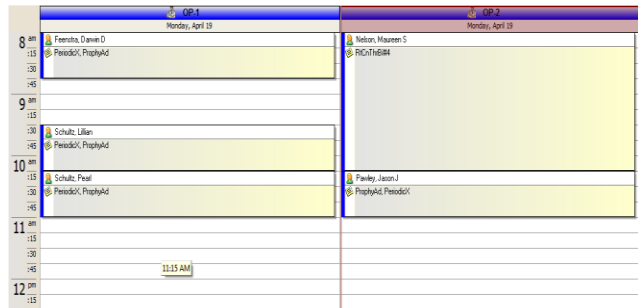
- Relation to Primary Policy Holder
- Subscriber Name
- Insurance ID – If Blank pulls from Subscriber
- Group Number
- Benefit Assignment
- Insurance Carrier Name
- Employer – Converts from Group Plan

Insurance Carrier:

Insurance Carrier window showing fields for 'Insurance Carrier Name' (Aetna), 'Address1', 'City' (Lexington), 'State' (KY), 'Zip' (40512), 'Phone' ((800)843-3661), 'Payer ID' (60054), 'Payer Office' (NOCD), and 'Submission Type' (Electronic). It also includes 'Form Type' and 'Provider ID' fields.

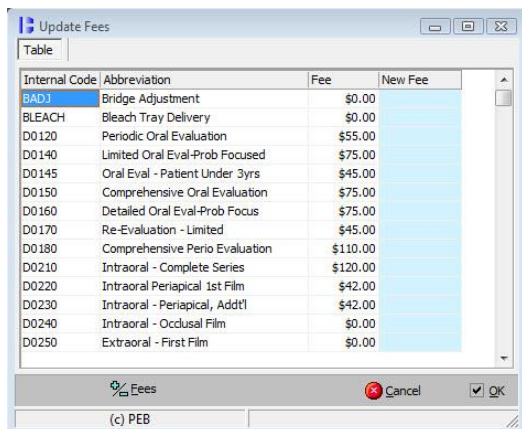
- Insurance Carrier Name
- Address 1
- Address 2
- City
- State
- Zip
- Phone
- Payer ID – Verify after conversion
- Payer Office Always NOCD
- Submission Type Always Electronic
- Form Type current ADA Form
- Provider ID – Defaults to 1

Appointment Book:



- Practice Appointments will convert to appropriate column
- Assigned to Doctor in the XL DentTM Scheduler
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length
- Appointment Notes
- All Appointments convert with procedure codes if supplied. Operative appointments may need to be modified following conversion.

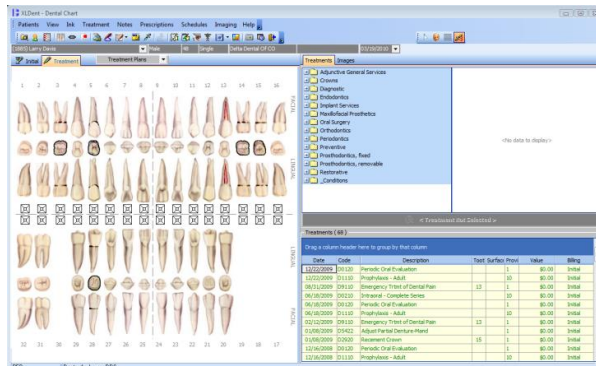
Fee Table:



Internal Code	Abbreviation	Fee	New Fee
BADJ1	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	

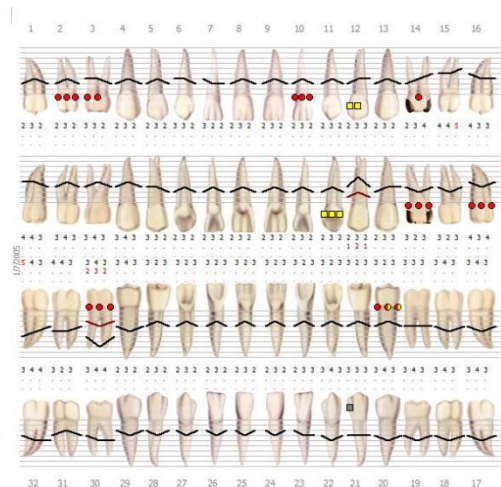
- Procedure Codes
 - ◆ Active ADA Codes
 - ◆ Base Code Abbreviation
- Primary Fee Schedule (Fee1 or Standard Fee in system)

XLChartTM:



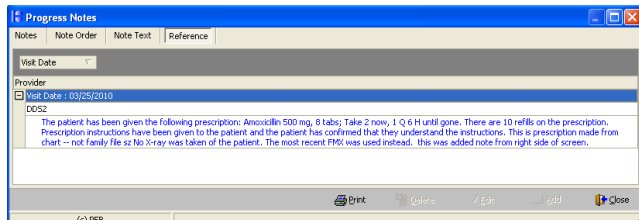
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChartTM
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value
- Provider

Perio Charting



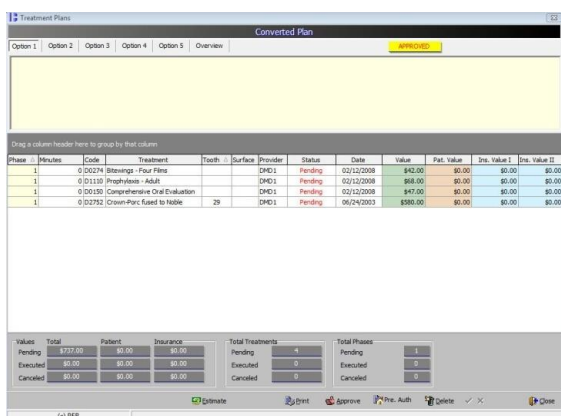
- Pocket
- Recession
- Bleeding
- Suppuration
- Mobility
- Furcation

Progress Notes Reference Tab



- Procedure Notes
- Date
- Procedure Code
- Tooth
- Surface
- Note Detail
- Provider

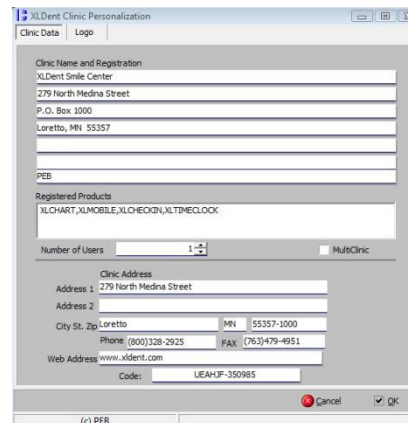
Treatment Plans:



Phase	Minutes	Code	Treatment	Tooth	Surface	Provider	Status	Date	Value	Pat. Value	Ins. Value I	Ins. Value II
1	0	020274	Brushings - Four Films			DM1	Pending	02/12/2008	\$42.00	\$0.00	\$0.00	\$0.00
1	0	021128	Prophylaxis - Adult			DM1	Pending	02/12/2008	\$68.00	\$0.00	\$0.00	\$0.00
1	0	020150	Comprehensive Oral Evaluation			DM1	Pending	02/12/2008	\$47.00	\$0.00	\$0.00	\$0.00
1	0	021732	Crown-Parc fused to Hable	29		DM1	Pending	06/24/2003	\$380.00	\$0.00	\$0.00	\$0.00

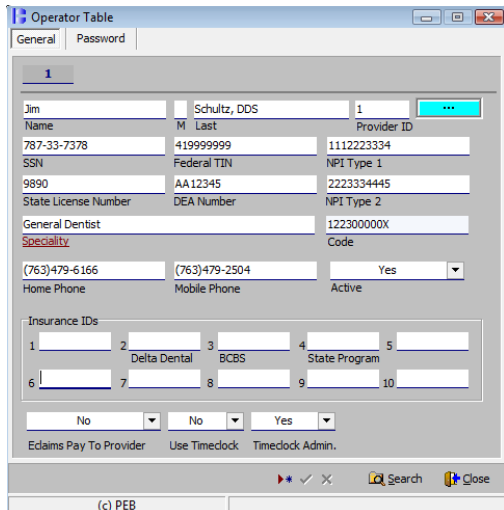
- Phase - Defaults to 1
- Minutes - Defaults to 0
- Code
- Treatment Description
- Tooth
- Surface
- Provider
- Status - Defaults to Pending
- Date
- Value
- Patient Value - Defaults to 0
- Insurance Value I - Defaults to 0
- Insurance Value II - Defaults to 0

Practice Information:



- Practice Demographic Information
- Clinic Name
- Clinic Address and Phone
- Clinic Logo

Operators:



The screenshot shows a software window titled "Operator Table" with a "General" tab selected. The form contains the following fields and values:

- Name: Jim Schultz, DDS (Middle Initial: M, Last Name: Schultz, DDS, Provider ID: 1)
- SSN: 787-33-7378
- Federal TIN: 419999999
- NPI Type 1: 1112223334
- State License Number: 9890
- DEA Number: AA12345
- NPI Type 2: 2223334445
- General Dentist: 122300000X
- Specialty Code: (empty)
- Home Phone: (763)479-6166
- Mobile Phone: (763)479-2504
- Active: Yes
- Insurance IDs: 1 (empty), 2 (Delta Dental), 3 (BCBS), 4 (State Program), 5 (empty), 6 (empty), 7 (empty), 8 (empty), 9 (empty), 10 (empty)
- Declaims Pay To Provider: No
- Use Timeclock: No
- Timeclock Admin: Yes

- 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:

?:\ezdental\ or ?:\program files\ezdental

Files Needed

?:\ezdental*. * excluding Images folder

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.

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 XLDentTM Representative.

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
- ⊙ Patient Referred To / From
- ⊙ Prescription Listing
- ⊙ Patient Prescriptions
- ⊙ Benefit Plans / Allowed Amounts
- ⊙ School Name
- ⊙ Archived Patients
- ⊙ Patient Title
- ⊙ Patient Driver's License #
- ⊙ Patient Salutation
- ⊙ Patient Alert
- ⊙ Document Center

Notes on Conversions:

- Plan name converts in place of employer name.
- Only treatment plans created in the last year (12 months) will convert.
- Patient Insurance may not be converted when linking in existing system is inaccurate or inconsistent.
- Referred to table converts to Referral Source as displayed in existing software. Referrals may be duplicated. This can be manually updated after the conversion.
- Fee Schedules will convert to Benefit Plan Allowed amounts.

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.

Marital Status

When this is converted, converts Married to Married, Single to Single, Child to Other and Other to Other.

Preferred Dentist

When this is not converted all patients will be assigned to the default Doctor.

Preferred Hygienist

When this is not converted all patients will be default blank.

Consent Date

If consent date is blank in original software, will convert as blank.

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 XLDentTM. This can be manually changed.

History Reference Tab:

Personal Payments posted to family level will convert to responsible party. All adjustments convert to the responsible party. If the responsible party is inactive, it will not convert personal payments or adjustments.

Appointment Book

If appointment procedures in existing software are linked to treatment plans, these procedures codes will not be included in the appointment in XLDentTM.

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 XLDentTM 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.