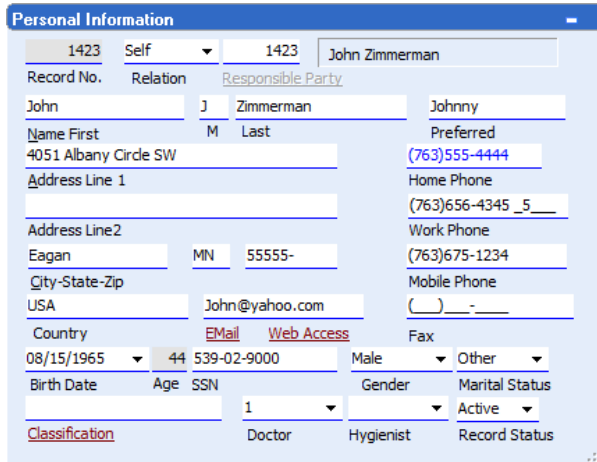


Patient Information:



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)656-4345_5_ Work Phone

Address Line 2 (763)675-1234

Eagan MN 55555- City-State-Zip Mobile Phone

USA John@yahoo.com

Country EMail Web Access Fax

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

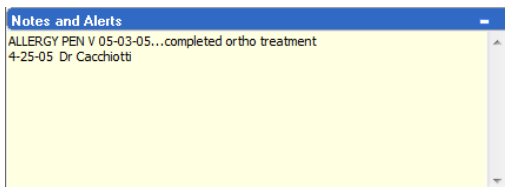
Birth Date Age SSN Gender Marital Status

1 Active

Classification Doctor Hygienist Record Status

- Patients grouped by responsible party
- First Name
- Last Name
- Middle Initial
- Preferred Name
- Address Line 1
- City
- State
- Zip
- Home Phone Number
- Work Phone Number
- Work Extension Number
- Mobile Phone Number from other phone
- Email Address
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status – Active, Inactive and Auxiliary
- Genesis Chart # is XLDent™ Record #

Patient Notes:

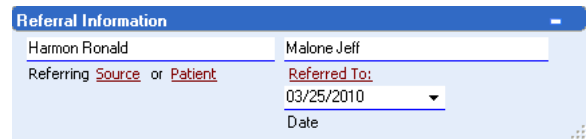


Notes and Alerts

ALLERGY PEN V 05-03-05....completed or tho treatment
4-25-05 Dr Cacchiotti

- Patient General Notes
- Patient Medical Notes
- Patient Alert
- Referral Reason

Referral Information:



Referral Information

Harmon Ronald Malone Jeff

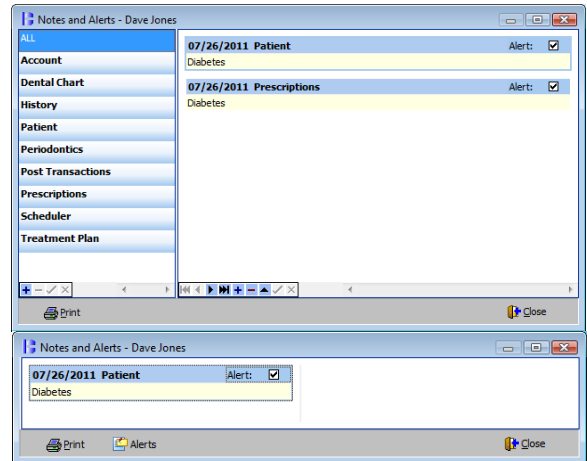
Referring Source or Patient Referred To:

03/25/2010

Date

- Referred To
- Referred Date

Notes and Alerts:



Notes and Alerts - Dave Jones

ALL

Account 07/26/2011 Patient Alert:

Diabetes

Dental Chart 07/26/2011 Prescriptions Alert:

History Diabetes

Patient

Periodontics

Post Transactions

Prescriptions

Scheduler

Treatment Plan

Print Close

Notes and Alerts - Dave Jones

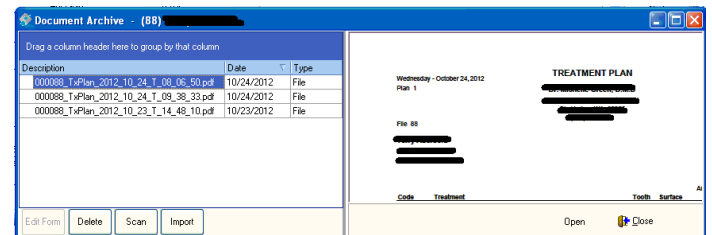
07/26/2011 Patient Alert:

Diabetes

Print Alerts Close

- Documentation - Alerts Financial convert to Account Alert
- Documentation – Alerts Financial View at Ledger convert to Account Alert

Document Archive:



Document Archive - (88)

Drag a column header here to group by that column

Description	Date	Type
000088_TxPlan_2012_10_24_T_08_06_50.pdf	10/24/2012	File
000088_TxPlan_2012_10_24_T_09_38_33.pdf	10/24/2012	File
000088_TxPlan_2012_10_23_T_14_48_10.pdf	10/23/2012	File

Wednesday - October 24, 2012

Plan 1

TREATMENT PLAN

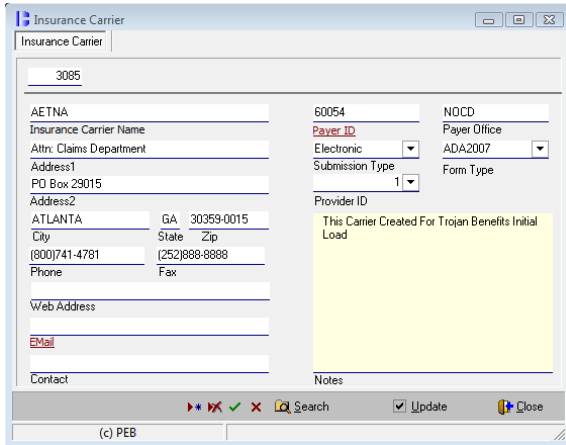
File 88

Code Treatment Teeth Surface

Edit Form Delete Scan Import Open Close

- Description
- Date
- Type – Defaults to File

Insurance Carrier Information:



Insurance Carrier
3085

AETNA
Insurance Carrier Name
Attn: Claims Department
Address1
PO Box 29015
Address2
ATLANTA GA 30359-0015
City State Zip
(800)741-4781 (252)888-8888
Phone Fax
Web Address
Email
Contact

60054
Payer ID
Electronic
Submission Type
Provider ID
Notes
This Carrier Created For Trojan Benefits Initial Load

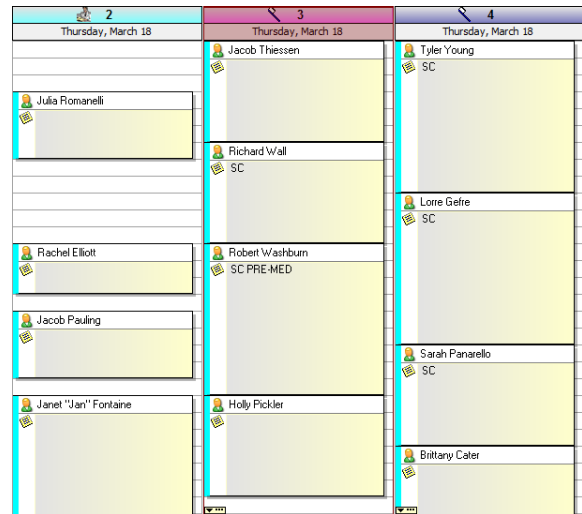
NOCD
Payer Office
ADA2007
Form Type

Update Close

(c) PEB

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

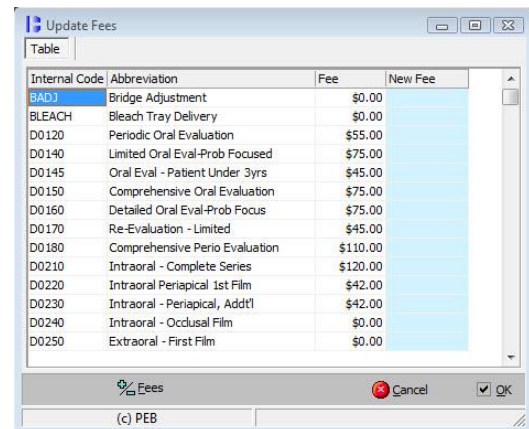
Appointment Book:



2	3	4
Thursday, March 18	Thursday, March 18	Thursday, March 18
Julia Romanelli	Jacob Thiessen	Tyler Young SC
Rachel Elliott	Richard Wall SC	Lore Gette SC
Jacob Pauling	Robert Washburn SC PRE-MED	Sarah Panarello SC
Janet "Jan" Fontaine	Holy Pickler	Brittany Caler

- Practice Appointments will convert to appropriate column
- Assigned to Doctor in the XLDent™ Scheduler needs to correct appointment provider at confirming or posting.
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length
- Appointment Comments
- Appointment Detail

Fee Table:



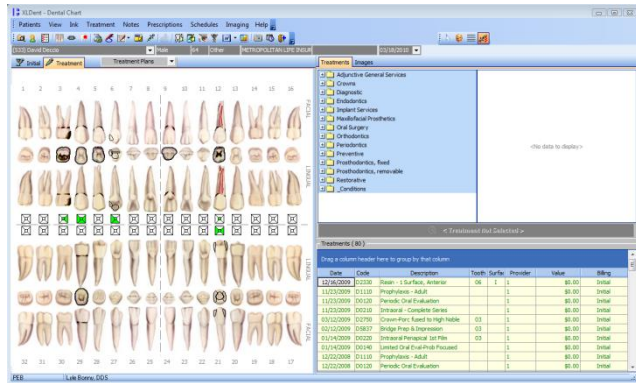
Internal Code	Abbreviation	Fee	New Fee
BADJ	Bridge Adjustment	\$0.00	
BLEACH	Bleach Tray Delivery	\$0.00	
D0120	Periodic Oral Evaluation	\$55.00	
D0140	Limited Oral Eval-Prob Focused	\$75.00	
D0145	Oral Eval - Patient Under 3yrs	\$45.00	
D0150	Comprehensive Oral Evaluation	\$75.00	
D0160	Detailed Oral 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	

Update Fees Cancel OK

(c) PEB

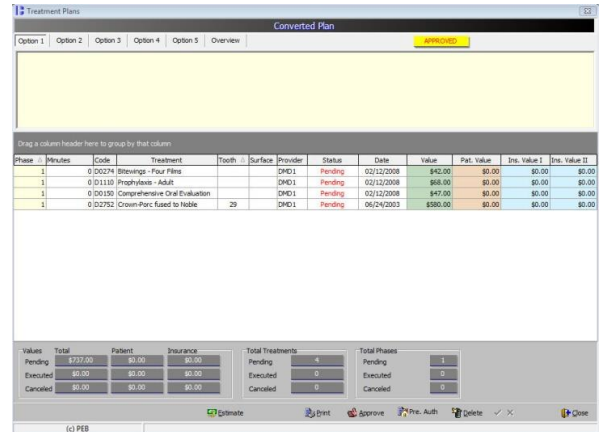
- Procedure Codes
 - ◆ Active ADA Codes
 - ◆ Base Code Abbreviation
- Primary Fee Schedule

XLChart™:



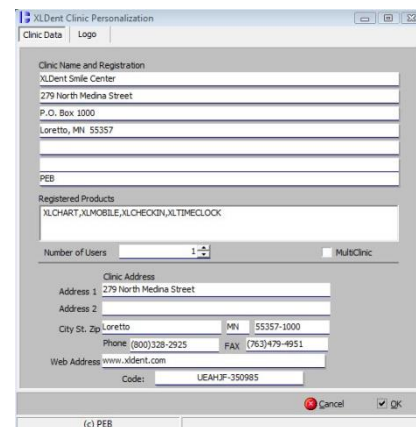
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChart™
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value
- Provider

Treatment Plans:



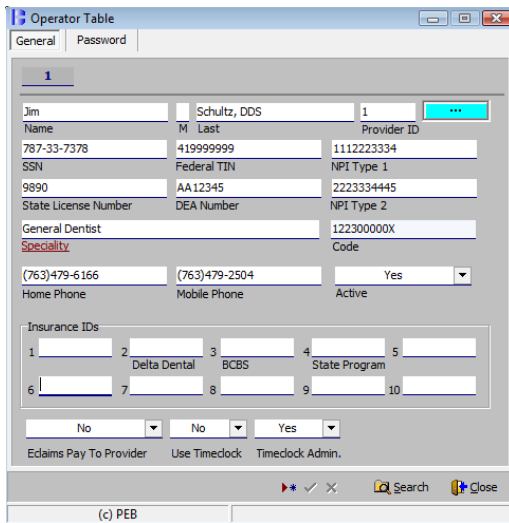
- Phase
- Minutes – Defaults to 0
- Code
- Treatment Description
- Tooth
- Surface
- Provider
- Status – Defaults to Pending
- Date – Defaults to conversion date
- Value
- Patient Value – Defaults to 0
- Insurance Value I – Defaults to 0
- Insurance Value II – Defaults to 0

Practice Information:



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

Operator Table:



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

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

?:\genwin\ or ?:\program files\genwin

Files Needed:

?:\genwin*.* excluding Images folder

Need software and license disks if available.

Backup of Data files only:

- 👉 Inserting the appropriate backup media into the appropriate disk drive.
- 👉 From the main ledger screen, **click** on the “misc” button.
- 👉 Using your mouse, **click** on “2 | Backup, Restore” that appears in the list.
- 👉 Click on “OK”
- 👉 At the “Backup and Restore” window, select the specify backup destination
- 👉 Type **BACKUP** in the Field Provided
- 👉 Press **Enter**

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 In
- ⊙ Prescription Listing
- ⊙ Patient Prescriptions
- ⊙ Benefit Plans / Allowed Amounts
- ⊙ Progress Notes
- ⊙ Tickler File
- ⊙ Documents – Miscellaneous Recall Notes
- ⊙ Documents – Alerts Office
- ⊙ Documents – Alerts Clinical
- ⊙ Cell Number

Notes on Conversions:

- The first fee scheduled listed in Genesis will be converted.
- Only treatment plans created in the last year (12 months) will convert.
- 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.
- If a family member was moved from the original account to a new account, any old payments will be on the original account.

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

Gender

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

Marital Status

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

Patient Status

Inactive patients that have active family members will be assigned as Auxiliary.

Dentist

Practice		Providers		General	Passwords	Printers	Statements
Dr	Pr	Provider	T.I.N. or SS#	License #	Color	Symbol	
1	1				1		
1	5				2		
1	6				3		
1	7				1		
1	8				1		
1	fc				0		

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

Account Reference History:

Due to the way Genesis displays Doctor and Provider codes, we combine the two numbers for reference history. XLChart initial transactions will only show Doctor code.

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.

Recall Frequency

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

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.

Treatment Plans

Transferred to ledger Treatment Plans will not convert.

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.