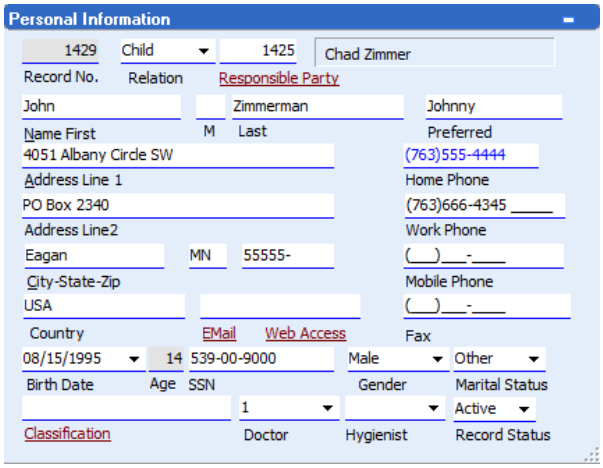
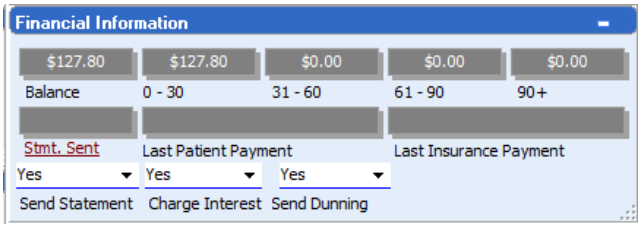
Patient Information:



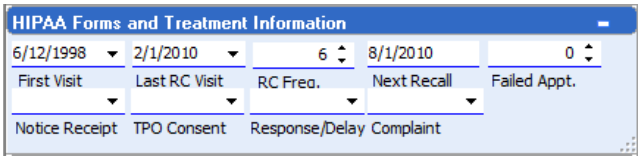
- ☑ Patients grouped by responsible party.
- ☑ First Name
- ☑ Last Name
- ☑ Middle Initial
- ☑ Preferred Name
- ☑ Address 1
- ☑ Address 2
- ☑ City
- ☑ State
- ☑ Zip
- ☑ Home Phone Number
- ☑ Work Phone Number
- ☑ Gender
- ☑ Birth Date
- ☑ Patient SSN
- ☑ Doctor of Record
- ☑ Record Status – All Patients convert as Active

Financial Information:



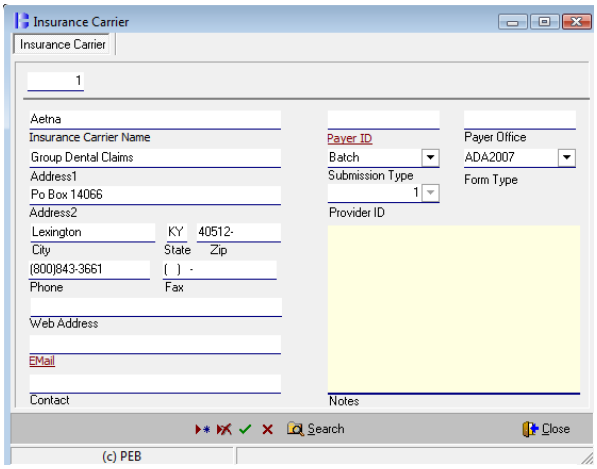
- ☑ Account Balances – All in current.
- ☑ Send Statement – Defaults to Yes
- ☑ Charge Interest – Defaults to Yes
- ☑ Send Dunning – Defaults to Yes

HIPAA Forms and Treatment Information:



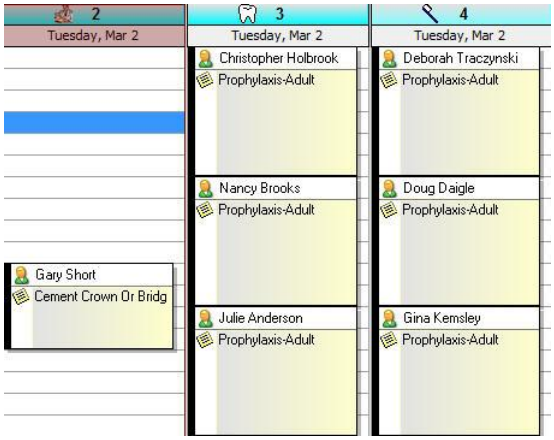
- ☑ First Visit Date
- ☑ Last Visit Date
- ☑ Last Recall Visit
- ☑ Recall Frequency
- ☑ Next Recall Date – Based on last recall visit date using recall frequency

Insurance Carrier:



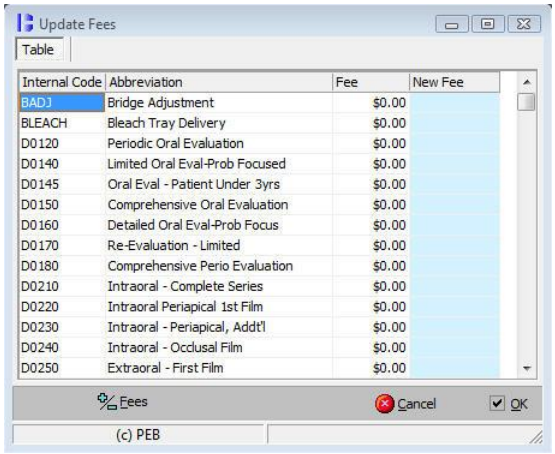
- ☑ Insurance Carrier Name – Not Linked to Patients
- ☑ Address 1
- ☑ Address 2
- ☑ City
- ☑ State
- ☑ Zip
- ☑ Phone
- ☑ Payer ID – Add after conversion
- ☑ Payer Office – Defaults to Blank
- ☑ Submission Type Always Batch
- ☑ Form Type current ADA Form
- ☑ Provider ID – Defaults to 1

Appointment Book:



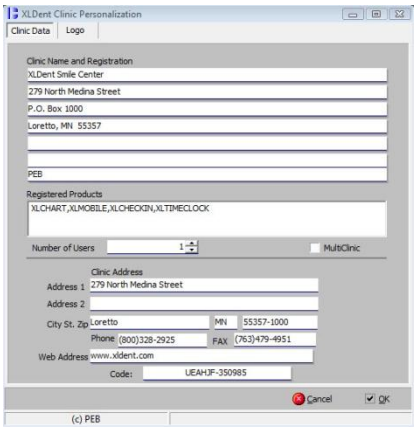
- ☑ Practice Appointments will convert to appropriate column – Not Linked to Provider Table
- ☑ Patient Name
- ☑ Appointment Date
- ☑ Appointment Time
- ☑ Appointment Length
- ☑ All Appointments convert default Prophy Code [D1110]. Operative appointments may need to be modified following conversion.

Fee Table:



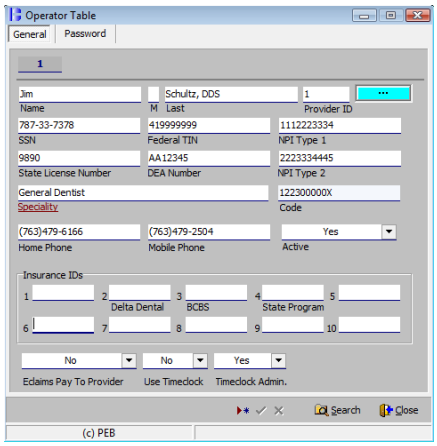
- ☑ Procedure Codes
  - ♦ Active ADA Codes
  - ♦ Base Code Abbreviation
- ☑ Primary Fee Schedule – Manually entered by Trainer.

Practice Information



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

Operator Table:



- ☑ Provider Information for all Doctors and Hygienist
- ☑ 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
?:\outlook\ or ?:\program files\outlook

Files Needed
?:\outlook*.* 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 XLDent™ 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
- ⃠ Outstanding Insurance Claims
- ⃠ Treatment Plans
- ⃠ Transaction History

Notes on Conversions:
- ➢ Patients that have no first name and no last name were not converted.

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.

Preferred Dentist
When this is not converted all patients will be assigned to the doctor selected on the Conversion Authorization Form.

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 it will default to 0 months. This will have to be manually updated after loading the converted database.

Fee
When this is not converted it will be manually added for all services after the final conversion.

Transaction History
When this is not converted, a balance forward adjustment will be made for all patients with a balance. To have a record to refer back to, you may want to print the account history for all patients and place this in their chart.

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 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.