

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

Address Line 2 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 – Uses Accounts #
- First Name
- Last Name
- Address 1
- City
- State
- Zip
- Home Phone Number
- Work Phone Number
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status

Financial Information:



Financial Information

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

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

Stmnt. 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

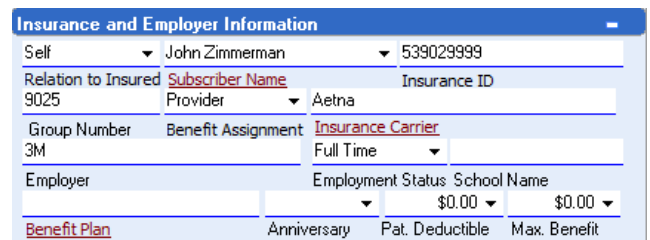
First Visit Last RC Visit RC Freq. Next Recall Failed Appt.

02/19/2010

Notice Receipt TPO Consent Response/Delay Complaint

- First Visit Date
- Last Visit Date
- Last Recall Visit - Based on next recall date minus recall frequency
- Recall Frequency - Defaulted to 6
- Next Recall Date
- TPO Consent Date (defaults to date of conversion)

Insurance and Employer Information:



Insurance and Employer Information

Self John Zimmerman 539029999

Relation to Insured Subscriber Name Insurance ID

9025 Provider Aetna

Group Number Benefit Assignment Insurance Carrier

3M Full Time

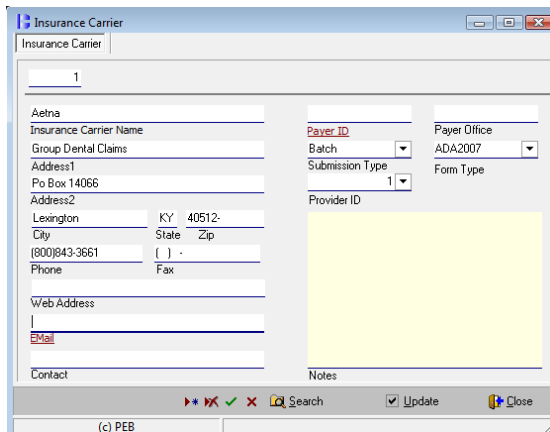
Employer Employment Status School Name

\$0.00 \$0.00

Benefit Plan Anniversary Pat. Deductible Max. Benefit

- Relation to Primary Insured ONLY
- Subscriber Name
- Insurance Id – If blank defaults to SSN# if available
- Group Number
- Benefit Assignment
- Insurance Carrier Name
- Employment Status – Defaults to Full Time
- Patient Deductible – Defaults to 0
- Max Benefit – Defaults to 0

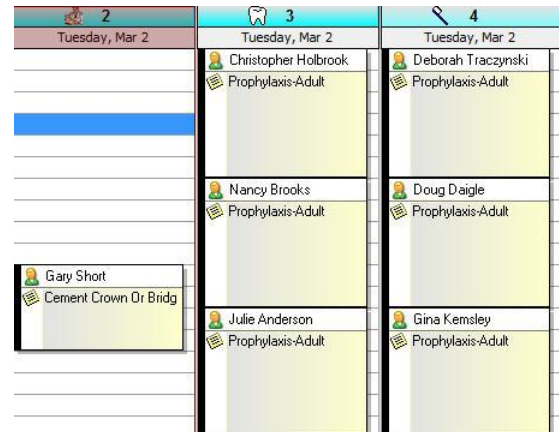
Insurance Carrier :



The screenshot shows a software window titled "Insurance Carrier" with a tab labeled "Insurance Carrier". It contains several input fields and dropdown menus for entering insurance information. The fields include: Aetna, Insurance Carrier Name, Group Dental Claims, Address1, Po Box 14066, Address2, Lexington KY 40512, City, State, Zip, (800)843-3661, Phone, Fax, Web Address, Email, Contact, Payer ID, Payer Office, Batch (ADA2007), Submission Type, Form Type, and Provider ID (1). There are also search, update, and close buttons at the bottom.

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

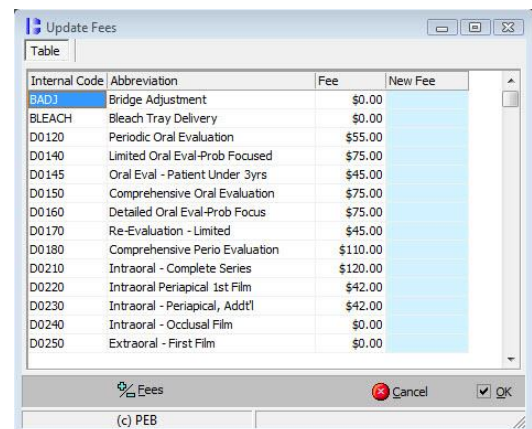
Appointment Book:



The screenshot shows a three-column appointment book for Tuesday, Mar 2. The columns are numbered 2, 3, and 4. Column 2 has a patient entry for Gary Short with the appointment "Cement Crown Or Bridg". Column 3 has three entries: Christopher Holbrook (Prophylaxis-Adult), Nancy Brooks (Prophylaxis-Adult), and Julie Anderson (Prophylaxis-Adult). Column 4 has three entries: Deborah Traczynski (Prophylaxis-Adult), Doug Daigle (Prophylaxis-Adult), and Gina Kemsley (Prophylaxis-Adult).

- Practice Appointments will convert to appropriate column
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length – Defaults to 30 minutes unless supplied by office
- Appointment Notes
- All Appointments convert default Prophy Code [D1110]. Operative appointments may need to be modified following conversion.

Fee Table:



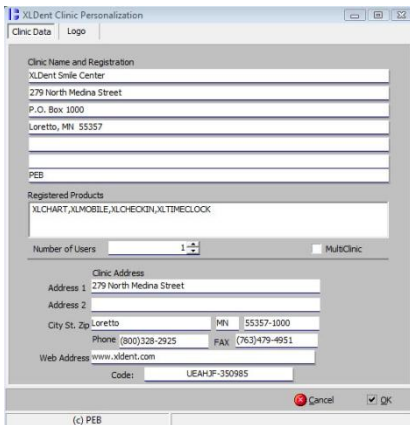
The screenshot shows a dialog box titled "Update Fees" with a "Table" tab. It contains a table with columns for Internal Code, Abbreviation, Fee, and New Fee. The table lists various dental procedures and their associated fees.

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	

Buttons for "Fees", "Cancel", and "OK" are visible at the bottom of the dialog box.

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

Practice Information

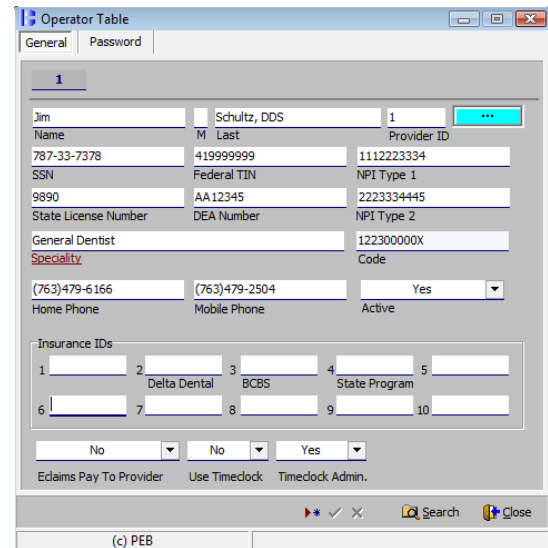


The screenshot shows the 'XLDent Clinic Personalization' window with the following fields filled out:

- Clinic Name and Registration:** XLDent Smile Center, 279 North Medina Street, P.O. Box 1000, Loretto, MN 55357
- Registered Products:** XLCART, XLMOBILE, XLCHECKIN, XLTIMECLOCK
- Clinic Address:** Address 1: 279 North Medina Street, Address 2: (empty), City: Loretto, MN 55357-1000, Phone: (800)328-2925, FAX: (763)479-4951, Web Address: www.xldent.com, Code: UEAH3F-350985

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

Operator Table:



The screenshot shows the 'Operator Table' window with the following information for provider 1:

Jim	Schultz, DDS	1
Name	M Last	Provider ID
787-33-7378	419999999	1112223334
SSN	Federal TIN	NPI Type 1
9890	AA 12345	2223334445
State License Number	DEA Number	NPI Type 2
General Dentist		122300000X
Specialty		Code
(763)479-6166	(763)479-2504	Yes
Home Phone	Mobile Phone	Active

Insurance IDs:

1	2	3	4	5
	Delta Dental	BCBS	State Program	
6	7	8	9	10

Buttons: No, No, Yes

Options: Eclaims Pay To Provider, Use Timeclock, Timeclock Admin.

- 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:

?:\softdent\ or ?:\program files\softdent

Files Needed

?:\Softdent*. * 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.

Duplicate Patients:

Some Practice Management software will allow entry of patients and other information multiple times without warning of duplication. Due to the nature of the database conversion process, there are some items that you should review on the conversion evaluation to identify this duplication. One such item is the duplication of Patient records. To assist you in locating duplicate patients, the XLDent™ Name and Address listing is provided during the evaluation process. Please contact your XLDent™ representative with any questions regarding this process. We look forward to helping you with a smooth transition to XLDent™.

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
- ⊗ Archival History
- ⊗ Prescription Listing
- ⊗ Secondary Insurance
- ⊗ Notes
- ⊗ History
- ⊗ Benefit Plans / Allowed Amounts
- ⊗ Referrals
- ⊗ Treatment Plans

Notes on Conversions:

- A/R report in Softdent automatically filters out CIL accounts – XLDent™ converts these and is included in the A/R report
- Softdent allows for service codes to have more than 5 characters as well as decimals. XLDent™ allows only 5 digit service codes, therefore, when these codes are converted to XLDent™, we convert the first 5 valid characters for that code.
- Inactive accounts with balances should be reactivated or written off prior to final conversion. This will be determined at the time of preliminary conversion.
- Softdent records up to 4 guarantors. We only convert Guarantor 1.
- Appointments will convert with a defaulted prophylaxis code. This can be manually changed after the conversion.

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.

Recall Frequency

When this is not entered into current system it will default to 0. This will have to be manually updated after loading the converted database.

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.