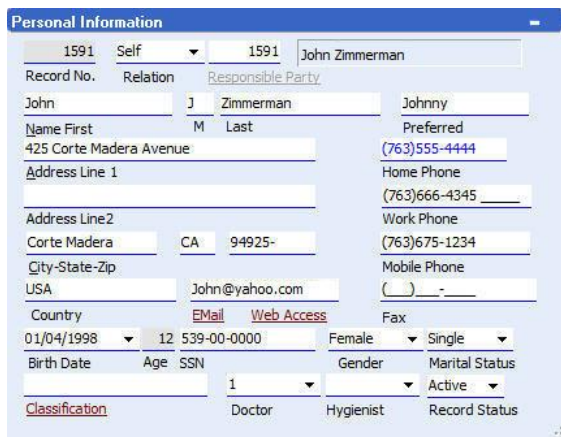


Patient Information:



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

(763)666-4345

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

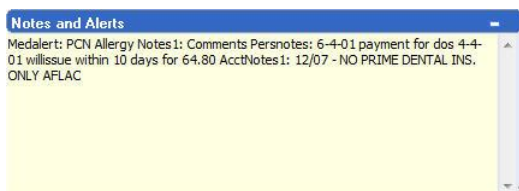
Birth Date Age SSN Gender Marital Status

1 Active

Classification Doctor Hygienist Record Status

- Patients grouped by responsible party.
- First Name
- Middle Initial
- Last Name
- Preferred Name
- Address 1
- City
- State
- Zip
- Home Phone Number
- Work Phone Number
- Mobile Phone Number
- Email Address 1
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status – Active and Auxiliary

Patient Notes Panel:

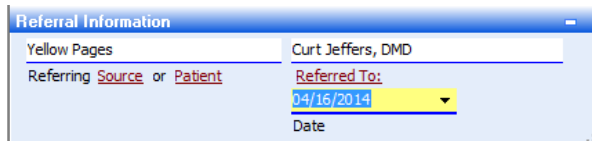


Notes and Alerts

Medalart: PCN Allergy Notes1: Comments Persnotes: 6-4-01 payment for dos 4-4-01 will issue within 10 days for 6-4-80 AcctNotes1: 12/07 - NO PRIME DENTAL INS. ONLY AFLAC

- Chart Number
- Account & Patient User Codes
- Account Notes

Referral Information:



Referral Information

Yellow Pages Curt Jeffers, DMD

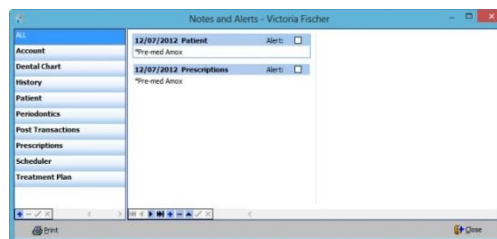
Referring Source or Patient Referred To:

04/16/2014

Date

- Referring Source
- Referred To and Date

Notes and Alerts:



Notes and Alerts - Victoria Fischer

Account 12/07/2012 Patient Alert

Dental Chart 12/07/2012 Prescriptions Alert

History No-med Anx

Patient No-med Anx

Periodontics

Post Transactions

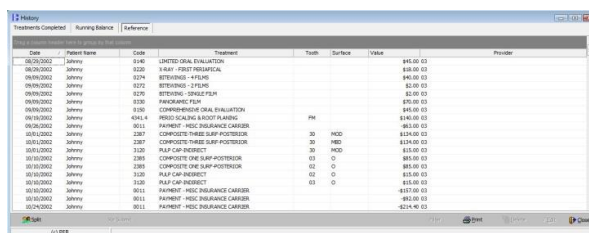
Prescriptions

Scheduler

Treatment Plan

- Medical Alerts convert to Patient Chart Alert
- Patient Notes 1 convert to Patient Notes
- Patient Notes 2 convert to Patient Notes
- Personal Notes convert to Patient Notes
- Team Talk Account Note convert to Account Notes
- Team Talk Patient Note convert to Patient Notes

History Reference Tab:



Date	Patient Name	Code	Treatment	Tooth	Surface	Value	Provider
08/26/2002	Johnny	0140	UNITED ORAL EVALUATION			\$45.00	ED
08/26/2002	Johnny	0100	PLAQUE REMOVAL			\$20.00	ED
08/26/2002	Johnny	0274	RETAINING - FILMS			\$40.00	ED
08/26/2002	Johnny	0102	RETAINING - CLIPS			\$2.00	ED
08/26/2002	Johnny	0220	RETAINING - SPECIAL P/W			\$2.00	ED
08/26/2002	Johnny	0100	PLAQUE REMOVAL			\$20.00	ED
08/26/2002	Johnny	0120	COMPREHENSIVE ORAL EVALUATION			\$45.00	ED
08/26/2002	Johnny	4041.4	PROF-GINGIVAL ASSESS PLUNING		PM	\$20.00	ED
08/26/2002	Johnny	0011	PAYMENT - MED INSURANCE CHARGE			\$63.00	ED
08/26/2002	Johnny	2387	COMPOSITE THREE SURF POSTERIOR	30	MOO	\$124.00	ED
08/26/2002	Johnny	2387	COMPOSITE THREE SURF POSTERIOR	30	MED	\$124.00	ED
08/26/2002	Johnny	1100	PLAQUE REMOVAL			\$20.00	ED
08/26/2002	Johnny	2385	COMPOSITE ONE SURF POSTERIOR	03	O	\$65.00	ED
08/26/2002	Johnny	2385	COMPOSITE ONE SURF POSTERIOR	02	O	\$65.00	ED
08/26/2002	Johnny	1100	PLAQUE REMOVAL			\$20.00	ED
08/26/2002	Johnny	1100	PLAQUE REMOVAL			\$20.00	ED
08/26/2002	Johnny	0011	PAYMENT - MED INSURANCE CHARGE			\$127.00	ED
08/26/2002	Johnny	0011	PAYMENT - MED INSURANCE CHARGE			\$63.00	ED
08/26/2002	Johnny	0011	PAYMENT - MED INSURANCE CHARGE			\$214.40	ED

- Treatment History – Viewed as History Reference – Includes Charges, Payments, Debits and Credits [Does not include deleted transactions]
- Date
- Patient Name
- Code
- Treatment Description
- Tooth
- Surface
- Value
- Provider – Displayed as Provider who performed the service.

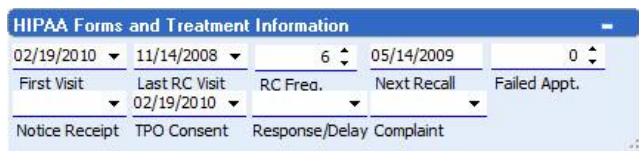
Financial Information:



Financial Information window showing account balances and payment options. Balances are categorized by age: 0-30, 31-60, 61-90, and 90+. Options include 'Send Statement', 'Charge Interest', and 'Send Dunning', all with a default 'Yes' selection.

- Account Balances -- Aged accordingly based on patient primary doctor.
- Send Statement – Default Yes
- Charge Interest – Default Yes
- Send Dunning – Default Yes

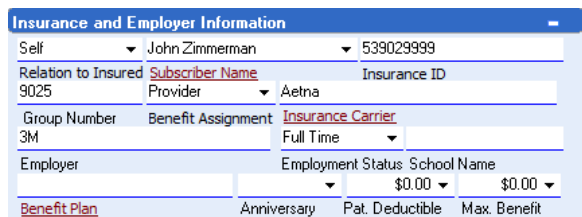
HIPAA Forms and Treatment Information:



HIPAA Forms and Treatment Information window showing dates and frequencies. Fields include First Visit, Last RC Visit, RC Freq., Next Recall, and Failed Appt. There are also sections for Notice Receipt, TPO Consent, Response/Delay, and Complaint.

- First Visit Date
- Last Visit Date
- Last Recall Date (Last Exam Date)
- Recall Frequency
- Next Recall Date – Calculated based on last recall date + recall frequency (# Months)
- TPO Consent Date (default is date of conversion)

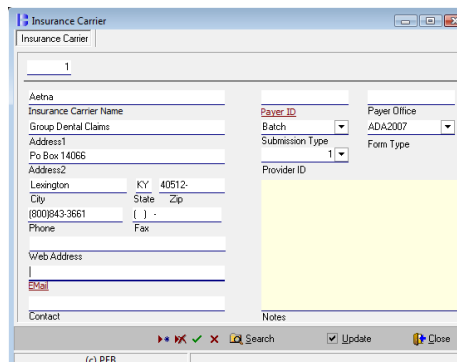
Insurance and Employer Information:



Insurance and Employer Information window showing details for John Zimmerman. Fields include Relation to Insured, Subscriber Name, Insurance ID, Provider (Aetna), Group Number, Benefit Assignment, Insurance Carrier, Employer, Employment Status, School Name, Pat. Deductible, and Max. Benefit.

- Relationship to Primary Policy Holder – Self Only
- Subscriber Name
- Insurance Id – If blank, default SSN# (if available)
- Group Number
- Benefit Assignment - Default Provider
- Insurance Carrier Name
- Employer (from Insurance Plan Name)
- Employment Status – Default Full Time
- Patient Deductible – Default 0
- Max Benefit – Default 0

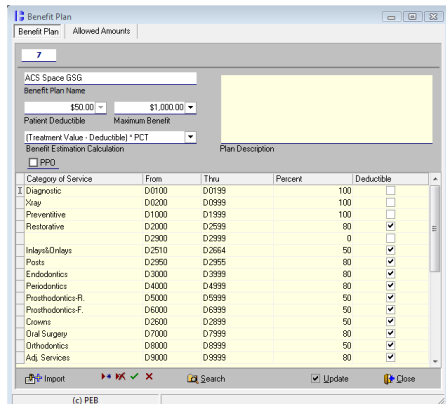
Insurance Carrier :



Insurance Carrier window showing details for Aetna. Fields include Insurance Carrier Name, Group Dental Claims, Address1, Address2, Lexington, KY, 40512, City, State, Zip, Phone, Fax, Web Address, Payer ID, Payer Office, Batch, Submission Type, and Form Type.

- Insurance Carrier Name
- Address 1
- Address 2
- City
- State
- Zip
- Phone
- Fax
- Payer ID
- Payer Office
- Submission Type – Default Electronic
- Form Type current ADA Form
- Provider ID – Default 1

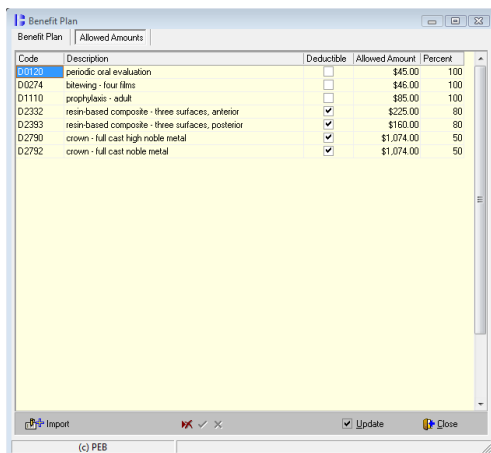
Benefit Plan:



****Benefit Plan List Only – Not linked to Patients****

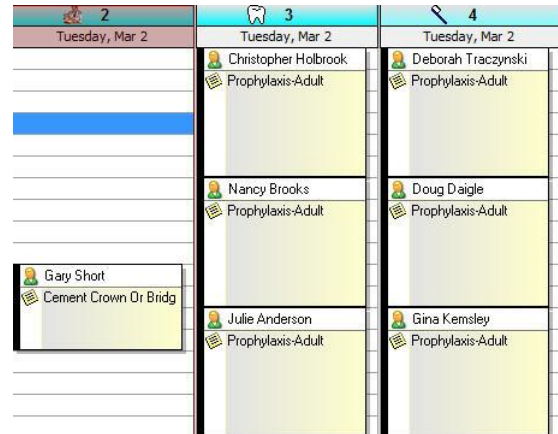
- Benefit Plan Name
- Patient Deductible
- Maximum Benefit
- Benefit Estimation Calculation – Default (Treatment Value – Deductible) * PCT)
- Category of Service
- Codes From and Thru
- Percent
- Deductible

Benefit Plans Allowed Amounts Tab:



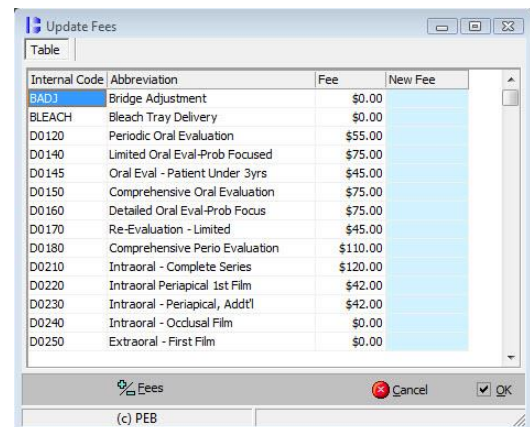
- Code
- Description
- Deductible
- Allowed Amount
- Percent

Appointment Book:



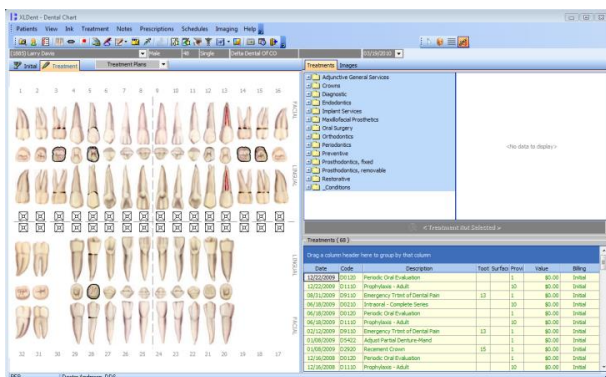
- Practice Appointments will convert to appropriate column
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length
- Appointment Notes
- All Appointments convert default Prophy Code [D1110 or D1120] depending upon dentist specialty. Operative appointments may need to be modified following conversion.

Fee Table:



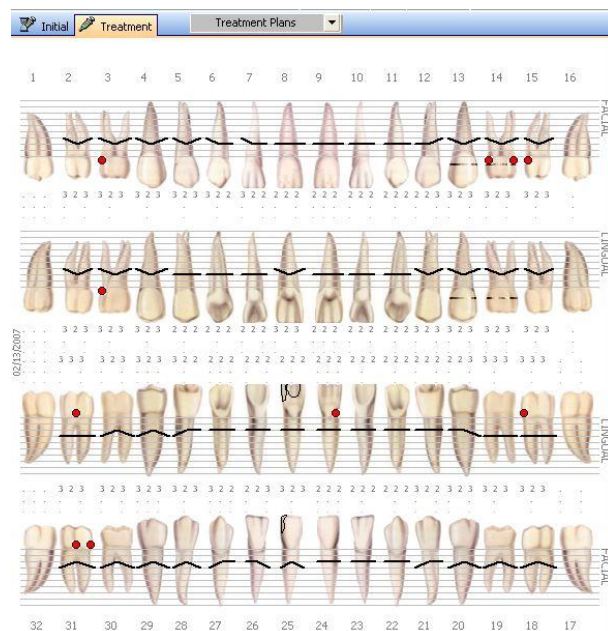
- Procedure Codes
 - ◆ Active ADA Codes
 - ◆ Base Code Abbreviation
- Primary Fee Schedule

XLChart™:



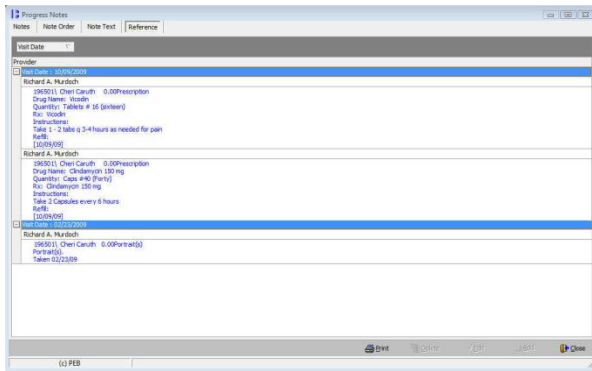
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChart™
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value
- Provider - Patient's current doctor of record.

XLChart™ - Perio:

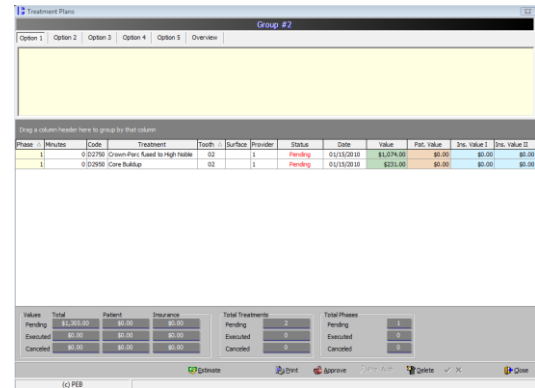


- Exam Date
- Pocket Depth
- Recession
- MGJ
- Bleeding
- Suppuration
- Plaque
- Calculus
- Furcation

Progress Notes Reference Tab



Treatment Plans:

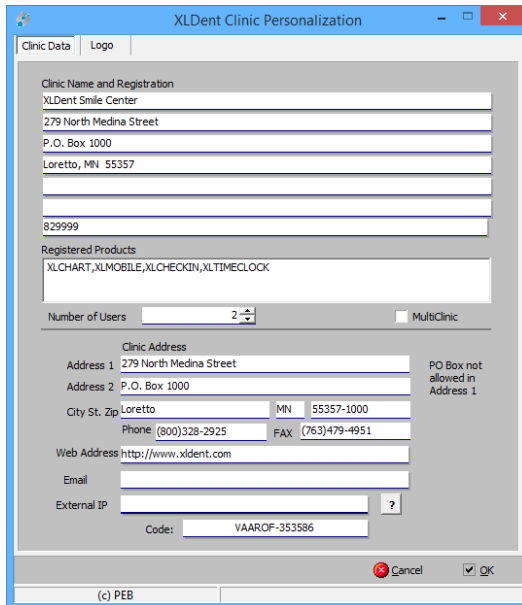


****Only plans created in the last 12 months will convert.****

- Clinical Notes
 - ◆ Procedure Date
 - ◆ Procedure Code
 - ◆ Tooth
 - ◆ Surface
 - ◆ Note Detail
 - ◆ Provider
- Patient RX
 - ◆ Procedure Date
 - ◆ Drug Name
 - ◆ Quantity
 - ◆ RX
 - ◆ RX Instructions
 - ◆ Provider
 - ◆ Refills

- Converted Plans are Accepted and Diagnosed
- Phase
- Minutes – Default 0
- Code
- Treatment Description
- Tooth
- Surface
- Provider
- Status – Default Pending
- Date
- Value
- Patient Value – Default 0
- Insurance Value I – Default 0
- Insurance Value II – Default 0

Practice Information

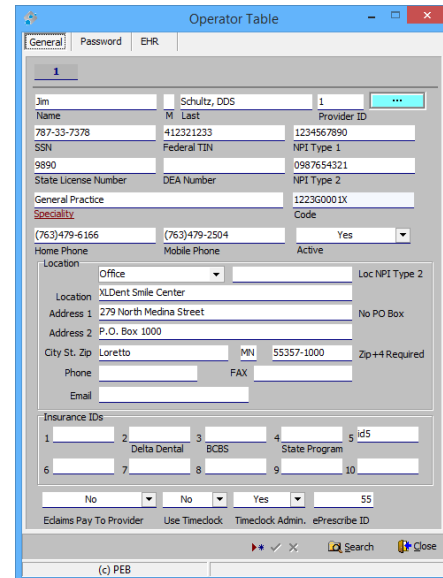


The screenshot shows the 'XLDent Clinic Personalization' window with the following fields filled:

- Clinic Name and Registration: XLDent Smile Center
- Address 1: 279 North Medina Street
- Address 2: P.O. Box 1000
- City, St, Zip: Loretto, MN 55357
- Phone: (800)328-2925
- Fax: (763)479-4951
- Web Address: http://www.xldent.com
- External IP: (blank)
- Code: VAAROF-353586

- Practice Demographic Information
- Clinic Name
- Address 1
- Address 2
- City, St, Zip+4
- Phone
- Fax
- Web Address – If supplied
- Email – If supplied
- External IP – Defaults Blank
- Clinic Logo

Operator Table:



The screenshot shows the 'Operator Table' window with the following fields filled for the first operator:

- Name: Jm Schultz, DDS
- Provider ID: 1
- SSN: 787-33-7378
- Federal TIN: 412321233
- NPI Type 1: 1234567890
- State License Number: 9890
- DEA Number: 0987654321
- NPI Type 2: 1223G0001X
- Specialty: (blank)
- Home Phone: (763)479-6166
- Mobile Phone: (763)479-2504
- Active: Yes
- Location: XLDent Smile Center
- Address 1: 279 North Medina Street
- Address 2: P.O. Box 1000
- City, St, Zip: Loretto, MN 55357-1000
- Phone: (blank)
- Fax: (blank)
- Email: (blank)
- Insurance IDs: 1 Delta Dental, 2 BCBS, 3 State Program, 4, 5, 6, 7, 8, 9, 10
- Claims Pay To Provider: No
- Use Timedock: No
- Timedock Admin: Yes
- ePrescribe ID: 55

- 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 – Default Yes
- Loc NPI Type 2 – Default Blank
- Location – Clinic Name
- Address 1
- Address 2
- City, St Zip
- Phone
- Fax
- Email – If supplied
- 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.

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.

Patient Documents:

For an additional fee, we have the ability to convert Documents and Images that reside in the Softdent pwimages folder

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
- ⊗ Archival History
- ⊗ Prescription Listing
- ⊗ Secondary Insurance
- ⊗ Appointment Book Slot Notes
- ⊗ Appointment Book Blocks
- ⊗ ERA
- ⊗ Patient Referrals
- ⊗ Account Documents
- ⊗ Inactive Patients

Notes on Conversions:

- Account and Patient Active/Inactive Status is determined by the Inactive check box on each Account or Patient Record.
- Phone numbers that contain only an area code will not convert as the area code and will need to be cleaned up after conversion.
- Insurance Plan name converts in place of employer name
- A/R report in Softdent automatically filters out balances on CIL accounts – XLDent™ includes all balances on the A/R report
- Inactive accounts with balances should be reactivated or written off prior to final conversion. This will be determined at the time of preliminary conversion.
- When a patient is transferred in Softdent, the history items do not fully transfer to the new record and therefore will be located on the previous account.
- Softdent allows service codes to have more than 5 characters plus decimals, whereas XLDent™ allows only 5 digit service codes. Converted codes will contain only the first 5 valid characters for each code.
- Appointments will convert with a default prophylaxis code. This can be manually changed after the conversion.
- Benefit Plan table converts, but is not linked to subscriber. This will need to be reviewed and manually updated after conversion.
- Softdent allows Benefit Plan Category of Service Codes to be blank and to overlap. We altered the categories to remove overlap.
- Softdent allows for clinical notes to have a blank procedure date. These notes will convert over with the created date.
- Only document images (JPG, BMP and HTM) in the pwimages\patient folder will convert.
- Team Talk Notes convert with Created Date and End Date is contained within the note.
- Due to the lack of Patient Identification for Guarantors 2, 3 and 4. the mobile and email content will not accurately convert on Guarantor 2, 3 and 4
- In Softdent, there are 4 areas where an Insurance ID can be entered. We convert the patient record Insurance ID. If the subscriber is not a patient, it will convert with the SSN if available, or blank.

Below are some additional notes concerning items that will or will not convert:

Patient ID

Softdent Patient ID # is XLDentTM Record#

Gender

When this is not converted or not entered into current system, default is Male.

Marital Status

When this is not converted or not entered into current system, default is Other.

Preferred Dentist

When this is not converted, 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 XLDentTM. This can be manually changed.

Recall Frequency

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

Patient Status

Active and Auxiliary status patients convert to XLDentTM. Auxiliary status is reserved for Guarantors who do not have a corresponding Patient Record.

Patient Treatment Plans

All Treatment Plans NOT scheduled and NOT in Tickler plans will convert. Accepted plans are marked approved in XLDent, and Diagnosed plans are not approved. Only the last 12 months of Treatment Plans will convert.

Patient Benefit Plans (Bluebook Values)

Allowed Amounts with Invalid ADA Code will not be converted. Example 01110.01, 01110.02, etc.

Benefit Plan Maximum Benefit

When this is not converted, default is \$0.00.

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.

Miscellaneous Notes

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/End of Year totals or printed reports from your previous system. At the end of the actual month and year, you will combine the totals from XLDentTM with the totals from your previous system to get accurate Month to Date/Year to Date totals.

If posting continues in your existing practice management software after the conversion cutoff date, 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.