

**Patient Information:**



Personal Information

Record No. 1591 Self 1591 John Zimmerman

Relation Responsible Party

Name First John J Zimmerman Last Johnny Zimmerman

Address Line 1 425 Corte Madera Avenue (763)555-4444

Address Line 2 Home Phone (763)666-4345

City-State-Zip Corte Madera CA 94925- Work Phone (763)675-1234

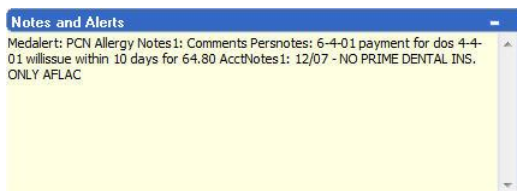
Country USA John@yahoo.com Mobile Phone

Birth Date 01/04/1998 Age 12 SSN 539-00-0000 Gender Female Marital Status Single

Classification Doctor Hygienist Record Status Active

- 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:**

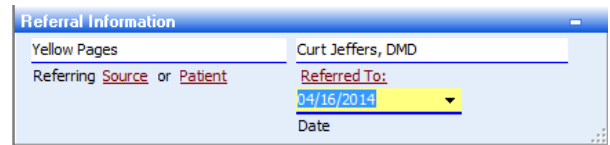


Notes and Alerts

Medalart: PCN Allergy Notes 1: Comments Persnotes: 6-4-01 payment for dos 4-4-01 willissue within 10 days for 64.80 AcctNotes 1: 12/07 - NO PRIME DENTAL INS. ONLY AFLAC

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

**Referral Information:**



Referral Information

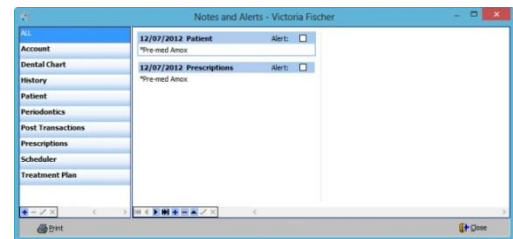
Yellow Pages Curt Jeffers, DMD

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 Alerts

Dental Chart 12/07/2012 Prescriptions Alerts

History

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
08/20/02	Johnny Zimmerman	0140	UNITED DENTAL EVALUATION			\$45.00	ED
08/20/02	Johnny Zimmerman	0100	2 HALF PRIME DENTAL			\$10.00	ED
08/20/02	Johnny Zimmerman	0274	RETAINING - FILMS			\$40.00	ED
08/20/02	Johnny Zimmerman	0102	RETAINING - CLIPS			\$2.00	ED
08/20/02	Johnny Zimmerman	0230	RETAINING - SPECIAL P/W			\$2.00	ED
08/20/02	Johnny Zimmerman	0100	PARADIGM P/W			\$20.00	ED
08/20/02	Johnny Zimmerman	0120	COMPREHENSIVE DENTAL EVALUATION			\$45.00	ED
08/20/02	Johnny Zimmerman	40414	PROF-DENTAL X-RAY FILMS		PA	\$20.00	ED
08/20/02	Johnny Zimmerman	0011	PAYMENT - MED INSURANCE CHARGE			\$63.00	ED
08/20/02	Johnny Zimmerman	2387	COMPOSITE THREE SURF POSTERIOR	30	MED	\$124.00	ED
08/20/02	Johnny Zimmerman	2385	COMPOSITE ONE SURF POSTERIOR	03	MED	\$55.00	ED
08/20/02	Johnny Zimmerman	2385	COMPOSITE ONE SURF POSTERIOR	03	O	\$55.00	ED
08/20/02	Johnny Zimmerman	2385	COMPOSITE ONE SURF POSTERIOR	03	O	\$55.00	ED
08/20/02	Johnny Zimmerman	2385	COMPOSITE ONE SURF POSTERIOR	03	O	\$55.00	ED
08/20/02	Johnny Zimmerman	0011	PAYMENT - MED INSURANCE CHARGE			\$127.00	ED
08/20/02	Johnny Zimmerman	0011	PAYMENT - MED INSURANCE CHARGE			\$63.00	ED
08/20/02	Johnny Zimmerman	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:**



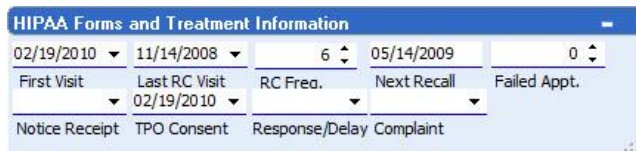
Financial Information window showing account balances and payment options.

\$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		

Buttons: Send Statement, Charge Interest, Send Dunning

- 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:**



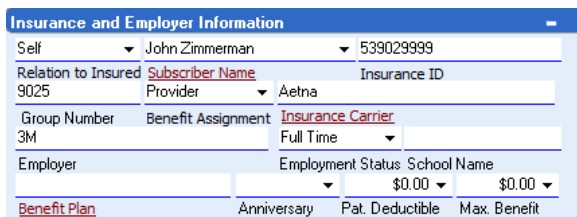
HIPAA Forms and Treatment Information window showing visit dates and frequencies.

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			

Buttons: Notice Receipt, TPO Consent, Response/Delay, Complaint

- First Visit Date
- Last Visit Date
- Last Recall Date (Last Prophy 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:**

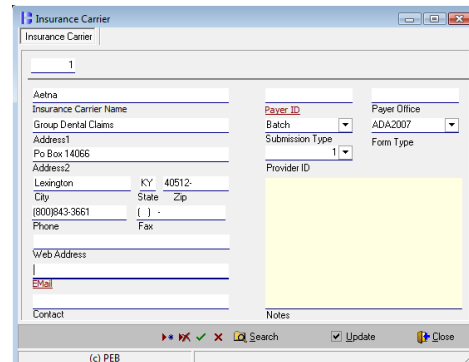


Insurance and Employer Information window showing patient and insurance details.

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
Benefit Plan	Anniversary	Pat. Deductible
		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 :**



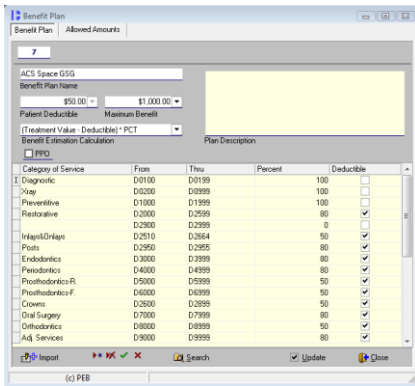
Insurance Carrier window showing carrier details.

Aetna	Payer ID	Payer Office
Insurance Carrier Name	Batch	ADA2007
Group Dental Claims	Submission Type	Form Type
Address1	1	
Po Box 14066	Provider ID	
Address2		
Lexington KY 40512		
City State Zip		
(800)943-3661		
Phone Fax		
Web Address		
Email		
Contact		

Buttons: Update, Close

- 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

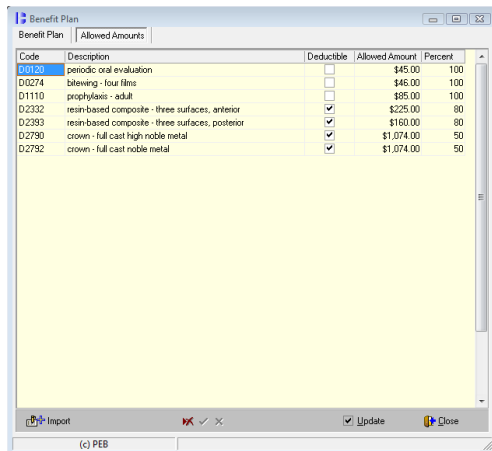
**Benefit Plan:**



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

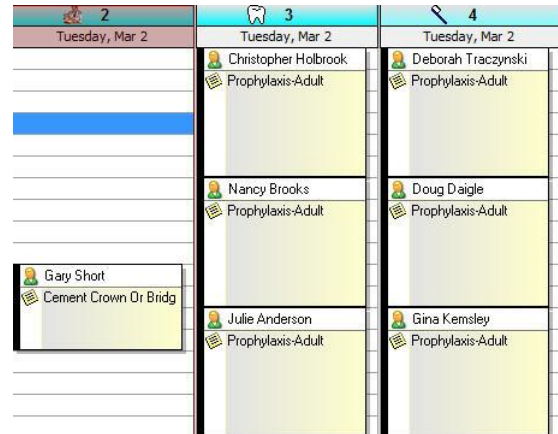
- Benefit Plan Name
- Patient Deductible
- Maximum Benefit
- Benefit Estimation Calculation – Default (Treatment Value – Deductible) \* PCT)
- Category of Service
- Codes From and Thru
- Percent
- Deductible

**Benefit Plans Allowed Amounts Tab:**



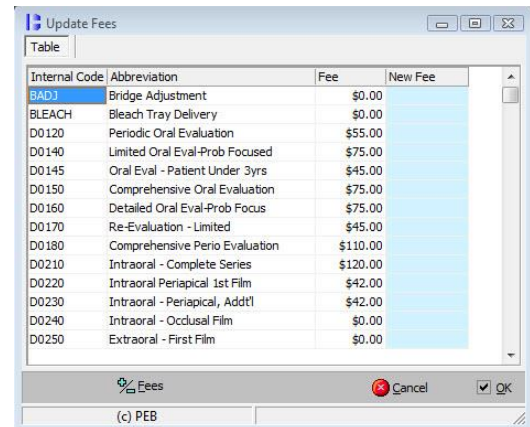
- Code
- Description
- Deductible
- Allowed Amount
- Percent

**Appointment Book:**



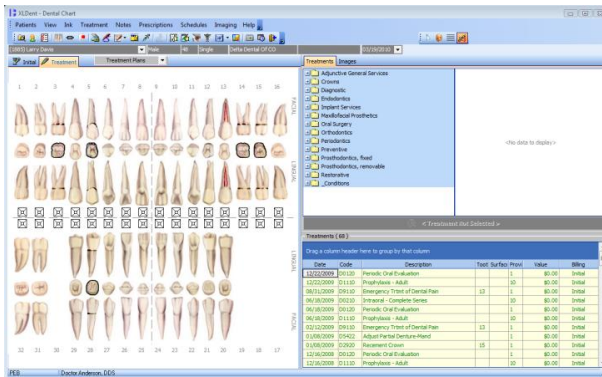
- Practice Appointments will convert to appropriate column
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length
- Appointment Notes
- All Appointments convert default Prophy Code [D1110 or D1120] depending upon dentist specialty. Operative appointments may need to be modified following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

**Fee Table:**



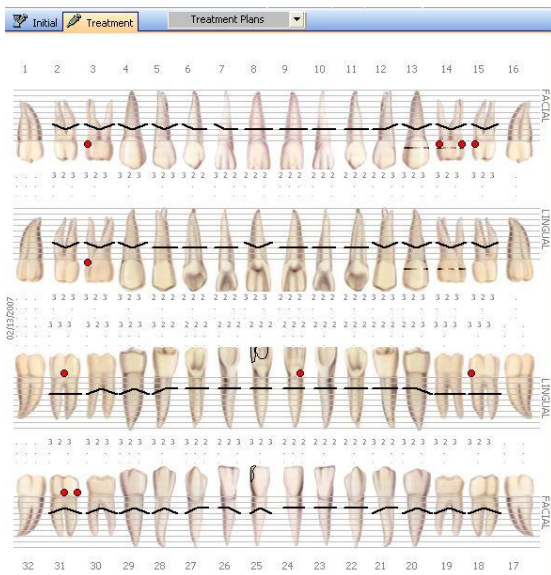
- Procedure Codes
  - ◆ Active ADA Codes
  - ◆ Base Code Abbreviation
- Primary Fee Schedule

**XLChart™:**



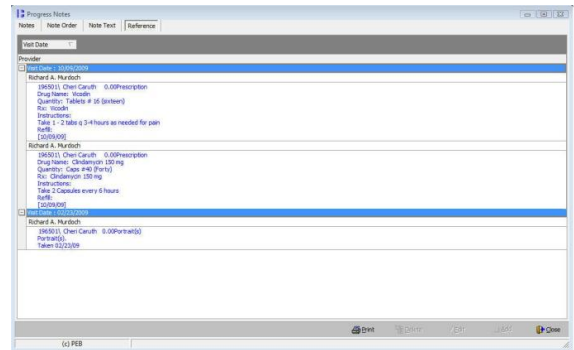
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChart™
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value
- Provider - Patient's current doctor of record.

**XLChart™ - Perio:**



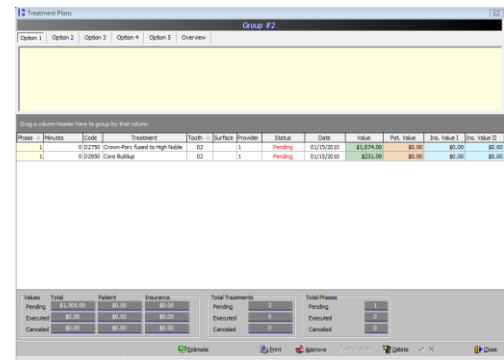
- Exam Date
- Recession
- Bleeding
- Plaque
- Furcation
- Pocket Depth
- MGJ
- Suppuration
- Calculus

**Progress Notes Reference Tab**



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

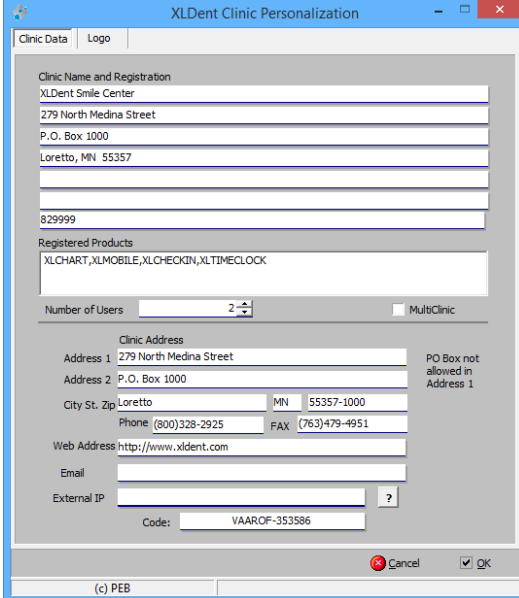
**Treatment Plans:**



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

- 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



**XLdent Clinic Personalization**

Clinic Data | Logo

Clinic Name and Registration  
 XLdent Smile Center  
 279 North Medina Street  
 P.O. Box 1000  
 Loretto, MN 55357  
 829999

Registered Products  
 XLCHART, XLMOBILE, XLCHECKIN, XLTIMELOCK

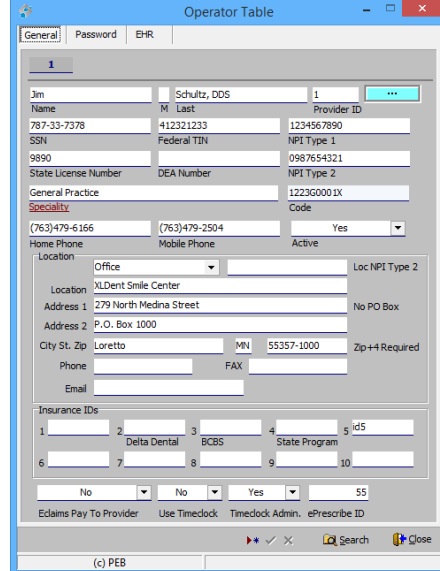
Number of Users: 2 MultiClinic

Clinic Address  
 Address 1: 279 North Medina Street PO Box not allowed in Address 1  
 Address 2: P.O. Box 1000  
 City St. Zip: Loretto MN 55357-1000  
 Phone: (800)328-2925 FAX: (763)479-4951  
 Web Address: http://www.xldent.com  
 Email:  
 External IP: Code: VAAROF-353586

(c) PEB

- 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:



**Operator Table**

General | Password | EHR

1

Jim Schultz, DDS 1 Provider ID  
 Name M Last  
 787-33-7378 412321233 1234567890  
 SSN Federal TIN NPI Type 1  
 9890 0987654321  
 State License Number DEA Number NPI Type 2  
 General Practice 1223G0001X  
 Specialty Code  
 (763)479-6166 (763)479-2504 Yes  
 Home Phone Mobile Phone Active

Location Office Loc NPI Type 2  
 Location XLdent Smile Center  
 Address 1 279 North Medina Street No PO Box  
 Address 2 P.O. Box 1000  
 City St. Zip Loretto MN 55357-1000 Zip+4 Required  
 Phone FAX  
 Email

Insurance IDs  
 1 2 3 4 5  
 Delta Dental BCBS State Program  
 6 7 8 9 10  
 No No Yes 55  
 Eclaims Pay To Provider Use Timedock Timedock Admin. ePrescribe ID

(c) PEB

- 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



**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.
- We convert the value of the procedure in Reference History. Tax is not included.
- Prescription history does not convert. We convert prescriptions from the Clinical Notes.

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

### **Patient ID**

Softdent Patient ID # is XLDent™ 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 XLDent™. 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 XLDent™. 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 XLDent™ 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.**