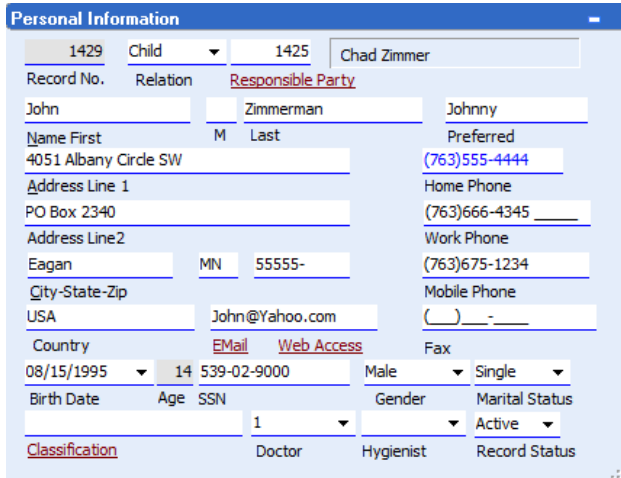


**Patient Information:**



**Personal Information**

1429 Child 1425 Chad Zimmer

Record No. Relation Responsible Party

John Zimmerman Johnny

Name First M Last Preferred

4051 Albany Circle SW (763)555-4444

Address Line 1 Home Phone

PO Box 2340 (763)666-4345

Address Line2 Work Phone

Eagan MN 55555- (763)675-1234

City-State-Zip Mobile Phone

USA John@Yahoo.com ( ) - -

Country EMail Web Access Fax

08/15/1995 14 539-02-9000 Male Single

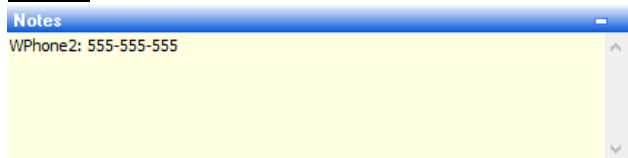
Birth Date Age SSN Gender Marital Status

1 Active

Classification Doctor Hygienist Record Status

- Patients grouped by same responsible party
- First Name
- Last Name
- Middle Initial
- Preferred Name
- Address Line 1
- Address Line 2
- City
- State
- Zip
- Home Phone Number
- Work Phone Number
- Mobile Phone Number
- Email Address
- Gender
- Marital Status
- Birth Date
- Patient SSN
- Doctor of Record
- Record Status
- Old Account ID converts as XLDent™ record number

**Notes:**

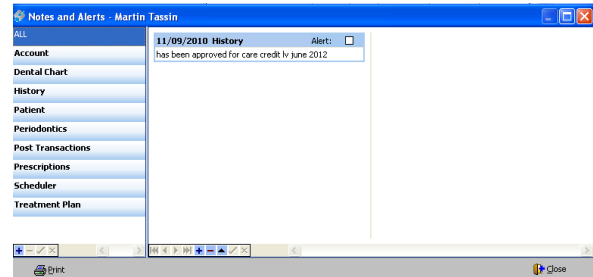


**Notes**

WPhone2: 555-555-555

- Work 2 Phone Number

**Alerts:**



**Notes and Alerts - Martin Tassin**

ALL

Account

Dental Chart

History

Patient

Periodontics

Post Transactions

Prescriptions

Scheduler

Treatment Plan

11/09/2010 History Alerts

has been approved for care credit by June 2012

- Patient Medical Alerts convert to Dental Chart Alert and Prescription Alert
- Patient Premed convert to Dental Chart Alert and Scheduler Alert
- Patient Sticky Notes convert to Patient Note
- Responsible Party Sticky Notes convert to History Note
- Lives with Sticky Notes convert to Account Note

**History Reference Tab:**



**History**

Drag a column header here to group by that column.

Date	Patient Name	Code	Treatment	Tooth	Surface	Value		Provider
01/20/2012	Victoria	150.00	Camp Oral Eval-New Or Estab Patient			\$55.00	2	
01/20/2012	Victoria	220.00	Periapical X-ray - First Film			\$27.00	2	
01/20/2012	Victoria	330.00	Panoramic Film			\$95.00	2	
01/20/2012	Victoria	1200.00	Child fluoride - No Prophy.			\$41.00	2	
01/20/2012	Victoria	1120.00	Prophylaxis-child			\$51.00	2	
02/09/2012	Victoria	2.00	Insurance Check Payment			\$273.38	2	
02/09/2012	Victoria	50.90	Participating Insurance Adjustment			\$1.00	2	
03/07/2012	Victoria	620.00	Analgene			\$33.00	2	
03/07/2012	Victoria	2991.00	Resin Composite - 2 Surface, Posterior	14	O	\$126.00	2	
03/07/2012	Victoria	2.00	Insurance Check Payment			\$463.38	2	
01/20/2012	Victoria	150.00	Camp Oral Eval-New Or Estab Patient			\$55.00	2	
01/20/2012	Victoria	1203.00	Child fluoride - No Prophy.			\$41.00	2	
01/20/2012	Victoria	330.00	Panoramic Film			\$95.00	2	
01/20/2012	Victoria	1120.00	Prophylaxis-child			\$51.00	2	
02/09/2012	Victoria	2.00	Insurance Check Payment			\$245.74	2	
02/09/2012	Victoria	50.90	Participating Insurance Adjustment			\$1.00	2	

- Treatment History – Viewable as History Reference [includes Charges, Payments, Debits and Credits]
- Date
- Patient Name
- Code
- Treatment Description
- Tooth
- Surface
- Value
- Provider

**Financial Information:**

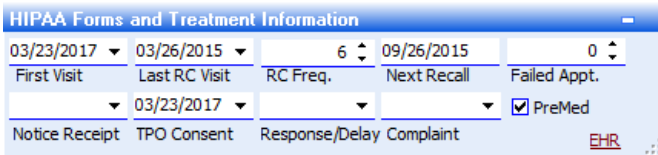


Financial Information window showing account balances and payment options.

\$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		
Send Statement	Charge Interest	Send Dunning		

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

**HIPAA Forms and Treatment Information:**

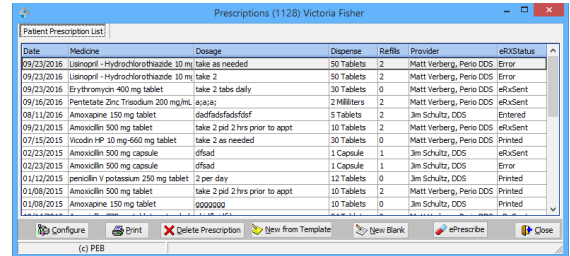


HIPAA Forms and Treatment Information window showing visit dates and frequencies.

03/23/2017	03/26/2015	6	09/26/2015	0
First Visit	Last RC Visit	RC Freq.	Next Recall	Failed Appt.
	03/23/2017			<input checked="" type="checkbox"/> PreMed
Notice Receipt	TPO Consent	Response/Delay	Complaint	EHR

- First Visit Date
- Last Visit Date
- Last Recall Visit
- Recall Frequency
- Next Recall Date – Based on last recall visit date using recall frequency
- Failed Appt
- TPO Consent - Defaults to Conversion Date
- Premed Indicator

**Patient Prescription List:**

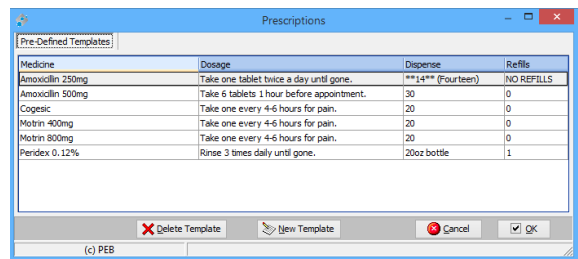


Patient Prescription List window showing a list of prescriptions for patient Victoria Fisher.

Date	Medicine	Dosage	Dispense	Refills	Provider	eRXStatus
09/23/2016	Lisinopril - Hydrochlorothiazide 10 mg	take as needed	50 Tablets	2	Matt Verberg, Perio DDS	Error
09/23/2016	Lisinopril - Hydrochlorothiazide 10 mg	take 2	50 Tablets	2	Matt Verberg, Perio DDS	Error
09/23/2016	Hydroxyzine 400 mg tablet	take 2 tabs daily	30 Tablets	0	Matt Verberg, Perio DDS	eRXSent
09/16/2016	Pentelate Zinc Trisodium 200 mg/ml	asac	2 Milliliters	2	Matt Verberg, Perio DDS	eRXSent
09/11/2016	Amoxiclavine 150 mg tablet	daefafafafafafaf	5 Tablets	2	Jim Schultz, DDS	Entered
09/11/2016	Amoxiclavine 500 mg tablet	take 2 pd 2 hrs prior to appt	10 Tablets	2	Matt Verberg, Perio DDS	eRXSent
07/15/2015	Vioclin HP 10 mg-660 mg tablet	take 2 as needed	30 Tablets	0	Matt Verberg, Perio DDS	Printed
02/23/2015	Amoxicillin 500 mg capsule	ofad	1 Capsule	1	Jim Schultz, DDS	eRXSent
02/23/2015	Amoxicillin 500 mg capsule	ofad	1 Capsule	1	Jim Schultz, DDS	Error
01/12/2015	penicillin v potassium 250 mg tablet	2 per day	12 Tablets	0	Jim Schultz, DDS	Printed
01/08/2015	Amoxicillin 500 mg tablet	take 2 pd 2 hrs prior to appt	10 Tablets	2	Matt Verberg, Perio DDS	Printed
01/08/2015	Amoxiclavine 150 mg tablet	0000000	10 Tablets	0	Jim Schultz, DDS	Printed

- Date
- Medicine
- Dosage
- Dispense
- Refills
- Provider

**Prescription Predefined Templates:**

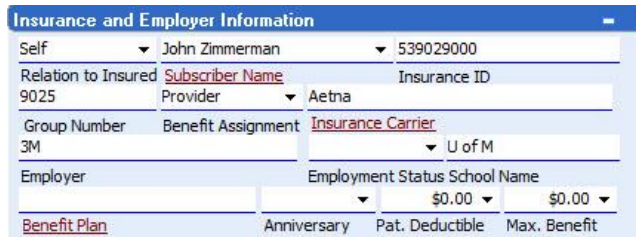


Prescription Predefined Templates window showing a list of predefined templates.

Medicine	Dosage	Dispense	Refills
Amoxicillin 250mg	Take one tablet twice a day until gone.	***14** (fourteen)	NO REFILLS
Amoxicillin 500mg	Take 6 tablets 1 hour before appointment.	30	0
Cogesic	Take one every 4-6 hours for pain.	20	0
Motrin 400mg	Take one every 4-6 hours for pain.	20	0
Motrin 800mg	Take one every 4-6 hours for pain.	20	0
Peridex 0.12%	Rinse 3 times daily until gone.	20oz bottle	1

- Medicine
- Dosage
- Dispense
- Refills

**Insurance and Employer Information:**



Insurance and Employer Information

Self John Zimmerman 539029000

Relation to Insured Subscriber Name Insurance ID  
9025 Provider Aetna

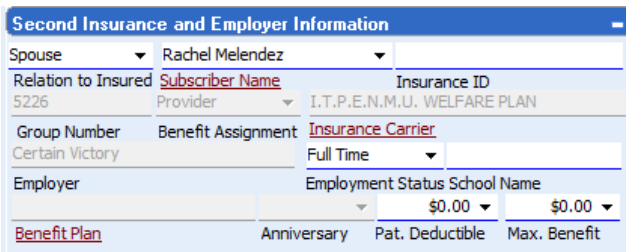
Group Number Benefit Assignment Insurance Carrier  
3M U of M

Employer Employment Status School Name  
\$0.00 \$0.00

Benefit Plan Anniversary Pat. Deductible Max. Benefit

- Relation to Primary Policy Holder
- Subscriber Name
- Insurance Id – If blank defaults to SSN# if available
- Group Number
- Benefit Assignment – Default to Provider
- Insurance Carrier Name
- Employer Name
- School Name
- Benefit Plan
- Anniversary
- Pat. Deductible – Subscriber Only
- Max. Benefit – Subscriber Only

**Second Insurance and Employer Information:**



Second Insurance and Employer Information

Spouse Rachel Melendez

Relation to Insured Subscriber Name Insurance ID  
5226 Provider I.T.P.E.N.M.U. WELFARE PLAN

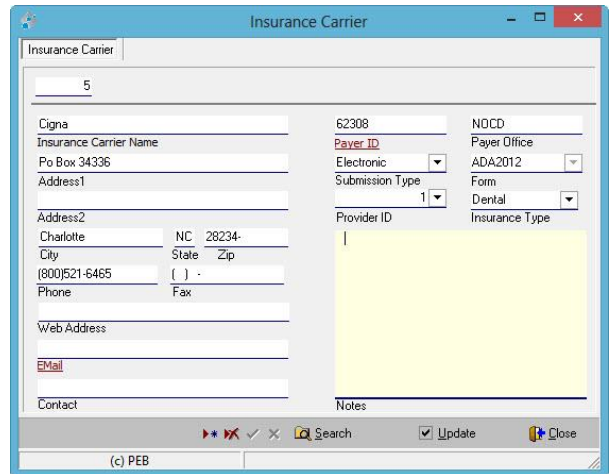
Group Number Benefit Assignment Insurance Carrier  
Certain Victory Full Time

Employer Employment Status School Name  
\$0.00 \$0.00

Benefit Plan Anniversary Pat. Deductible Max. Benefit

- Relation to Primary Policy Holder
- Subscriber Name
- Insurance ID – If Blank pulls from Subscriber
- Group Number
- Benefit Assignment – Default to Provider
- Insurance Carrier Name
- Employer Name
- Benefit Plan
- Anniversary
- Pat. Deductible – Subscriber Only
- Max. Benefit – Subscriber Only

**Insurance Carrier:**



Insurance Carrier

5

Cigna 62308 NOCD

Insurance Carrier Name Payer ID Payer Office

Po Box 34336 Electronic ADA2012

Address1 Submission Type Form

Address2 Provider ID 1 Dental

Charlotte NC 28234- Insurance Type

City State Zip

(800)521-6465 Phone Fax

Web Address

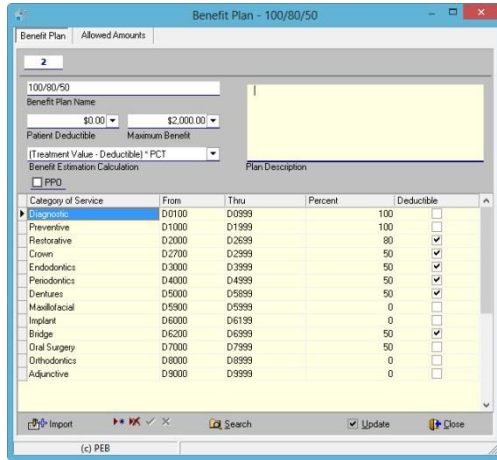
E-Mail

Contact Notes

(c) PEB

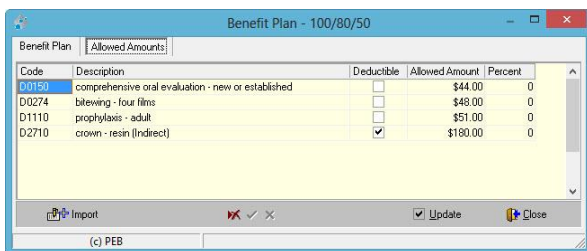
- Insurance Carrier Name
- Address 1
- Address 2
- City
- State
- Zip
- Phone
- Fax
- Contact
- Payer ID – Verify after conversion
- Payer Office Always NOCD
- Submission Type Always Electronic
- Form Type current ADA Form
- Provider ID – Defaults to 1

**Benefit Plan:**



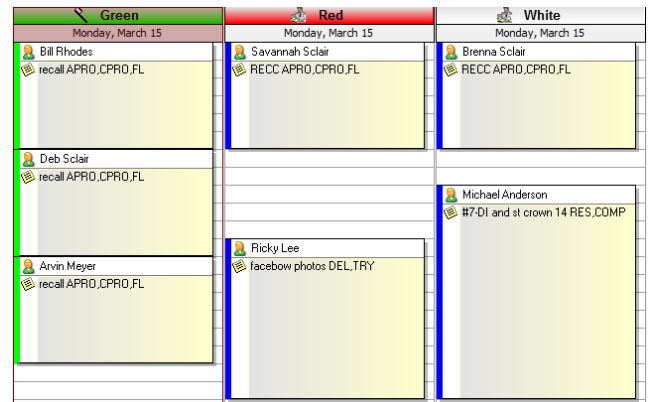
- Benefit Plan Name
- Patient Deductible
- Maximum Benefit
- Benefit Estimation Calculation – Defaults to (Treatment Value – Deductible) \* PCT)
- Category of Service
- Codes From and Thru
- Percent
- Deductible

**Benefit Plan Allowed Amounts Tab:**



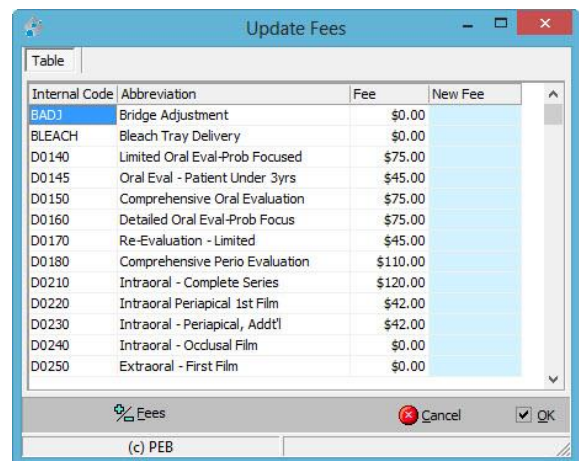
- Code
- Description
- Deductible
- Allowed Amount
- Percent

**Appointment Book:**



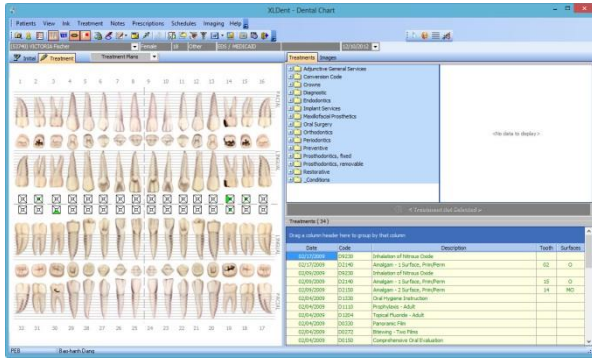
- Practice Appointments will convert to appropriate column. Doctor appointments will convert to 1 column.
- Assigned to Doctor in the XLDent™ Scheduler
- Patient Name
- Appointment Date
- Appointment Time
- Appointment Length
- Appointment Comments
- Appointment Detail

**Fee Table:**



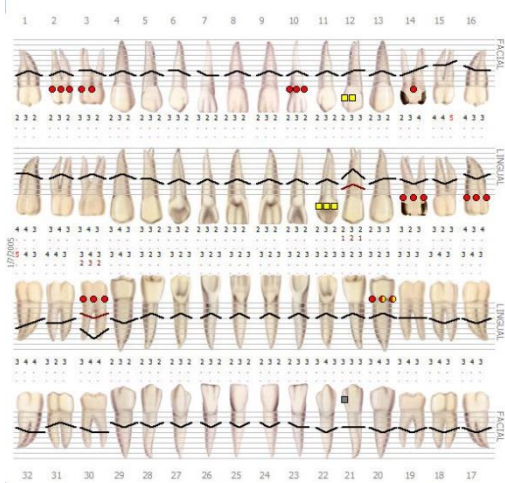
- Procedure Codes
  - ◆ Active ADA Codes
  - ◆ Base Code Abbreviation
- Primary Fee Schedule

**XLChart<sup>TM</sup>:**



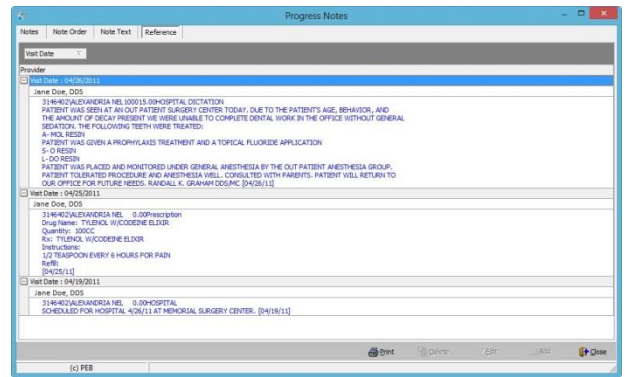
- Restorative Chart -- As a visual representation of treatment completed on valid ADA codes only. This will be recorded as Initial Treatment in XLChart<sup>TM</sup>
- Date
- Patient Name
- Code
- Treatment
- Tooth
- Surface
- Value
- Provider

**Perio Charting**



- Pocket
- Recession
- Bleeding
- Suppuration
- Plaque
- Calculus
- Mobility
- Furcation

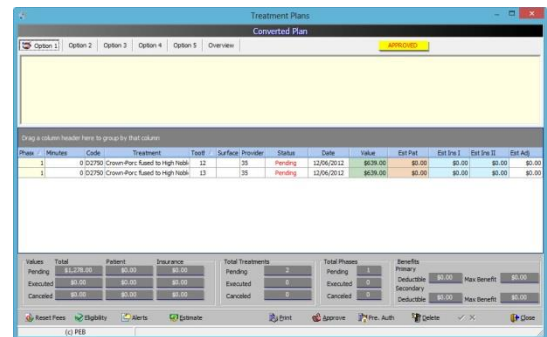
**Progress Note Reference Tab**



**Progress Notes and Progress Note Alerts**

- Date
- Note Body

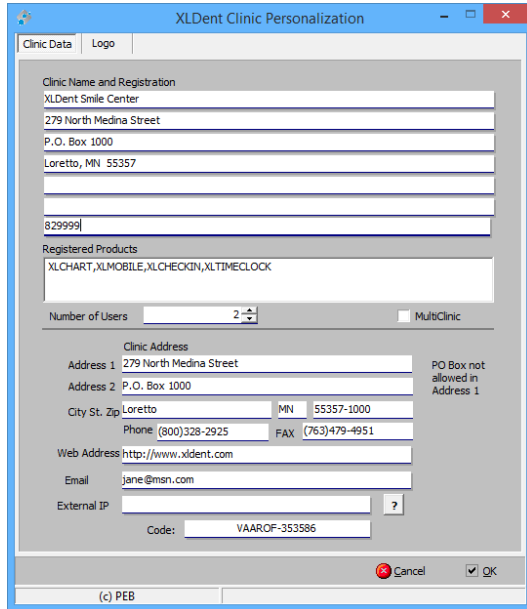
**Treatment Plans:**



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



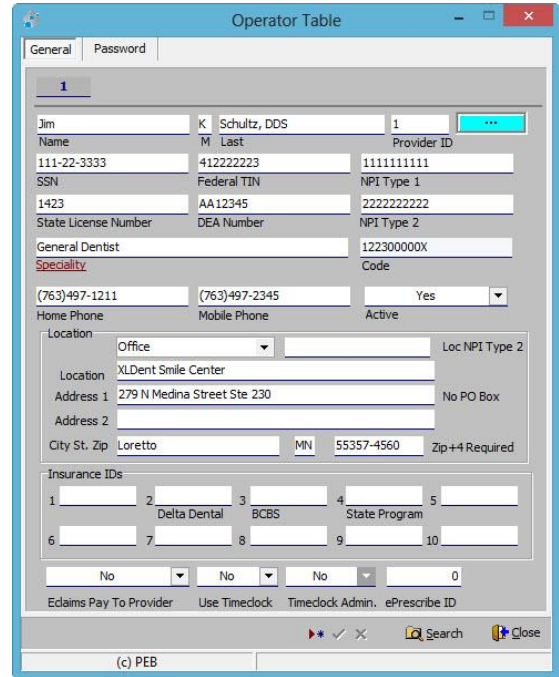
**Practice Information:**



The screenshot shows the 'XLDent Clinic Personalization' window with the 'Clinic Data' tab selected. It contains various input fields for clinic information, including name, address, phone numbers, and user settings.

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

**Operator Table:**



The screenshot shows the 'Operator Table' window with the 'General' tab selected. It displays a table of operator information for a user named Jim Schultz, DDS, including personal and professional details like SSN, TIN, and license numbers.

- 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
- Speciality
- Home Phone
- Mobile Phone
- Active
- Location – Defaults to Office Name
- Location Address 1 & Address 2
- Location City, State, Zip
- Insurance ID's – If available

**File Location:**

?:\pworks\ or ?:\program files\pworks

**Files Needed**

?:\pworks\\*. \* excluding Images folder

Need original software and license disks if available.

**Patient Documents:**

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

**To Print the A/R report:**

In Practice Works - Click File - Click Print - Click Accounts & Receivables - Click Account Receivable, Uncheck separate reports, check combined report, Check all other options for accounts with, check print in condensed format.

**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<sup>TM</sup> 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
- ⊗ Referred By / To
- ⊗ Patient Portrait
- ⊗ Patient Images
- ⊗ Patient Attachments.

**Notes on Conversions:**

- We do not get notes that attach by visit ID (patient appointment), Insurance company ID, Insurance plan ID, Appointment Book (date specific) or treatment code/treatment plan.
- Non-patient insurance subscriber relationship (self) needs to be updated following conversion.
- 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.
- Due to the way this practice management software connects family groupings and/or insurance carriers, linking may need to be updated after the conversion.
- Only treatment plans created in the last year (12 months) will convert. Accepted and In Progress plans convert as approved, Proposed plans convert as not approved.
- Due to the way this practice management software handles treatment plans we cannot guarantee accurate results. This will be evaluated during the preliminary conversion per client dataset.
- Due to the way this practice management software captures perio chart values we cannot guarantee accurate results. This will be evaluated during the preliminary conversion per client dataset.
- Referral Source Table does convert, but they are not linked to patient records.

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.

### **Patient Preferred Name**

When this field is blank, this will convert the First Name as the Preferred Name.

### **Preferred Dentist**

The Owns Production Doctor is converted as the preferred doctor. On Auxiliary records, there is no default doctor, this will need to be manually updated after the conversion.

### **Marital Status**

Divorced and widowed statuses convert as other.

### **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<sup>TM</sup>. This can be manually changed.

### **Last Recall Date**

When this is not entered into current system it will not convert

### **Recall Frequency**

When this is not converted or not entered into current system it will default to 0.

### **TPO Consent Date**

Your Practice Management Software does not record a consent date, therefore this will not convert. For your convenience, the date of the conversion has been inserted as the consent date. It is important that you verify and update this date following the conversion.

### **Patient Status**

All patients convert as Active unless they are identified on the Inactive report or are identified as a non-person.

### **Appointment Category**

When this is not converted the Appointment Category and Notes area will be blank. This can be manually updated after the conversion.

### **Payer ID**

The Payer ID's from your previous system may not be accurate according to the Emdeon Payer List. This field must be verified following conversion.

### **Patient Treatment Plans**

Accepted and In Progress plans are marked approved. Proposed are not approved. Auto Created treatment plans do not convert. Completed plans do not convert.

### **Treatment Plan Date**

When entry date is blank, defaults to conversion date.

### **Email**

Forty (40) characters are converted only.

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<sup>TM</sup> 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.**