PRELIMINARY SCHEDULE

as of December 20, 2017

Time	Sun, Jan 28, 2018
4:00 PM – 5:45 PM	PRE-REGISTRATION AND MEET & GREET WITH CUSTOMER SUCCESS MANAGERS - IN THE SUMMIT LOUNGE
6:25 PM – 7:00 PM	OPTIONAL ACTIVITY: FLYOVER CANADA – ADDITIONAL COST + REGISTRATION REQUIRED

Time	Mon, Jan 29, 2018 – SUMMIT DAY 1
7:30 AM – 8:30 AM	REGISTRATION, MORNING COFFEE, JUICE & PASTRIES
10:00 AM – 5:00 PM	SUMMIT LOUNGE
	MORNING PRESENTATIONS:
8:30 AM – 8:45 AM	Welcome to Summit 2018 – *Ted DeVries, President & CEO, Exan Group*
8:45 AM – 10:00 AM	Project Accessible Oral Health. Building Trust & Impact with Public-Private Collaboration – *John D. Kemp, President & CEO, The Viscardi Center* + *Mark S. Wolff, DDS, PhD, Associate Dean, Professor and Chair, NYU College of Dentistry* + *Steven W. Kess, VP Global Professional Relations, Henry Schein*
10:00 AM – 10:30 AM	COFFEE BREAK 30 MINS.
10:30 AM – 11:15 AM	Prescription Drug Misuse – How can the electronic record help? – *Denise Stewart, DDS, MHSA, Chief Policy Officer, American Dental Education Association*
11:15 AM – 12:00 PM	axiUm Update – *Exan Group: Rachel Nelson, Director of Sales, Marketing & Professional Services* + *Bethany Foote, Director of Development* + *Tamara Lee, Director of Support*
12:00 PM – 1:00 PM	LUNCH
	AFTERNOON BREAKOUT SESSIONS:
1:00 PM – 1:45 PM	• Using axiUm to Manage Student Progress in a Distributed Clinical Education Model – *ECU School of Dental Medicine* • Applying Automation to Drive Results – *New York University, College of Dentistry* • Customer Success Manager - Best Practices – *Exan Group* • Using PowerPoint to Create Training Videos, For Dummies – *Exan Group* • Sponsor Presentation – EasyMarkit Demonstration – *EasyMarkit*
1:45 PM – 2:00 PM	WATER BREAK – 15 MINS.
2:00 PM – 2:45 PM	• Accreditation Prep for CODA Visit – *University of New England, College of Dental Medicine* + *Harvard School of Dental Medicine* • axiUm Provider Levels – *Loma Linda University, School of Dentistry* • Building a Hygiene Center to Ensure Patient Needs are Met – *Tufts University, School of Dental Medicine* • axiUm Info Manager 101 – *Exan Group* • Sponsor Presentation – *TBD*
2:45 PM– 3:15 PM	COFFEE BREAK – 30 MINS.
3:15 PM – 4:00 PM	• Address Verification Panel – *Ohio State University, College of Dentistry* + *Rutgers School of Dental Medicine* • axiUm Platform Options – *Exan Group* • SNODDS Implementation – *UCSF School of Dentistry* • Sponsor Presentation – MiPACS Updates: 3D, CAD/CAM and Web-Based Viewing – *Medicor Imaging*
4:00 PM – 4:15 PM	WATER BREAK – 15 MINS.
4:15 PM – 5:00 PM	• COHRI Consortium Meeting – *Various Speakers* • HL7 Integration – *Exan Group* • DDX Lab – *Exan Group* + *Henry Schein* • Patient Intake Form, Screening Form, Medical Consult – *UBC Faculty of Dentistry* + *Exan Group* • Sponsor Presentation – *TBD*
5:00 PM – 6:00 PM	WELCOME RECEPTION

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Time	Tue, Jan 30, 2018 – SUMMIT DAY 2
6:30 AM	**MORNING RUN/WALK (OPTIONAL) – Meet at Hotel Front Desk/Main Lobby**
7:30 AM – 8:30 AM	**MORNING COFFEE, JUICE & PASTRIES**
9:00 AM – 5:00 PM	**SUMMIT LOUNGE**
	MORNING PRESENTATIONS:
8:30 AM – 8:45 AM	Morning Welcome – *Ted DeVries, President & CEO, Exan Group*
8:45 AM – 9:30 AM	axiUm Ascend – Product Launch Update – *AT Still University + Exan Group*
9:30 AM – 10:00 AM	axiUm Ascend Roadmap – *Exan Group*
10:00 AM – 10:30 AM	**COFFEE BREAK 30 MINS.**
10:30 AM – 11:15 AM	Digital Dentistry – *Panel, Various Speakers TBD*
11:15 AM – 11:45 AM	New Technologies – *Oswaldo Nieves, DDS, Instructor, Division of Restorative Dentistry, Penn Dental Medicine, University of Pennsylvania*
11:45 AM – 12:00 PM	Consortium Mid-Year Meeting Announcement
12:00 PM – 1:00 PM	**LUNCH**
	AFTERNOON BREAKOUT SESSIONS:
1:00 PM – 1:45 PM	• Referral Portal Workshop – *Exan Group* • Digital Photography Workflow – *Indiana School of Dentistry* • Education Sets-Up Patients for Success – *Willamette Dental Group* • Actionable Surveys – *EasyMarkit + Exan Group* • Sponsor Presentation – *TBD*
1:45 PM – 2:00 PM	**WATER BREAK – 15 MINS.**
2:00 PM – 2:45 PM	• Security and Authentication Process – *University of the Pacific* • Grading Workshop – *Exan Group* • Got Help? axiUm Community – *Exan Group* • Sponsor Presentation – *TBD*
2:45 PM – 3:15 PM	**COFFEE BREAK – 30 MINS.**
3:15 PM – 4:00 PM	• Linking Your Dispensary System with Your Inventory System – *Midwestern University College of Dental Medicine* • axiUm FirstAccess and PatientAccess – *University of Louisville, School of Dentistry* • SNODDS Implementation – *UCSF School of Dentistry* • Session for Canadian Dental Schools – *University of Saskatchewan, College of Dentistry*
4:00 PM – 4:15 PM	**WATER BREAK – 15 MINS.**
4:15 PM – 5:00 PM	• Why Patients Don't Come Back - *EasyMarkit* • Custom Lists – *Exan Group* • axiUm Surgery Module – *Exan Group* • axiUm and Oracle 007 – *Exan Group* • Session – *TBD*
6:00 PM – 7:00 PM	**COCKTAIL RECEPTION**
7:00 PM – 10:00 PM	**GALA DINNER**
10:00 PM	**OPTIONAL ACTIVITY: KARAOKE at FANTACITY, SPONSORED BY EASYMARKIT – FREE ADMISSION + REGISTRATION RECOMMENDED**

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PRELIMINARY SCHEDULE

as of December 20, 2017

Time	Wed, Jan 31, 2018 – OPTIONAL TRAINING DAY
8:00 AM – 9:00 AM	MORNING COFFEE, JUICE & PASTRIES
9:00 AM – 10:15 AM	*General axiUm Training: Business Office Workflow – Accounts Receivables and Collections Processes *General axiUm Training: Clinical Workflow – Configuration and Use of Web Forms ~~**Introduction to Crystal Reports in axiUm~~ **COURSE IS NOW FULL** ~~**Intermediate Skills for Crystal Reports in axiUm~~ **COURSE IS NOW FULL**
10:15 AM – 10:45 AM	COFFEE BREAK 30 MINS.
10:45 AM – 12:00 PM	General axiUm Training: Business Office Workflow – Transactions and Recommended Maintenance General axiUm Training: Clinical Workflow – Student and Patient Assignments ~~**Introduction to Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL** ~~**Intermediate Skills for Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL**
12:00 PM – 1:00 PM	LUNCH – Le Pavillon
1:00 PM – 2:15 PM	General axiUm Training: Business Office Workflow – Why is our A/R so high? Are we missing money? General axiUm Training: Clinical Workflow – Efficiencies Using the Appointment Expert ~~**Introduction to Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL** ~~**Intermediate Skills for Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL**
2:15 PM – 2:45 PM	COFFEE BREAK 30 MINS.
2:45 PM – 4:00 PM	General axiUm Training: Business Office Workflow – Insurance Clean Up General axiUm Training: Clinical Workflow – Ortho, Ortho, Ortho! ~~**Introduction to Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL** ~~**Intermediate Skills for Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL**

*Please note for the "General axiUm Training" classes:

- There are two tracks and one course in each track's time slot – Business Office Workflow and Clinical Workflow.
- Attendees choose *one track* to attend for the day – either Business Office Workflow or Clinical Workflow.

**Please note for both the "Crystal Reports" classes:

- **INTRODUCTION COURSE IS NOW FULL:** The *Introduction to Crystal Reports in axiUm* course is now full.
- **INTERMEDIATE COURSE IS NOW FULL:** The *Intermediate Skills for Crystal Reports in axiUm* course is now full.
  - Please contact summit@exansoftware.com, to have your name placed on the waiting list.
  - Seating is limited for both classes. Register early.
  - Participants must meet prerequisite requirements for each class. See table below.

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Course Title	Prerequisites	Course Overview & Agenda

COURSE IS NOW FULL
 	
Introduction to Crystal Reports in axiUm
	COURSE IS NOW FULL
	
	• Must be an axiUm client.
	• Basic knowledge of axiUm.
		COURSE IS NOW FULL
		
		• Course Date: Wed, Jan 31, 2018.
		• This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM.
		• A laptop will be provided for your temporary use.
		
		Course Agenda
		
		• Introduction to Relational Databases
		  o Database terminology (Table, Row, Column, Keys)
		  o The relational database model
		• Become familiar with Crystal Report environment
		  o Database Expert
		  o Crystal Report Sections
		  o Select Expert
		  o Group Expert
		  o Sort Expert
		  o Parameters
		  o Summary formulas
		• Overview of standard reports and how axiUm interacts with them
		  o Areas where axiUm runs standard Crystal reports
		  o How axiUm passes information to standard reports
		  o Restrictions to consider when modifying standard reports
		  o Make simple edits on standard reports
		• Get to know different types of axiUm custom reports
		  o Definitions for each type of axiUm custom report
		  o Differences between axiUm custom report types
		  o axiUm requirements and specifics for each type of a custom report
		  o How axiUm interacts with Custom reports
		  o Learn to create axiUm Consents using the master template

COURSE IS NOW FULL
 	
Intermediate Skills for Crystal Reports in axiUm
	COURSE IS NOW FULL
	
	• Must be an axiUm client.
	• Understanding of relational databases.
	• Ability to add/join tables in Crystal Reports.
	• Comfortable making edits to both Standard and Custom Reports.
		COURSE IS NOW FULL
		
		• Course Date: Wed, Jan 31, 2018.
		• This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM.
		• Attendees are required to bring a laptop with the following software installed:
		  o **Oracle** 11.2.0.4 or 12.1.0.2 client (please note 12.1.0.2 is only supported with axiUm 6.03 and above)
		  o **axiUm** 5.20 or higher
		  o **Crystal Reports** 2008 or higher.
		
		Course Agenda
		
		• Creating a Custom Info Manager Report
		  o High level report design and considerations
		  o Creating an Info Manager Report
		  o Setup and optional formulas
		  o Converting an Info Manager report to Personal Planner
		  o Converting an Info Manager report to Patient Care
		• Using Summaries, Running Totals, and Formulas
		  o Differences between Summaries and Running Totals
		  o Creating a simple report Summary
		  o Creating and using Running Totals
		  o Using Formulas to track totals
		• Creating and Using Sub-Reports
		  o Determining when Sub-Reports are useful
		  o Creating and linking Sub-Reports
		  o Using Shared Variables within Sub-Reports
		• Creating Custom Lists for Info Manager (7.0)
		  o Creating a Simple Custom List (View)
		  o Creating Custom Lists that tie to the PATIENT or USER tables
		  o Setup of Custom Lists in axiUm and how to use them

General axiUm Training: Business Office Workflow	• Must be an axiUm client. • Basic knowledge of axiUm.	• Course Date: Wed, Jan 31, 2018. • This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM. • Attendees are encouraged to bring their own laptops. • Attendees choose one track to attend for the day (Business Office or Clinical).
General axiUm Training: Clinical Workflow	• Must be an axiUm client. • Basic knowledge of axiUm.	• Course Date: Wed, Jan 31, 2018. • This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM. • Attendees are encouraged to bring their own laptops. • Attendees choose one track to attend for the day (Business Office or Clinical).

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