

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 – <i>Ted DeVries, President & CEO, Exan Group</i>
8:45 AM – 10:00 AM	Project Accessible Oral Health. Building Trust & Impact with Public-Private Collaboration – <i>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</i>
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? – <i>Denise Stewart, DDS, MHSA, Chief Policy Officer, American Dental Education Association</i>
11:15 AM – 12:00 PM	axiUm Update – <i>Exan Group: Rachel Nelson, Director of Sales, Marketing & Professional Services + Bethany Foote, Director of Development + Tamara Lee, Director of Support</i>
12:00 PM – 1:00 PM	LUNCH
	AFTERNOON BREAKOUT SESSIONS:
1:00 PM – 1:45 PM	<ul style="list-style-type: none"> Using axiUm to Manage Student Progress in a Distributed Clinical Education Model – <i>ECU School of Dental Medicine</i> Applying Automation to Drive Results – <i>New York University, College of Dentistry</i> Customer Success Manager - Best Practices – <i>Exan Group</i> Using PowerPoint to Create Training Videos, For Dummies – <i>Exan Group</i> Sponsor Presentation – <i>EasyMarkit Demonstration – EasyMarkit</i>
1:45 PM – 2:00 PM	WATER BREAK – 15 MINS.
2:00 PM – 2:45 PM	<ul style="list-style-type: none"> Accreditation Prep for CODA Visit – <i>University of New England, College of Dental Medicine + Harvard School of Dental Medicine</i> axiUm Provider Levels – <i>Loma Linda University, School of Dentistry</i> Building a Hygiene Center to Ensure Patient Needs are Met – <i>Tufts University, School of Dental Medicine</i> axiUm Info Manager 101 – <i>Exan Group</i> Sponsor Presentation – <i>TBD</i>
2:45 PM – 3:15 PM	COFFEE BREAK – 30 MINS.
3:15 PM – 4:00 PM	<ul style="list-style-type: none"> Address Verification Panel – <i>Ohio State University, College of Dentistry + Rutgers School of Dental Medicine</i> axiUm Platform Options – <i>Exan Group</i> SNODDS Implementation – <i>UCSF School of Dentistry</i> Sponsor Presentation – <i>MiPACS Updates: 3D, CAD/CAM and Web-Based Viewing – Medicor Imaging</i>
4:00 PM – 4:15 PM	WATER BREAK – 15 MINS.
4:15 PM – 5:00 PM	<ul style="list-style-type: none"> COHRI Consortium Meeting – <i>Various Speakers</i> HL7 Integration – <i>Exan Group</i> DDX Lab – <i>Exan Group + Henry Schein</i> Patient Intake Form, Screening Form, Medical Consult – <i>UBC Faculty of Dentistry + Exan Group</i> Sponsor Presentation – <i>TBD</i>
5:00 PM – 6:00 PM	WELCOME RECEPTION

This is a preliminary schedule.

All sessions, topics, speakers, times, activities and rooms are subject to change.

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 – <i>Ted DeVries, President & CEO, Exan Group</i>
8:45 AM – 9:30 AM	axiUm Ascend – Product Launch Update – <i>AT Still University + Exan Group</i>
9:30 AM – 10:00 AM	axiUm Ascend Roadmap – <i>Exan Group</i>
10:00 AM – 10:30 AM	COFFEE BREAK 30 MINS.
10:30 AM – 11:15 AM	Digital Dentistry – <i>Panel, Various Speakers TBD</i>
11:15 AM – 11:45 AM	New Technologies – <i>Oswaldo Nieves, DDS, Instructor, Division of Restorative Dentistry, Penn Dental Medicine, University of Pennsylvania</i>
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	<ul style="list-style-type: none"> • Referral Portal Workshop – <i>Exan Group</i> • Digital Photography Workflow – <i>Indiana School of Dentistry</i> • Education Sets-Up Patients for Success – <i>Willamette Dental Group</i> • Actionable Surveys – <i>EasyMarkit + Exan Group</i> • Sponsor Presentation – <i>TBD</i>
1:45 PM – 2:00 PM	WATER BREAK – 15 MINS.
2:00 PM – 2:45 PM	<ul style="list-style-type: none"> • Security and Authentication Process – <i>University of the Pacific</i> • Grading Workshop – <i>Exan Group</i> • Got Help? axiUm Community – <i>Exan Group</i> • Sponsor Presentation – <i>TBD</i>
2:45 PM – 3:15 PM	COFFEE BREAK – 30 MINS.
3:15 PM – 4:00 PM	<ul style="list-style-type: none"> • Linking Your Dispensary System with Your Inventory System – <i>Midwestern University College of Dental Medicine</i> • axiUm FirstAccess and PatientAccess – <i>University of Louisville, School of Dentistry</i> • SNODDS Implementation – <i>UCSF School of Dentistry</i> • Session for Canadian Dental Schools – <i>University of Saskatchewan, College of Dentistry</i>
4:00 PM – 4:15 PM	WATER BREAK – 15 MINS.
4:15 PM – 5:00 PM	<ul style="list-style-type: none"> • Why Patients Don't Come Back - <i>EasyMarkit</i> • Custom Lists – <i>Exan Group</i> • axiUm Surgery Module – <i>Exan Group</i> • axiUm and Oracle 007 – <i>Exan Group</i> • Session – <i>TBD</i>
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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Time	Wed, Jan 31, 2018 – OPTIONAL TRAINING DAY
8:00 AM – 9:00 AM	MORNING COFFEE, JUICE & PASTRIES
9:00 AM – 10:15 AM	<p>*General axiUm Training: Business Office Workflow – Accounts Receivables and Collections Processes</p> <p>*General axiUm Training: Clinical Workflow – Configuration and Use of Web Forms</p> <p>**Introduction to Crystal Reports in axiUm COURSE IS NOW FULL</p> <p>**Intermediate Skills for Crystal Reports in axiUm</p>
10:15 AM – 10:45 AM	COFFEE BREAK 30 MINS.
10:45 AM – 12:00 PM	<p>General axiUm Training: Business Office Workflow – Transactions and Recommended Maintenance</p> <p>General axiUm Training: Clinical Workflow – Student and Patient Assignments</p> <p>**Introduction to Crystal Reports in axiUm COURSE IS NOW FULL</p> <p>Intermediate Skills for Crystal Reports in axiUm (cont'd)</p>
12:00 PM – 1:00 PM	LUNCH – Le Pavillon
1:00 PM – 2:15 PM	<p>General axiUm Training: Business Office Workflow – Why is our A/R so high? Are we missing money?</p> <p>General axiUm Training: Clinical Workflow – Efficiencies Using the Appointment Expert</p> <p>**Introduction to Crystal Reports in axiUm COURSE IS NOW FULL</p> <p>Intermediate Skills for Crystal Reports in axiUm (cont'd)</p>
2:15 PM – 2:45 PM	COFFEE BREAK 30 MINS.
2:45 PM – 4:00 PM	<p>General axiUm Training: Business Office Workflow – Insurance Clean Up</p> <p>General axiUm Training: Clinical Workflow – Ortho, Ortho, Ortho!</p> <p>**Introduction to Crystal Reports in axiUm COURSE IS NOW FULL</p> <p>Intermediate Skills for Crystal Reports in axiUm (cont'd)</p>

*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:

- **INTRO COURSE IS NOW FULL:** The *Introduction to 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
<p>COURSE IS NOW FULL</p> <p>Introduction to Crystal Reports in axiUm</p>	<p>COURSE IS NOW FULL</p> <ul style="list-style-type: none"> • Must be an axiUm client. • Basic knowledge of axiUm. 	<p>COURSE IS NOW FULL</p> <ul style="list-style-type: none"> • 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. <p><u>Course Agenda</u></p> <ul style="list-style-type: none"> • Introduction to Relational Databases <ul style="list-style-type: none"> ◦ Database terminology (Table, Row, Column, Keys) ◦ The relational database model • Become familiar with Crystal Report environment <ul style="list-style-type: none"> ◦ Database Expert ◦ Crystal Report Sections ◦ Select Expert ◦ Group Expert ◦ Sort Expert ◦ Parameters ◦ Summary formulas • Overview of standard reports and how axiUm interacts with them <ul style="list-style-type: none"> ◦ Areas where axiUm runs standard Crystal reports ◦ How axiUm passes information to standard reports ◦ Restrictions to consider when modifying standard reports ◦ Make simple edits on standard reports • Get to know different types of axiUm custom reports <ul style="list-style-type: none"> ◦ Definitions for each type of axiUm custom report ◦ Differences between axiUm custom report types ◦ axiUm requirements and specifics for each type of a custom report ◦ How axiUm interacts with Custom reports ◦ Learn to create axiUm Consents using the master template
<p>Intermediate Skills for Crystal Reports in axiUm</p>	<ul style="list-style-type: none"> • 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. 	<ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> ◦ 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) ◦ axiUm 5.20 or higher ◦ Crystal Reports 2008 or higher. <p><u>Course Agenda</u></p> <ul style="list-style-type: none"> • Creating a Custom Info Manager Report <ul style="list-style-type: none"> ◦ High level report design and considerations ◦ Creating an Info Manager Report ◦ Setup and optional formulas ◦ Converting an Info Manager report to Personal Planner ◦ Converting an Info Manager report to Patient Care • Using Summaries, Running Totals, and Formulas <ul style="list-style-type: none"> ◦ Differences between Summaries and Running Totals ◦ Creating a simple report Summary ◦ Creating and using Running Totals ◦ Using Formulas to track totals • Creating and Using Sub-Reports <ul style="list-style-type: none"> ◦ Determining when Sub-Reports are useful ◦ Creating and linking Sub-Reports ◦ Using Shared Variables within Sub-Reports • Creating Custom Lists for Info Manager (7.0) <ul style="list-style-type: none"> ◦ Creating a Simple Custom List (View) ◦ Creating Custom Lists that tie to the PATIENT or USER tables ◦ Setup of Custom Lists in axiUm and how to use them
<p>General axiUm Training: Business Office Workflow</p>	<ul style="list-style-type: none"> • Must be an axiUm client. • Basic knowledge of axiUm. 	<ul style="list-style-type: none"> • 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).
<p>General axiUm Training: Clinical Workflow</p>	<ul style="list-style-type: none"> • Must be an axiUm client. • Basic knowledge of axiUm. 	<ul style="list-style-type: none"> • 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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