# SUMMIT 2018

# PRELIMINARY SCHEDULE

as of January 16, 2018

| Time | Sun, Jan 28, 2018 |
|---|---|
| 4:00 PM – 5:45 PM | PRE-REGISTRATION AND MEET & GREET WITH YOUR 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 | • Utilizing axiUm to Manage Student Progress in a Distributed Clinical Education Model – *Lennon Scott, Clinical Information Manager + Nisha Ganesh, DDS, Director of Predoctoral Education in General Dentistry ECU School of Dental Medicine*<br>• Applying Automation to Drive Results – *Mark S. Wolff, DDS, PhD, Associate Dean, Professor and Chair, NYU College of Dentistry*<br>• Workflow Wizardry with Your Customer Success Managers – *Lauralynn Mealing, Customer Success Manager + Andrea Stewart, Customer Success Manager, Exan Group*<br>• Create Practical Training That Won't Break Your Budget – *Rafael Villanueva, Implementation Consultant, Exan Group*<br>• Platinum Sponsor Presentation: EasyMarkit Product Demo – *Andrew Batey, Head of Growth, EasyMarkit* |
| 1:45 PM – 2:00 PM | WATER BREAK – 15 MINS. |
| 2:00 PM – 2:45 PM | • Ongoing Preparation for a CODA Site Visit Using axiUm – *John D. Da Silva, Vice Dean, Harvard School of Dental Medicine + Nici Kimmes, Associate Dean, Curriculum Integration and Analytics, University of New England, College of Dental Medicine +*<br>• Compliance, Chart Audits and Record Management. It's Not Just a Student Issue! – *Ramon Enachescu, Clinical Systems Administrator, + Marina Black, Director of Clinic and Financial Operations, Loma Linda University, School of Dentistry*<br>• Creating a Functioning Hygiene Center – *Mary Jane Hanlon, Interim Associate Dean of Clinical Affairs, Tufts University, School of Dental Medicine*<br>• axiUm Info Manager 101 – *Grant Bowen, Technical Engineer – Crystal Reports, Exan Group*<br>• Sponsor Presentation: *TBD* |
| 2:45 PM – 3:15 PM | COFFEE BREAK – 30 MINS. |
| 3:15 PM – 4:00 PM | • Experian Capture - Address Verification? – *Linda Black, EHR Manager, Ohio State University, College of Dentistry + William Thomas, Rutgers School of Dental Medicine*<br>• axiUm Platform Options – *Bethany Foote, Director, Product and Software Development + Ted DeVries, President & CEO + Bob Wei, Manager, Development, Exan Group*<br>• Lockbox Solutions – *Lennon Scott, Clinical Information Manager, ECU School of Dental Medicine + Samir Boudjebla, Manager, Product Management, Exan Group*<br>• axiUm and Oracle 007 – *Jim Cruickshank, Technical Support Analyst, Exan Group*<br>• Gold Sponsor Presentation: MiPACS Updates: 3D, CAD/CAM and Web-Based Viewing – *Scott Mallonee, Medicor Imaging* |

This is a preliminary schedule.

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

**SUMMIT 2018**

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|---|---|
| **4:00 PM – 4:15 PM** | **WATER BREAK – 15 MINS.** |
| **4:15 PM – 5:00 PM** | • COHRI Consortium Meeting, Data-Intensive Approach to Development Biomedical Pathway Management Platform and Drug Discovery Software – *Dr. Hong-Gee Kim, Professor and Head, Dental Management & Informatics Dept, School of Dentistry Head, Interdisciplinary Program of Cognitive Science Director, Biomedical Knowledge Engineering Laboratory, Seoul National University*<br>• HL7 Integration with axiUm – *Nicole Mansfield, Technical Engineer, Exan Group*<br>• axiUm eLab – Samir Boudjebla, Manager, Product Management, *Exan Group + Sandy MacDonald, Henry Schein*<br>• Patient Intake Form – *Dr. Ricardo Schwedhelm, Clinical Associate Professor, Associate Dean for Clinics, University of Washington, School of Dentistry + Susan Schmitz, UBC Faculty of Dentistry*<br>• High Performing Organizations, a Cultural DNA Analysis – *Sam Khattab, Manager, Human Resources, Exan Group* |
| **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 | Welcome to Day 2 – *Ted DeVries, President & CEO, Exan Group* |
| 8:45 AM – 9:30 AM | axiUm Ascend Launch – *Dr. Jonny Brennan, AT Still University* |
| 9:30 AM – 10:00 AM | axiUm Ascend Roadmap – *Bethany Foote, Director, Product & Software Development, Exan Group* |
| 10:00 AM – 10:30 AM | **COFFEE BREAK 30 MINS.** |
| 10:30 AM – 11:15 AM | Digital Dentistry – *Dr. Alan Jurim, integratedDENTAL* |
| 11:15 AM – 11:45 AM | Closing the Gap Between the Pre-Clinical and Clinical Education Using the Simodont Virtual Reality – *Dr. Oswaldo Nieves, Director of the Preclinical Education and Advanced Simulation, University of Pennsylvania School of Dental Medicine* |
| 11:45 AM – 12:00 PM | Mid-Year Consortium Announcement – *Pirin Becker, Manager of Clinical Software Applications, University of Colorado School of Dental Medicine* |
| 12:00 PM – 1:00 PM | **LUNCH** |
| | **AFTERNOON BREAKOUT SESSIONS:** |
| 1:00 PM – 1:45 PM | • Referral Solutions – Paul Delicana, Junior Business Analyst, *Exan Group*<br>• Digital Photography Workflow – *Craig Eberhardt, Indiana School of Dentistry*<br>• Exploring Patient Centric Education – *Joshua B. Even, DMD, Director of Clinical Strategy & Support, + Joanna Mullins, RDH, MHI, Manager of Clinical Strategy & Support, Willamette Dental Group*<br>• Survey Says: You're Doing It Wrong. 5 Mistakes That Ruin Survey Research – *Andrew Batey, EasyMarkit + Eyal Aharoni, Professor of Psychology at Georgia State University & Founder of Logic Insights Consulting + Corinna Bates, Event Marketing Specialist, Exan Group* |
| 1:45 PM – 2:00 PM | **WATER BREAK – 15 MINS.** |
| 2:00 PM – 2:45 PM | • Successful Design & Testing of 835i – *Susan Schlussler +John D. McIntosh*<br>• Security and Authentication Process – *Raybel Ramos, University of the Pacific*<br>• Grading & Approvals Workshop – *Samir Boudjebla, Manager, Product Management, Exan Group*<br>• Getting the Most of Decision Support in Your EHR (Session 1, Limit of 32 People) – *Joel White, DDS, MS, Vice Chair, Division Chair and Professor + Elsbeth Kalenderian, DDS, MPH, PhD, Chair and Professor, UCSF School of Dentistry*<br>• Gold Sponsor Presentation: iPrescribe Solution – *Bryan Alburger, Channel Manager, DrFirst* |
| 2:45 PM – 3:15 PM | **COFFEE BREAK – 30 MINS.** |
| 3:15 PM – 4:00 PM | • Integrating the Dispensary and Inventory Modules to Track CAD/CAM and Implants – *Dr. David Dodell, Director of Clinical Systems, Midwestern University College of Dental Medicine*<br>• Got Help? axiUm Community – *Kelsey Rempel, Technical Writer + Melissa Matthieu, Technical Writer, Exan Group*<br>• Getting the Most of Decision Support in Your EHR (Session 2, Limit of 32 People) – *Joel White, DDS, MS, Vice Chair, Division Chair and Professor + Elsbeth Kalenderian, DDS, MPH, PhD, Chair and Professor, UCSF School of Dentistry* |
| 4:00 PM – 4:15 PM | **WATER BREAK – 15 MINS.** |
| 4:15 PM – 5:00 PM | • Custom Lists – *Sandi Acres, Business Analyst, Exan Group*<br>• axiUm Surgery Module – *Lisa Kottke, Field Sales Consultant, Exan Group*<br>• Getting the Most of Decision Support in Your EHR (Session 3, Limit of 32 People) – *Joel White, DDS, MS, Vice Chair, Division Chair and Professor + Elsbeth Kalenderian, DDS, MPH, PhD, Chair and Professor, UCSF School of Dentistry*<br>• Meaningful Use – Stage 2 – *Sharon C. Perelman, DDS, MMI, Director of Clinical Information Systems, New York University College of Dentistry*<br>• Platinum Sponsor Presentation: Why Patients Don't Come Back – *Andrew Batey, EasyMarkit* |
| 6:00 PM – 7:00 PM | **COCKTAIL RECEPTION** |
| 7:00 PM – 10:00 PM | **GALA DINNER** |

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| 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** | *General axiUm Training: Business Office Workflow – Accounts Receivables and Collections Processes<br><br>*General axiUm Training: Clinical Workflow – Configuration and Use of Web Forms<br><br>~~**Introduction to Crystal Reports in axiUm~~ **COURSE IS NOW FULL**<br><br>~~**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<br><br>General axiUm Training: Clinical Workflow – Student and Patient Assignments<br><br>~~**Introduction to Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL**<br><br>~~**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?<br><br>General axiUm Training: Clinical Workflow – Efficiencies Using the Appointment Expert<br><br>~~**Introduction to Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL**<br><br>~~**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<br><br>General axiUm Training: Clinical Workflow – Ortho, Ortho, Ortho!<br><br>~~**Introduction to Crystal Reports in axiUm (cont'd)~~ **COURSE IS NOW FULL**<br><br>~~**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**<br><br>Introduction to Crystal Reports in axiUm | **COURSE IS NOW FULL**<br><br>• Must be an axiUm client.<br>• Basic knowledge of axiUm. | **COURSE IS NOW FULL**<br><br>• Course Date: Wed, Jan 31, 2018.<br>• This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM.<br>• A laptop will be provided for your temporary use.<br><br>Course Agenda<br><br>• Introduction to Relational Databases<br>  o Database terminology (Table, Row, Column, Keys)<br>  o The relational database model<br>• Become familiar with Crystal Report environment<br>  o Database Expert<br>  o Crystal Report Sections<br>  o Select Expert<br>  o Group Expert<br>  o Sort Expert<br>  o Parameters<br>  o Summary formulas<br>• Overview of standard reports and how axiUm interacts with them<br>  o Areas where axiUm runs standard Crystal reports<br>  o How axiUm passes information to standard reports<br>  o Restrictions to consider when modifying standard reports<br>  o Make simple edits on standard reports<br>• Get to know different types of axiUm custom reports<br>  o Definitions for each type of axiUm custom report<br>  o Differences between axiUm custom report types<br>  o axiUm requirements and specifics for each type of a custom report<br>  o How axiUm interacts with Custom reports<br>  o Learn to create axiUm Consents using the master template |
| **COURSE IS NOW FULL**<br><br>Intermediate Skills for Crystal Reports in axiUm | **COURSE IS NOW FULL**<br><br>• Must be an axiUm client.<br>• Understanding of relational databases.<br>• Ability to add/join tables in Crystal Reports.<br>• Comfortable making edits to both Standard and Custom Reports. | **COURSE IS NOW FULL**<br><br>• Course Date: Wed, Jan 31, 2018.<br>• This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM.<br>• Attendees are required to bring a laptop with the following software installed:<br>  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)<br>  o **axiUm** 5.20 or higher<br>  o **Crystal Reports** 2008 or higher.<br><br>Course Agenda<br><br>• Creating a Custom Info Manager Report<br>  o High level report design and considerations<br>  o Creating an Info Manager Report<br>  o Setup and optional formulas<br>  o Converting an Info Manager report to Personal Planner<br>  o Converting an Info Manager report to Patient Care<br>• Using Summaries, Running Totals, and Formulas<br>  o Differences between Summaries and Running Totals<br>  o Creating a simple report Summary<br>  o Creating and using Running Totals<br>  o Using Formulas to track totals<br>• Creating and Using Sub-Reports<br>  o Determining when Sub-Reports are useful<br>  o Creating and linking Sub-Reports<br>  o Using Shared Variables within Sub-Reports<br>• Creating Custom Lists for Info Manager (7.0)<br>  o Creating a Simple Custom List (View)<br>  o Creating Custom Lists that tie to the PATIENT or USER tables<br>  o Setup of Custom Lists in axiUm and how to use them |
| General axiUm Training: Business Office Workflow | • Must be an axiUm client.<br>• Basic knowledge of axiUm. | • Course Date: Wed, Jan 31, 2018.<br>• This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM.<br>• Attendees are encouraged to bring their own laptops.<br>• Attendees choose one track to attend for the day (Business Office or Clinical). |
| General axiUm Training: Clinical Workflow | • Must be an axiUm client.<br>• Basic knowledge of axiUm. | • Course Date: Wed, Jan 31, 2018.<br>• This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM.<br>• Attendees are encouraged to bring their own laptops.<br>• Attendees choose one track to attend for the day (Business Office or Clinical). |

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