

Time	Sun, Jan 28, 2018
4:00 PM – 6:00 PM	PRE-REGISTRATION AND MEET & GREET WITH YOUR CUSTOMER SUCCESS MANAGERS - IN THE SUMMIT LOUNGE – CHARTWELL ROOM
6:25 PM – 7:00 PM	OPTIONAL ACTIVITY: FLYOVER CANADA – ADDITIONAL COST + REGISTRATION REQUIRED – MEET IN CHARTWELL ROOM
Time	Mon, Jan 29, 2018 – SUMMIT DAY 1
7:30 AM – 8:30 AM	MORNING COFFEE, JUICE & PASTRIES – PARK BALLROOM FOYER
7:30 AM – 8:30 AM	REGISTRATION – LE PAVILLON HALLWAY
10:00 AM – 5:00 PM	SUMMIT LOUNGE – CHARTWELL ROOM
	MORNING PRESENTATIONS: PARK BALLROOM
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. – PARK BALLROOM FOYER
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 – BUFFET: PARK BALLROOM FOYER & SEATING: LE PAVILLON
	AFTERNOON BREAKOUT SESSIONS:
1:00 PM – 1:45 PM	<ul style="list-style-type: none"> Utilizing axiUm to Manage Student Progress in a Distributed Clinical Education Model – <i>Lennon Scott, Clinical Information Manager + Nisha Ganesh, DDS, Director of Predoctoral Education in General Dentistry ECU School of Dental Medicine – SEASONS ROOM</i> Applying Automation to Drive Results – <i>Mark S. Wolff, DDS, PhD, Associate Dean, Professor and Chair, NYU College of Dentistry – ARBUTUS ROOM</i> Workflow Wizardry with Your Customer Success Managers – <i>Lauralynn Mealing, Customer Success Manager + Andrea Stewart, Customer Success Manager, Exan Group – GARIBALDI ROOM</i> Create Practical Training - That Won't Break Your Budget – <i>Rafael Villanueva, Implementation Consultant, Exan Group – ASPEN ROOM</i> Platinum Sponsor Presentation: EasyMarkit 2.0: What Is Changing For You In The New Year – <i>Owen Ingraham, Head of Technology + Joshua DeVries, Head of Sales, EasyMarkit – OAK ROOM</i>
1:45 PM – 2:00 PM	WATER BREAK – 15 MINS.
2:00 PM – 2:45 PM	<ul style="list-style-type: none"> Ongoing Preparation for a CODA Site Visit Using axiUm – <i>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 – ASPEN ROOM</i> Compliance, Chart Audits and Record Management. It's Not Just a Student Issue! – <i>Ramon Enachescu, Clinical Systems Administrator, + Marina Black, Director of Clinic and Financial Operations, Loma Linda University, School of Dentistry – GARIBALDI ROOM</i> Creating a Functioning Hygiene Center – <i>Mary Jane Hanlon, Interim Associate Dean of Clinical Affairs, Tufts University, School of Dental Medicine – OAK ROOM</i> axiUm Info Manager 101 – <i>Grant Bowen, Technical Engineer – Crystal Reports, Exan Group – SEASONS ROOM</i> axiUm Enhancements – <i>Rachel Nelson, Director of Sales, Marketing & Professional Services + Samir Boudjebba, Manager, Product Management, Exan Group – ARBUTUS ROOM</i>
2:45 PM – 3:15 PM	COFFEE & HOT CHOCOLATE BREAK – 30 MINS. – PARK BALLROOM FOYER & 3 RD FLOOR FOYER
3:15 PM – 4:00 PM	<ul style="list-style-type: none"> Experian Capture - Address Verification? – <i>Linda Black, EHR Manager, Ohio State University, College of Dentistry – ASPEN ROOM</i> axiUm Platform Options – <i>Bethany Foote, Director, Product and Software Development, Exan Group – ARBUTUS ROOM</i>



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	<ul style="list-style-type: none">• axiUm Lockbox Solution – <i>Lennon Scott, Clinical Information Manager, ECU School of Dental Medicine + Samir Boudjebba, Manager, Product Management, Exan Group</i> – GARIBALDI ROOM• axiUm and Oracle 008 – <i>Jim Cruickshank, Technical Support Analyst, Exan Group</i> – SEASONS ROOM• Gold Sponsor Presentation: MiPACS Updates: 3D, CAD/CAM and Web-Based Viewing – <i>Scott Mallonee, Medicor Imaging</i> – OAK ROOM
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, Development of Drug Discovery Software with Semantic Big Data – <i>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</i> – SEASONS ROOM• HL7 Integration with axiUm – <i>Nicole Mansfield, Technical Engineer, Exan Group</i> – GARIBALDI ROOM• axiUm eLab – <i>Samir Boudjebba, Manager, Product Management, Exan Group</i> – ASPEN ROOM• Patient Intake Form – <i>Dr. Ricardo Schwedhelm, Clinical Associate Professor, Associate Dean for Clinics, University of Washington, School of Dentistry + Susan Schmitz, UBC Faculty of Dentistry</i> – ARBUTUS ROOM• High Performance Organizations, a DNA Analysis – <i>Sam Khattab, Manager, Human Resources, Exan Group</i> – OAK ROOM
5:00 PM – 6:00 PM	WELCOME RECEPTION – PARK BALLROOM FOYER

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 – PARK BALLROOM FOYER
9:00 AM – 5:00 PM	SUMMIT LOUNGE – CHARTWELL ROOM
	MORNING PRESENTATIONS: PARK BALLROOM
8:30 AM – 8:45 AM	Welcome to Day 2 – <i>Ted DeVries, President & CEO, Exan Group</i>
8:45 AM – 9:30 AM	axiUm Ascend Launch – <i>Dr. Jonny Brennan, AT Still University</i>
9:30 AM – 10:00 AM	axiUm Ascend Roadmap – <i>Bethany Foote, Director, Product & Software Development, Exan Group</i>
10:00 AM – 10:30 AM	COFFEE BREAK 30 MINS. – PARK BALLROOM FOYER
10:30 AM – 11:15 AM	Digital Dentistry – <i>Dr. Alan Jurim, integratedDENTAL</i>
11:15 AM – 11:45 AM	Closing the Gap Between the Pre-Clinical and Clinical Education Using the Simodont Virtual Reality – <i>Dr. Oswaldo Nieves, Director of the Preclinical Education and Advanced Simulation, University of Pennsylvania School of Dental Medicine</i>
11:45 AM – 12:00 PM	Mid-Year Consortium Announcement – <i>Pirin Becker, Manager of Clinical Software Applications, University of Colorado School of Dental Medicine</i>
12:00 PM – 1:00 PM	LUNCH – BUFFET: PARK BALLROOM FOYER & SEATING: LE PAVILLON
	AFTERNOON BREAKOUT SESSIONS:
1:00 PM – 1:45 PM	<ul style="list-style-type: none"> axiUm Referrals Demo – <i>Paul Delicana, Product Owner, Exan Group</i> – SEASONS ROOM Digital Photography Workflow – <i>Craig Eberhardt, Indiana School of Dentistry</i> – GARIBALDI ROOM Exploring Patient Centric Education – <i>Joshua B. Even, DMD, Director of Clinical Strategy & Support, + Joanna Mullins, RDH, MHI, Manager of Clinical Strategy & Support, Willamette Dental Group</i> – ARBUTUS ROOM Survey Says: You're Doing It Wrong. 5 Mistakes That Ruin Survey Research – <i>Andrew Batey Head of Growth, EasyMarkit + Eyal Aharoni, PhD, Professor of Psychology at Georgia State University & Founder of Logic Insights Consulting + Corinna Bates, Event Marketing Specialist, Exan Group</i> – OAK ROOM
1:45 PM – 2:00 PM	WATER BREAK – 15 MINS.
2:00 PM – 2:45 PM	<ul style="list-style-type: none"> Security and Privacy Related to HIPAA – <i>Raybel Ramos, University of the Pacific</i> – SEASONS ROOM Grading & Approvals Workshop – <i>Samir Boudjebba, Manager, Product Management, Exan Group</i> – ARBUTUS ROOM Getting the Most of Decision Support in Your EHR (Session 1, Limit of 32 People) – <i>Joel White, DDS, MS, Vice Chair, Division Chair and Professor + Elsbeth Kalenderian, DDS, MPH, PhD, Chair and Professor, UCSF School of Dentistry</i> – ASPEN ROOM Meaningful Use – Stage 2 – <i>Sharon C. Perelman, DDS, MMI, Director of Clinical Information Systems, New York University College of Dentistry</i> – GARIBALDI ROOM Gold Sponsor Presentation: iPrescribe Solution – <i>Bryan Alburger, Channel Manager, DrFirst</i> – OAK ROOM
2:45 PM – 3:15 PM	COFFEE BREAK – 30 MINS. – PARK BALLROOM FOYER & 3 RD FLOOR FOYER
3:15 PM – 4:00 PM	<ul style="list-style-type: none"> Integrating the Dispensary and Inventory Modules to Track CAD/CAM and Implants – <i>Dr. David Dodell, Director of Clinical Systems, Midwestern University College of Dental Medicine</i> – SEASONS ROOM Got Help? axiUm Community – <i>Kelsey Rempel, Technical Writer + Melissa Matthieu, Technical Writer, Exan Group</i> – GARIBALDI ROOM REPEAT: Getting the Most of Decision Support in Your EHR (Session 2, Limit of 32 People) – <i>Joel White, DDS, MS, Vice Chair, Division Chair and Professor + Elsbeth Kalenderian, DDS, MPH, PhD, Chair and Professor, UCSF School of Dentistry</i> – ASPEN ROOM REPEAT: axiUm Enhancements – <i>Rachel Nelson, Director of Sales, Marketing & Professional Services + Samir Boudjebba, Manager, Product Management, Exan Group</i> – ARBUTUS ROOM Gold Sponsor Presentation: New Applications of Robotics: Finding Purpose and Meaning for Robotic Technologies in Dentistry – <i>Francois Boucher, Executive Vice-President, Kinova Robotics</i> – OAK ROOM
4:00 PM – 4:15 PM	WATER BREAK – 15 MINS.
4:15 PM – 5:00 PM	<ul style="list-style-type: none"> Custom Lists – <i>Sandi Acres, Business Analyst, Exan Group</i> – ARBUTUS ROOM What's So Special About Surgery? A Review of the Surgery Module – <i>Lisa Kottke, Field Sales Consultant, Exan Group</i> – GARIBALDI ROOM

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



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	<ul style="list-style-type: none">• REPEAT: Getting the Most of Decision Support in Your EHR (Session 3, Limit of 32 People) – <i>Joel White, DDS, MS, Vice Chair, Division Chair and Professor + Elsbeth Kalenderian, DDS, MPH, PhD, Chair and Professor, UCSF School of Dentistry</i> – ASPEN ROOM• Platinum Sponsor Presentation: Why Patients Don't Come Back – <i>Nathan DeVries, Head of Customer Success + Joshua DeVries, Head of Sales, EasyMarkit</i> – SEASONS ROOM
6:00 PM – 7:00 PM	COCKTAIL RECEPTION – PARK BALLROOM FOYER
7:00 PM – 10:00 PM	GALA DINNER – PARK BALLROOM
10:00 PM	OPTIONAL ACTIVITY: KARAOKE at FANTACITY, SPONSORED BY EASYMARKIT – FREE ADMISSION + REGISTRATION RECOMMENDED

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

Time	Wed, Jan 31, 2018 – OPTIONAL TRAINING DAY
8:00 AM – 9:00 AM	MORNING COFFEE, JUICE & PASTRIES – 3 RD FLOOR FOYER & SEASONS ROOM
9:00 AM – 10:15 AM	*General axiUm Training: Business Processes – We all need help with Insurance! – ARBUTUS ROOM *General axiUm Training: Clinical Workflow – Configuration and Use of Web Forms – SEASONS ROOM **Introduction to Crystal Reports in axiUm COURSE IS NOW FULL – ASPEN ROOM **Intermediate Skills for Crystal Reports in axiUm COURSE IS NOW FULL – OAK ROOM
10:15 AM – 10:45 AM	COFFEE BREAK 30 MINS. – 3 RD FLOOR FOYER & SEASONS ROOM
10:45 AM – 12:00 PM	General axiUm Training: Business Processes – Better control of Patient Payments – ARBUTUS ROOM General axiUm Training: Clinical Workflow – Student and Patient Assignments – SEASONS ROOM **Introduction to Crystal Reports in axiUm (cont'd) COURSE IS NOW FULL – ASPEN ROOM **Intermediate Skills for Crystal Reports in axiUm (cont'd) COURSE IS NOW FULL – OAK ROOM
12:00 PM – 1:00 PM	LUNCH – Le Pavillon
1:00 PM – 2:15 PM	General axiUm Training: Business Processes – Refunds, Fees & Keeping up Connections – ARBUTUS ROOM General axiUm Training: Clinical Workflow – Efficiencies Using the Appointment Expert – SEASONS ROOM **Introduction to Crystal Reports in axiUm (cont'd) COURSE IS NOW FULL – ASPEN ROOM **Intermediate Skills for Crystal Reports in axiUm (cont'd) COURSE IS NOW FULL – OAK ROOM
2:15 PM – 2:45 PM	COFFEE BREAK 30 MINS. – 3 RD FLOOR FOYER & SEASONS ROOM
2:45 PM – 4:00 PM	General axiUm Training: Business Processes – Benefit Plans, Coverage Templates and a Surprise! – ARBUTUS ROOM General axiUm Training: Clinical Workflow – Ortho, Ortho, Ortho! – SEASONS ROOM **Introduction to Crystal Reports in axiUm (cont'd) COURSE IS NOW FULL – ASPEN ROOM **Intermediate Skills for Crystal Reports in axiUm (cont'd) COURSE IS NOW FULL – OAK ROOM

*Please note for the “General axiUm Training” classes:

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

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>COURSE IS NOW FULL</p> <p>Intermediate Skills for Crystal Reports in axiUm</p>	<p>COURSE IS NOW FULL</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. 	<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. • Attendees are required to bring a laptop with the following software installed: <ul style="list-style-type: none"> ○ Oracle 12.1.0.2 32-bit client (required to run axiUm 7.x) ○ .NET framework 3.5 and 4.5.2 ○ Crystal Report Runtime 32-bit ○ Crystal Reports Designer 2008 or higher • Note: The Oracle Client install must be run as administrator. <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 Processes</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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General axiUm Training: Clinical Workflow	<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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