

Time	Tuesday, February 25, 2020	
1:00 PM – 4:00 PM	PRE-REGISTRATION – Kitsilano Foyer Registration Desk	
Time	Wednesday, February 26, 2020	
7:00 AM – 8:00 AM	MORNING COFFEE, JUICE & BREAKFAST – Parq Grand Foyer	
7:00 AM – 8:00 AM	REGISTRATION – Kitsilano Foyer Registration Desk	
10:00 AM – 4:00 PM	MISSION CONTROL LOUNGE OPEN – Burrard Room	
	MORNING PRESENTATIONS – Parq Grand Ballroom	
8:00 AM – 8:15 AM	Welcome to Summit 2020 – Rachel Nelson, President, Exan Software	
8:15 AM – 9:00 AM	The Future of the Dental Industry: Three Key Trends Dental Schools Need to Plan For - Marko Vujicic, PhD, Chief Economist & Vice President of the Health Policy Institute, American Dental Association	
9:00 AM – 9:30 AM	History in The Making: Texas' First Dental School in 50 Years – Richard C. Black, DDS, MS, Dean, Texas Tech University Health Sciences Center El Paso, Woody L. Hunt School of Dental Medicine	
9:30 AM – 9:45 AM	COHRI – What's Next - Udo Oyoyo, MPH, Director of Statistical Services, and Assistant Professor, Department of Dental Education Services, School of Dentistry and the Department of Radiology, School of Medicine, Loma Linda University	
9:45 AM – 10:15 AM	COFFEE BREAK 30 MINS.	
10:15 AM – 11:00 AM	Experiences and Advantages of Implementing Consistency of Care – Integrated Health Solution – Mark S. Wolff, DDS, PhD, Morton Amsterdam Dean, University of Pennsylvania School of Dental Medicine	
11:00 AM – 11:15 AM	The EHR Interoperability Solution: A Necessity to Optimize Patient Care - Stanley M. Bergman, Chairman of the Board and CEO, Henry Schein, Inc.	
11:15 AM – 12:00 PM	Panel Discussion: Thought Leadership - Moderator: Rachel Nelson, President, Exan Software	
12:00 PM – 1:00 PM	LUNCH – 60 MINS. – Parq Grand Dining Room	
	AFTERNOON BREAKOUTS	
1:00 PM – 1:45 PM	Track – Financial Room: Parq Salon A	Orbiting into The World of Medical Billing – Anna Trieu, Director of Patient Services & Kristine Estes, Manager of Clinical IT, University of Texas Health Sciences Center at Houston
	Track – IT Room: Parq Salon B	7.05 & 7.06 Enhancements – Doreen Xue, Manager, QA, & Nicole Waldern, Business Analyst, Exan Software
	Track – Clinical Room: Parq Salon C	Ortho Manager – Review and Discussion – Lauralynn Mealing, Professional Services Consultant & Edward Chan, Account Executive, Exan Software
	Track – All Room: Granville	Disbanding Tribes and Building Communities – Sam Khattab, Manager, Human Resources, Exan Software
1:45 PM – 2:00 PM	WATER BREAK – 15 MINS. – Parq Grand Foyer	
2:00 PM – 2:45 PM	Track – Financial Room: Parq Salon A	7.05 & 7.06 Enhancements (Repeat) – Doreen Xue, Manager, QA, & Nicole Waldern, Business Analyst, Exan Software
	Track – IT Room: Parq Salon B	Worst-Case Scenario Survival Handbook – Melissa Miller, Senior Director of Technology & Jared Venezia, IT Manager, Enterprise Systems, The University of Pennsylvania, School of Dental Medicine
	Track – Clinical Room: Parq Salon C	RVU - More Than Just a Production Monitoring Tool – Sorin T. Teich, DMD, MBA, Associate Dean Clinical Affairs, Medical University of South Carolina, James B. Edwards College of Dental Medicine
	Track – All Room: Granville	Platinum Sponsor – Treating Patients the Way They Want to Be Treated - Josh Devries, CEO Intiveo
2:45 PM – 3:15 PM	COFFEE BREAK – 30 MINS. – Parq Grand Foyer	
3:15 PM – 4:00 PM	Track – Financial Room: Parq Salon A	Partnering with Henry Schein Financial Services – Steve Morris, Regional Sales Manager, Henry Schein Financial Services
	Track – IT Room: Parq Salon B	The Unlucky 13 – Jim Cruickshank, Technical Consultant, Exan Software
	Track – Clinical Room: Parq Salon C	7.05 & 7.06 Enhancements (Repeat) – Doreen Xue, Manager, QA, & Nicole Waldern, Business Analyst, Exan Software
	Track – All Room: Granville	Tips and Tricks for Training – Pirin Becker, Program Manager, Clinical Software Systems, University of Colorado, Anschutz Medical Campus

Please note: This is a preliminary schedule. All sessions, topics, speakers, dates, times, activities and rooms are subject to change.

4:00 PM – 4:15 PM	WATER BREAK – 15 MINS. – Parq Grand Foyer	
4:15 PM – 5:00 PM	Track – Financial Room: Parq Salon A	Old Unapproved & Unallocated Items – Group Discussion – Lauralynn Mealing, Professional Services Consultant & Sandi Acres, Technical Account Manager, Exan Software
	Track – IT Room: Parq Salon B	axiUm Crystal Reports: Question & Answer – Sogol Nikzad, Technical Engineer, Grant Bowen, Technical Engineer & Philip Qumsieh, Manager, axiUm Support, Exan Software
	Track – Clinical Room: Parq Salon C	Dentistry for Tomorrow – Wendy Woodall, DDS, MAGD, Associate Dean of Academic Affairs, Texas Tech University Health Sciences Center El Paso, Woody L. Hunt School of Dental Medicine
	Track – All Room: Granville	COHRI Working Groups – COHRI Board of Directors
	Room: Ash	Canadian Networking Session – Rachel Nelson, President & Sherill Corpuz, Manager, Professional Services, Exan Software
5:00 PM – 6:00 PM	WELCOME RECEPTION – Parq Grand Foyer	
Time	Thursday, February 27, 2020	
6:30 AM – 7:30 AM	MORNING RUN/WALK (OPTIONAL) – Meeting Location – Parq Hotel Lobby	
7:30 AM – 8:30 AM	MORNING COFFEE, JUICE & BREAKFAST - Parq Grand Foyer	
9:00 AM – 4:00 PM	MISSION CONTROL LOUNGE OPEN – Burrard Room	
	MORNING PRESENTATIONS - Parq Grand Ballroom	
8:30 AM – 8:35 AM	Welcome to Day Two – Rachel Nelson, President, Exan Software	
8:35 AM – 9:05 AM	Evolving Healthcare Delivery Models – David Kochman, Vice President, Corporate Affairs and Deputy Chief of Staff, Office of the CEO, Henry Schein, Inc.	
9:05 AM – 9:35 AM	Trends in Dental Education and Practice – Denice Stewart, DDS, MHSA, Chief Policy Officer, American Dental Education Association	
9:35 AM – 10:20 AM	Data-driven Transformation of our Patient Journey – Ramon Enachescu, Director of Enterprise Applications, Herman Ostrow School of Dentistry, University of Southern California	
10:20 AM – 10:50 AM	COFFEE BREAK 30 MINS. – Parq Grand Foyer	
10:50 AM – 11:20 AM	Information Technology Risks for Dental Education: Cataloging Critical IT Resources and Data – Gary F. Guest, DDS, Associate Dean for Patient Care, University of Texas Health Sciences Center at San Antonio, School of Dentistry	
11:20 AM – 11:50 AM	Exan Roadmap – Bethany Foote, Director, Product Development, Exan Software	
11:50 AM – 12:00 PM	Mid Year Announcement – Melissa Miller, Senior Director of Technology, Jared Venezia, IT Manager, Enterprise Systems & Joe Wolk, Director & Senior EHR Administrator, University of Pennsylvania	
12:00 PM – 1:00 PM	LUNCH - Parq Grand Dining Room	
	AFTERNOON BREAKOUT SESSIONS	
1:00 PM – 1:45 PM	Track – Financial Room: Parq Salon A	Forgotten Financial Features – Sandi Acres, Technical Account Manager, Exan Software
	Track – IT Room: Parq Salon B	Consistency of Care (COC) – Bethany Foote, Director, Product Development, Exan Software
	Track – Clinical Room: Parq Salon C	Development of a Student Dashboard in axiUm – Susan Rowan, DDS, Executive Associate Dean & Nish Shivnani, Director of Health Informatics and Technology, The University of Illinois at Chicago, College of Dentistry
	Track – All Room: Granville	COHRI – Big Mouth Repository – Britta Magnuson, DMD, Assistant Professor, Tuft University School of Dental Medicine
1:45 PM – 2:00 PM	WATER BREAK – 15 MINS. – Parq Grand Foyer	
2:00 PM – 2:45 PM	Track – Financial Room: Parq Salon A	Financial Networking Session – Lauralynn Mealing, Professional Services Consultant, Exan Software, Aaron Lee, Manager, Custom Services & Knowledge Management, Exan Software, J. Donnie Parris, Director of Business Strategy, Virginia Commonwealth University, School of Dentistry & Rebecca M. Dixon, MD, FAAP, Assistant Professor of Clinical Pediatrics, Indiana University
	Track – IT Room: Parq Salon B	IT Networking Session – Philip Qumsieh, Manager, axiUm Support, Exan Software, Jim Cruickshank, Technical Consultant, Exan Software, Frank Pancratz, IT Administrator III/Axiom Administrator/Crystal Report Developer, The University of Tennessee Health Science Center and Charles Laird, Dental Clinic IT Director, University of Detroit Mercy, School of Dentistry

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Preliminary Schedule

as of February 21, 2020

	Track – Clinical Room: Parq Salon C	Clinical Networking Session – Sandi Acres, Technical Account Manager, Exan Software, Ilya Motrych, Project Manager, Exan Software, Melissa Nieves, Analyst, Arizona School of Dentistry & Oral Health, A.T. Still University, & Quinton Wesley, Assistant Director of Dental Assistants, Harvard School of Dental Medicine
	Track – All Room: Granville	Training Networking Session – Sherill Corpuz, Manager, Professional Services, Exan Software, Alex Kostiouk, Implementation Consultant, Exan Software, Sarah Cinnamon, Senior Trainer, Dental Informatics, Oregon Health & Sciences University & Pirin Becker, Program Manager, Clinical Software Systems, University of Colorado, Anschutz Medical Campus
2:45 PM – 3:15 PM	COFFEE BREAK – 30 MINS. – Parq Grand Foyer	
3:15 PM – 4:00 PM	Track – Financial Room: Parq Salon A	Coding the Un-Codable: Using Unregulated Procedure Codes for Tracking and Billing Purposes – J. Donnie Parris, Director of Business Strategy, Virginia Commonwealth University, School of Dentistry
	Track – IT Room: Parq Salon B	How to Budget & Integrate New Technology – David Dodell, DMD, Director of Clinical Systems, Midwestern University College of Dental Medicine - Arizona
	Track – Clinical Room: Parq Salon C	eRx PDMP – Kirk Hasley, Director, Sales & Marketing, Exan Software
	Track – All Room: Granville	Analytics and Data Visualization: Discussion and Feedback – Nicole Waldern, Business Analyst, Exan Software
4:00 PM – 4:15 PM	WATER BREAK – 15 MINS. – Parq Grand Foyer	
4:15 PM – 5:00 PM	Track – Financial Room: Parq Salon A	COHRI - Strategic Steps for Grant Submission - Manish Valiathan. B.D.S., M.D.S., D.D.S., M.S.D, Associate Professor, Department of Orthodontics, School of Dental Medicine, Case Western Reserve University
	Track – IT Room: Parq Salon B	Gold Sponsor – MiPacs: Step into the Future – Scott Mallonee, Sales Manager, Medisor Imaging
	Track – Clinical Room: Parq Salon C	Implementation of the Treatment Planning Module – Elena Riccio Leach, DDS, MS, Clinical Assistant Professor, University of Texas Health Sciences Center at San Antonio, School of Dentistry
	Track – All Room: Granville	Academic Product Research: Using Design Thinking – Nicole Waldern, Business Analyst, Exan Software
6:00 PM – 7:00 PM	COCKTAIL RECEPTION – Parq Grand Foyer	
7:00 PM – 10:00 PM	GALA DINNER – Parq Grand Ballroom	

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Time	Friday, February 28, 2020 – Optional Training Day	
8:00 AM – 9:00 AM	MORNING COFFEE, JUICE & BREAKFAST – Parq Salon D	
9:00 AM – 10:15 AM Room: Parq Salon C	axiUm Enhancements and New Modules in vsn 7.05 and 7.06: <ul style="list-style-type: none"> Case Management Approvals Workflow 	
10:15 AM – 10:30 AM	COFFEE BREAK 15 MINS. - Parq Salon D	
10:30 AM – 11:15 AM Room: Parq Salon C	axiUm Enhancements and New Modules in vsn 7.05 and 7.06 (cont'd): <ul style="list-style-type: none"> Dental Device Tracking and Other Enhancements 	
11:15 AM – 11:30 AM	WATER BREAK 15 MINS. - Parq Salon D	
11:30 AM – 12:00 PM Room: Parq Salon C	axiUm Enhancements and New Modules in vsn 7.05 and 7.06 (cont'd): <ul style="list-style-type: none"> Rules to Support Financial Departments/Reporting 	
12:00 PM – 1:00 PM	LUNCH – Parq Salon D	
1:00 PM – 1:45 PM	Track 1 – Parq Salon A	Track 2 – Parq Salon C
	What the Fees? (Financial Focus)	Looking Under the EHR Hood. (Clinical Focus)
1:45 PM – 2:00 PM	WATER BREAK 15 MINS. - Parq Salon D	
2:00 PM – 2:45 PM	Do Your Transaction Codes Spark Joy? Might be Time to Declutter! (Financial Focus)	Security: HIPAA or Hippo? (Admin/IT Focus)
2:45 PM – 3:00 PM	COFFEE BREAK 15 MINS. - Parq Salon D	
3:00 PM – 3:45 PM	Feeding Your Financial Team – Info Manager Reports to Satisfy a Financial Appetite. (Financial Focus)	Custom Views & Other Cool Custom Tricks. (Admin/IT Focus)
3:45 PM – 4:00 PM	WRAP-UP/CONCLUSION	

Course Title	Prerequisites	Course Overview
General axiUm Training	<ul style="list-style-type: none"> Must be an axiUm client. Basic knowledge of axiUm. 	<ul style="list-style-type: none"> Course Date: Friday, February 28, 2020 This is a 6-hour course, scheduled from 9:00 AM to 4:00 PM. There is one track in the morning from 9:00 AM to 12:00 PM. There are two tracks in the afternoon from 1:00 PM to 4:00 PM and three courses per track. Attendees may switch from one track to the other throughout the afternoon. Attendees are encouraged to bring their own laptops.

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