Add or Remove a Doctor - Add a New Location - Practice sale with a License Transfer - Dissolution of Partnership

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Overview

This article covers how to add or remove a doctor, add a new location, and handle a practice sale with a license transfer.

Adding a doctor to your practice

Note: Depending on your licensing contract, you may have a fee to add another doctor.

Will need the following information:

Doctor’s full name.

Will the doctor be working part-time or full-time?

When will their start date be?

The new doctor's NPI number, U.S. offices only.

In TDO, you will need to do the following:

Once the new doctor has been added, complete the setup by going to Setup > Site Configuration > Edit Doctor Information.

Adding/Editing Operatory Names https://kb.tdo4endo.com/article.php?id=192

Moving operatory columns on the calendar https://kb.tdo4endo.com/article.php?id=767

Adding Users and Security Levels https://kb.tdo4endo.com/article.php?id=65

Doctor leaving the practice

Will need the following information:

The date the doctor is leaving the practice.

A Minimum of 30 days' notice when a doctor plans to leave the practice.

Note: There may be ongoing fees associated with the doctor. A **30-day notice** is required to cancel billing.

In TDO, you will need to do the following:

Before marking the doctor inactive in TDO, go to Administrative > Ledger Adjustment Tool Report and make sure it does not contain any discrepancies

Mark the doctor inactive after they leave the practice in Edit Doctor Information. Setup>Site Configuration>Edit Doctor Information.

When a doctor is marked inactive, you can still post payments, apply debit or credit adjustments, and run reports.

When a doctor is marked as inactive, you cannot:

Schedule new appointments

Add new teeth

Post new fees

Create new insurance claims

Adding a practice location

We will need the following information:

The date you plan to open the new location.

Will this location be replicated or a separate database?

Replicated Vs. Not Replicated. What does it mean?

If they choose to have a separate database, you cannot merge the data with the existing office later. You can either stay separate or change to the existing location's replica, losing the data you entered up until the change.

Selling a practice with a license transfer

A license can only be transferred once. TDO Software consents to the transfer of a TDO Professional software license to another party exclusively from the initial owner.

If the license has never been transferred, please call support with the following information.

Who are you selling the practice to, and what is the approximate date of the sale?

We will need a good email for both the selling doctor and the buying doctor. They will both need to sign a license transfer contract.

The conditions listed below must be met to qualify for TDO Professional license transfer:

- TDO Professional software cannot be transferred as an individual component. The transfer can only take place upon the sale of the initial owner's entire practice.
- License Transfer Agreement and the TDO Fees Policy must be executed by the buyer and seller and submitted to TDO Software.
- A new HIPPA/Business Associates Agreement must be executed by the buyer and submitted to TDO Software.
- All TDO Services Fees and Technical Support Fees must be brought current by the seller before the transfer.
- The Practice buyer will be responsible for their annual Technical Support fee at the time the transfer agreement is executed.
- All future recurring TDO Services Fees and Technical Support Fees must be disclosed in writing by the seller before the transfer and submitted to TDO Software.
- If the seller has multiple TDO Professional software licenses and wishes to retain one or more licenses, please note that the seller will be required to maintain at least one full standalone TDO Professional license, which may require additional licensing fees.
- The buyer will be responsible for registering with any TDO-integrated vendors, such as electronic claims companies, in advance of the transfer.
- You will have seven days from the closing date to return the required documentation to qualify for technical support assistance. If you have any questions, please contact sales@tdo4endo.com.

Non-Refundable License Transfer Fee: $1000

Dissolution of Partnership

TDO Software will facilitate TDO Professional software license transitions in the event that a

partnership is legally dissolved. The legal owner of the TDO Professional software license(s) is the party listed on the initial Confidentiality and Purchase Agreement. Subsequent transfers are prohibited.

The conditions listed below must be met to qualify for TDO Professional license transition upon dissolution:

- Dissolution of Partnership document must be executed by all parties and submitted to TDO Software.
- A new HIPPA/Business Associates Agreement must be executed for each party wishing to utilize the software and submitted to TDO Software.
- The parties need to be aware that each separate practice seller will be required to maintain at least one full standalone TDO Professional license, which may require additional licensing fees.
- Each party will be responsible for registering with TDO integrated vendors such as DentalXchange/ClaimConnect 800.576.6412 ext. 455 in advance of the transfer.
- You will have seven days from the closing date to return the required documentation in order to qualify for technical support assistance. If you have any questions, please contact sales@tdo4endo.com .

Online URL: https://kb.tdo4endo.com/article.php?id=1015