

Notes Page - Items to Get and Send

116 [TDO KB](#) February 25, 2026 [Reporting Tools](#) 5.46K

Overview

Notes page - Needed section

Detailed Instructions

If additional X-rays/reports are needed from another doctor, or if you need to send any X-rays to any other doctor. When the doctor checks these items from within the patient's record on the **Note page** or by clicking the **Items Needed** button on the **Notes to Front** page, it generates a report for the front desk.

Pain History Pain Full Mouth Probing Multi Tooth Info Diag

ions Recall Notes Surgical Diagnosis Surgical Treatment

Print SOAP Note Internal Email Task List Non-Private Notes

Clinical Findings at this Visit

☐ Asymptomatic	☐ Temp sensitivity
☐ Improved but slightly tender	☐ Swelling reduced
☐ Intermittent pain	☐ Swelling
☐ Constant pain	☐ Palpation soreness
☐ Initially asymptomatic with recent pain	☐ Percussion sensitivity
☐ Initially painful but now asymptomatic	☐ Sinus tract present
	☐ Sinus tract healed

Needed

☐ XRay from General Dentist	☐ Speak with General Dentist
☒ XRay from prior Endodontist	☐ Speak with prior Endodontist
☐ Send XRays to Oral Surgeon	☐ Speak with Periodontist
☐ Send XRays to Periodontist	☐ Speak with Orthodontist
☐ Speak with physician	☐ Speak with Oral Surgeon
☐ Need prior Endodontist's final report	☐ Speak to patient after Doctors
	☐ Record to be Completed
	☐ Predetermination of Fees

☐ Send new referral report to referring doctor

☐ Send new referral report to:

- This list needs to be checked daily, or throughout the day, and as many items requested and sent as possible.
- To open this report, select **Reports** from the top menu bar and then click **Daily Reports**
- From the **Daily Reports** menu, choose **Daily Items to Get and Send**. If the button is enabled, that means there are items on the list to be done.

Daily Reports

for

Doctor	Front Office
Records to Complete Daily Doctors to Call Patients to Call Call List of All Patients by Day Patients with Referred Teeth Daily Analysis Reports Waiting Time Report All MTA and CaOH Cases	Daily Items to Get and Send Patient's X-Rays Received Patients to Call Reports to be Completed Patients with Referred Teeth Recall Reports to be Completed Letters to Send Diagnostic Reports to be Completed Financial Tickler

This report shows what you need to get or send. The date this request was made is shown, the referring doctor's name and phone number.

There is a field for Progress Notes. For example, if you called to request an X-ray and are waiting for it to be received. In this case, you would leave the item checked but enter a 'Progress Note'.

- If you need to open the patient's record for any reason, you may click the 'Open Record' button.
- If you would like to view the notes on this patient, click the 'View Notes' button.
- To scroll through all the patients who need something sent or obtained, use the 'Next' and 'Previous' arrow buttons.
- When you are completed with this report, click the 'Close' button.

Online URL: <https://kb.tdo4endo.com/article.php?id=116>