

Items Needed

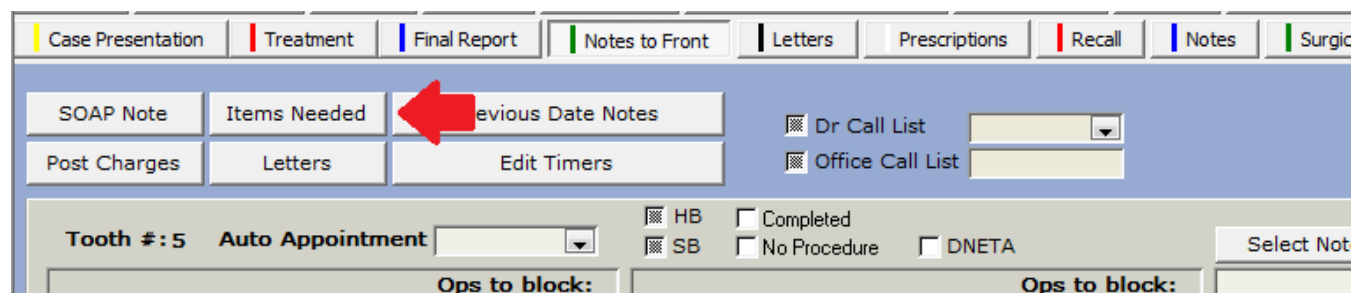
238 [TDO KB](#) October 12, 2021 [Program Setup](#) 4.98K

Overview

This is an area accessible both on the Notes to Front tab as well as the Notes tab.

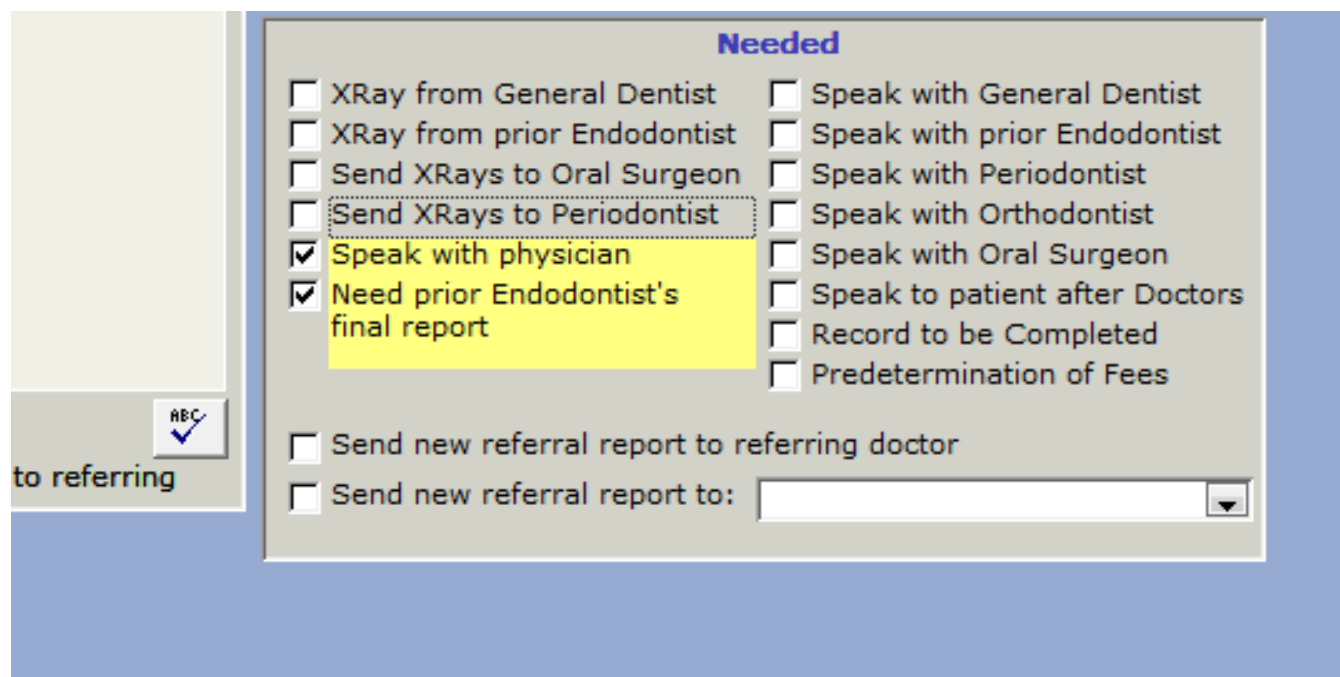
Detailed Instructions

There are two ways to access the "Items Needed" page, as shown below:



The screenshot shows a software interface with a top navigation bar containing tabs: Case Presentation, Treatment, Final Report, Notes to Front, Letters, Prescriptions, Recall, Notes, and Surgery. Below this is a sub-menu with buttons: SOAP Note, Items Needed (highlighted with a red arrow), Previous Date Notes, Post Charges, Letters, and Edit Timers. To the right of these buttons are dropdown menus for 'Dr Call List' and 'Office Call List'. Below the sub-menu is a section for 'Tooth #: 5' and 'Auto Appointment' with a dropdown. To the right are checkboxes for 'HB', 'SB', 'Completed', 'No Procedure', and 'DNETA'. At the bottom right is a 'Select Not' button. Below this section are two 'Ops to block:' labels with dropdown menus.

or



The screenshot shows a dialog box titled 'Items Needed'. It contains two columns of checkboxes. The first column includes: 'XRay from General Dentist', 'XRay from prior Endodontist', 'Send XRays to Oral Surgeon', 'Send XRays to Periodontist' (highlighted with a dashed border), 'Speak with physician' (checked), 'Need prior Endodontist's final report' (checked and highlighted in yellow), 'Send new referral report to referring doctor', and 'Send new referral report to:'. The second column includes: 'Speak with General Dentist', 'Speak with prior Endodontist', 'Speak with Periodontist', 'Speak with Orthodontist', 'Speak with Oral Surgeon', 'Speak to patient after Doctors', 'Record to be Completed', 'Predetermination of Fees', and a dropdown menu. At the bottom left of the dialog box is a button labeled 'ABC' with a checkmark and the text 'to referring'.

You can check off items you need or wish to send, as well as doctors you wish to speak to.

By simply clicking these items a list is generated in the [Items to Get and Send](#) area of the program, under Daily Reports.

Daily Reports

for

Carr

Doctor

Records to Complete

Daily Doctors to Call

Patients to Call

Call List of All Patients by Day

Front Office

Daily Items to Get and Send

Patient's X-Rays Received

Patients to Call

Reports to be Completed

which will have the items checked:

Daily Items to Get...

Kermit The Frog

Tooth: 5 Date: 12/9/2014

☐ XRay from General Dentist

☐ XRay from Endodontist

☒ Endodontist Final Report

☐ XRay to Periodontist

☐ XRay to Oral Surgeon

☐ Predetermination of Fees to patient

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