

Financial Tickler overview

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Overview

When using the Financial Tickler feature, the Financial Tickler report will indicate which patients' accounts need to be revisited.

The Aging Analysis report and patient Account Statements can be used for this purpose, but the Financial Tickler report can be utilized if you wish to have more specific time periods to follow up on patient accounts.

The Financial Tickler report will show the patients with a non-zero balance whose 'Date to be Revisited' is prior to or equal to the current date. If the patient has zero balance or a credit balance, they will not be shown in the Financial Tickler report.

Detailed Instructions

There are two ways to set the patient revisit date: automatic or manual.

Automatic

To enable the automatic Financial Tickler function, open the Control Table:

TDO Version 11: [Administrative > Edit Control Table]

TDO Version 12: [Setup > Site Configuration > Edit Control Table]

After opening the Control Table, go to the Application Settings tab. In the '**Automatic Financial Tickler**' section, select '**Automatically Update Future Dates**'. Then, set the **Insurance Auto Fin. Tickler Delay** and the '**Non-Insurance Auto Fin. Tickler Delay**', each as a number in days. The first sets the Automatic Financial Tickler delay for insured patients, and the second sets the delay for non-insured patients. When a fee is posted to a patient's ledger or a claim is created for them, their '**Revisit Account On**' date will be set to [the current date] + [the number of days set in the corresponding automatic financial tickler delay].

Control Table

Control Table Information

Practice Information Application Settings Network Settings Workstation Settings

Video Files Location
Video Path:

Tooth entries in the appointment history
☒ Show Tooth Entries

Action on mark appointment
as Cancelled / No Show / Rescheduled:
Move appointments to column: Op 1 or Dr

Letter Module Properties
Letters Editor: Reports...
Letters Format: ☒ Send PDF

SOAP NoteTmpt:
☐ Attach original image on email
Email Rpt to Authorized Dr Setup PDF Email Setup
Email Rpt to Authorized Pat. Setup

Automatic Financial Tickler
Insurance Auto Fin. Tickler Delay (days):
Non-Insurance Auto Fin. Tickler Delay (days):
☒ Enable Ins. Financial Tickler Pop-ups
☒ Enable Non-Ins. Financial Tickler Pop-ups
☒ Automatically Update Future Dates

Insurance
Delta Claim ID:
☒ Insurance Estimating ☐ Default to Non-Assigned
☐ New patient default to NO insurance
☐ Disable Insurance Comparison

Index Name Caption
Singular form: Plural form:

Message Viewer
☐ Run Messenger at Startup
Phone/Fax
Phone Prefix:

International
Culture:
☐ Disable State Autofill ☐ General Dentist
Insurance Form:

Medical History
Type: Lang. Short:
☒ Show Pref. Language on Patient Chart
☒ Enable allergy pop-up in prescription form

Diagnosis Form
Default Form Size:

Multiple Fee
☒ Enable Multiple Fee Schedules

SMS Options
☒ Allow Staff group to send SMS
☐ Check Send SMS automatically

Miscellaneous Settings
☒ Enable Procedure and Teeth Association ☒ Lock Manual Notes after:
☐ Display SSN and DOB on Ledger and Statement

Google Accounts - Calendar Sync
Integrated Devices

Close

For example, if one sets the Financial Tickler Delay to be 30 days and creates a claim for an insured patient today, the Financial Tickler date will be one month from today. If tomorrow another fee is posted to the same patient's ledger, the new Financial Tickler date will be 30 days from tomorrow.

Manual

The manual option is for those offices that want to have more control over setting the Financial Tickler date. It is up to the users to define through the combo in the Ledger and Fees page when they want to revisit that patient's account.

The revisit date can be manually changed on the patient's ledger or the patient's fee page by clicking the **Fin. Tickler** button.

Filter Doctor:
Filter Location:
Patient: Brown, Charlie
Patient has double coverage

☒ Sent to Collections ☐ Interest ☒ Hide Voiced Transactions

Fin. Tickler ☒ HB

Credit Adj Print Ledger Void Transaction Ledger Note Receive Ins. Pmt.
Debit Adj Print Statement Enter Stmt Sent Edit Notes Receive Payment

Change Code List Enter Explosion Codes MultiFee: Delta Calc. Insurance New Claim **Fin. Tickler**

Tooth	Code	Surface	Description	Original Fee	Fee	Ins. Est.	Deductible	Pt Est.	Fee Presented	Dr.
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To open the Financial Tickler report, showing all the accounts that are due to be revisited, click **Reporting Tools** on the top menu bar, **Daily Reports**, and then **Financial Tickler**.

Daily Reports

for

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Doctor

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

Front Office

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

You will see the patient information, including ledger transactions. You can also change the revisit date on this form. If you wish to enter a note into the patient's chart, you may do that directly on the left side in the **Financial Tickler Note** section. Entering a note here will automatically add it to the patient's note page.

Add New Ledger Note

Add New Patient Note

Open Patient Record

Financial Tickler

Previous Patient to Call

Next Patient to Call

Online URL: <https://kb.tdo4endo.com/article.php?id=241>