Video - Clinical Training Outline

26 TDO KB February 23, 2026 New User resources 9.11K

Basic functions

- How to add and change a tooth
- How to change doctors or locations
- How to use the Treatment Timer
- How to enter pre med information
- How to enter vital signs
- How “do not show this message again” works for the alerts
- How to send and receive internal emails
- How to send and receive instant messages

Notes tab

- How to search and review notes
- How to use the notes filters

Medical History

- How to view the patient’s medical history
- How to review archived medical histories
- How to create a new medical history or make changes

Pain History

- How to view the patient’s pain history
- How to link the pain history to a specific tooth
- How to generate a pain history summary note

Pain

- How to add additional pain symptoms
- How to make changes to the patient’s pain history

Image/Acquire

- How to take X Rays, CBCT and intra oral images
- How to save images
- How to adjust contrast

- How to crop and rotate images
- How to view and open images already saved to TDO
- How to change categories and dates

Multi Tooth Testing

- How to create the testing columns
- How to use Auto Fills
- How to add and adjust testing results in the MTI tab
- How to Download the treating teeth
- How to add probing depths
- How to Save a Summary Note

Diagnosis Page

- How to document prior treatment
- How to add additional findings
- How to create a diagnosis page summary note

Case Presentation Page

- How to add fees
- How to document if the Medical History, Pain History and Informed Consents have been signed
- How to confirm pre-med information
- How to confirm patient’s vital signs are entered
- How to document if the case choice is Accepted, Pending or Rejected
- How to open the pre op image to present the case using visual resources

Draw page

- How to access the draw page and use basic functions
- How to save an image with annotations
- How to use educational images when presenting the case (Doctors)

Treatment Page

- How to document Anesthesia and N20
- How to use the Anesthesia Auto Fills
- How to use the Treatment Auto Fills
- How to document Irrigation and Instrument Protocol
- How to document fractures
- How to document pre and post-op perforation
- Basic functionality of the Treatment page
- How to create a treatment page summary note

Final Report Page

- How to document Case Status
- How to document Prognosis
- How to add patient Recall
- How to document Restorative Recommendations
- How to add a final report note

Notes to Front

- How to use the Appointment Auto Fills
- How to add a note for the front desk staff
- How to flag the patient as do not ever treat again

Prescriptions

- How to use the E Rx or if not utilizing MD Toolbox integration
- How to use the Prescription Auto Fills
- How to add a prescription to the patient chart
- How to Check Interaction
- How to print a prescription
- How to Check Interaction between medications
- How to pull up the drugs database
- How to print the drug information

Recall

- How to use the Recall Auto Fills
- How to generate a recall summary note
- How to print the recall page

Surgical Diagnosis and Surgical treatment

- How to create a Surgical Diagnosis summary note
- How to document prior treatment
- How to enter and modify auto note

Reports and follow up

- How to send Consult and Final reports to referring doctors/general dentists utilizing the Letter mo
- How to copy an additional doctor or the patient
- How to use the link only for encryption
- How to check if a report was sent
- How to open a report from the chart
- How to add the patient to a call list (follow up)