

Admin Training Outline

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Topics Covered Include

What you should know

Calendar

- How to make appointments – the steps on how to schedule new appointments for [New](#) or [Existing](#) patients.
- Changing same day appointments with click and drag – with a click and drag of the mouse, you may easily change the start and finish times of your appointments if needed.
- [Rescheduling appointments with cut and paste](#)– with cut and paste, you may easily reschedule appointments to a different day on the calendar as needed.
- Cancelled and No Show appointments – the steps on how to easily cancel and/or mark appointments as no show as needed.
- Call lists for cancelled and no shows - How to add the cancelled and no show patient appointments to the “patients needing an appointment” call lists in TDO.

Check-in

- Check-in patient on calendar and appointment turns yellow – 1st step in the Check-in process. [Patient Check In](#)
- Take patient photo – you may use a digital camera or a web camera to take the patient photo through TDO’s Image Acquire screen.
- Have patient register via the web, tablet pc or on paper – will give an overview of each of these options for patient registration, so you may collect the patient’s contact information, medical history, pain history and consent forms. [How to use the Infograbber](#)
- Scan in documents/radiographs – will review the settings for each, so you may easily scan documents and x-rays into the patient record through TDO’s Image Acquire screen.
- Enter in patient’s insurance information – this should be done in the patient’s “Insurance” tab in TDO. Here you may record carrier, profile, subscriber and benefits information. [Insurance Information in TDO](#)
- Send instant message to assistant, patient is ready – overview of the Instant Messenger in TDO and how you may use it to communicate internally throughout the office.

Check-out

- Check-out patient on calendar – 1st step to begin the check-out process.
- Make next appointment (if needed) – If the patient is returning for an appointment, be sure to schedule their new appointment on the calendar.
- Go through auto check-out steps, by clicking on “Fees” first – the auto check-out steps begin with

presenting and/or posting the patient's fees.

- Go through Fees, Receive Payment, Walkout Slip, Insurance Claim – all are critical steps in the patient's check-out.
- Finally, click “Mark patient as out” at the end of the check-out steps – this completes the patient's check-out.

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