

Online Patient Registration

330 [TDO KB](#) February 24, 2026 [Cloud Ribbon Menu](#), [New User resources](#) 31.13K

Overview

TDO Cloud Service allows your patients the ability to register and complete their medical history, pain history, and review their consent forms in the patient area of your website significantly reducing your patient's wait time when they arrive for their office visit.

Pre-requisites

- TDO Cloud Service
- Admin, Referring Doctor and Patient log in “links” on website
- *Optional: TDO hosted website*

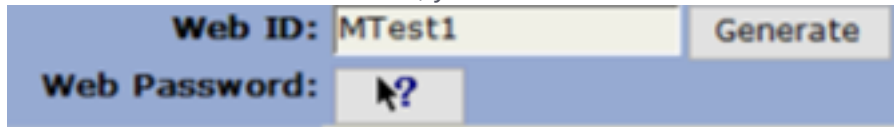
Detailed Instructions

1. Generate the patient’s web username and password in the lower right corner on the *Patient Tab*
The patient will enter their username and password in the Patient's Area on your website, it is case sensitive.

The screenshot shows the TDO Cloud Service Patient Registration form. The form is divided into several sections: Patient Information, Referred Information, Insurance Note, and a bottom section for correspondence and consent. The Patient Information section includes fields for First Name (Anita), Last Name (Endo), Salutation, Address1 (123 TDO), Address2, City (San Diego), State (CA), Zip (92122), Phone (Home, Work, Mobile, Fax), SS#, Birthdate (1/1/2000), Age (22), and Gender (Female). The Referred Information section includes Referred by (Cam Endo, MD), Referred Practice, Gen Dentist, Additional Doctor, Occupation, Employer Name, Employer Address, Emerg. Contact, Spouse, Guarantor, Legal Guardian, Other Contact, Email Home, and Email Work. The Insurance Note section includes Web ID (AEndo5) and Web Password (*****). The bottom section includes checkboxes for 'Prefer Correspondence via' (Mail, Fax, Email (H), Email (W)), 'Patient will call to set up appointment', 'Need to call patient to set up appointment', 'Do Not Schedule', 'Deceased', 'Outcome Case', 'Lecture', 'Board', 'Export', and 'Implant'. A 'Generate' button is highlighted in yellow next to the Web Password field, and a message 'You have generated letters to send' is displayed below it.

2. To send this info to the patient:
Go to the *Letters Module* >Template: “Patient Registration”; this will autofill the patient’s web username and password.
This template can be customized to match your office’s needs. Send the letter to the patient via the desired method.

Note: In newer versions of TDO, you will not be able to see the Patient's Web Password.



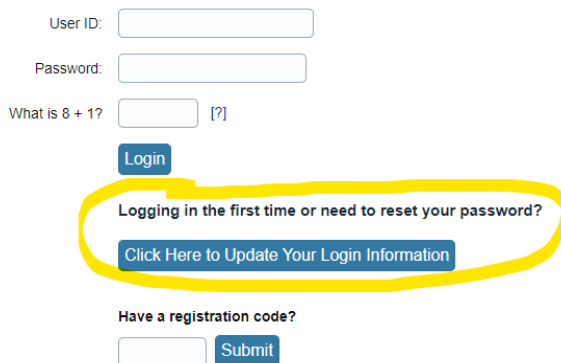
The screenshot shows a login interface with a blue header. It contains two rows: 'Web ID:' with a text input field containing 'MTest1' and a 'Generate' button; and 'Web Password:' with a text input field containing a question mark and a mouse cursor icon.

If this is the case:

Go to the *Letters Module* > Template: “Patient Registration” this will autofill the patient’s web username

On the Patient's Area of your website, the Patient will be prompted to create a password when logging in for the first time.

Patient's Area



The screenshot shows a login form with the following elements: 'User ID:' and 'Password:' text input fields; a CAPTCHA question 'What is 8 + 1?' with a text input field and a '[?]' link; a 'Login' button; a link 'Logging in the first time or need to reset your password?' which is circled in yellow; a link 'Click Here to Update Your Login Information' also circled in yellow; and a 'Have a registration code?' section with a text input field and a 'Submit' button.

Patient Registration Process

Once the patient has gained access to the Patient's Area, they they must agree to the “**Terms of Use of TDO Cloud Services**” If it is their first time logging in.

There will be a terms of conditions for patients and it is only displayed once per user. The patient will need to accept the terms before continuing to the login pages.

You can disable the terms of conditions for patients through the Web Wizard under Patient Login area.

Patient's Area



The screenshot shows a navigation menu with two rows of links. The first row includes 'PATIENT REGISTRATION' (highlighted), 'EVALUATION', 'OFFICE MESSAGES / PAYMENTS', 'UPDATE ACCOUNT INFORMATION', and 'LOGOUT'. The second row includes 'PATIENT REGISTRATION', 'MEDICAL HISTORY', 'PRESCRIPTIONS', 'PAIN HISTORY', and 'CONSENT FORMS'.

Patient Registration: The patient will fill in their information, such as address, phone number, dental insurance, etc., and click “save.” The information is then transferred into your TDO.

Medical History: The patient is then prompted to fill out the medical history you have selected. There are two medical history forms that come with TDO, a short form and a long form. There is also an option to create a customizable one in TDO. Please refer to the KB article for more information. The patient can always review, make necessary changes, and sign in the office. *The medical history expires after 30 days.*

Prescriptions: The patient is then prompted to add their medications. If they stop taking a medication, it is recommended that they mark it as ‘stopped taking’ so a record of past medications remains.

Prescriptions

Patient Registration Notes:

- Do not use the browser's back button.
- Click on the Next button at the bottom of the page to make sure your information is saved and sent to us.
- Your answers are for our records only and will be kept confidential.

Medication Prescribed	Reason for Taking	Qty	Frequency	Date started on medication
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Add New Medication

Please fill out the fields below, then click on "Enter Medication". **You must enter medications one-by-one. Type the medication name in the box below.**

Medication Prescribed:

Reason for Taking:

Qty (Ex: 2 pills or 5 ml):

Frequency(Ex: Once a day):

Date started on medication: (if not sure, leave it blank):
 m/d/yyyy

Enter Medication

Pain History: Patient will answer questions regarding tooth pain, severity and surrounding area.

Consent Forms: The patient can review the consent forms before signing them in the office.

Patient's Area

[PATIENT REGISTRATION](#) [CONSENT FORMS](#) [EVALUATION](#) [OFFICE MESSAGES / PAYMENTS](#) [UPDATE ACCOUNT INFORMATION](#) [LOGOUT](#)

Consent Forms Notes:

- The forms are for your review only. You will be asked to sign them when you come in to our office.
- Depending on the applications you have installed on your computer, the forms may open directly or you will be given a security warning from your browser.
- Do not forget to fill out the Patient Registration, Medical History and Pain History by clicking on the links above.

Choose the consent form to be viewed by clicking on the link(s) below. You will be asked to sign the form(s) when you visit our office. If you have any questions, please tell us when you come in.

[Financial Policy](#) (Last updated on 2/2/2022)

[Privacy Policy](#) (Last updated on 5/6/2021)

[Consent for RCT](#) (Last updated on 11/5/2020)

Evaluation: The patient is able to leave feedback about their visit. They have 30 days post

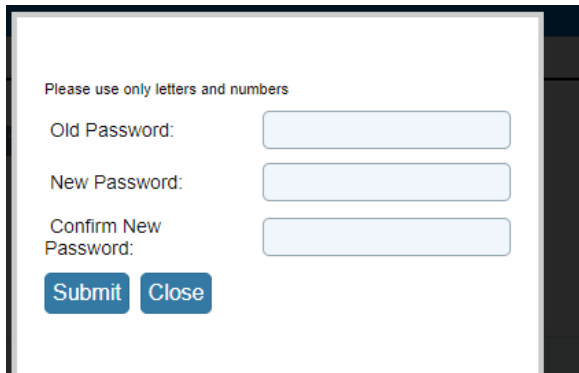
appointment day to leave feedback.

The responses can be viewed in TDO under Main Data > Treatment Questionnaire

Office Messages/Payments: Any emails or letters send to the patient through the letters module will be visible here.

The patient can also view their current balance and make a payment online. Please see: [TDO E-Commerce](#)

Update Account Information: Patients can change their login password here.

A screenshot of a web form for updating a password. The form is titled "Please use only letters and numbers". It contains three input fields: "Old Password:", "New Password:", and "Confirm New Password:". Below the input fields are two buttons: "Submit" and "Close". The form is displayed in a window with a dark sidebar on the right.

Through this method, patients are only able to fill out and review consent forms. To sign forms from home, please see [Ability to sign forms from home](#)

Online URL: <https://kb.tdo4endo.com/article.php?id=330>