TDO the Unknown: Tips and Tricks from TDO Meeting 2015

349 TDO KB October 9, 2025 Help Ribbon Menu, New User resources, Program Setup, Reporting Tools 20.51K

TDO the Unknown: Tips and Tricks

Main Page

- **T1, T2, T3 meaning**: T1 patient is very nice, T2 patient is average, T3 patient is difficult. Also how to clear the T rating.
- **Menu > Macro note** same as macro note on notes tab. Faster way to enter in a note.
- **Referring/General Dr Notes open shortcut.** On the main page lower right, if there are notes entered on the referring dr or general drs page, you can double click on the yellow box to open the notes, you can also edit from here.
- **Printing a patient record.** Front Desk Menu > Print Record. Have to print for each tooth. Print consent forms and medical history.

Patient Tab

- **Searching for patient by ID number**. Right click on the patient id box on the patient tab > Lookup value
- **Deleting a patient**. On the main patient page. Click 'Remove patient'. They must have a zero balance on the ledger and the teeth must be deleted first.
- **Last 10 patients**. File > Last 10 patients
- **Preferred language on infograbber**. On the main patient page, below the patient picture. Applies to the patient registration, Short medical history and the pain history.

Appointment Tab

- **Opening detail appt and appt on calendar**. On the appointment tab, click 'Open' to see the appointment details. Click on the calendar icon to see the appointment on the calendar.

Ledger

- **HB and SB.** HB means 'Hard Ball' the patient is difficult to collect money from. SB means 'Soft Ball' the patient is easy to collect payment from. You can mark these on ledger or on the Notes to Front page.
- **Opening a claim.** Double click on the number in the reference column on the same line as one of the codes that are on the claim.
- **Opening a CC receipt.** Double click on the number in the reference column on the same line as the CC charge.
- **Filtering by Doctor.** Very useful if you are questioning the patient's balance. Sometimes fees are posted to the wrong Dr which can throw off the patients balance. Use this feature to catch any fees posted incorrectly.
- **Entering in bulk insurance check.** Insurance > Receive insurance payment. When you select

the insurance company, it will list all the current open claims for that insurance.

Treatment Tab

- **Case filter.** Allows for filtering of what records are viewable on the treatment tab. 'All' shows all records. 'Tooth' shows only the records for the tooth that is highlighted in the upper right box. 'Group' then "Complete Group" will bring up a window where you can group 2 or more teeth together. "Pick" brings up a window where you can pick 2 or more teeth to show, pick is temporary.

Final Report Tab

- **Notify by email.** Final report tab > Notify by email

Control Table

- **Inactivity duration before log off:** Administrative > Edit Control table > workstation settings > set to 999 if you do not want it to log off.
- **Set calendar to open first.** Administrative > Edit Control Table > Workstation settings > 'Open application showing calendar first'. Remember this setting is per workstation, not per user.
- **Set messenger to open.** Administrative > Edit Control Table > Application settings > Run messenger at startup
- **Automatically move or hide cancelled/rescheduled.** Administrative > Edit Control Table > Application Settings > Action on mark appointment

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Reports

- **Top 10 insurance graph.** Reports > Visual Analysis of TDO data > Practice Assessment. Right clicking on the graphs allows for customization. Filter options at the top. Also if you hover your mouse over each section, there is a pop up that gives more details.

Snapshot

- **Graphs.** Single right click on some areas in the snapshot brings up a graph for that time frame. Example: Adjusted receipts, Adjusted Production, Total Production.
- **Double click on top Drs name.** Double clicking on the Doctor's name at the top of the snapshot opens the Snapshot Summary report. This report gives a break down by patient, the codes charged, the beginning/ending AR, total billed to insurance. It also gives a report total on the last page with an overview of all the information.
- **Average PI.** This is the average profitability index. It is the total production divided by the treatment time. If you are using the treatment timer, then it uses that time. If you are not using the treatment timer, then it uses the appointment length.
- **Breakdown snapshot.** Has three parts:
- Insurance shows how much was charged to insurance (debit) and how much was actually collected (credit).
- Adjustment: Lists all the adjustment reasons for debit and credit, this is great for keeping track of

in network insurances.
- NC: Lists the reasons for No Charge and the debit/credit amounts
- All three show the percentage difference between debits and credits. Also this report can be filtered for a specific referring Dr.
- **Exam log/EHR audit log.**
- **-Exam Log:** Shows deleted teeth, and if teeth numbers were changed.
- **-EHR audit log:** Shows who accessed what patient record, if a tooth was added and if something was updated.
- -Both reports list the time of the change, the tooth number, the computer and the user who was logged in when the change was made.
- **Financial audit trail**
- **How to backdate fees.** Fees tab > enter in the past date in the "posted" box below the "presented" box. The posted date is the DOS and will be the date on the ledger and on the claim form. The presented date is the date the fee was originally presented to the patient.

Insurance

- **Insurance reports.** Insurance > View/Edit Insurance Company Information > Choose the company > View All Patients and View all Claims

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Program setup

- **Teeth association.** First it has to be enabled in the control table under Administrative > Edit Control Table > Application settings. Then go to Program setup > Procedure and teeth association. Allows you to assign specific teeth or groups to procedure codes. This is helpful in preventing incorrect teeth numbers being posted. This is a global setting, so it will save to all workstations.
- **Alert set up options.** Program setup > Alert setup options. Choose up to 4 Doctors to have an appointment alert set up. The alert will pop up right before the appointment depending on what time you chose.
- **Adding a payer id.** Program setup > Payer id. If you are using DXC, I suggest checking their website to make sure it's the correct payer id. Go to the "Payer List" section on their site.
- **Main page order.** Program setup > Main page order. Remove tabs you are not using or rearrange the order of them. The setting is saved per user.
- **Change appointment color per Doctor.** Program Setup > Appointment Setup > click on "Overwrite background with color per doctor" a grey box will appear. Click on the box and another window will open where you can select the color for each Doctor.

Help menu

- **Backup log.** Help > About TDO/Submit Ticket > Backup restore log. This will tell you when and where the last backup ran. It does not tell you if there were errors when it ran. You will still need to check the backup log on that particular workstation.

Infograbber

- **How to stop email notifications.** The email notification of when a patient is done registering will only pop up on whoever's screen is logged into infograbber. If you no longer want the pop up, the work around is to create a separate username specifically for the infograbber log in such as "tablet" or "infograbber"

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