How to Print individual & multiple Account Statements

451 TDO KB February 25, 2026 Reporting Tools, TDO software 10.65K

Overview

There are two ways to print statements within TDO. The first is through the Ledger tab with the Print Statement button - this allows you to print the statement for the currently selected patient. The second option is to use the Account Statements report. Here, you can either select one patient to print the statement for or opt to print multiple patient statements at once.

Table of Contents

- Overview
- "Account Statements" report - one or more statements
  - Reports to run BEFORE "Account Statements"
    - "Open Teeth"
    - "Aging Analysis"
    - "Outstanding Claims"
  - Step-by-Step
- Ledger > "Print Statement" button - selected patient
  - "Print Statement" vs. "Print Ledger"
  - Video
  - Step-by-Step

"Account Statements" report - *one or more statements*

The "Account Statements" report is most useful when trying to efficiently print multiple patient statements at once.

Reports to run BEFORE "Account Statements"

There are three (3) other reports that are recommended to be ran on regular basis and prior to pulling/running the "Account Statements" report, those reports are...

Report	Location	
"Open Teeth"	• Report Tools • Administrative • Open teeth	
"Aging Analysis"	• Reporting Tools	

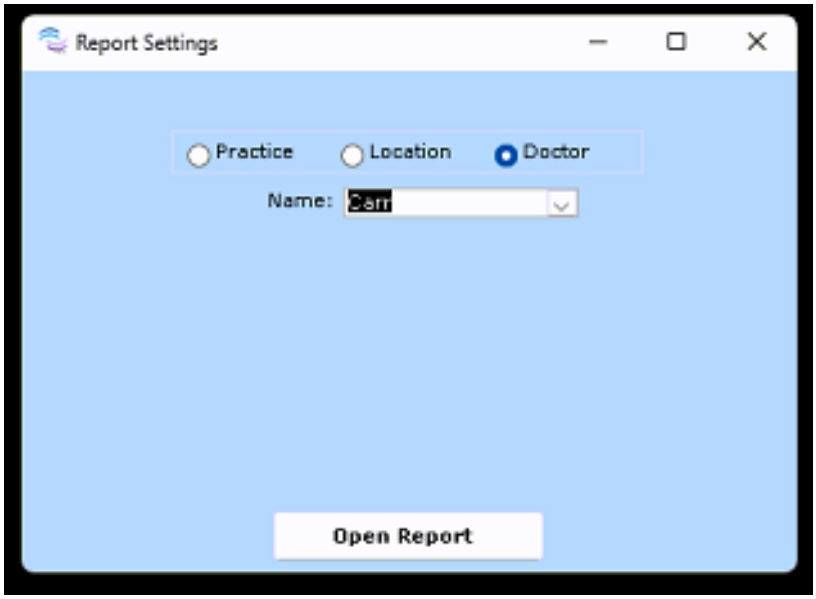
	• Financial • Aging Analysis	
"Outstanding Claims"	• Reporting Tools • Insurance • Outstanding Claims • All Claims over 30/45/60 days	

Detailed Instructions

Under the **Main ribbon menu** click on **Reporting Tools**

Select **Financial**

Select **Account Statements** - this will open a pop-up **Report Settings** window with filters



Select how you would like to view the information by checking off either **Practice**, **Location**, or **Doctor**

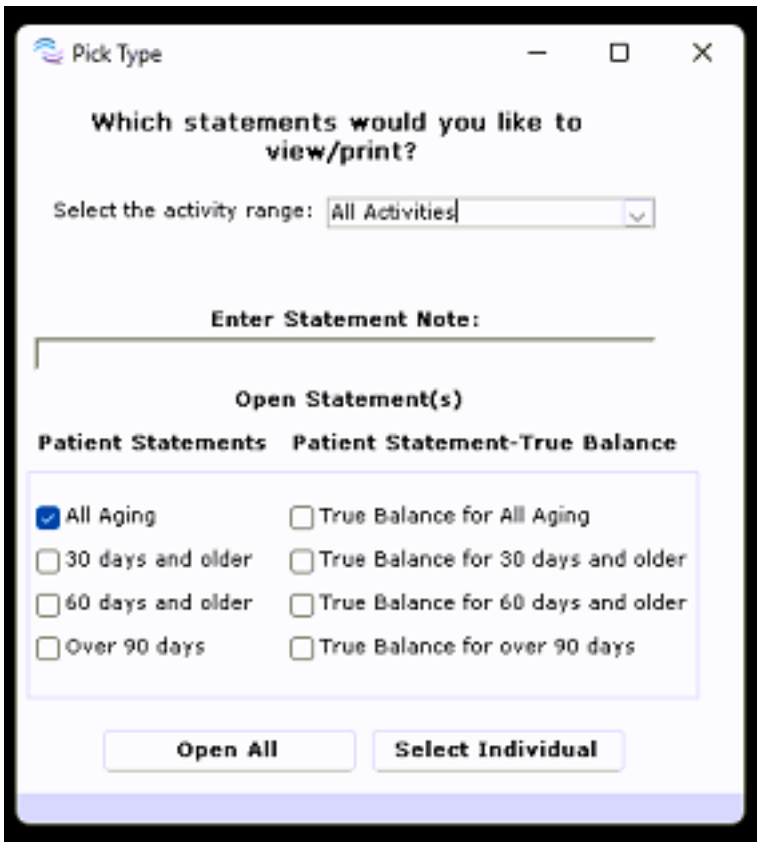
Required: Use the **Name:** drop-down to select the appropriate name of either the Practice, Location, or Doctor that you'd like to view

Click **Open Report** - this will close the **Report Settings** window and open a new **Pick Type** window

Pick Type

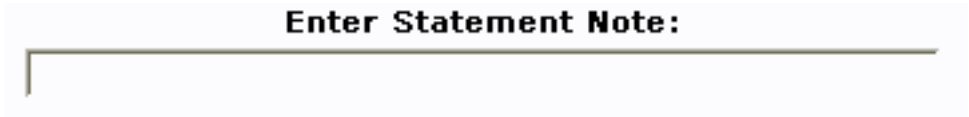
The **Pick Type** window allows you to define the activity range, add a note to all statements you are about to generate, and filter by patient status. Breaking down your accounts receivable by the age of the

account; this can be useful in determining which patients need to be contacted regarding their balance.

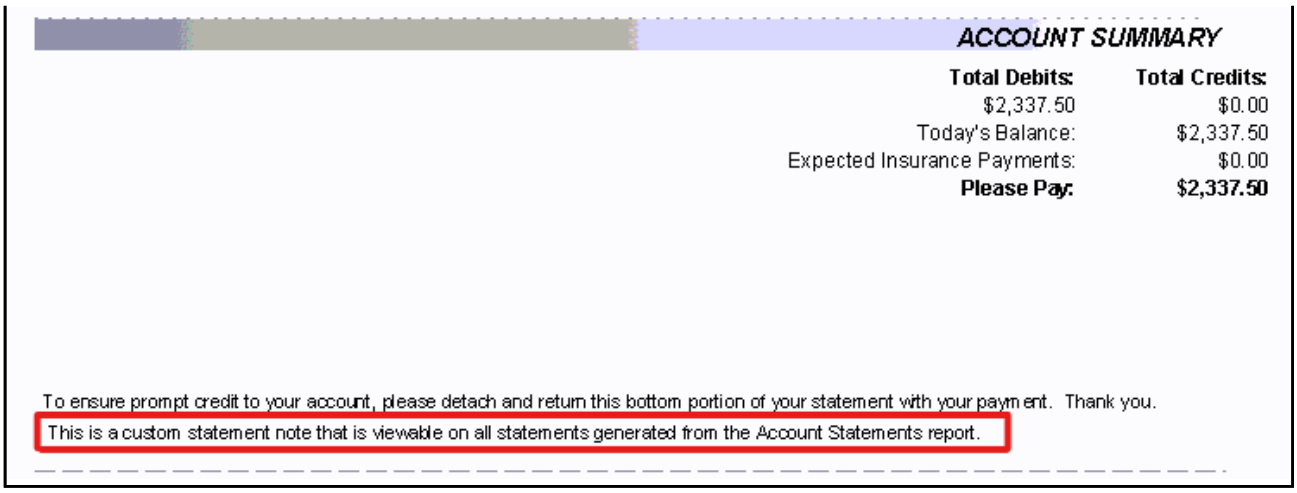


Select the activity range by clicking on the drop-down. Viewable ranges are **1 Month**, **6 Months**, **1 Year**, **All Activities**, or **Enter Date Range** to see a custom time frame.

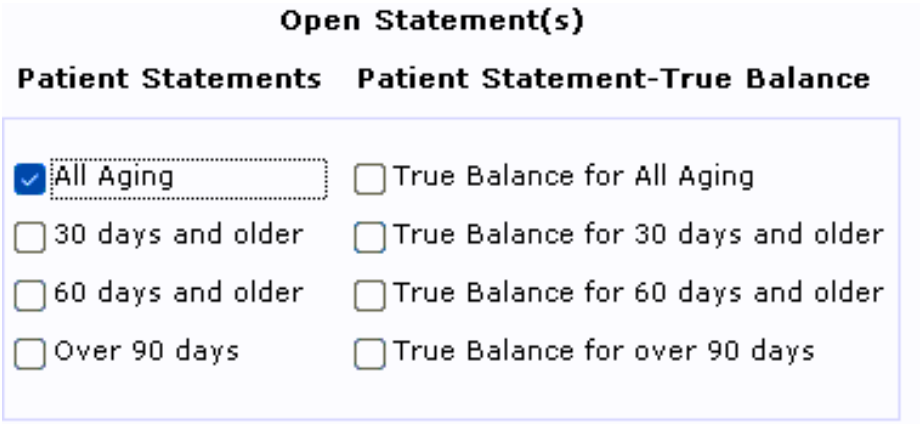
Optional: if you would like to add a custom note to appear on **ALL** statements pulled, write it beneath the **Enter Statement Notes:** field. Your custom note will appear just above the payment stub at the bottom of the page.



In the image below, outlined in red is where the custom statement note entered will appear.



Select what type of patient statement you would like to view under the **Open Statement(s)** section. Only one (1) checkbox can be marked.



Patient Statements	Patient Statement - True Balance
All Aging displays all patients with a positive balance on their ledger regardless of their treatment and insurance status.	True Balance displays patients with a ledger balance AND have the below: 1. All cases or teeth are closed for the patient. Meaning treatment was performed or, the case was closed without a procedure and most importantly it was marked in the final report tab. 2. All insurance claims are closed. (Reports > Insurance > Outstanding insurance claims) When you select “open all” TDO will create a statement for each patient according to the filters chosen and they will be ready to print.

Next select either **Open All** to view all patient statements that match your selected criteria or **Select Individuals** to manual choose which patient(s) you would like to view (to select multiple from the **Select Individuals** window hold down the **CTRL** button on your keyboard while selecting the patients) and click **OK**

Once you have either clicked on **Open All** or selected your desired patients and click **OK**, TDO will then generate printable statements

There are two (2) ways to print the generated statement(s):

Option 1 - *selectable printer & can print physical copy or to PDF*

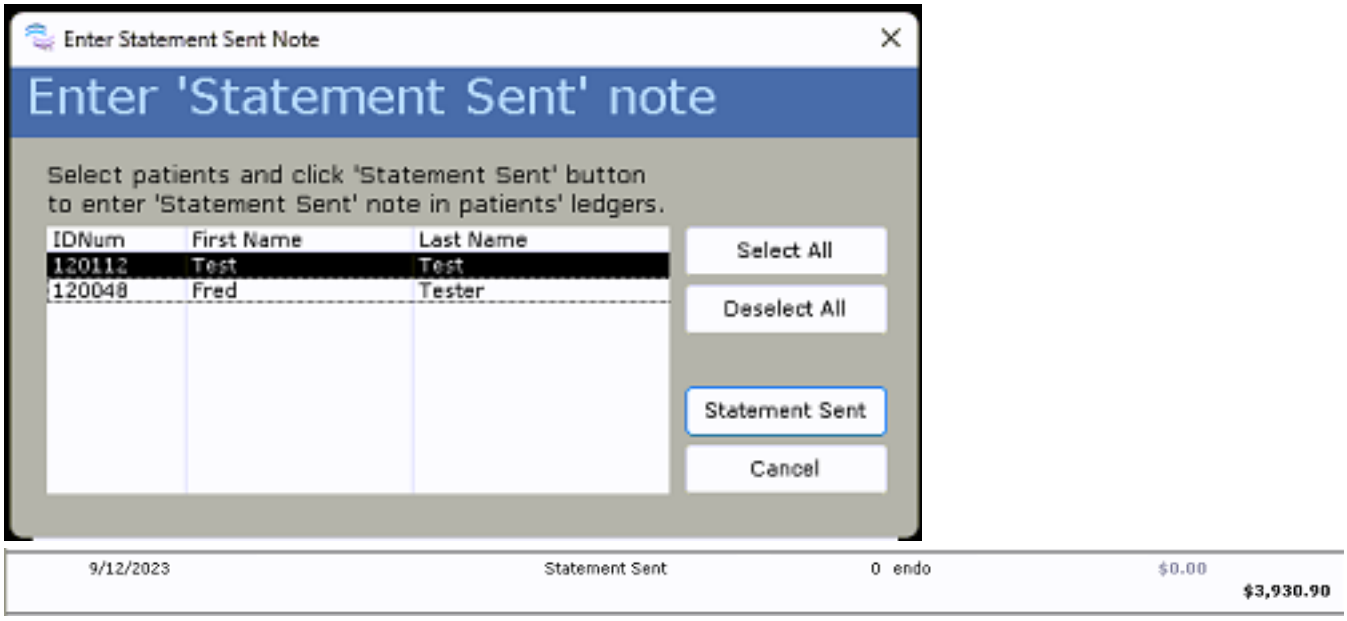
> On your keyboard simultaneously hit **CTRL + P** to bring up your computers print setup window
> Select your **desired printer** from the drop-down (to print to PDF, select "**Print to PDF**")
> Click **OK** to print

Option 2 - *automatically prints to **last used** printer*

> Right-click on the page and select **Print** - this will print to whatever printer was last used on your computer

To exit out of the generated statement(s) click **Esc** on your keyboard - a pop-up window labeled **Enter Statement Sent Note** will appear

Optional: In the **Enter Statement Sent Note** click **Select All** to highlight all loaded patient statements or manually select them individually, once happy with your selections click **Statement Sent**. Any patient that was marked as Statement Sent will now have a new note in their Ledger saying so. If you would like to skip this step, simply click **Cancel.**



Ledger > "Print Statement" button - *selected*

patient

"Print Statement" vs. "Print Ledger"

The main difference between the "Print Statement" and "Print Ledger" is that the statement will have a pay stub at the bottom, and printing the ledger will not.

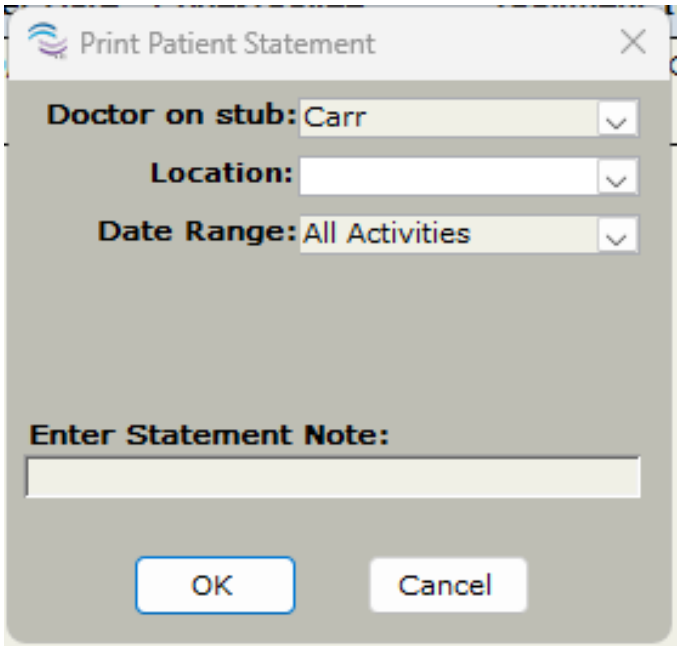
Video

The below video was filmed in TDO v11, however, the steps are the same in TDO v12.

Open a patient that you'd like to print a statement for

Select the **Ledger** tab

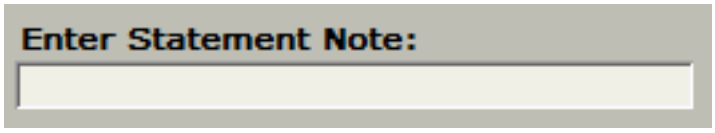
Click on **Print Statement** - a pop-up window called **Print Patient Statement** will open



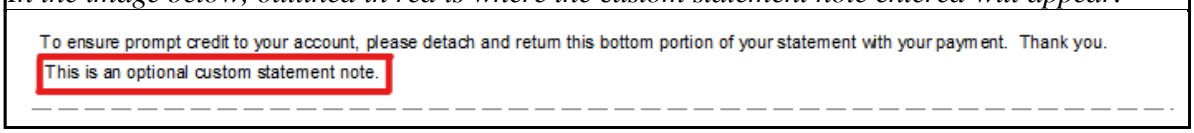
If your office has multiple locations or doctors, use the **Doctor on stub:** and **Location:** drop-downs to select the correct details to show on the statement

Use the **Date Range:** drop-down to select the time frame the statement will generate for, there are options for **1 Month**, **6 Months**, **1 Year**, **All Activities**, and **Enter a Date Range** for a custom range.

Optional: if you would like to add a custom note to appear on **ALL** statements pulled, write it beneath the **Enter Statement Notes:** field. Your custom note will appear just above the payment stub at the bottom of the page.



In the image below, outlined in red is where the custom statement note entered will appear.



Once happy with the filters & statement note, click **OK** to generate the patient statement

There are two (2) ways to print the generated statement:

Option 1 - *selectable printer & can print physical copy or to PDF*

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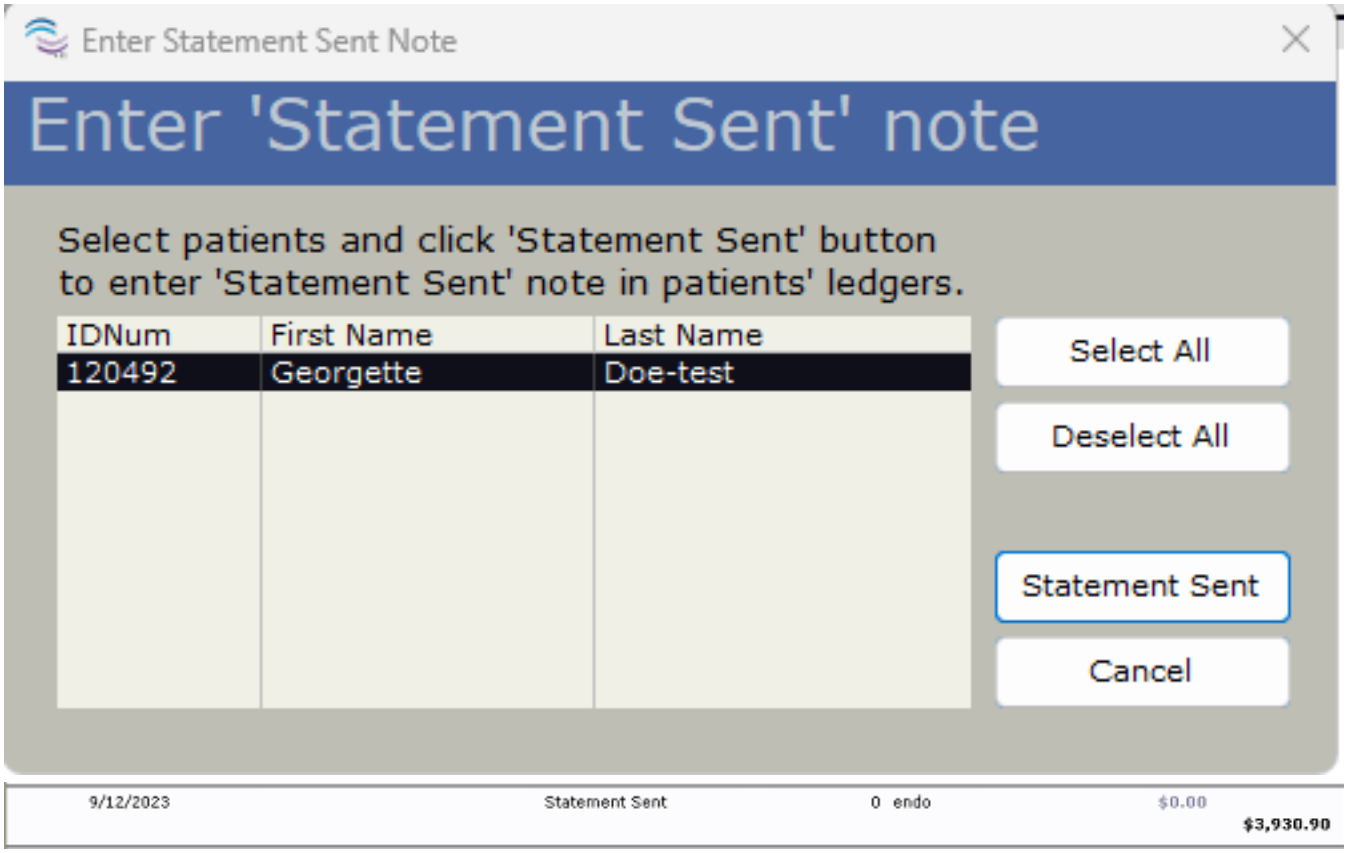
Option 2 - *automatically prints to **last used** printer*

> Right-click on the page and select **Print** - this will print to whatever printer was last used on your computer

To exit out of the generated statement click **Esc** on your keyboard - a pop-up window labeled **Enter Statement Sent Note** will appear

Optional: In the **Enter Statement Sent Note** click **Statement Sent** if you would like a new **Ledger Note** to be generated for the patient. If you would like to skip this step, simply click **Cancel.**



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