

# How to Print individual & multiple Account Statements

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## 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.

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## "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...

| <u>Report</u>    | <u>Location</u>                                                                                              |  |
|------------------|--------------------------------------------------------------------------------------------------------------|--|
| "Open Teeth"     | <ul style="list-style-type: none"><li>• Report Tools</li><li>• Administrative</li><li>• Open teeth</li></ul> |  |
| "Aging Analysis" | <ul style="list-style-type: none"><li>• Reporting Tools</li></ul>                                            |  |

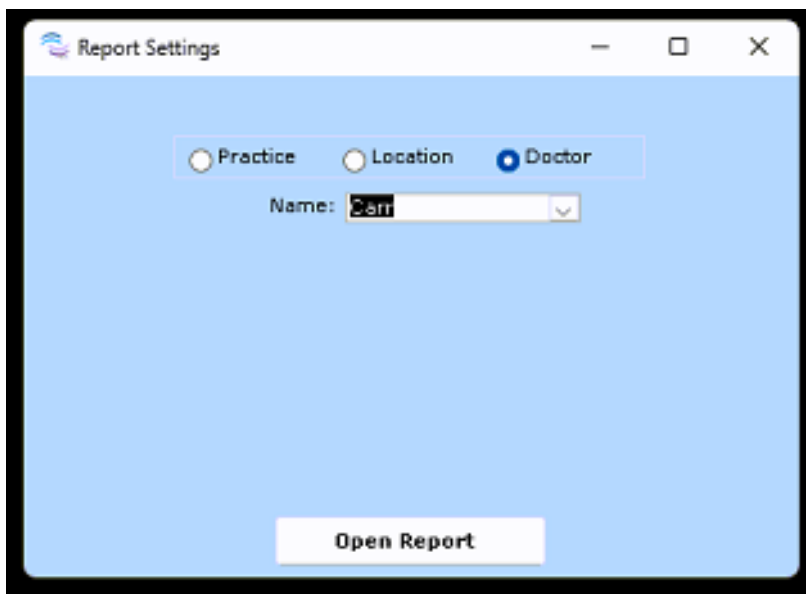
|                      |                                                                                                                                                                 |  |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
|                      | <ul style="list-style-type: none"> <li>• Financial</li> <li>• Aging Analysis</li> </ul>                                                                         |  |
| "Outstanding Claims" | <ul style="list-style-type: none"> <li>• Reporting Tools</li> <li>• Insurance</li> <li>• Outstanding Claims</li> <li>• All Claims over 30/45/60 days</li> </ul> |  |

## 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.

The screenshot shows a window titled "Pick Type" with standard window controls. The main heading is "Which statements would you like to view/print?". Below this is a label "Select the activity range:" followed by a dropdown menu currently set to "All Activities". Underneath is a text input field labeled "Enter Statement Note:". Below the text field is a section titled "Open Statement(s)" containing two columns: "Patient Statements" and "Patient Statement-True Balance". The "Patient Statements" column has four checkboxes: "All Aging" (checked), "30 days and older", "60 days and older", and "Over 90 days". The "Patient Statement-True Balance" column has four corresponding checkboxes: "True Balance for All Aging", "True Balance for 30 days and older", "True Balance for 60 days and older", and "True Balance for over 90 days". At the bottom are two buttons: "Open All" and "Select Individual".

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.

This image is a close-up of the "Enter Statement Note:" label and the text input field below it. The input field is empty and has a light blue border.

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

| ACCOUNT SUMMARY              |                       |
|------------------------------|-----------------------|
| <b>Total Debits:</b>         | <b>Total Credits:</b> |
| \$2,337.50                   | \$0.00                |
| Today's Balance:             | \$2,337.50            |
| Expected Insurance Payments: | \$0.00                |
| <b>Please Pay:</b>           | <b>\$2,337.50</b>     |

To ensure prompt credit to your account, please detach and return this bottom portion of your statement with your payment. Thank you.

This is a custom statement note that is viewable on all statements generated from the Account Statements report.

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

Open Statement(s)

Patient Statements

Patient Statement-True Balance

☒ All Aging
 ☐ True Balance for All Aging

☐ 30 days and older
 ☐ True Balance for 30 days and older

☐ 60 days and older
 ☐ True Balance for 60 days and older

☐ Over 90 days
 ☐ True Balance for over 90 days

| Patient Statements                                                                                                                 | Patient Statement - True Balance                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>All Aging displays all patients with a positive balance on their ledger regardless of their treatment and insurance status.</p> | <p>True Balance displays patients with a ledger balance <u>AND</u> have the below:</p> <ol style="list-style-type: none"> <li>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.</li> <li>2. All insurance claims are closed. (Reports &gt; Insurance &gt; Outstanding insurance claims)</li> </ol> <p>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.</p> |

Next select either **Open All** to view all patient statements that match your selected criteria or **Select Individuals** to manually 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 computer's 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**.

| IDNum  | First Name | Last Name |
|--------|------------|-----------|
| 120112 | Test       | Test      |
| 120048 | Fred       | Tester    |

9/12/2023      Statement Sent      0 endo      \$0.00      \$3,930.90

**Ledger > "Print Statement" button - *selected***

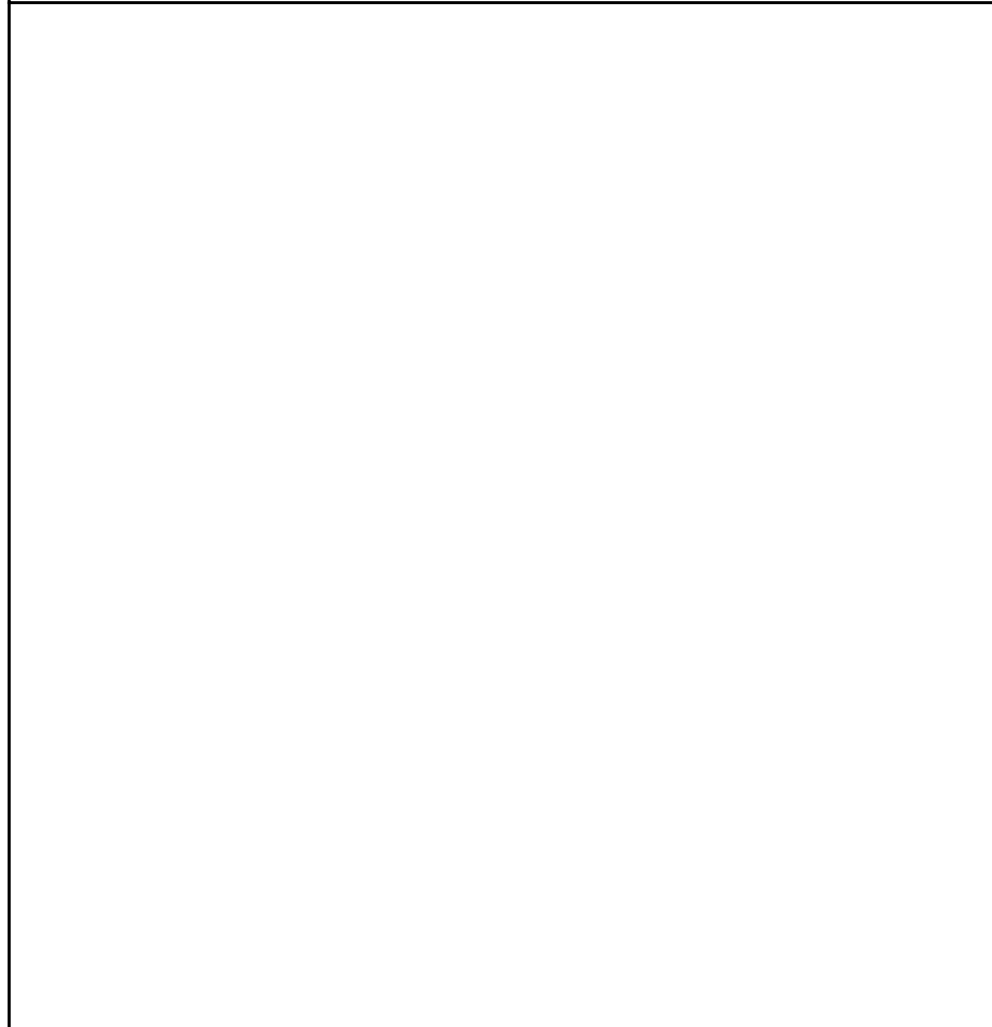
# *patient*

## "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.*

To ensure prompt credit to your account, please detach and return this bottom portion of your statement with your payment. Thank you.

**This is an optional custom statement note.**

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*

- > 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 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**.

Enter Statement Sent Note

Enter 'Statement Sent' note

Select patients and click 'Statement Sent' button to enter 'Statement Sent' note in patients' ledgers.

| IDNum  | First Name | Last Name |
|--------|------------|-----------|
| 120492 | Georgette  | Doe-test  |
|        |            |           |
|        |            |           |
|        |            |           |

Select All

Deselect All

Statement Sent

Cancel

9/12/2023

Statement Sent

0 endo

\$0.00

\$3,930.90

Online URL: <https://kb.tdo4endo.com/article.php?id=451>