

Advanced Admin Training Outline

599 [TDO KB](#) September 16, 2025 [New User resources](#) 37.47K

Advanced Admin

How to optimize TDO and utilize reports to manage your practice proficiently

Topics covered:

Financial reports

[Aging Analysis](#) and [Account Statements](#)

[Snapshot](#) in more detail

[Breakdown snapshot](#)

[Inaccurate posting](#) of multiple locations and/or multiple doctor practices

Insurance Reports

How to manage claims, outstanding claims, and Insurance payments

Cloud Reports

[Excel Spreadsheets and additional reports](#)

Clinical Reports and Charting Optimization

Patients not scheduled and needing treatment

Patients follow up

Open cases

[Daily reports](#)

Patient Experience

Online Registration

Appointment Confirmation

Online Payments

Templates

Advanced features and efficiencies

Referring Doctor Reports and Marketing

Patient reviews

[Referring doctor](#) and admin portal

Batch Letters/ Newsletter

Analysis reports and ranking, labels, and marketing tools

Recall and follow up

[How to organize your recall system](#)

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