Referral Reports Overview

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Overview

Referral reports in TDO can be printed in three different ways:

- Daily Reports (from the **Reports** button in the top menu bar)
- Front Desk Menu
- Letters module

Detailed Instructions

Referral Reports to be Completed

- Click **Reports** on the top menu
- Select **Daily Reports**
- Click on **Reports to be Completed**
- This information comes from patient's Final Report
- Click **Open Referral Report(s)**
- Click "File" and then **Print**
- Click lower **X** in upper right corner to close screen
- Click that the report was sent and enter date sent
- Check patient's insurance and mark accordingly
- Put check mark next to **No** if report is not sent

Note: The patient's record will not delete from "Reports to be Completed" list until "Sent" or "No" has been checked and the insurance window has been completed.

Reports from Front Desk Menu

- Click **Front Desk Menu** on the top menu bar
- Select the report from the Small, Half Page or Large Report menu
- Click the "Print" button on the form
- A message will come up asking if you would like to mark the final report as sent. By clicking yes it will automatically mark it on the patient's Final Report page

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Reports from Letters Module

- Click the **Letters** tab on the patient's screen

- Select correct letter from **Template** drop down box
- Check report
- To print now, click **Save & Send Now** To print later, click **Save**
- Click **OK** in message box
- Report is saved to patient's record
- Verify letter sent by checking in **Letters List** tab

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