

# What a referring doctor can view online

659 [TDO KB](#) February 25, 2026 [Cloud Ribbon Menu](#), [Doctors](#) 19.45K

## Overview

TDO allows a referring doctor to log into your website using the referring doctor portal provided by [TDO Cloud](#). The following items will be visible to the referring doctor.

- Pre-op1, post-op1, and recall images
- Past appointment dates
- Prescriptions
- Notes that are marked as 'show on web to referring'
- Summary Recall note from the recall tab
- Any letters that have been emailed or printed to them
- Any pictures that were on those letters

## Detailed Instructions

In the referring Doctor Information tab in TDO, check the box to "Show Patient Summary on Web"

The screenshot displays the 'Doctor Information' form in the TDO software. The form is divided into several sections:

- Top Bar:** Includes a 'Select doctor:' dropdown menu with 'Test' selected, an 'Add new doctor' button, and icons for print and help.
- Left Panel:** Contains a 'Generate' button, 'Web ID: TTest2', and 'Web Password: j6vj8qBf'. Below this is a checkbox labeled 'Show Patient Summary on Web' which is checked and highlighted with a yellow box. Further down are fields for 'Auto Division', 'Manual Division', 'Children's Names', 'School/Notes', 'Notes', and 'Notes For All Patients'.
- Doctor Info Section:** Includes fields for 'Last Name: Test', 'First Name: Test', 'Title (if desired):', 'Name for reports: Dr. Test Test', 'Specialty:', 'Assistant:', 'Front Office:', 'Working Hours:', 'Birth Date:', 'Spouse:', 'Phone(Home):', 'Phone(Mobile):', and 'Website:'. There is also a 'Coronal Endodontics Preferences' button.
- Email Addresses Section:** Features a table with columns for 'Type' and 'Address'.
- Address Section:** Includes tabs for 'Address 1', 'Address 2', and 'Practices'. The 'Address 1' tab is active, showing fields for 'Address1:', 'Address2:', 'City:', 'State:', 'Zip:', 'Phone:', 'Fax:', and 'Back:'. A 'Preferred' checkbox is also present.
- Bottom Right Panel:** Contains a 'Patients' section and a list of buttons: 'Referred To', 'Referral Assessment', 'Marketing Events', 'Patient Assessment', 'Envelope', 'Not Completed Patient', 'Completed Patient', 'Detail Report', 'Analysis - Data', 'Analysis - Graph', and 'Open Teeth'.

When this box is checked, the referring doctor sees the following in the referring doctor portal

## Referring Doctor's Area

|              |         |               |      |         |        |
|--------------|---------|---------------|------|---------|--------|
| PATIENT INFO | REPORTS | REFER PATIENT | CHAT | MY INFO | LOGOUT |
|--------------|---------|---------------|------|---------|--------|

| Patients Summary                     |     |
|--------------------------------------|-----|
| Patients referred (Lifetime):        | 108 |
| Patients undergoing treatment YTD:   | 0   |
| Patients in need of restoration YTD: | 0   |
| Patients with cases completed YTD:   | 0   |

You can allow referring Doctors from the same referring practice to view each other's patient info.

This can be done by [linking referring Doctors to the same practice](#) and enabling the setting in your web wizard.

### Web Wizard

[WEBSITE SETTINGS](#) [OFFICE INFORMATION](#) [PAGE CONTENT](#) [BLOG](#) [LOGOUT](#)

[GENERAL](#) [SITE LINKS](#) [ADMIN LOGIN](#) [PATIENT LOGIN](#) [REFERRING DOCTOR LOGIN](#) [GENTLEWAVE RCN](#) [ADVANCED OPTIONS](#)

Enable "Remember Me" option on the Login page.

Choose to show the "Remember Me" option to save the user name and password on the referring doctor's computer. You can also set the amount of time that the user name and password is remembered for. The default will be for as long as the browser is open. Otherwise the limit can be set in days.

### Referring Doctor Practice Settings

If multiple referring doctors are in the same practice, use the settings below to allow them to view case information for patients assigned to at least one of the doctors in the practice. If you wish to make letters sent to the referring doctors shared, there is a setting for that as well.

- ☒ Allow patient information to be shared.
- ☐ Allow sent letters to be shared

## Reference

For further articles relating to similar issues, please check:

[Adding Referring Doctor to a Referring Practice](#)

Pre Op/ Post Op Images Not Showing up in Referring Doctor Portal

Helping Referring Doctors Reset their Password

Online URL: <https://kb.tdo4endo.com/article.php?id=659>