

Filter Category in Image Organizer

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Overview

The “Filter Category” will allow the user to filter results in Organizer by category in the same pop-up that filters dates.

This feature is available in **TDO Version 12.219** and higher

Detailed Instructions

- The Category Filter is located when clicking the **Configure Image Date Filter** button in Organizer. Make sure to have "All Patients" selected.



- On the **Pick Begin and End Dates** window, you can find Filters and Category.

Pick Begin End Dates

Practice Doctor: All Referring Doctor: All

Dates

Begin Date: ☒ 3/ 1/2018 End Date: ☒ 3/21/2018

Date Range: Current Month

Filters

☐ In Treatment ☐ Super Recall

☐ Completed Cases ☐ Irrigation Protocol

☐ No Definitive Endodontic Performed

Category

☐ No tooth required

☐ CBCT

☐ Additional X-rays

☐ BTW

☐ FMX

☐ Panorex

☐ Pre-other office

☐ Referral x-ray

☐ General

☐ Patient Picture

☐ Referral Slip

☐ Paint Picture

☐ Correspondence

☐ Correspondence--Ins

☐ Insurance E.O.B.

☐ Insurance Check

☐ Insurance Claim Form

☐ Patient Refund Check

☐ Display Only If All Are Present

Uncheck All Check All

Recall1*:
If a recall is acquired during the selected date period,
the filter will automatically display Pre-op 1 and
Post-op 1, even if their date of acquisition is prior to
the date filter.

Apply Clear Cancel

- **Practice Doctors:** It will allow you to filter by Doctor if your office has multiple providers.

Pick Begin End Dates

Practice Doctor: All

Dates

Begin Date: 2 McTESTERSON, TEST

End Date: Carr, Gary

Date Range: CARR, GARY

Date Range: Who, Guess

- **Referring Doctor:** It will allow you to filter by all Referring Doctors you have in your database or by a specific Referring Doctor.

Referring Doctor:

End Date: ☒ 3/

☐ Super Recall

☐ Irrigation Protocol

216981, Ticket
Barnett, Sammie
Carr, Gary
Johnson, Jacob
Mattress, Alan
Nobel, William
Starburst, Sarah
Stevens, Tony
Test, Referring
Test, Test
Turner, Jameson
Wang, Charlie

- **Dates:** It will allow you to pick a date range or a period.

Dates

Begin Date: ☒ 3/ 1/2018

End Date: ☒ 3/21/2018

Date Range:

☐ Super Recall

☐ Irrigation Protocol

Current Month
Last Month
Previous Month
Last Year MTD
Current Quarter
Last Quarter
Previous Quarter
Last Year QTD
Current Year
Last Year
Previous Year
Last Year YTD
Life Time
User Defined

- **Filters Available**

Filters

☐ In Treatment

☐ Completed Cases

☐ No Definitive Endodontic Performed

☐ Super Recall

☐ Irrigation Protocol

- **In treatment:** It will allow to filter all cases that are in treatment or open cases.
- **Completed Cases:** It will allow to filter all cases that are completed or tooth (teeth) with a completion date.
- **No Definitive Endodontic Performed:** It will allow to filter all cases where tooth has not been treated.
- **Super Recall:** It will allow to filter all cases marked as “Super Recall” in the Final Report Page.
- **Irrigation Protocol:** it will allow you to filter all cases where “Irrigation Protocol” has been used in Treatment Report Page. **NOTE: it will only allow filtering on one irrigation protocol at a time.**
- **Category**

- With this new functionality, TDO will allow you to filter images by any "Image Category" that you have listed or added in your TDO software. You can select one or more image categories to filter.



- **Display Only if All Are Present:** this will filter only the cases where one or more categories are selected.
- **“Uncheck All” button:** It will allow you to clear the Category filter to make a new selection.
- **“Check All” button:** It will allow you to checked all the Categories at once.
- **“Apply” button:** TDO will run the query based on the items selected in the Filter Category window.
- **“Clear” button:** It will clear any filter selection by unchecking the boxes selected in case you need to start a new filter.
- **“Cancel” button:** The query will not run. With the cancel button, it will adjust so that images don’t show in Organizer if there was any selection on the filters (date range, category, etc).

Video

Online URL: <https://kb.tdo4endo.com/article.php?id=694>