

Ability to sign Pre-Treatment Estimates on Web Infograbber

723 [TDO KB](#) October 11, 2023 [Cloud Ribbon Menu](#) 9.19K

Overview

Offices using TDO can now allow their patients to sign Pre-Treatment Estimates using the Web based infograbber.

In order to use this new functionality, an active TDO Cloud subscription is required.

Detailed Steps:

1. Add fees in the **Fees** page.

Tooth # Code			Surface	Description	Original Fee	Fee No Charge	Ins. Est.	Deductible	Pt Est.	Fee Category	Presented	Dr. Location	Post All	
				Est # of visits	Prognosis									
▶	1	2	3	10	D99310	Spec Consult	\$125.00	\$125.00	\$125.00	\$0.00	\$0.00	A	Carr LO2	Post
*	1	2	3	10										Post

2. Log on to the Web Infograbber.

 **TDO** QUALITY-CENTERED ENDODONTICS

Office Login

*Fields are case sensitive

User Name:

Password:

3. Search for the patient who needs the Pre-Treatment Estimate signed.

 **TDO**
QUALITY-CENTERED
ENDODONTICS

Display Type: ☐ Standard ☒ Large Font

Autofill Test [\[dismiss\]](#)

It is a good idea to test filling out the patient forms using a test patient to make sure that the form fields are not showing auto fill options. If this is the first time you are using this device, please run two tests since the first one would probably not show any auto fill options the first time around.

Please see our KB article at kb.tdo4endo.com/article.php?id=670 for more information on how to turn off your autofill settings if needed.

Search for a Patient

Search by:

To search for a patient, type the first few letters of the patient's or referring doctor's first or last name.

×

use * to list all

4. Select the **Pre Treatment Estimate** option.

 **TDO**
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Display Type: ☐ Standard ☒ Large Font

Rocha, Maria

☐ Infograbber Forms ☒ **Pre Treatment Estimate**

5. Click on **Open Pre Treatment Estimate** button.

 **TDO**
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ENDODONTICS

Display Type: ☐ Standard ☒ Large Font

Rocha, Maria

☐ Infograbber Forms ☒ Pre Treatment Estimate

After signing the Pre Treatment Estimate, a pdf file will be generated and it will be viewable in the TDO Image Organizer under the Correspondence category.

Location:

Open Pre Treatment Estimate

6. The Pre Treatment Estimate form will open.

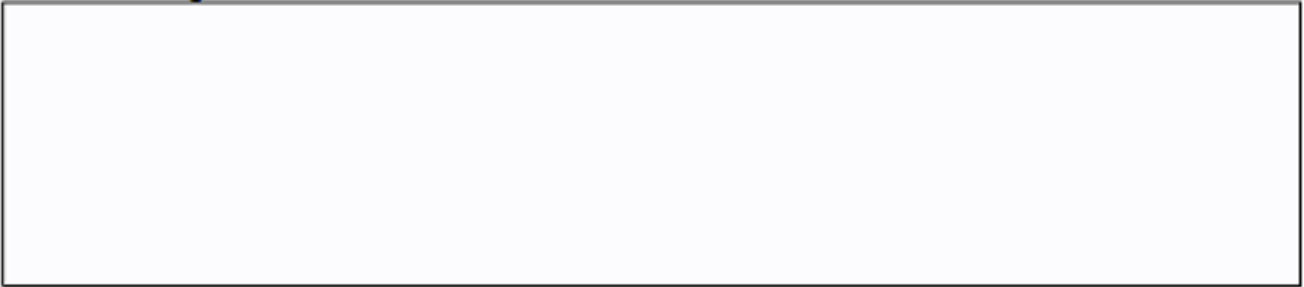
Pre Treatment Estimate											
Carr Endodontics Gary B. Carr, D.D.S. 123 easy st San Diego, CA 92121 P: (658) 558-3636 F: (658) 558-3633										9/17/2018	
Patient Information											
Maria Rocha 123 5Th ave Encinitas, CA 92103				Home Phone: Business Phone: Cell Phone:				Account Balance: \$0.00 Estimated Patient Balance: \$0.00 Estimated Insurance Balance: \$125.00			
Guarantor:				Birthdate: 6/5/1967 SSN: 123456789				Next Recall Due: Next Appt. Date: Start: End:			
Doctor Information											
Name: Gary B. Carr, D.D.S.				License #: 6492333				Tax ID: 542-54-8515			
Visit Detail						Estimated					
Date	Code	Description Est # of visits / Prognosis	Tth	Surface	Dr	Orig Fee	Charges	Deductible	Patient	Insurance	
9/17/2018	D9310	Spec Consult	10		Carr	\$125.00	\$125.00	\$0.00	\$0.00	\$125.00	
						\$125.00	\$125.00	\$0.00	\$0.00	\$125.00	
Number of Appointments: NA Carrier: Aetna Employer: AAA Date: 9/17/2018						Deductible Left Standard: \$50.00 Preventive: \$0.00 Other: \$0.00					
Max Benefits: \$2,000.00 Benefits Left: \$1,500.00						Deductible Met: No NonDuplication of Benefits Clause: No					
Your signature below means that you and your doctor have reviewed this plan of treatment and you agree to its fees and terms.											
Patient Signature:						9/17/2018					
Clear Signature											
Practice Signature:						9/17/2018					
Clear Signature											

Submit

7. Have the patient to sign in the **Patient Signature** box using either the patient's finger or the stylus pen.

Patient Signature:

9/17/2018



Clear Signature

8. Have the authorized person in the practice to sign in the **Practice Signature** box using the finger or stylus pen.

Practice Signature:

9/17/2018



Clear Signature

9. Click on **Submit**.

10. Click on **Finish**.

Pre Treatment Estimate



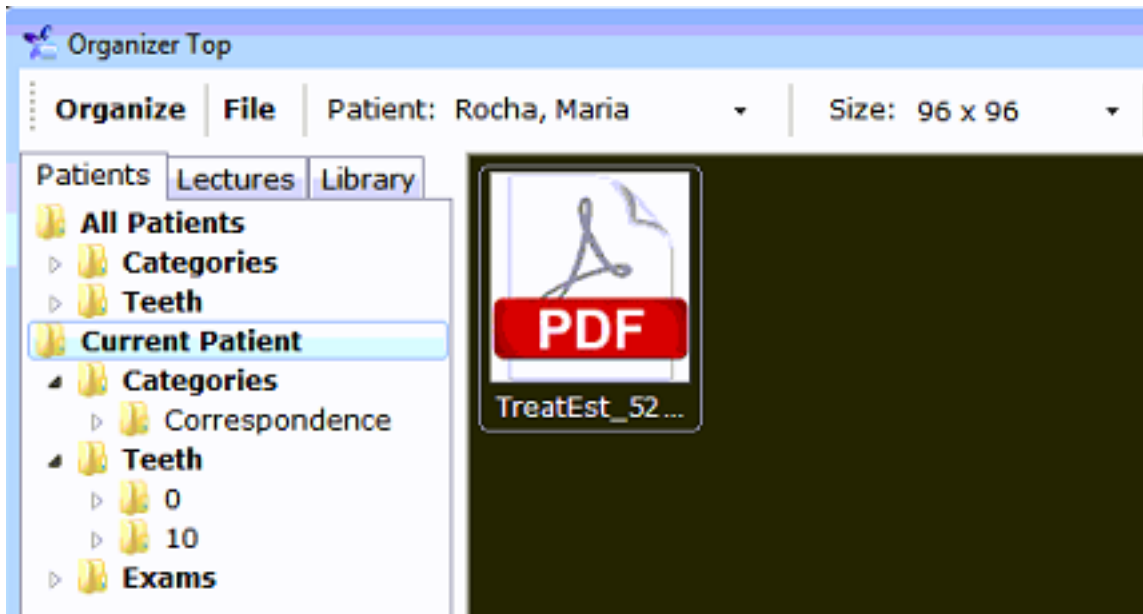
Thank you!

The Pre Treatment Estimate form has been successfully processed. It can be viewed in the Image Organizer under the Correspondence category.

Please click Finish below to return to the login screen.

Finish

11. Open Image Organizer in TDO and the Pre Treatment Estimate will be saved as a PDF.



12. Double-Click on the PDF icon and the Pre Treatment Estimate with signatures will open.

Online URL: <https://kb.tdo4endo.com/article.php?id=723>