

[v12] Main Ribbon Menu - Notes

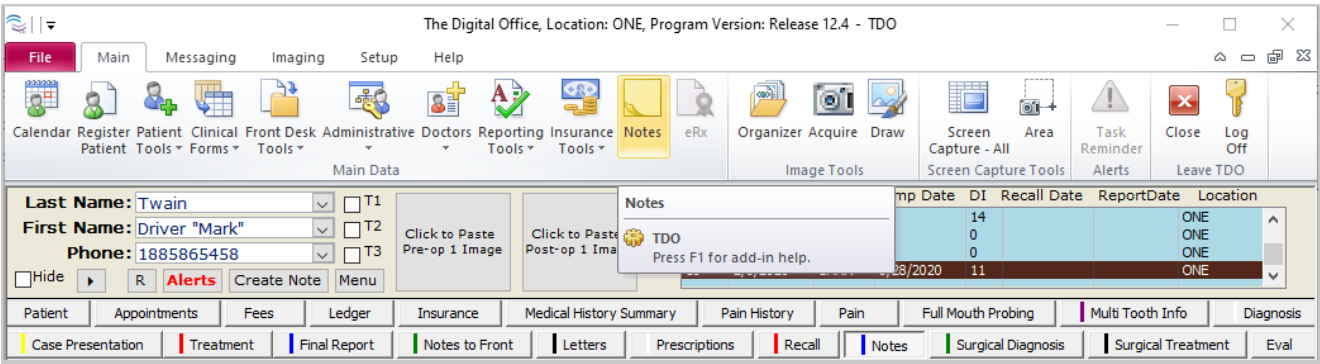
774 [TDO KB](#) February 26, 2026 [Notes](#) 3.80K

Overview

You can filter by category when reviewing a patient's notes. This feature is available in TDO version 12.350 and newer.

Detailed Instructions

On the Main Tab, Click on Notes



The Category field will be located at the top of the form.

The Digital Office, Location: ONE, Program Version: Release 12.4 - TDO

File Main Messaging Imaging Setup Help

Notes

Tooth: 18 Clear Tooth Filter Category: [Dropdown] [Ascending]

11/19/2020 10:56:20 AM
Entered by: admin
Patient information changed on the website/infograbber/

11/19/2020 9:15:42 AM
Tooth: 18
Entered by: kevin
The radiographic diagnostic findings are as follows: Ther incomplete or inadequate (reason(s):). The clinical exam

11/19/2020 9:11:56 AM
Tooth: 18
Entered by: kevin
Medication: Amoxicillin Mg dosage: 500 # of Tabs/Cap

11/17/2020 5:39:21 PM
Entered by: admin
Patient information changed on the website/infograbber/TDO. Previous information was: - First Name: Driver

11/16/2020 9:08:44 AM
Entered by: admin
Patient information changed on the website/infograbber/TDO. Previous information was: - Salutation: Dr.

10/21/2020 3:25:35 PM
Entered by: kevin
Treatment completed for Tooth Upper Incisor on 11/13/2020 11:54:55 AM

Call List Note
Diagnosis Page Summary Note
Final Treatment Note
Financial Tickler Note
General Note
Initial Consultation Note
Interim Treatment Note
Medical History Summary Note
Multi Tooth Summary Note
Multi Tooth Testing Note
Pain History Summary Note
Patient Registration Note
Treatment Page Summary Note
Referring Doctor Communication Note
Summary Recall Note
Anesthesia Summary Note

Close

Category: General Note [Hide Note] [Show on web to referring]

Note Locked

Comment by: admin [Manual Entry]

[Send new referral report to referring doctor]
[Send new referral report to:]

Record: 14 1 of 18 [No Filter] Search

User: kevin BP: Pulse: Temp: Alert: Med Hist Needs Updating Ref Dr: Dr. Kevin Clay (P): Gen Dr: (P): Num Lock [A] Powered by Microsoft Access

By default, the Notes form displays the patient's notes and the tooth on the Main page in descending order.

“Ascending” checkbox. It is simply the sort of notes you are viewing.

When selecting a category from the dropdown, TDO will display any notes saved under the category for the highlighted tooth number on the Main page.

The Digital Office, Location: ONE, Program Version: Release 12.4 - TDO

File Main Messaging Imaging Setup Help

Calendar Register Patient Clinical Front Desk Administrative Doctors Reporting Insurance Notes eRx Organizer Acquire Draw Screen Capture - All Area Task Reminder Close Log Off

Main Data

Last Name: Twain First Name: Driver "Mark" Phone: 1885865458

Hide R Alerts Create Note Menu

Click to Paste Pre-op 1 Image Click to Paste Post-op 1 Image

Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	ReportDate	Location
1	11/13/2020	CARR		14			ONE
7	11/13/2020	CARR		0			ONE
3	3/11/2020	CARR		0			ONE
18	2/6/2020	CARR	8/28/2020	11			ONE

Patient Case Present

Filter Current View

Tooth 18 Clear Tooth Filter Category Diagnosis Page Summary Note Clear Category Filter Ascending

11/19/2020 9:15:42 AM

Tooth: 18

Entered by: kevin

The radiographic diagnostic findings are as follows: There is radiographic evidence of (possible) caries. I would characterize the endodontic treatment as either incomplete or inadequate (reason(s):). The clinical examination findings are as follows: Date of Completion: Treatment not completed yet. Assistant: test

Clicking the “Clear Tooth Filter” will display any notes saved under the category selected for all teeth.

Last Name: Twain First Name: Driver "Mark" Phone: 1885865458

Hide R Alerts Create Note Menu

Click to Paste Pre-op 1 Image Click to Paste Post-op 1 Image

Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	ReportDate	Location
1	11/13/2020	CARR		14			ONE
7	11/13/2020	CARR		0			ONE
3	3/11/2020	CARR		0			ONE
18	2/6/2020	CARR	8/28/2020	11			ONE

Patient Case Present

Filter Current View

Tooth Category General Note Clear Category Filter Ascending

7/14/2021 1:44:13 PM

Tooth: 1

Entered by: kevin

The patient may come back next week

11/19/2020 10:56:20 AM

Entered by: admin

Patient information changed on the website/infograbber/TDO. Previous information was: - First Name: Hat Vc

11/19/2020 9:11:56 AM

Tooth: 18

Entered by: kevin

Medication: Amoxicillin Mg dosage: 500 # of Tabs/Caps: 4 Date Questioned: 11/19/2020 Taken at: <-- No time entered -->

11/17/2020 5:39:21 PM

If the tooth and category fields are cleared out, TDO will display all patients and treatment notes for all teeth.

Last Name: Twain First Name: Driver "Mark" Phone: 1885865458		☐ T1 ☐ T2 ☐ T3	Click to Paste Pre-op 1 Image	Click to Paste Post-op 1 Image	<table border="1"> <thead> <tr> <th>Tooth</th> <th>Initial Date</th> <th>Doctor</th> <th>Comp Date</th> <th>DI</th> <th>Recall Date</th> <th>ReportDate</th> <th>Location</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>11/13/2020</td> <td>CARR</td> <td></td> <td>14</td> <td></td> <td></td> <td>ONE</td> </tr> <tr> <td>7</td> <td>11/13/2020</td> <td>CARR</td> <td></td> <td>0</td> <td></td> <td></td> <td>ONE</td> </tr> <tr> <td>3</td> <td>3/11/2020</td> <td>CARR</td> <td></td> <td>0</td> <td></td> <td></td> <td>ONE</td> </tr> <tr> <td>18</td> <td>2/5/2020</td> <td>CARR</td> <td>8/28/2020</td> <td>11</td> <td></td> <td></td> <td>ONE</td> </tr> </tbody> </table>	Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	ReportDate	Location	1	11/13/2020	CARR		14			ONE	7	11/13/2020	CARR		0			ONE	3	3/11/2020	CARR		0			ONE	18	2/5/2020	CARR	8/28/2020	11			ONE
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3	3/11/2020	CARR		0			ONE																																						
18	2/5/2020	CARR	8/28/2020	11			ONE																																						

☐ Hide

Filter
 Current View:

Filter
 ID#:
 Date: 7/14
 We should see the patient next week is the schedule allows
 Category:
 Comment:

Notes
 Tooth: Category:

7/14/2021 1:45:54 PM
Tooth: 18
Entered by: kevin
 We should see the patient next week is the schedule allows

7/14/2021 1:44:13 PM
Tooth: 1
Entered by: kevin
 The patient may come back next week

11/19/2020 10:56:20 AM
Entered by: admin
 Patient information changed on the website/infograbber/TDO. Previous information was: - First Name: Hat Vc

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11/19/2020 9:11:56 AM

Online URL: <https://kb.tdo4endo.com/article.php?id=774>