

Preparing for Candian Claims (CDA) Setup

824 [TDO KB](#) September 2, 2025 [Insurance](#) 3.94K

Overview

This article covers the steps necessary to prepare your practice to submit CDA claims through TDO. These instructions are ONLY for Canadian practices.

Detailed Instructions

On your server, navigate to the TDOBuilds folder and run SetupCanada.exe to install the latest lists of Canadian Provinces, Postal Codes, Insurance Carriers, and Fee Codes.

All workstations and users must exit TDO.

Always back up your database before running SetupCanada.exe. To ensure that you have the latest copy of SetupCanada.exe, contact TDO Support.

Get your CDA Provider # and CDA Provider Office # from the Canadian Dental Association's website. You'll need to enter these numbers into TDO shortly.

Open the Control Table (V11: Administrative > Edit Control Table) (V12: Setup > Site Configuration > Edit Control Table) and go to the Application Settings tab

- Set Culture to Canada
- Set Insurance Form to Canadian
- Uncheck the Disable State Autofill checkbox
- Enter the CDA Provider Office #
- Check the Enable Multiple Fee Schedules checkbox
- Check the Show Pref. Language on Patient Chart checkbox
- Check the Extraction in new Claim/Predet checkbox

Check the Enable Procedure and Teeth Association Checkbox

Control Table Information

Practice Information Application Settings Network Settings Workstation Settings

Video Files Location

Video Path:

C:\TDOVideo

Tooth entries in the appointment history

☐ Show Tooth Entries

Action on mark appointment

as Cancelled / No Show / Rescheduled:

Move appointments to column:

Letter Module Properties

Letters Editor: Reports...Letters Format: ☒ Send PDFSOAP NoteTmpt: * About Us ☐ Attach original image on email

Automatic Financial Tickler

Insurance Auto Fin. Tickler Delay (days): Non-Insurance Auto Fin. Tickler Delay (days): ☐ Enable Ins. Financial Tickler Pop-ups☐ Enable Non-Ins. Financial Tickler Pop-ups☐ Automatically Update Future Dates

Insurance

Delta Claim ID:

☒ Insurance Estimating ☐ Default to Non-Assigned☐ New patient default to NO insurance☒ Disable Insurance Comparison

Index Name Caption

Singular form:

Tooth

Plural form:

Teeth

Message Viewer

☐ Run Messenger at Startup

Phone/Fax

Phone Prefix:

International

Culture: ☐ Disable State Autofill ☐ General DentistInsurance Form: Canadian 6969

Medical History

Type:

Lang. Short

Med Hist: ☒ Show Pref. Language on Patient Chart☒ Enable allergy pop-up in prescription form

Diagnosis Form

Default Form Size:

Multiple Fee

☒ Enable Multiple
Fee Schedules

SMS Options

☒ Allow Staff group to send SMS☒ Check Send SMS automatically

Miscellaneous Settings

☒ Enable Procedure
and Teeth Association☒ Lock Manual
Notes after: ☐ Display SSN and DOB on
Ledger and Statement☒ Automatically fill Tth
Extraction in new
Claim/Predet☒ Show Patient\Ref Dr PwdsRecord: 1 of 3 No Filter

Close the Control Table to save your changes

Open Electronic Claims Setup (V11: Administrative > Electronic Claims Setup; V12: Setup > Site Configuration > Electronic Claims Setup)

- Set Webclaim Service to CDA - Canadian Electronic Claim
- Set Comm. Method to iTRANS (Internet)

Click OK to save your changes

Open Doctor Information (V11: Administrative > Edit Doctor Information; V12: Setup > Site Configuration > Edit Doctor Information). For each of the providers in the practice

- Enter the CDA Provider #
- Select a Billing doctor

Select a Billing office (i.e., the Practice Name from the Control Table)

 Doctors

— □ ×

Doctor Information 

Go to Doctor: 3 ▾ Add a Doctor ☐ Inactive

☐ Virtual Doctor

First Name* Middle Last Name* Mobile: ☐ Send SMS

John Doe John Doe

Full Name and Title (Ex. Gary B. Carr, D.D.S.) Specialty

John Doe DDS

License Number* Classification Licensing State*

98765 CA

Tax ID Number* BNDD/DEA# Blue Cross/Blue Shield ID Field Name

12346789

Web ID Web Pwd TDO4Endo.com | Credit Card Pmt Merchant ID

3 **** Jdoe 000000000000=TDOPS

NPI SMS Login SMS Password

123456789

Birthdate Multiple Fee Schedule CDA Provider# **

Default 4758563

1st email for Web notification 2nd email for Web notification

docdemo@tdo4endo.com

User name used to login in TDO: Laurie ▾

TDO Outcomes Research ID:

Billing doctor: ▾ Exceptions

Billing Address: 6235 Lusk Blvd, San Diego, CA 92121 Change

Billing office:** ▾

Provider ID Setup Doctor-Location Setup

Insurance First Name Ins. Middle Insurance Last Name

QuickBooks File Location: ▾ +

Class:

Sales Acct:

AR Account:

Check Acct:

* = required for electronic claims
** = required for Canadian electronic claims

If any insurance carriers have sent you a specific Billing Doctor Number (different from the one to be used for claims sent to them, you may need to add Exceptions on the Doctor Information page. Select the

provider in question and click Exceptions (next to the Billing doctor dropdown)

Doctors

Doctor Information

Go to Doctor: 3 ☐ Inactive

☐ Virtual Doctor

First Name* Middle Last Name* Mobile: ☐ Send SMS

John Doe

Full Name and Title (Ex. Gary B. Carr, D.D.S.) Specialty

John Doe DDS

License Number* Classification Licensing State*

98765 CA

Tax ID Number* BNDD/DEA# Blue Cross/Blue Shield ID Field Name

123456789

Web ID Web Pwd TDO4Endo.com I Credit Card Pmt Merchant ID

3 ***** Jdoe 000000000000=TDOPS

NPI SMS Login SMS Password

123456789

Birthdate Multiple Fee Schedule CDA Provider# **

Default 4758563

1st email for Web notification 2nd email for Web notification

docdemo@tdo4endo.com

User name used to login in TDO: Laurie

TDO Outcomes Research ID:

Billing doctor: Exceptions

Billing Address: 6235 Lusk Blvd, San Diego, CA 92121

Billing office:**

Insurance First Name Ins. Middle Insurance Last Name

QuickBooks File Location:

Class:

Sales Acct:

AR Account:

Check Acct:

* = required for electronic claims
** = required for Canadian electronic claims

Select the Insurance that you need to make an Exception for

Enter the Billing Doctor Number provided to you by that insurance company

Click Add Exception

 Add exception for a specific CDANet Insurance ✕

John Doe 

Add New Exception:

Insurance:
Billing Doctor Number:

Registered Exceptions:

Now you must configure individually each workstation that will be sending eClaims through TDO

1. See [this article](#) for TDO Version 11
2. See [this article](#) for TDO Version 12

Online URL: <https://kb.tdo4endo.com/article.php?id=824>