

Letters - Patient Statement - customizable template

863 [TDOKB1](#) September 29, 2023 [Site Configuration](#), [TDO software](#) 10.99K

Overview:

TDO4Endo.com Support Materials has a downloadable Word Document that will pull the same information as the internal Print Patient Statement in TDO.

Steps:

Using your Dr's User login, Log into TDO4endo.com

Select Support Materials



TDO PRODUCTS & SERVICES

DOWNLOAD TDO

BUILDS

FAQ

SUPPORT MATERIALS

MEETING LECTURES

LEXICOMP ONLINE

MAILING LISTS

USERS

TESTIMONIAL

EVALUATE US

EMPLOYMENT

PG BIOS

LOG OUT

TDO Support Materials

Customizable Medical History

- [Customizable Medical History](#)
- [Long Medical History Import File](#) *See Medical History document for import instructions
- [Short Medical History Import File](#) *See Medical History document for import instructions
- [ADA Health History Import File](#) *See Medical History document for import instructions
- [Covid 19 Import File v11](#) *See Medical History document for import instructions
- [Covid 19 Import File v12](#) *See Medical History document for import instructions
- [Covid 19 Preview](#) *This document shows a preview of the questions include in the Covid 19 Import File v11/v12

Letter Module Final Report Templates

- [1 Image Only](#)
- [6 Image Report](#)
- [Consult - Extraction](#)
- [Consult - No Treatment Needed](#)
- [Consult - Treatment Needed](#)
- [Final Report - 2 Pics](#)
- [Final Report - 3 Pics](#)
- [GentleWave Final Report](#)
- [Interim Treatment](#)
- [Recall Report](#)

Letter Module Financial Templates

- [Patient Financial Statement](#)
- [Patient Financial Statement - Date Range](#)
- [Walk Out Slip](#)

Letter HIPAA Templates

- [HIPAA Release of Information Authorization Form](#)

Letter Module Financial Templates

Patient Financial Statement- will run for lifetime of the patient

Patient Financial Statement Date Range- will allow you to specify which date range will show

Select which letter you would like to use, and download the letter

You may need to enable editing in order to Save the Document.

The screenshot shows a Microsoft Word document titled "PatientFinancialStatementDateRange (2) (Protected View) - Word". The document is in Protected View, with a yellow bar at the top stating "PROTECTED VIEW Be careful—Files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View." and an "Enable Editing" button.

The document content includes the following fields and sections:

- Header fields: <<Doctor Name Long>>, <<Practice Name>>, <<Practice Address>> <<Practice Address 2>>, <<Practice City>>, <<Practice State>> <<Practice Zip>>, Phone: <<Practice Phone>>, Fax: <<Practice Fax>>.
- System fields: <<System Long Date>>, Account Number: <<IDNum>>.
- Section Header: **Statement of Account**.
- Patient Information: <<PatientFirst>> <<PatientLast>>, <<PatientStreet>> <<PatientStreet2>>, <<PatientCity>>, <<PatientState>> <<PatientZip>>.
- Ledger Section: <<LedgerRptTransactionsDateRange>><<Format:>>
- Table:

<<LedgerRptTransactionsDateRange>>						
Date	Tooth	Description	Claim #	Charges	Credit	Running Balance
<<ItemDate>>	<<Tooth>>	<<Description>>	<<Claim#>>	<<Charges>>	<<Credit>>	<<Running Balance>>

>>

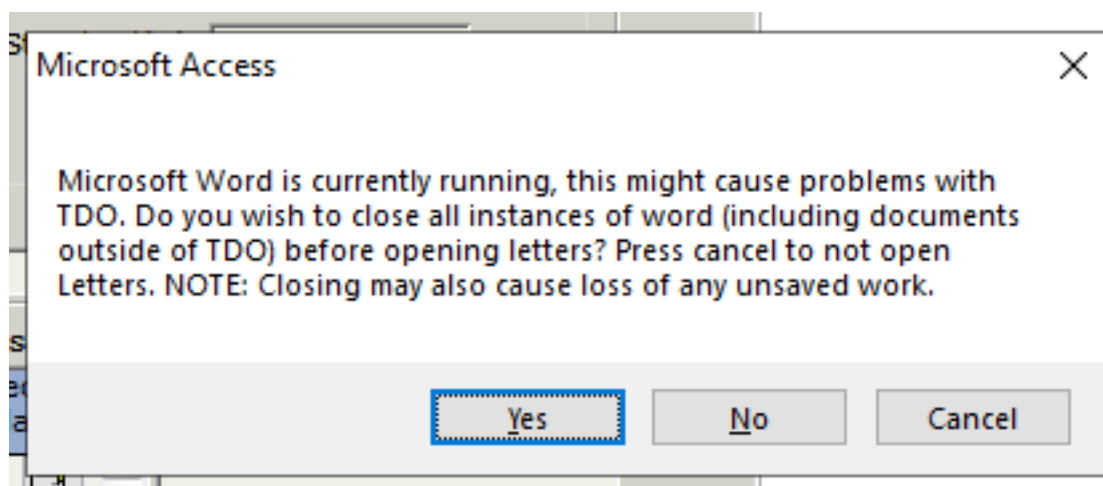
Account Summary

Total Debits: Total Credits:

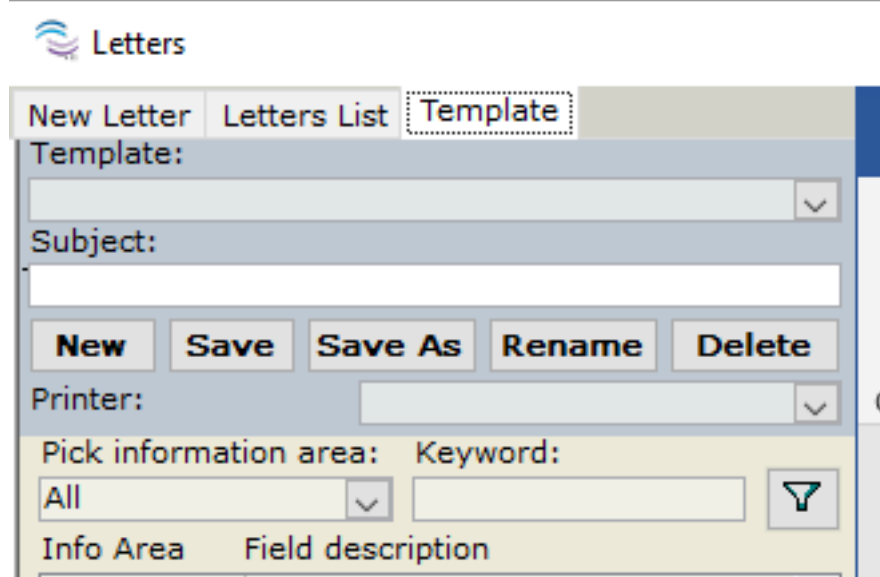
Page 1 of 2 158 words

Open your Letters Module in TDO

You may be prompted with a message that Microsoft Word is already running it will need to close the other instance or Word to open Letters



Select Template in letters



Open your Saved word Document either:

Patient Financial Statement

Patient Financial Statement Date Range

Copy the entire Document (ctrl – A, then ctrl-C) and Paste (ctrl-V) into Letters Template.

Select "Save As"

The screenshot shows the 'Letters' application interface. At the top, there are three tabs: 'New Letter', 'Letters List', and 'Template'. The 'Template' tab is currently selected. Below the tabs, there is a 'Template:' label followed by a dropdown menu. Below that is a 'Subject:' label followed by a text input field. A row of five buttons is displayed: 'New', 'Save', 'Save As' (highlighted in yellow), 'Rename', and 'Delete'. Below the buttons is a 'Printer:' label followed by a dropdown menu. At the bottom, there is a section titled 'Pick information area: Keyword:' with a dropdown menu showing 'All' and a text input field. To the right of this is a funnel icon. Below this section is a table with two columns: 'Info Area' and 'Field description'.

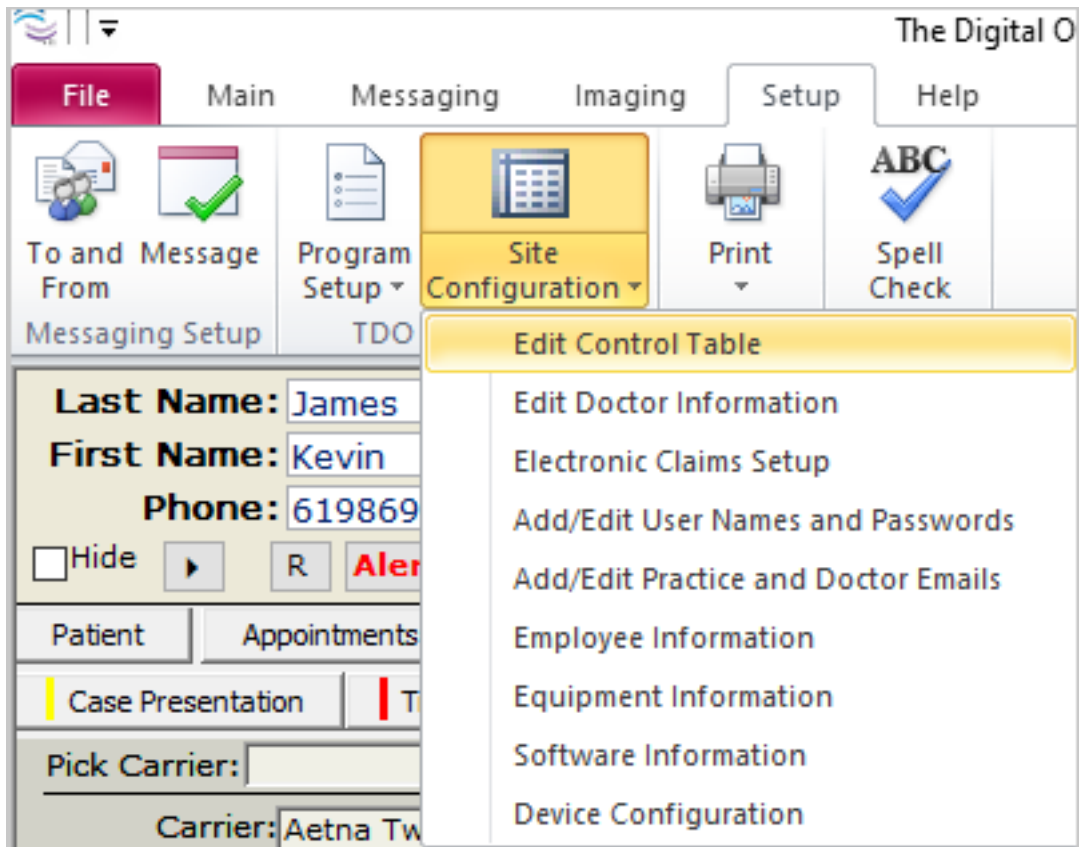
Name the New template

You can now open the template as its own letter to print or email to patients

Making Letter Statement the default path

Steps:

Open the Edit Control Table



Application Settings > Letters Module Properties> Reports

Control Table Information

Practice Information Application Settings Network Settings Workstation Settings

Video Files Location

Video Path:

SATDOVideo

Tooth entries in the appointment history

☐ Show Tooth Entries

Action on mark appointment

as Cancelled / No Show / Rescheduled:

Move appointments



to column: Cancel/Rec



Letter Module Properties

Letters Editor: MS Word



Reports...

Letters Format: MS Word (DocX)

☒ Send PDF

SOAP NoteTmpt: * About Us

☐ Attach original image on email

Email Rpt to Authorized Dr Setup

PDF Email Setup

Email Rpt to Authorized Pat. Setup

Automatic Financial Tickler

Insurance Auto Fin. Tickler Delay (days): 0

Non-Insurance Auto Fin. Tickler Delay (days): 0

☒ 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: UNITED STATES

☐ Disable State Autofill☐ General Dentist

Insurance Form:

US ADA

Medical History

Type: ADA 1993/TDO 8.0

Lang. Short

Med Hist: English

Med Hist:

English

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

Diagnosis Form

Default Form Size: Short Diagnosis Form

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:

24 Hours

☐ Display SSN and DOB on
Ledger and Statement☒ Show Patient\Ref Dr Pwds

Google Accounts - Calendar Sync

ERX ID Setup

Close

Integrated Devices

Reports-Letters Map
×

Report	Letter
☐ 2-Postop Referral Medium	☐
☐ 2-Postop Referral Small	☐
☐ 6 Image Report	☐
☐ Consult Referral Medium	☐
☐ Consult Referral Small	☐
☐ Interim Report Medium	☐
☐ Interim Report Small	☐
☐ Large Diagnostic	☐
☒ Patient's Statement	☒ Patient Statement 1
☐ Postop Referral Medium	☒ * Basic 3 Image Referral Report
☐ Postop Referral Small	☐ Kevinn Test
☐ Preop and Postop Referral Medium	☒ cherylcheryl

In the same row as Patients Statements in the “Letters” Column find your recently made Patient Statement Letter.

Make sure the bubble is clicked for Letter

With this Option when you Click on Print Statement in the Ledger, Letter will open you newly made Letter’s Template.

Patient	Appointments	Fees	Ledger	Insurance	Medical History Summary	Pain History	Pain	Full Mouth Probing	Multi Tooth Info	Diagnosis
Case Presentation	Treatment	Final Report	Notes to Front	Letters	Prescriptions	Recall	Notes	Surgical Diagnosis	Surgical Treatment	Eval

Filter Doctor: (All)
Filter Location: (All)
Patient: James, Kevin
Guarantor: Testing Teester
Patient has double coverage

☐ Sent to Collections
☒ Interest
☐ Hide Voided Transactions
☐ On Payment Plan

Fin. Tickler
Credit Adj
Debit Adj
Print Ledger
Print Statement
Void Transaction
Enter Stmt Sent
Ledger Note
Edit Notes
Receive Ins. Pmt.
Receive Payment

Online URL: <https://kb.tdo4endo.com/article.php?id=863>