Letters - Patient Statement - customizable template

863 TDOKB1 September 29, 2023 Site Configuration, TDO software 12.43K

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



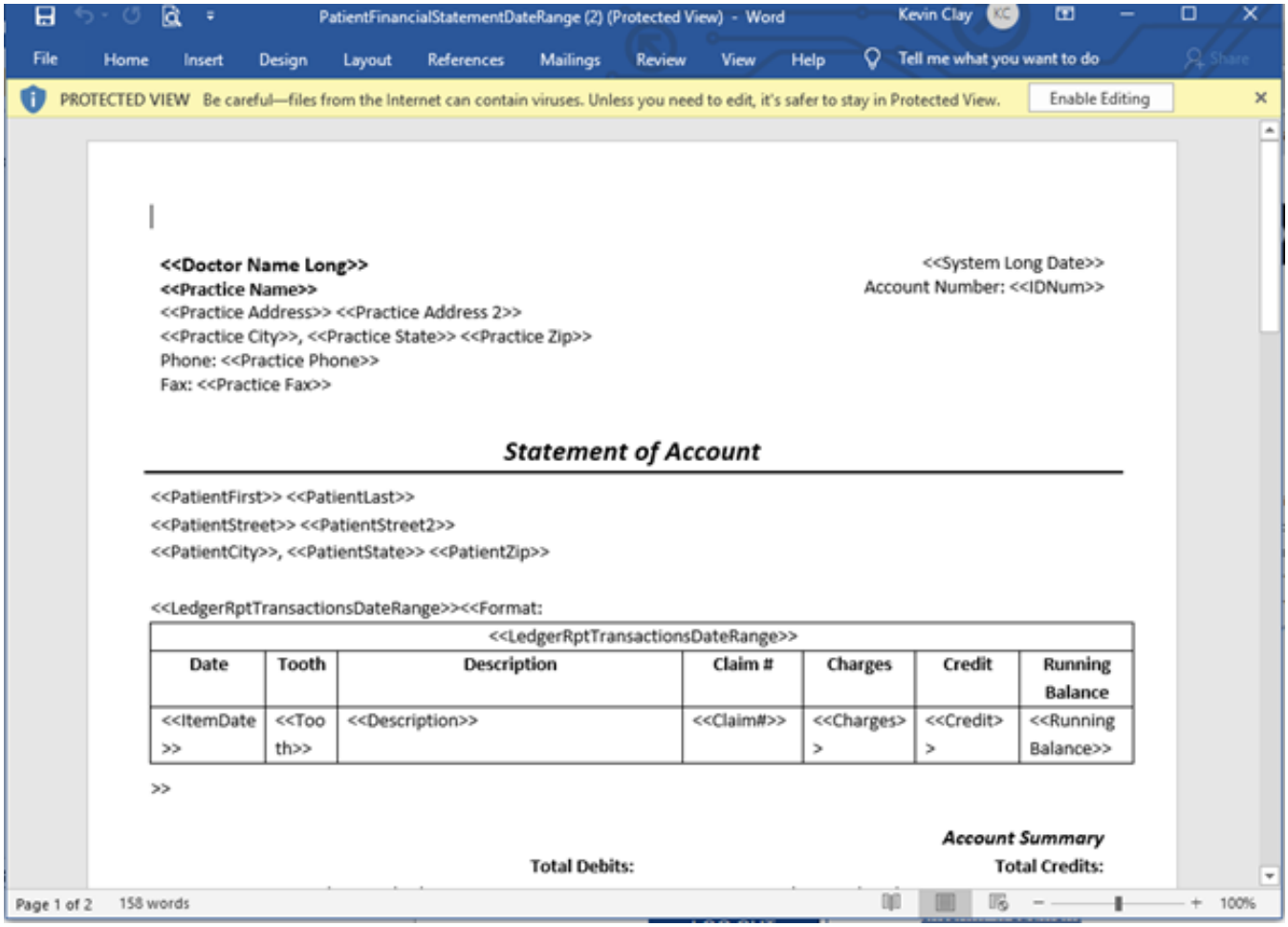
Letter Module Financial Templates

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

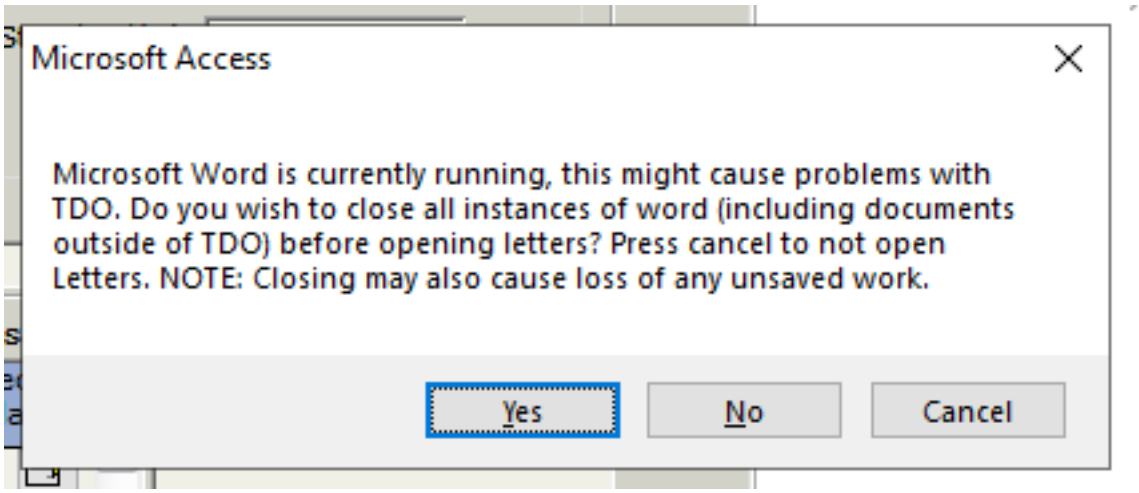
Select which letter you would like to use, and download the letter

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

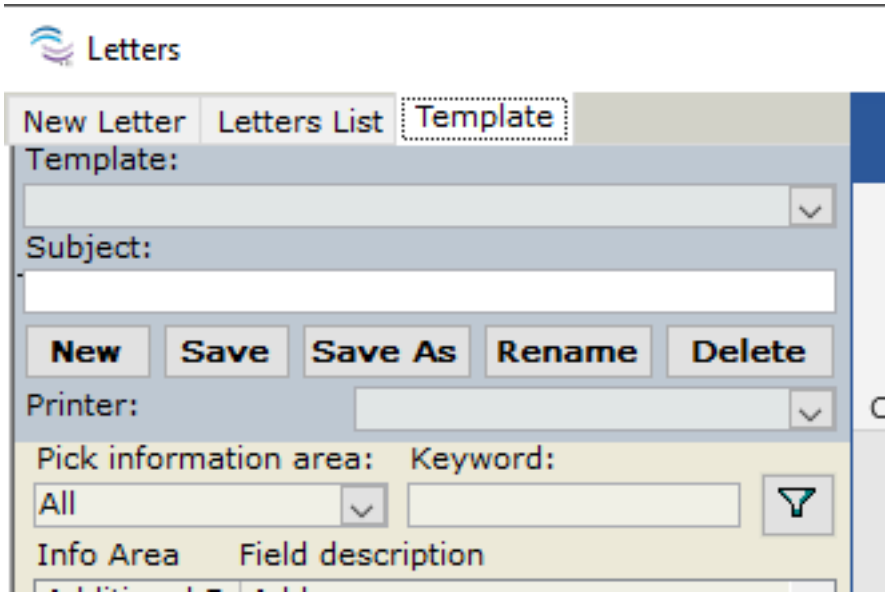


Open your Letters Module in TDO

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



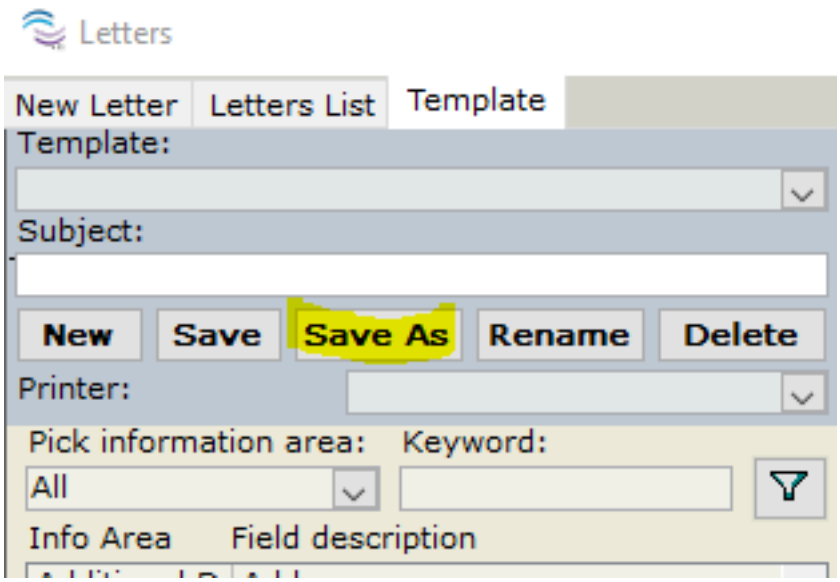
Open your Saved word Document either:

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”



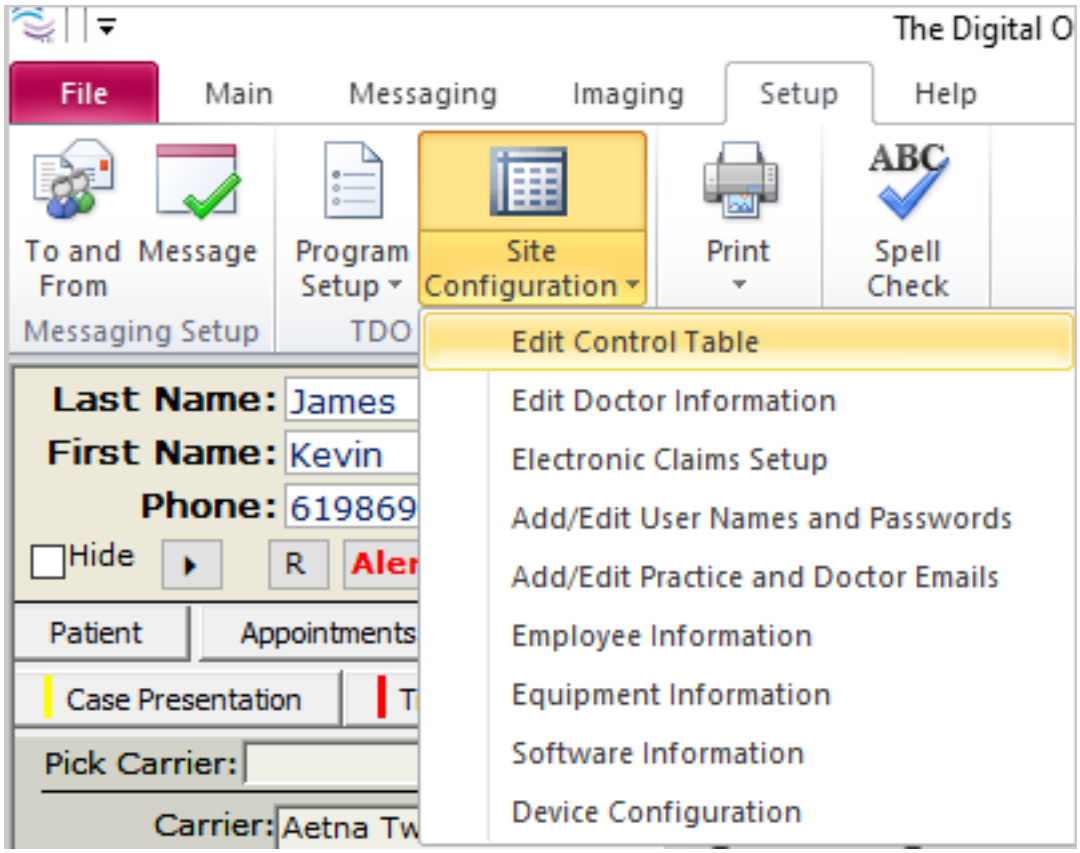
Name the New template

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

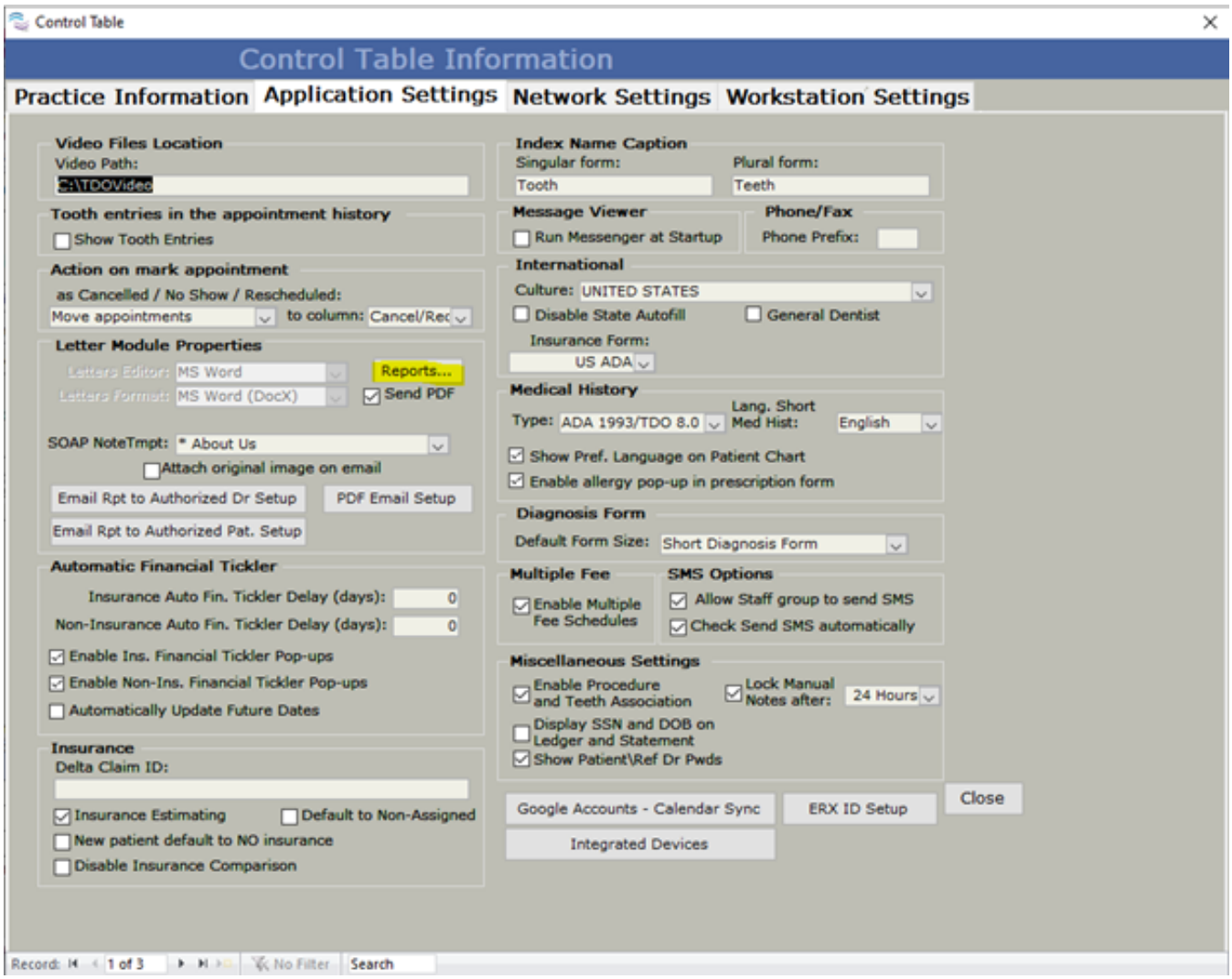
Making Letter Statement the default path

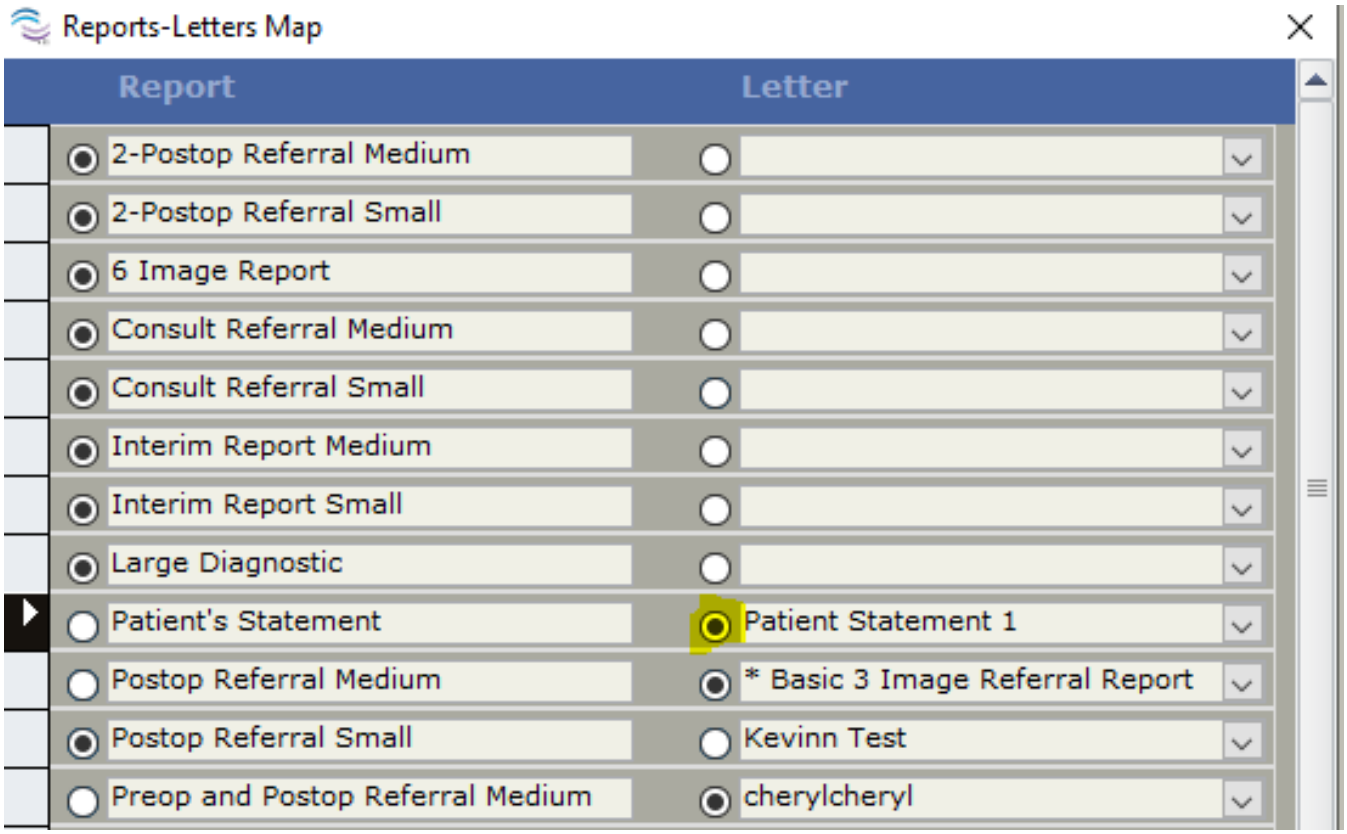
Steps:

Open the Edit Control Table



Application Settings > Letters Module Properties> Reports

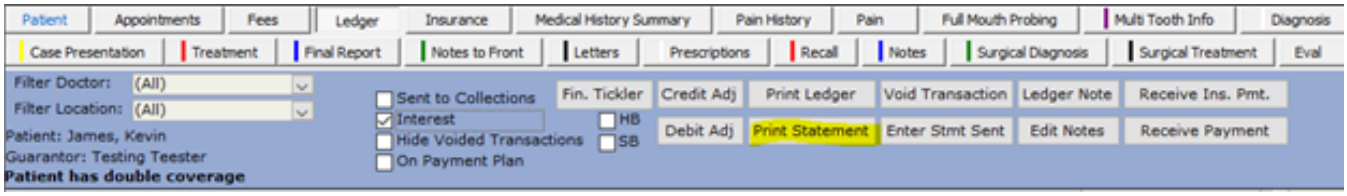

Control Table
Control Table Information
Practice Information
Application Settings
Network Settings
Workstation Settings
Video Files Location
Video Path:
C:\TDO\Video
Tooth entries in the appointment history
Show Tooth Entries
Action on mark appointment
as Cancelled / No Show / Rescheduled:
Move appointments
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
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
Record:
1 of 3
No Filter
Search



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.



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