

Infograbber - importing patient insurance information into TDO

880 [TDOKB2](#) September 29, 2023 [TDO software](#) 5.46K

Overview

TDO's Infograbber allows patient insurance information to be imported into the patient's Insurance tab in TDO. This article will go over how to do so.

Detailed Instructions

First, we need the patient to complete the Insurance Card from the Infograbber. When selecting which forms the patient will complete, make sure the Insurance Card box is checked. Otherwise, the patient will not be prompted to supply their insurance info. Shown below is where that option is for both the Infograbber program and the web Infograbber respectively.

Select Patient

Filter

Last Name:
kronii

First Name:

Preferred Language:
English

Last Name	First Name	MI	Patient Id	
Kronii	Ouro		120382	

Modules to Display

☒ Select All

☒ Patient Registration

☒ Insurance Card Info

☒ Medical History

☒ Pain History

☐ Treatment Questionnaire

Consent Forms:

This is new
Kevin is Ok
Cheryl is Cool
Min Sedation temp fix
Min Sedation

Left click your mouse above to unselect/select consent forms

Ok

Cancel

Once the patient gets to the Insurance Card screen, they will be prompted to enter their insurance information. Below is what the screen looks like for both the Infograbber program and the web Infograbber respectively.

TDO InfoGrabber 2.0 - Ouro Kronii (ID# 120382) - [Insurance Card]

File

Insurance Company:

Just in Time Insurance

Address:

5678 Clock Blvd

City, State, Zip:

San Diego

CA

92121

Primary Card:

☒

Subscriber

First Name:

Ouro

MI:

☐

DOB:

3/14/1994

Last Name:

Kronii

Group #:

123456

Gender:

☐ M ☒ F ☐ O ☐ D

Subscriber SSN/ID #:

12369420

Employer:

Time Variance Authority

Address:

9876 Sacred Timeline Way

City, State, Zip:

San Diego

CA

92121

Phone:

8585583696

Finish



QUALITY-CENTERED
ENDODONTICS

Insurance Company:

Just in Time Insurance

Street Address:

5678 Clock Blvd

City:

San Diego

State/Providence:

California

Zip/Postal Code:

92121

☒ Primary

Subscriber

First Name:

Ouro

MI:

Last Name:

Kronii

Gender:

☐ Male ☒ Female ☐ Other ☐ Declined

Birth Date:

3/14/1994

(m/d/yyyy)

Group Number

123456

SS/ID#:

12369420

Street Address:

9876 Sacred Timeline Way

Have the patient complete the Infograbber as normal.

Importing into TDO

After the patient has completed their Infograbber, we can go to the patient's Insurance tab in TDO. Once there, an Insurance Card button will appear near the center of the window, shown below.

The screenshot shows the TDO software interface with the following components:

- Menu Bar:** FILE, Main, Messaging, Imaging, Setup, Help.
- Toolbar:** 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 Section:**
 - Fields for Last Name (Kronii), First Name (Ouro), and Phone (8585583696).
 - Buttons for T1, T2, T3, and a 'Click to Paste' button.
 - Buttons for 'Click to Paste Pre-op 1 Image' and 'Click to Paste Post-op 1 Image'.
- Insurance Tab:**
 - Buttons for Patient, Appointments, Fees, Ledger, Insurance, Medical History Summary, Pain History, Pain, Full Mouth Probing, Multi Tooth Info, and Diagnosis.
 - Buttons for Case Presentation, Treatment, Final Report, Notes to Front, Letters, Prescriptions, Recall, Notes, Surgical Diagnosis, and Surgical Treatment.
 - Buttons for Pick Carrier, Or Profile, No Insurance, View Insurance Company Information, Envelope, Edit Profile, Search Profiles, Coverage Table, and Payment Table.
 - Buttons for Insurance Card (highlighted), RTB, and Hide Voiced Transactions.
- Subscriber Information:**
 - Fields for Carrier, Patient Ins ID, Payer ID, Begin, End, and Group #.
 - Buttons for Relationship to Subscriber (self, spouse, child, other).
 - Fields for First Name, Last Name, MI, Birthdate, SS/ID#, Gender, Address, City, State, Zip, Phone, and Employer.
- Benefits Section:**
 - Fields for Changed Date, Max Benefits, Benefits left, Preventive(A), Standard(B), and Other(C).
- Claims Summary Table:**

Date Sent	Date Rec'd	Amount	Claim Type	Claim #	Type	Assigned / Non-assigned	View Close	Reopen	No Pmt Claim
[Empty row]									

Once selected, a window will pop up with the information that the patient entered in the Infograbber. We can select Yes to import that information.

Note: This will only fill the subscriber information for the patient. You must select the insurance carrier based off the information in the Patient Entered Information window. If you select an existing Insurance Profile, it will overwrite the Employer and Group Number that the patient provided with the information you have on file.

Patient Entered Information



Carrier: Just in Time Insurance

Address:

5678 Clock Blvd

San Diego, CA 92121

Please choose the carrier using the above information.

Subscriber: Kronii,Ouro

Address:

9876 Sacred Timeline Way

San Diego,CA 92121

Phone: 8585583696

Employer: Time Variance Authority

Sub SSN/ID: 12369420

Group No: 123456

DOB: 3/14/1994

Gender: F

Do you wish to overwrite the current information with the information
the patient has entered?

Yes

No

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

Calvin Chang

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 Alerts Leave TDO

Main Data

Last Name: Kronii T1
 First Name: Ouro T2
 Phone: 8585583696 T3

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

Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	Report Date	Location
1	8/31/2021	CARR		0			ONE

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

Pick Carrier: Or Profile: No Insurance View Insurance Company Information Envelope

Carrier: Primary Secondary Next Ins. Co

Patient Ins ID: Edit Profile Search Profiles

Payer ID: Begin: End: Coverage Table Payment Table

Insurance Card

Subscriber: Relationship to Subscriber
☒ self ☐ spouse ☐ child ☐ other:

Subscriber information

First Name: Ouro MI: Birthdate: 3/14/1994
 Last Name: Kronii SS/ID#: 12369420
 Gender: Female
 Address: 9876 Sacred Timeline Way
 City: San Diego State: CA Zip: 92121
 Phone: (858) 558-3696 x
 Employer: Time Variance Authorit Group #: 123456

Benefits

Changed Date: Non-Duplication of Benefits Clause? ☐
 Max Benefits: Benefits left: RTB

Deductible Left

Preventive(A): Standard(B):
 Other(C):

Spoken to:

Summary of all claims submitted for this patient for this insurance company: ☒ Hide Voided Transactions Notes:

Date Sent	Date Rec'd	Amount	Claim Type	Claim #	Type	Assigned / Non-assigned	View Close	Reopen No Pmt Claim
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Record: 1 of 1 No Filter Search

User: Calvin BP: Pulse: Temp: Alert: Ref Dr: (P): Gen Dr: (P): NUM LOCK POWERED BY MICROSOFT ACCESS

Online URL: <https://kb.tdo4endo.com/article.php?id=880>