Infograbber - importing patient insurance information into TDO

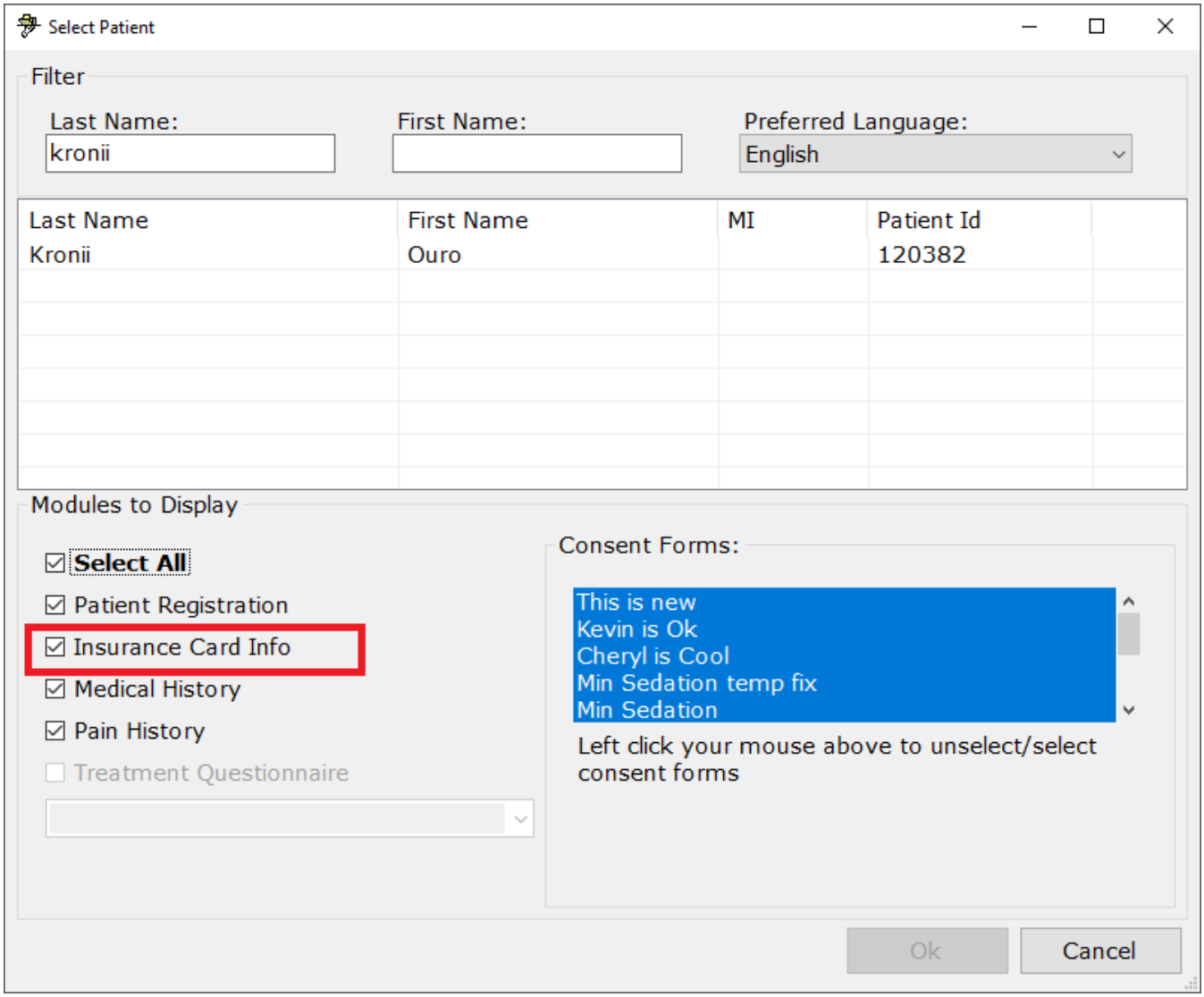
880 TDOKB2 September 29, 2023 TDO software 5.81K

Overview

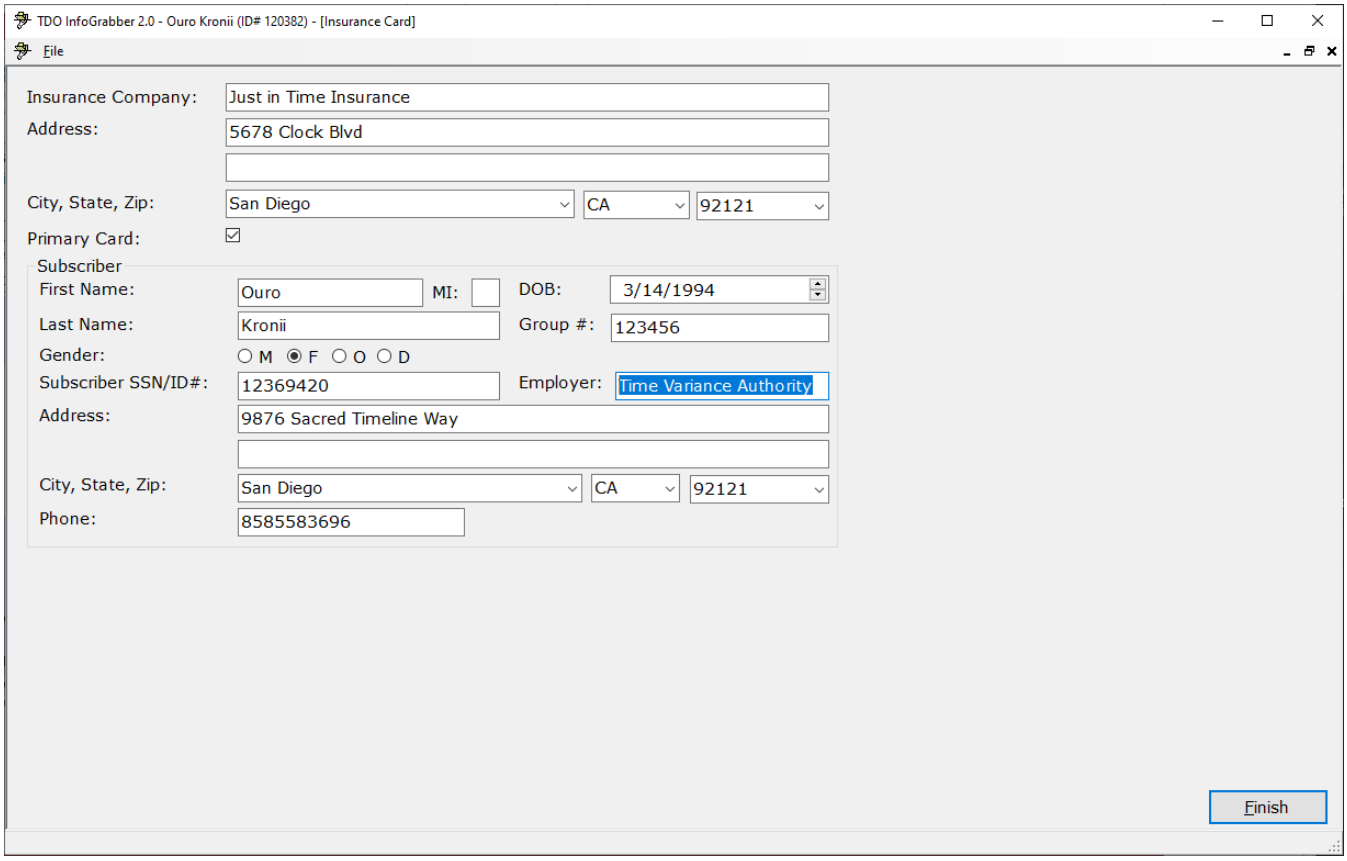
TDO's Infograbber allows patient insurance information to be imported into the patient's Insurance tab in TDO. This article will go over how to do so.

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.



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 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

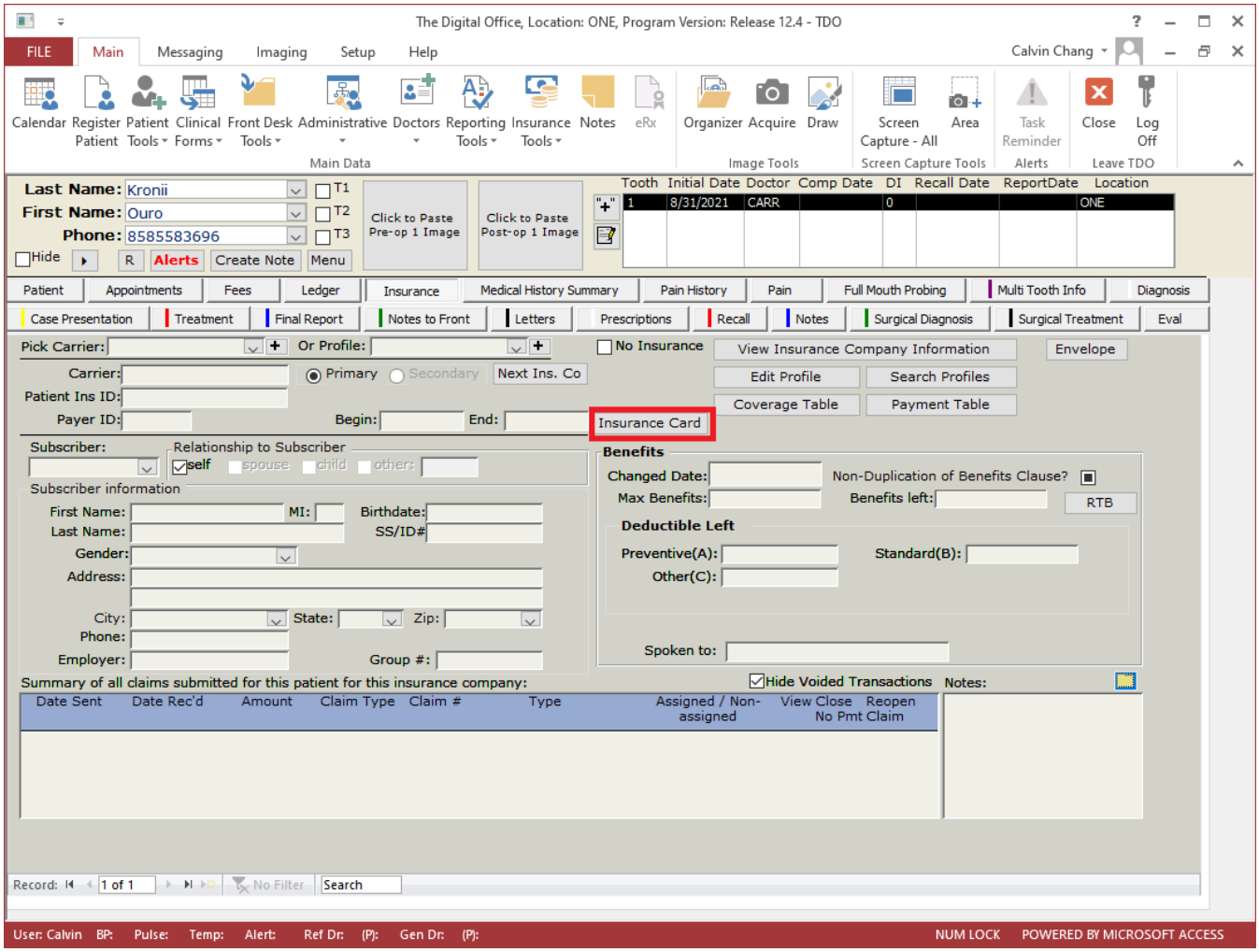
Street Address:

9876 Sacred Timeline Way

Have the patient complete the Infograbber as normal.

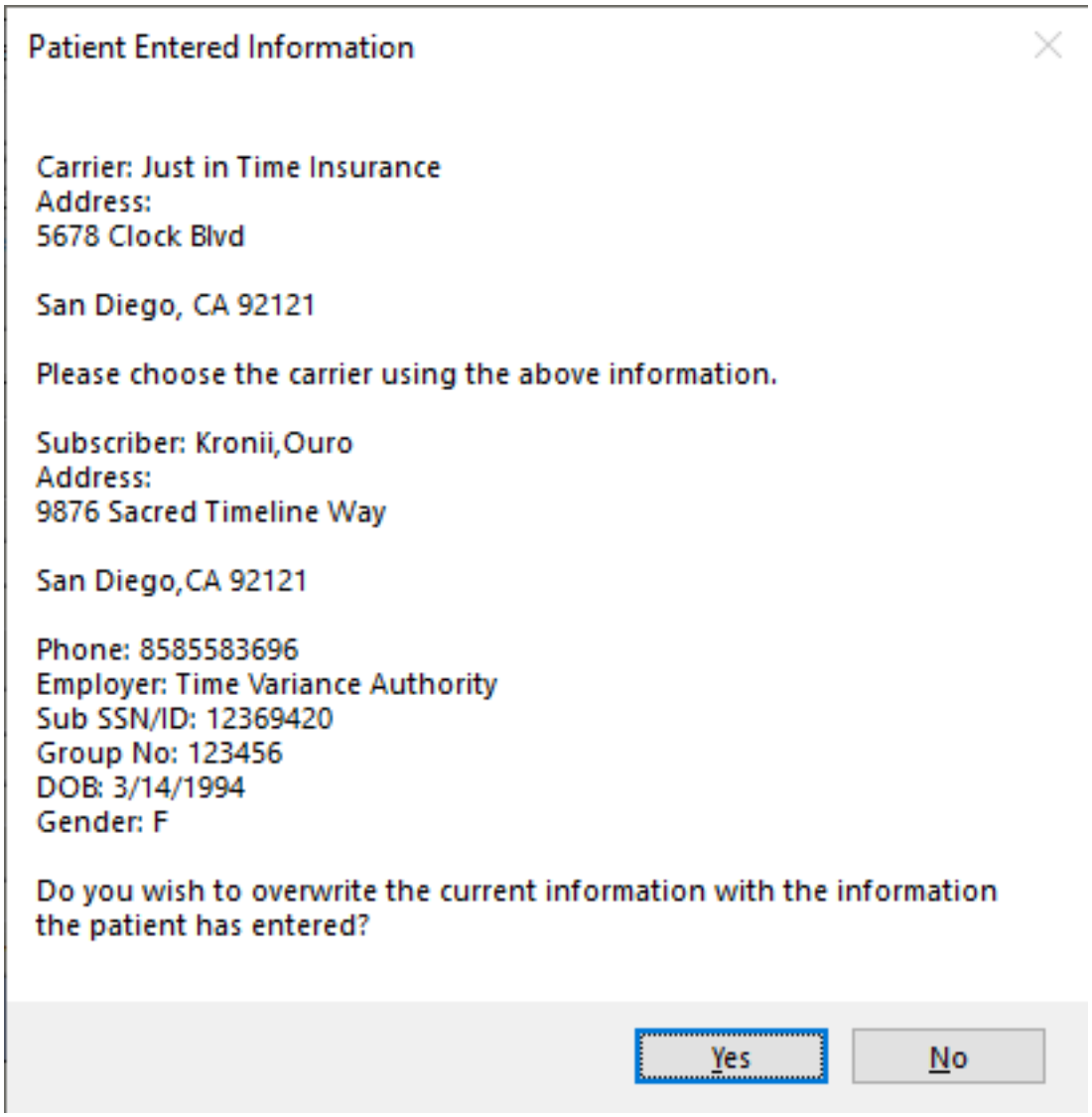
Importing into TDO

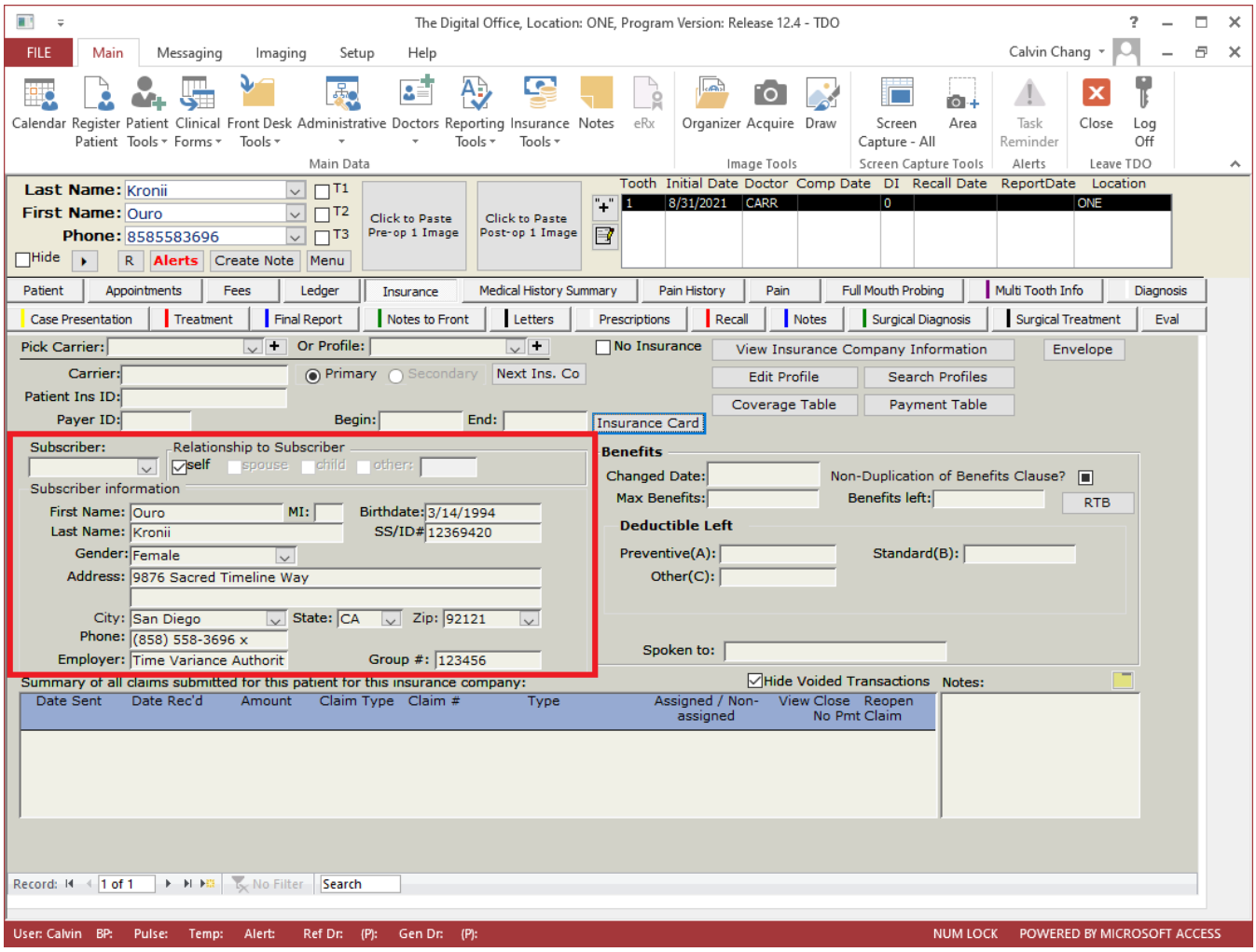
After the patient has completed their Infograbber, we can go to the patient's Insurance tab in TDO. Once there, an Insurance Card button will appear near the center of the window, shown below.



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



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