[v12] Check Out Process

900 TDOKB2 April 29, 2026 Calendar, New User resources, TDO software 13.34K

Overview

TDO has a fast and easy checkout process that is customizable to suit your practice's needs. This article will go over each step in that process, as well as how to customize it.

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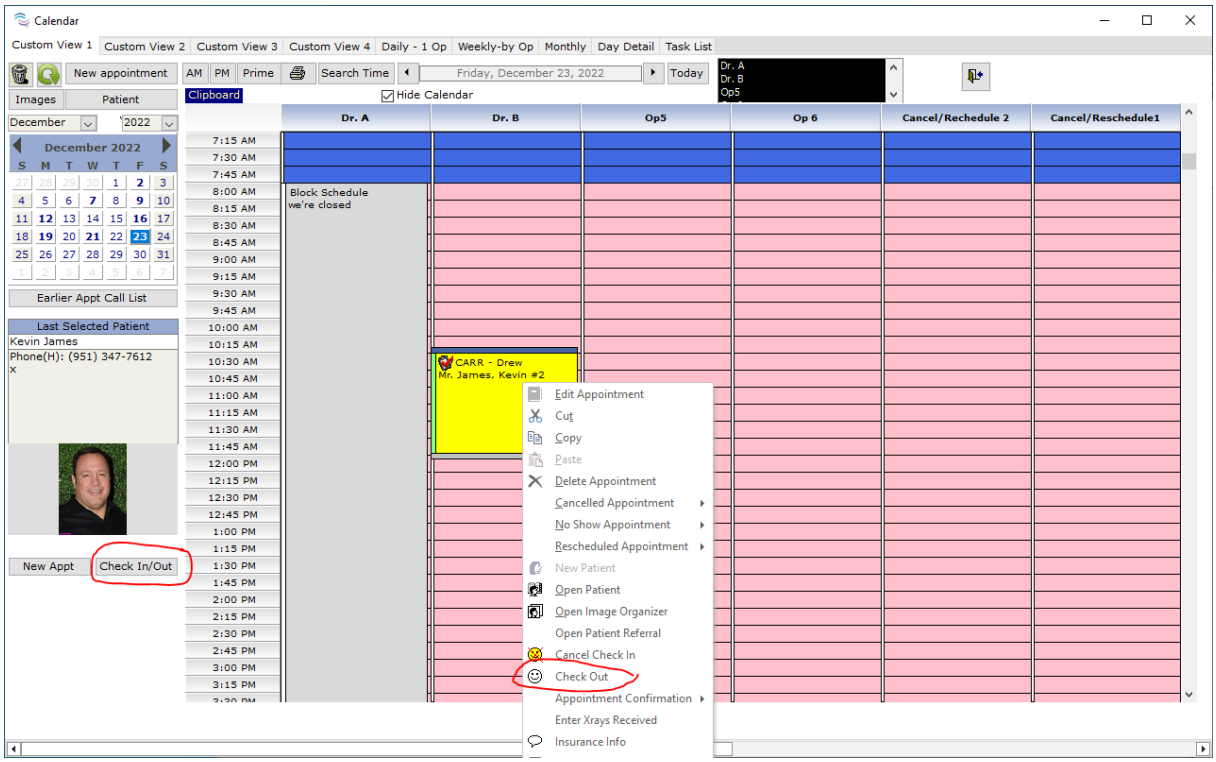
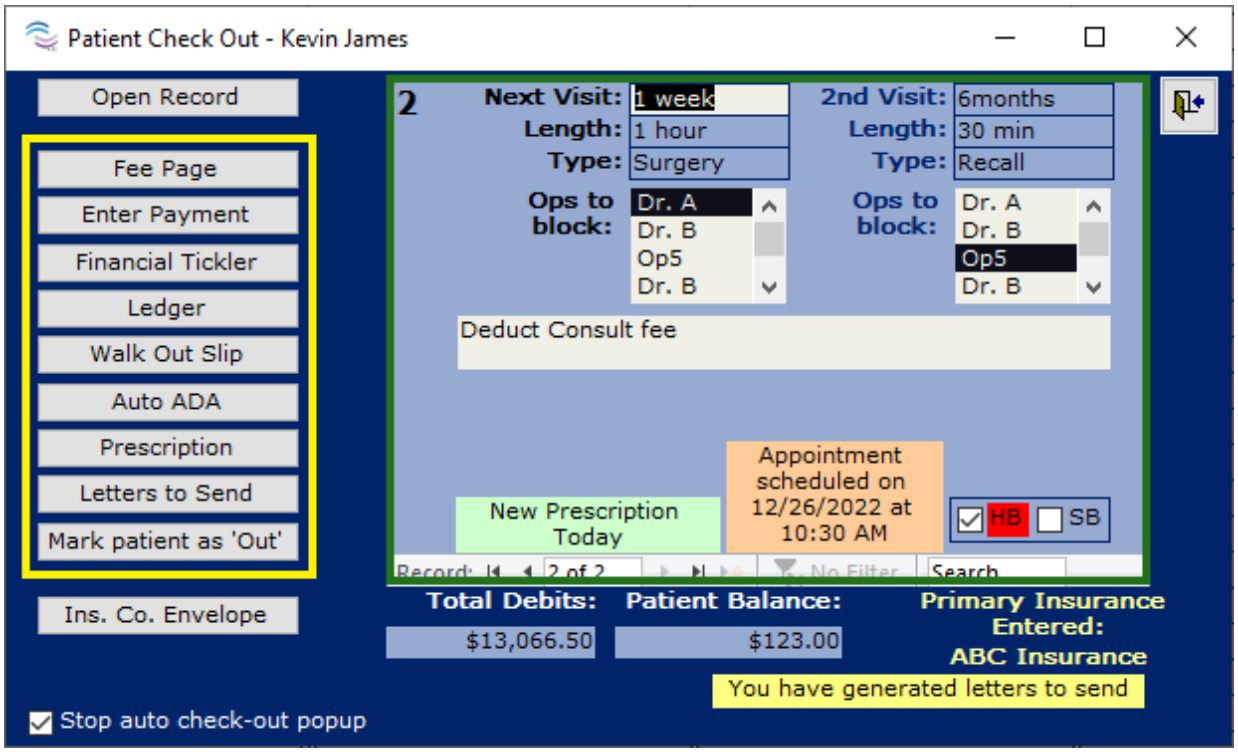
Detailed Instructions

check out', or select the **'check in/out'** button under the patient's profile photo. If you forgot to check in the patient, you will need to do that first. Alternatively, left-clicking a checked-in appointment will begin the process if the checkbox for 'Stop auto check-out popup' is *unchecked.*



From here, you will see a window that looks something like this:



As you can see, a lot of information about the patient is condensed into this window.

All the information inside the Green Box is taken from the **Notes to Front** tab in TDO. Some offices may refer to this as a **"Routing Slip" or "Route Slip"**. This includes information about recommended next steps, as well as any macro notes from the Notes to Front Tab.

- The New Prescription Today box will show if the patient has a prescription waiting to be sent. This information is taken from the Prescriptions Tab, but also shows in the Notes To Front.
- The Appointment Scheduled box will show if the patient already has another appointment scheduled, and when.
- The HB and SB checkboxes are intended to be checked to show that the patient is a 'Hardball' or 'Softball' in reference to how difficult it may be to collect payment from them.

- The Check Out window also shows the patient's **Total Debits**, **Current Balance**, their **Primary Insurance Provider**, if any, and if they have **Letters to Send**.

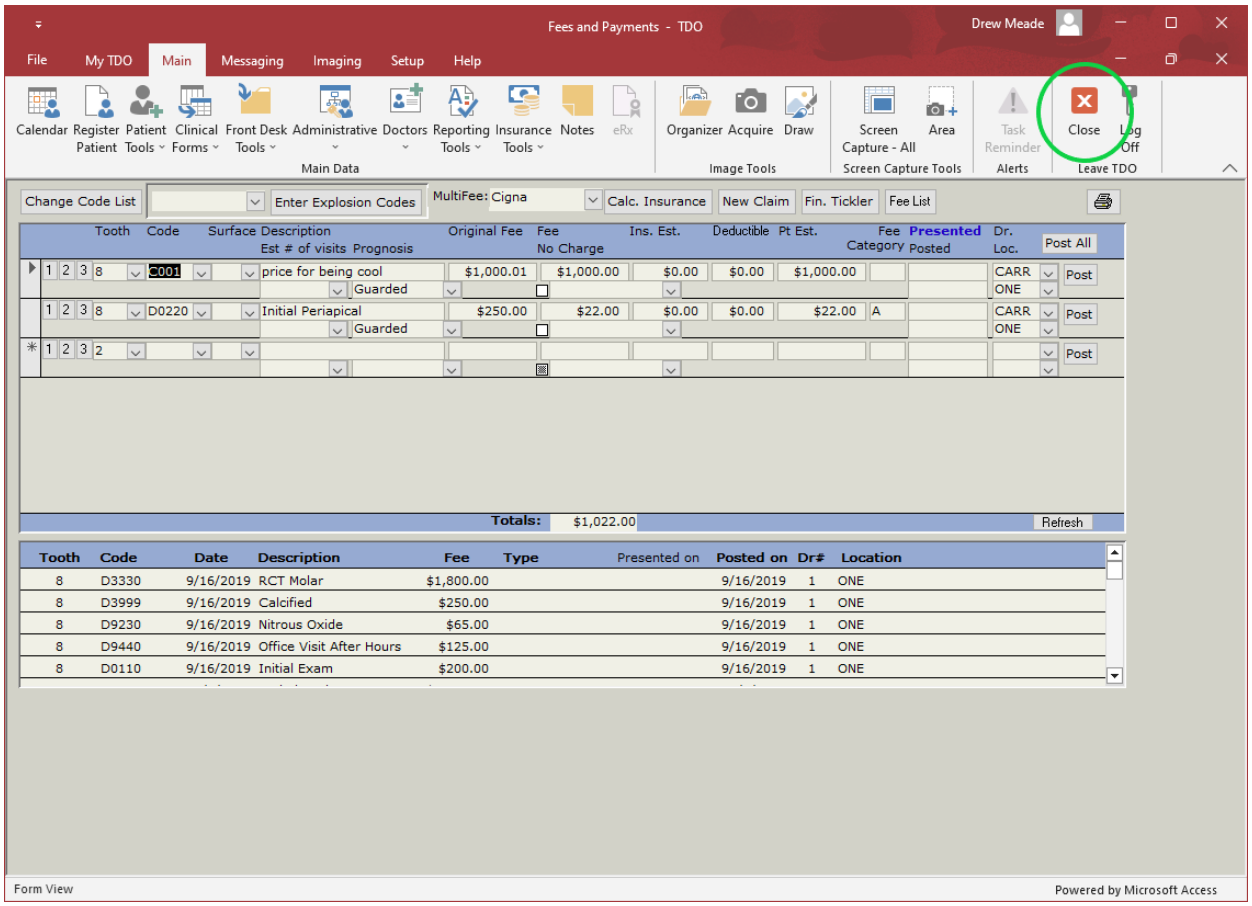
The buttons in the **Yellow Box,** in order, are the steps in your checkout process. Each button can be selected to begin at that point in the process, and they will continue in order until the last step. All these buttons can be **rearranged or removed** from the checkout process. Details on how to do this are listed below.

The Flow of the Checkout Process

Note: Once you begin the checkout process by selecting one of the buttons, each subsequent step will automatically lead to the next, until finished.

Note: If you decide to and interrupt the checkout process do do other things, you should be able to, but the popups may get in your way as TDO attempts to finish the remaining steps. If this becomes an issue for you, we recommend marking the 'Fixed' option for all steps in the Checkout Order Settings, as shown below.

- Here is an example of how the flow process works: If we have begun our checkout process on the fees page, and we close out of the fee page by selecting the red **Close** button, it will immediately open the 'Receive Payment' window. Closing out of the Receive Payment window will immediately open the 'Financial Tickler Calendar' window, and so on. Details about each step in the process can be found below.



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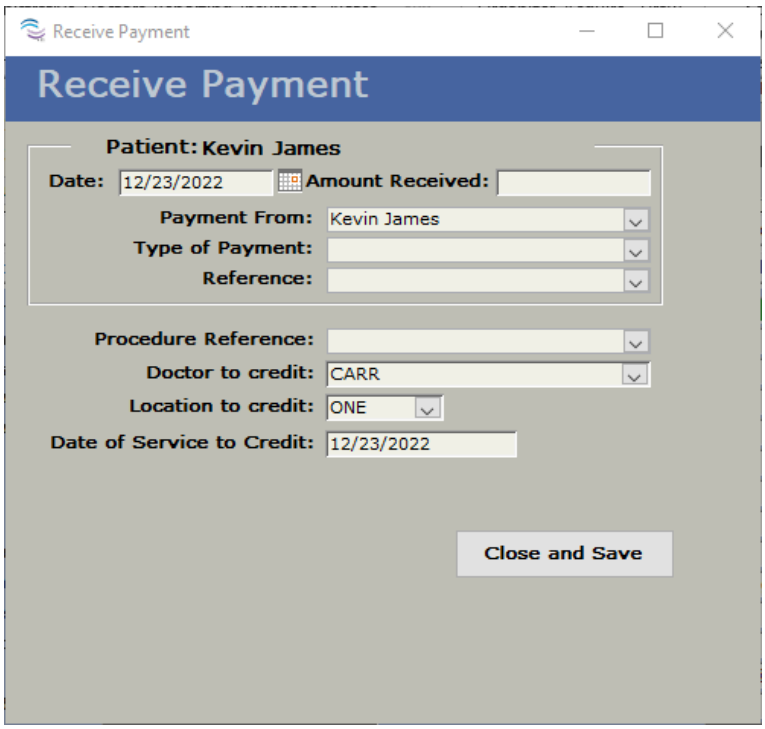

Fee Page

This button opens the Fee Page, just as you would from opening the Fees Page normally. For more

information about the Fee Page, [Click Here]

Enter Payment

This Button will open the 'Receive Payment' Window, just as you would from the Ledger. For more info, see: How to Receive a Payment

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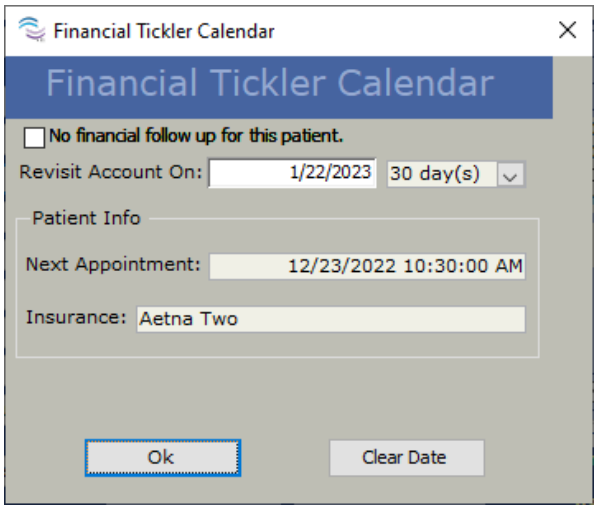
Financial Tickler

This Button will open the Financial Tickler Calendar window, just as you would from the Ledger. If you haven't seen it before, it looks like this:



This Window is intended to set a reminder for you to check on the patient's ledger at a later date. For more information, see: Financial Tickler overview

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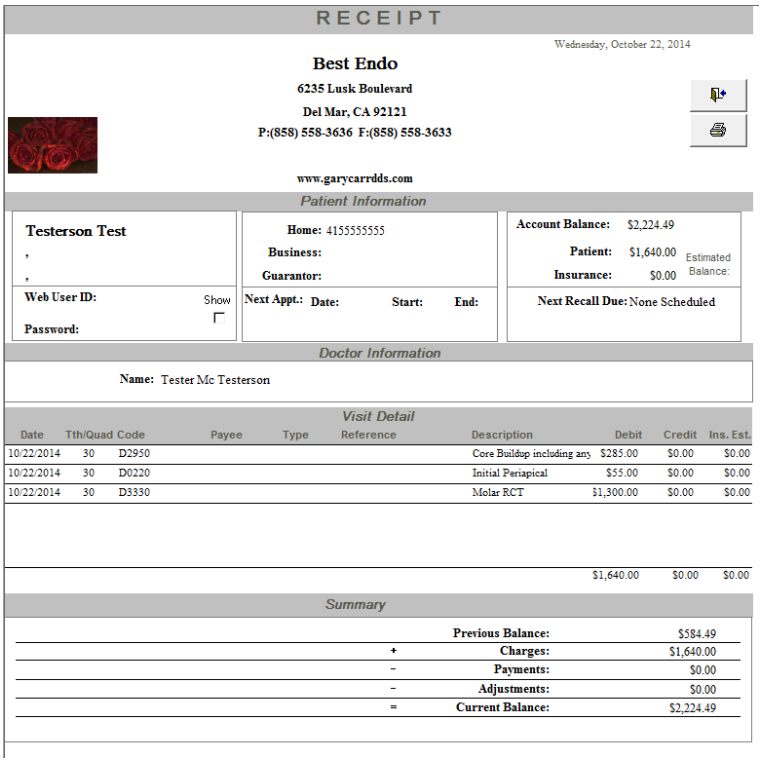
Walk Out Slip

This button will pull up the walkout slip, just as you would from Front Desk Tools -> Walkout Slip. If you haven't seen it before, it looks like this:



RECEIPT

Wednesday, October 22, 2014

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Del Mar, CA 92121
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Patient Information

Testerson Test
,
,
Web User ID: Show
Password:

Home: 4155555555
Business:
Guarantor:
Next Appt.: **Date:** **Start:** **End:**

Account Balance: $2,224.49
Patient: $1,640.00 Estimated Balance:
Insurance: $0.00
Next Recall Due: None Scheduled

Doctor Information

Name: Tester Mc Testerson

Visit Detail

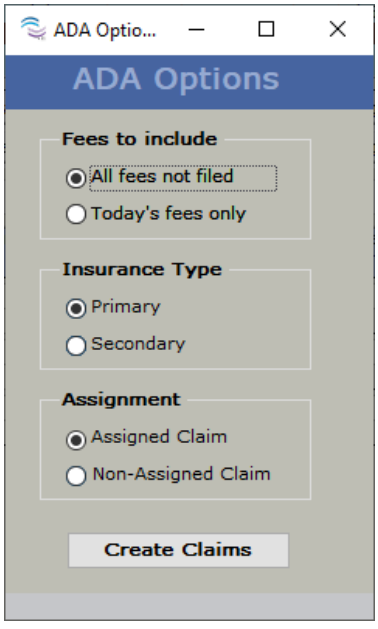
Date	Tth/Quad	Code	Payee	Type	Reference	Description	Debit	Credit	Ins. Est.
10/22/2014	30	D2950				Core Buildup including any	$285.00	$0.00	$0.00
10/22/2014	30	D0220				Initial Periapical	$55.00	$0.00	$0.00
10/22/2014	30	D3330				Molar RCT	$1,300.00	$0.00	$0.00
							$1,640.00	$0.00	$0.00

Summary

	Previous Balance:	$584.49
+	**Charges:**	$1,640.00
-	**Payments:**	$0.00
-	**Adjustments:**	$0.00
=	**Current Balance:**	$2,224.49

Auto ADA

This button will open the ADA Options window. This window is a handy tool to create insurance claims quickly. It looks like this:



Tip: Make sure the fees have been posted before getting to this step, or you won't be able to create a claim.

Prescription

This button will open the Print Preview for the patient's prescription, just as you would by clicking 'Print' in the Prescriptions tab. If they do not have a prescription for today's date, TDO will alert you. For more info on the Prescriptions tab, see: Prescriptions Tab overview.

Letters To Send

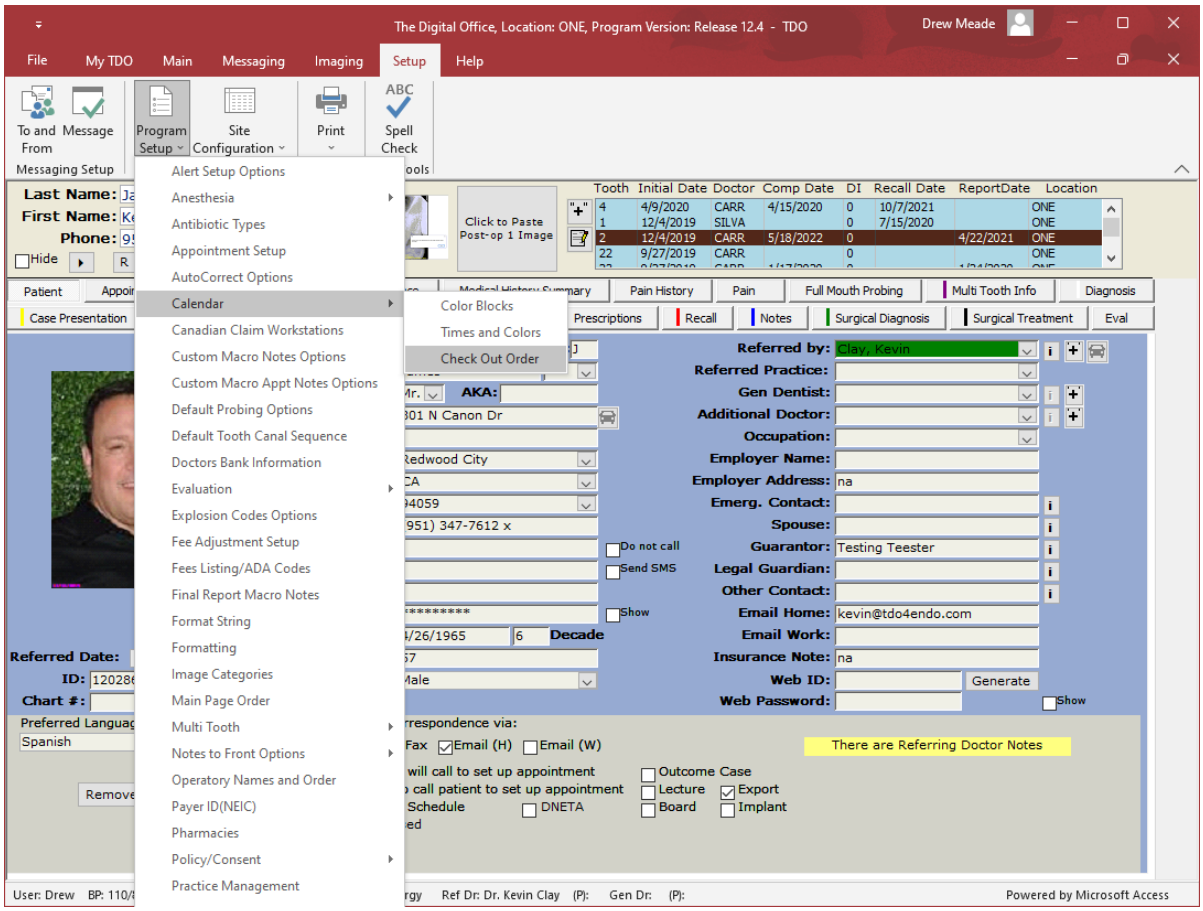
This button will open the Letters Activity window, just as you would by going to: Reporting Tools -> Daily Reports -> Letters to Send. If the patient does not have any, the window will still open, but it will be blank. From this window, you can generate or delete unsent letters, as well as send them.

Marking the Patient as 'Out'

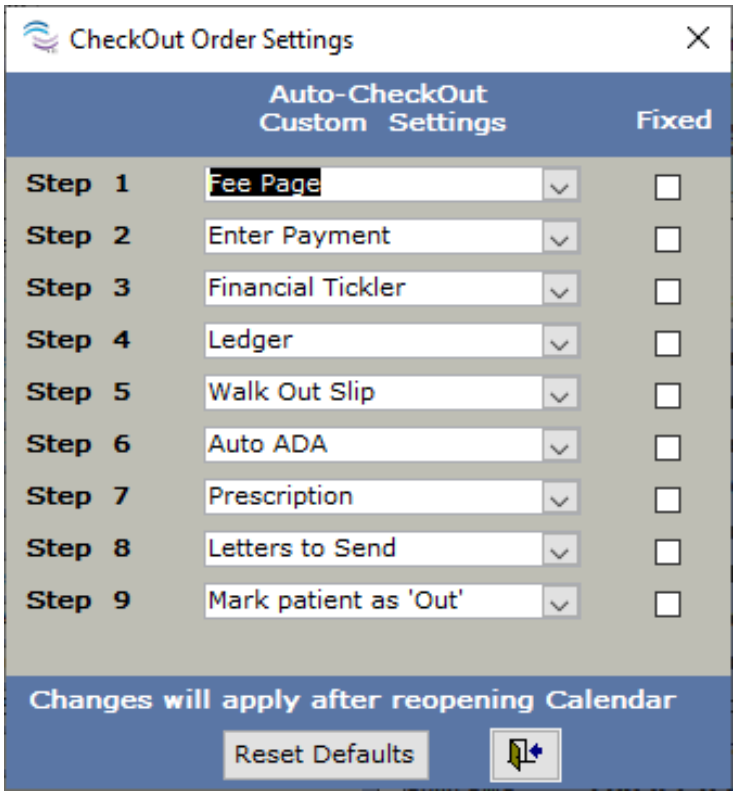
Last but not least, you can mark a patient as 'checked out' from the checkout window. This button will also affect the appointment on your calendar, typically by changing the color to whatever you have set in Setup -> Program Setup -> Appointment Setup. This will happen automatically when you finish your checkout process unless the option is marked 'Fixed' in the Check Out Order Settings, as detailed below.

Customizing the Checkout Window

To customize the order of the buttons in the checkout process, navigate to the Checkout Order Settings from: Setup -> Program Setup -> Calendar -> Check out Order.



The window looks like this:



From here, you can customize the order of each of the steps of the checkout process. The 'Fixed' option,

if selected for a button, will re-open the Patient Check Out window in between steps. You might want to do this for the 'Mark Patient as 'Out'' button, so they are not marked out preemptively if you finish the checkout process before they have actually left.

Online URL: https://kb.tdo4endo.com/article.php?id=900