

Referring Dr Portal

911 [TDOKB1](#) September 16, 2025 [Cloud Ribbon Menu](#), [TDO software](#) 7.33K

Overview

TDO allows referring doctors to use a portal to receive patient care updates, view images and reports, and make referrals for new and existing patients.

Detailed Instructions

Web ID and Password

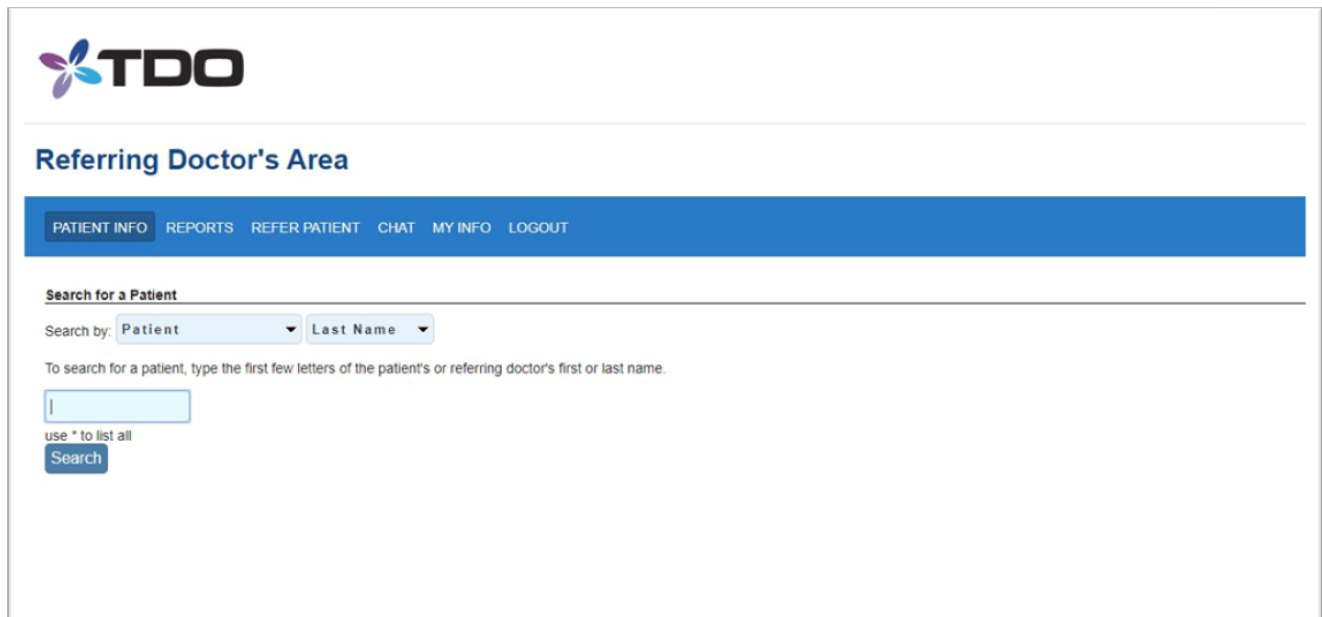
In order to access patient reports and images you will need a Web ID and password. Initially, you will be required to create a new password.

You will see the following page - Click on Forgot your login information

Enter the email address linked to your account. This is the email address we currently use to send you email correspondence. You will then receive an email with instructions as to how to reset your password. If you are in a larger practice with multiple referrers you may wish to co-ordinate these details with your practice manager or administration staff.

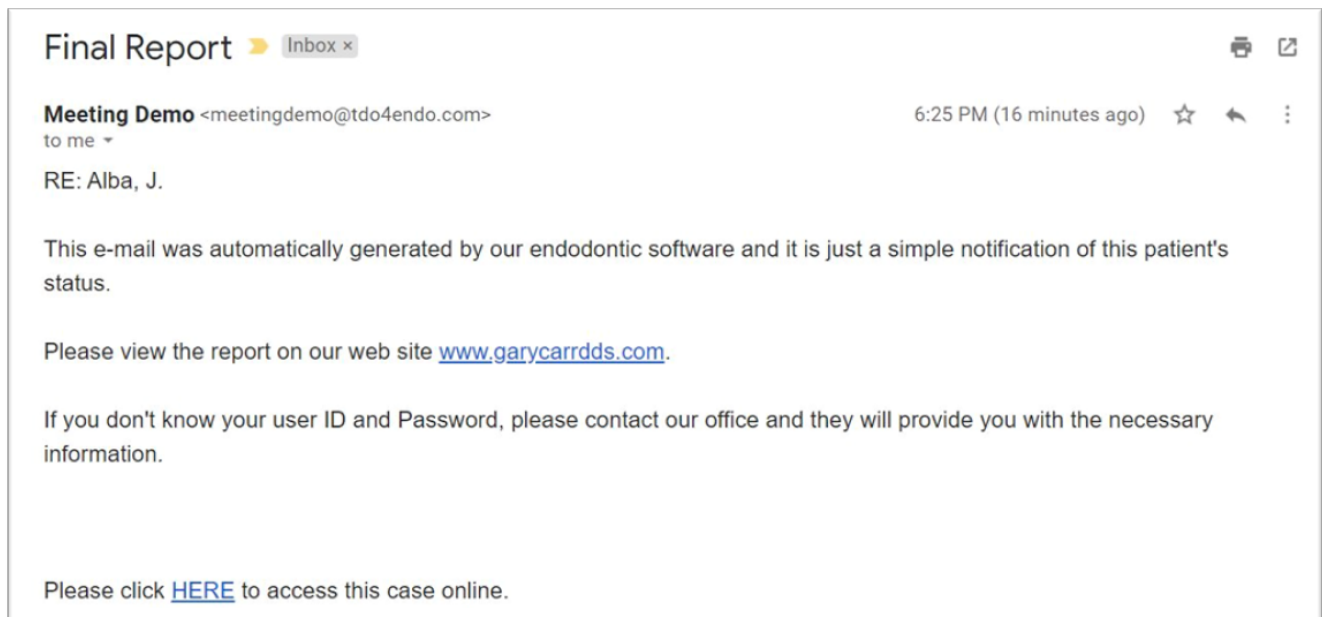
Your Portal

Once accessed, you can search up your referred patients.



The screenshot shows the 'Referring Doctor's Area' of the TDO website. At the top is the TDO logo. Below it is a navigation bar with links: PATIENT INFO, REPORTS, REFER PATIENT, CHAT, MY INFO, and LOGOUT. The main section is titled 'Search for a Patient'. It features a 'Search by:' dropdown menu with 'Patient' and 'Last Name' options. Below this is a text input field with a placeholder 'I'. A note states: 'To search for a patient, type the first few letters of the patient's or referring doctor's first or last name.' There is a 'Search' button and a hint 'use * to list all'.

When a report has been completed for a patient, an email with a link to that report. Click on the link in the email, enter your login details, and you will go directly to that report.



The screenshot shows an email titled 'Final Report' with a yellow envelope icon and an 'Inbox' label. The sender is 'Meeting Demo <meetingdemo@tdo4endo.com>' and the recipient is 'to me'. The email is dated '6:25 PM (16 minutes ago)'. The subject line is 'RE: Alba, J.'. The body of the email states: 'This e-mail was automatically generated by our endodontic software and it is just a simple notification of this patient's status. Please view the report on our web site www.garycarrdds.com. If you don't know your user ID and Password, please contact our office and they will provide you with the necessary information. Please click [HERE](#) to access this case online.'

Online Referrals

Referrals can be made securely via the website portal in the area “Refer patient”

You may choose to refer an existing patient or a new patient. You can also choose which Doctor you would like to refer to. The site will guide you through the process and you have the option of uploading relevant images to the referral. You can also download a summary of the referral detail to include in your own records.

Referring Doctor's Area

[PATIENT INFO](#)[REPORTS](#)[REFER PATIENT](#)[CHAT](#)[MY INFO](#)[LOGOUT](#)[REFER EXISTING PATIENT](#)[REFER NEW PATIENT](#)[VIEW PAST REFERRALS](#)

Refer To:

First Available

Existing Patients:

Office Location:

☒ Dr. Carr and Silva
62355555 Lusk Blvd
San Diego CA
92121

☐ practice title
123 second location
Sann Diegoo CA
92120

Referring Doctor's Area

PATIENT INFO REPORTS **REFER PATIENT** CHAT MY INFO LOGOUT

REFER EXISTING PATIENT **REFER NEW PATIENT** VIEW PAST REFERRALS

Refer To:

First Available ▼

Office Location:

☒ Dr. Carr and Silva
62355555 Lusk Blvd
San Diego CA
92121

☐ practice title
123 second location
Sann Diegoo CA
92120

Patient

First Name:

Last Name:

MI:

Birth Date:

m/d/yyyy

Patient Address

Street:

City:

State/Province:

Zip/Postal Code:

Patient Phone

Home:

Mobile:

Work:

Fax:

Patient Email

Home:

Work:

Teeth Needing Treatment															
☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11	☐ 12	☐ 13	☐ 14	☐ 15	☐ 16
☐ 32	☐ 31	☐ 30	☐ 29	☐ 28	☐ 27	☐ 26	☐ 25	☐ 24	☐ 23	☐ 22	☐ 21	☐ 20	☐ 19	☐ 18	☐ 17

Teeth Needing Evaluation															
☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11	☐ 12	☐ 13	☐ 14	☐ 15	☐ 16
☐ 32	☐ 31	☐ 30	☐ 29	☐ 28	☐ 27	☐ 26	☐ 25	☐ 24	☐ 23	☐ 22	☐ 21	☐ 20	☐ 19	☐ 18	☐ 17

Scheduling

☐ Patient will call☐ Please contact patient☐ Patient has appointment scheduled

Special Consideration

☐ Patient needs premed antibiotic ☐ Patient needs anti-anxiety meds ☐ Patient requires transportation☐ Patient is non-ambulatory☐ Trauma

Other Instructions

If there is a change in the patient's address or phone number, please enter it into the box below.

Submit

Once a tooth is selected, more options to add info are given

Teeth Needing Treatment															
☐	☐	☐	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16

☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
32	31	30	29	28	27	26	25	24	23	22	21	20	19	18	17

Teeth Needing Evaluation															
☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16

☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
32	31	30	29	28	27	26	25	24	23	22	21	20	19	18	17

Information for Tooth #5 - Treatment

Referral Request

☐ Consult Only

☐ Consult and Treat, as necessary

☐ Treat Irreversible/Neurotic pulp

☐ RCT started for pain control, treat

☐ Retreatment or Surgery

☐ Post Space only

☐ Other

Urgency

☐ Patient in Pain

☐ Treat ASAP

☐ Schedule at convenience

Requested Coronal Endo

☐ None

☐ Temp

☐ Bonded Resin

☐ Am/Am Post

☐ P/S

☐ Glass Ionomer

☐ Other

Existing Restoration

☐ Natural Tooth

☐ Permanent Crown

☐ Permanent Crown temp cement, please remove

☐ Temporary

☐ Permanent Crown will be replaced

Please complete Endodontic Treatment by date m/d/yyyy

To upload an image for tooth #5 click on the placeholder below

In the box below you can drag and drop multiple image files.

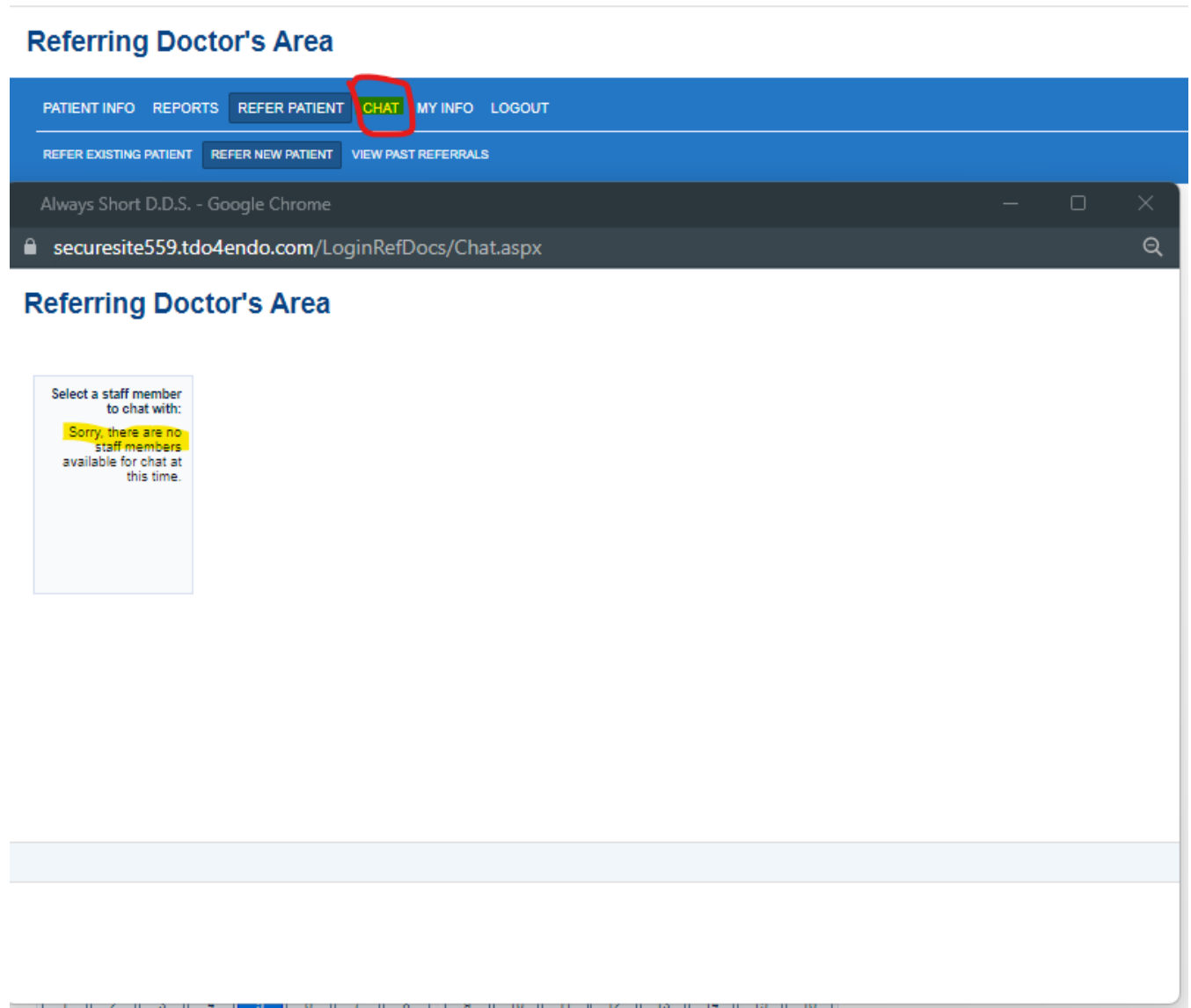
Drag Files Here

Allowed file extensions: .jpg, .jpeg
Maximum file size: 4 MB.

Note: Image attachments need to be jpg or jpeg files. NO PDF's. 4MB max for file size.

[Referral Chat - Link with more details](#)

When you click on the Chat tab it will open a new box and show you which staff members are available to chat. Choose the staff member you wish to chat to and a smaller chat box will open. write your message in the lower box. You will receive a reply once the staff member is available.



Reference

[Referral Chat](#)

[Enable "Remember Me" for Referring Doctors on your website](#)

[Helping Referring Doctors Reset their Password](#)

Online URL: <https://kb.tdo4endo.com/article.php?id=911>