

[v12] Notes page

924 [TDOKB2](#) February 24, 2026 [Pages](#) 5.94K

Overview

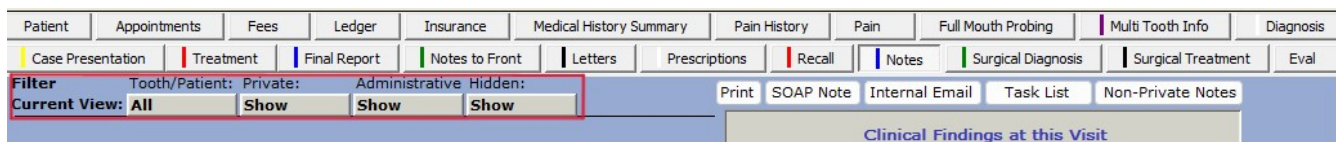
The Notes tab allows you to show or hide auto-populated and manually entered notes for the currently opened patient and distinguish between whether the note should be related to a Tooth or the Patient.

The screenshot shows a dental software interface with a top navigation bar containing tabs like Patient, Appointments, Fees, Ledger, Insurance, Medical History Summary, Pain History, Pain, Full Mouth Probing, Multi Tooth Info, and Diagnosis. Below this is a secondary bar with tabs for Case Presentation, Treatment, Final Report, Notes to Front, Letters, Prescriptions, Recall, Notes (highlighted with a red box), Surgical Diagnosis, Surgical Treatment, and Eval. The main content area is divided into several sections. On the left, there's a 'Filter' section with 'Current View: All' and 'Show' buttons. Below this, there's a 'Tooth/Patient' section with radio buttons for 'Tooth' (selected) and 'Patient', and checkboxes for 'Private' and 'Administrative'. A 'Sort Descending' checkbox is also present. The 'Date' is set to '6/28/2023 11:52:19 AM'. A 'Macro Note' dropdown menu is visible. The main note area is empty. On the right, there's a 'Clinical Findings at this Visit' section with checkboxes for various symptoms like Asymptomatic, Improved but slightly tender, Intermittent pain, Constant pain, Initially asymptomatic with recent pain, and Initially painful but now asymptomatic. Below this is a 'Needed' section with checkboxes for various tasks like XRay from General Dentist, XRay from prior Endodontist, Send XRays to Oral Surgeon, Send XRays to Periodontist, Speak with physician, Need prior Endodontist's final report, Speak with General Dentist, Speak with prior Endodontist, Speak with Periodontist, Speak with Orthodontist, Speak with Oral Surgeon, Speak to patient after Doctors, Record to be Completed, and Predetermination of Fees. At the bottom, there's a 'Comment by:' field with 'endo' and a 'Manual Entry' checkbox. The status bar at the very bottom shows 'Record: 14 6 of 6' and a search bar.

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Filter Current View



Notes have filter settings that can be changed by clicking on them. The filters are located in the top left corner of the Notes tab. The filters are:

Tooth/ Patient = Patient, Tooth, Both (*only shows selected tooth*), or All (*shows both but for all teeth*)

Private = Show, Hide, or Only

Administrative = Show, Hide, or Only

Hidden = Show, Hide, or Only

To see everything you can set them to...

Tooth/ Patient = All

Private = Show

Administrative = Show

Hidden = Show

Once the filter is set as desired, use the arrow buttons at the bottom to go through the notes.

Changing the viewed Note (“Record”)



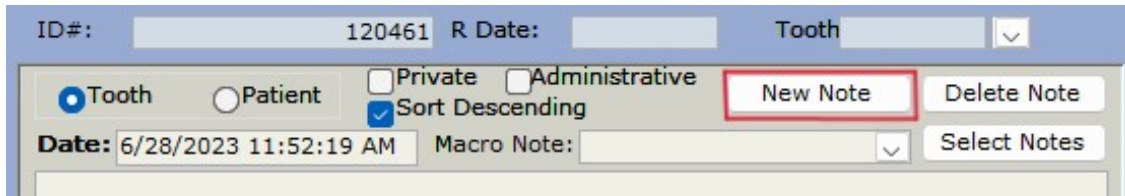
Each new note will add to the “Record” tally found at the bottom left of your TDO. To change the note being viewed, simply click the left or right arrow.

To jump to the first note click the left arrow with a line in front of it.	
To jump to the last note click the right arrow with a line behind it.	
To create a new note click the right arrow with a star/ asterisk behind it.	

Creating a New Note

Note: Some notes are automatically created from other parts of the TDO program as a page summary. For manually entered notes, the Category should be left as “General Note.”

To create a new note you can use the arrow with a star/asterisk behind it at the bottom left of your TDO. Or create a new Note by selecting the “New Note” button.

A screenshot of the TDO program interface. At the top, there are fields for 'ID#:' (120461), 'R Date:', and 'Tooth' (with a dropdown arrow). Below these are radio buttons for 'Tooth' (selected) and 'Patient', and checkboxes for 'Private' and 'Administrative'. A 'Sort Descending' checkbox is checked. A red box highlights the 'New Note' button. Other buttons include 'Delete Note' and 'Select Notes'. At the bottom, there is a 'Date:' field (6/28/2023 11:52:19 AM) and a 'Macro Note:' dropdown.

- Next mark the note as a Tooth or Patient note.

Tooth = note refers to specific tooth

Patient = note refers to the patient, not a specific tooth

- If applicable, select the Tooth number (#) using the Tooth dropdown.
- Next, to add the note text there are three options.

Option 1) manually type it

Option 2) click “**Select Notes**” to choose from a list of pre written notes - *for more details on see below*

Option 3) use the drop down to the right of “**Macro Note**” to select a prewritten note - *for more details see below*

- If applicable, mark the note as Private and/or Administrative.

Private = this will hide the note’s text body. To view the note and keep the Private setting, you’ll click the **View** button. This will allow you to temporarily view the note.

ID#: 120461

☐ Tooth
 ☒ Patient
 ☒ Private
 ☐ Administrative

☒ Sort Descending

Date: 4/21/2023 6:24:24 AM Macro Note:

Category: General Note
 ☐ Hide Note

☐ Show on web to referring

Note Locked

Comment by: admin

Select Notes

Note: “Select Notes” can only be used with new or modifiable notes prior to a note being locked.

This tool permits multi-selection from the items within its list - a preview of your selected items is available at the bottom of the window. To add them to your note click “OK.” To delete all previously selected items and start from scratch, click “Clear Result.”

Pick items

Select items from the list

Consult and quadrant diagno OCS, mm of mastication exa Discuss findings and complic Discuss prognosis, options in Discuss that I will not fill until Discuss the tr may last sever Discuss advantages and disa Discuss need for retreatmen Discuss that surgery may no that was discussed. Patient accepted treatment p Initial retreatment. Remove Remove post. Remove GP from Remove Ag Pts from Locate missed canal(s). Canal calcified.Discuss need Canal totally calcified.Discus Initial Treatment. Access, an preliminary filing and shapir Place permanent restoration. File & Shape. Obt with GP/Se Case complete. Recall. Healing normally. Ck CaOH.Replace next time.	PRETREATMENT PROCEDURE Remove crown. Remove bridge. Place Cu band. Crown lengthening with elect Alingate impressions for prov Diagnostic CBCT. External ECIR tr with TCA 3X Internal ECIR with TCA 3X x All decay removed. Not all decay removed. Remove prior restoration. Irrigation using: NaOCl, 200 proof ethanol. Anolyte. 17% EDTA. C-Soln. CHX. H2O2. Moller Protocol for 454 analy NaOCl, H2O2,Anolyte,EDTA. Ultradent CaOH. Na Perborate.	OTHER CONSULT FINDINGS Cannot reproduce symptoms Diagnosis unclear at this tim No endodontic treatment indi All teeth test WNL. See Diagn Tooth is not restorable. Needs extraction. 5.25% NaOCl, EDTA, CHX, 2 Discuss implant option. There are indications of neur Possible ATPF or MFP syndro There may be another tooth There may be multiple teeth There is referred pain makin Patient will check with insura Patient will call if symptoms Patient will return after provi Patient undecided on treatm Patient wants to discuss with	CASE DISPOSITION Referred back to general der Referred back to GP for prov Requested permanent crown Referred back to general der Referred to a facial pain spe Referred to an orthodontist f Referred to an oral surgeon I Referred to a periodontist for Referred for an implant cons Scheduled for normal recall. CASE COMPLEXITIES There is lateral root radioluc There is apical root resorptio Furcal perforation seen. Strip perforation seen. Repaired with: Separated instrument suspect Vertical fracture noted into c Patient had been in pain for Patient has been up all night Patient prefers not to return Patient requests referral for Patient refuses additional rac Requires care beyond the so Requires CBCT for adequate Will not fill until asymptoti Discussed pain will last 48 hr Told patient to call me if swe Separated instrument remov Separated instrument bypass Prior treatment appears ledge Ledge bypassed. Canal is completely blocked. There is an unlikely endodon Needs an oral path consult. Patient is uncooperative and	Recall. Healing normally. Recall. Needs no further recall. Recall. Needs further evaluation Recall. Needs extraction. CaOH Ck appt. CaOH change appt. Tooth symptomatic Tooth improving but still some s Tooth asymptomatic. Send CBCT Report Upon entry, it is seen there is circumferential decay furcal decay furcal or root fracture DR. DECKER CUSTOM NOTES CBCT Report. Pls include CBCT images # Pt was advised of the poss need if SW &/or Pain develop. X-rays &/or report scanned to i New Value test
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Preview:
Discuss that I will not fill until healing occurs. NaOCl, 200 proof ethanol.

Edit List

To reorder, add, remove, or inactivate an item from the list click **“Edit List”** at the bottom left.

ID	TDO ID	Standard Value	My Custom Value	Order	Don't use
221			Tooth asymptomatic.	1780	☐
222			Send CBCT Report	1790	☐
223			Upon entry, it is seen there is	1800	☐
224			circumferential decay	1810	☐
225			furcal decay	1820	☐
226			furcal or root fracture	1830	☐
227				1840	☐
228			DR DECKER CUSTOM NOTES	1860	☐
229			CBCT Report.	1870	☐
230			Pls include CBCT images #	1880	☐
231			Pt was advised of the poss need for AB's	1890	☐
232			if SW &/or Pain develop.	1900	☐
233			X-rays &/or report scanned to images.	1910	☐
235			New Value	1920	☐
236			test	1930	☐
*(New)					☐

To select an item row click on the far right brown/black box, once it has been selected the box will turn grey with an arrow. To multiselect, hold down the shift key and click the last row you want to select - all selected lines will now have a grey box next to them.

☐	233		X-rays &/or report scanned to images.	1910	☐
☐	235		New Value	1920	☐
☐	236		test	1930	☐
☐	(New)				☐

New = add a new line item, only the **“My Custom Value”** field in white is editable. Close to save.

Copy = select the item to be copied, click **“Copy.”** Close to save.

Remove = select the item or items to be removed, click **“Remove.”** Close to save. TDO default list items cannot be deleted.

Reorder list = select the item to be moved, click **“Move Up”** or **“Move Down.”** Close to save.

Tip: To organize your list you can add a new item with a line made of underscore characters **“_”** and use the Reorder list buttons to move it up or down to divide the list into different sections.

For your use, copy the below line into the “My Custom Value” field.

“ _____ ”

Macro Note

Note: “Macro Note” can only be used with new or modifiable notes prior to a note being locked.

Similar to “Select Notes,” “Macro Note” allows you to choose from a list of pre-made notes. However, the drop-down will only show the title and not the full text. Once an item from the list is selected, the text will populate into the text box.

Filter

Current View: All Show Show Show

Tooth/Patient: Private: Administrative Hidden:

ID#: 120461 R Date: Tooth

Print SOAP Note Internal Email Task List Non-Private Notes

Asymptomatic

Improved but slightly tender

Intermittent pain

Constant pain

Initially asymptomatic with recent pain

Initially painful but now asymptomatic

Temp sensitivity

Swelling reduced

Swelling

Palpation soreness

Percussion sensitivity

Sinus tract present

Sinus tract healed

Clinical Findings at this Visit

XRay from General Dentist

XRay from prior Endodontist

Send XRays to Oral Surgeon

Send XRays to Periodontist

Speak with physician

Need prior Endodontist's final report

Speak with General Dentist

Speak with prior Endodontist

Speak with Periodontist

Speak with Orthodontist

Speak with Oral Surgeon

Speak to patient after Doctors

Record to be Completed

Predetermination of Fees

Send new referral report to referring doctor

Send new referral report to:

notes to front test

PK

PK Affiliate

PK BANG

PK CBCT

PK Cold

PK CORE BUILD UP

PK DASH

PK Empty

PK Fax

PK FIRE

PK FLASH

PK Flat

PK Following

PK Full

PK Hot

PK Limits

PK Maxed

PK Mobile

PK Open

PK POST

PK PRE

PK REPORT

PK SCAN

PK Shut

Macro Note:

Select Notes

Date: 6/29/2023 7:09:54 AM

Category: General Note

Comment by: endo

New Note

Delete Note

Record: 14 6 of 6

to referring

Tooth Patient Private Administrative

Sort Descending

Date: 6/29/2023 7:09:54 AM

Macro Note: PK

Select Notes

Consult. Review medical history. Discuss all risks and complications including the possibility of pain, swelling and loss of the tooth. Discuss all alternative treatments and fees for the treatment. Patient to schedule apt for RCT.

Edit List

To add, edit, or remove an item from the list right-click on the drop down arrow and click “Edit List.”

Tooth Patient Private Administrative

Sort Descending

Date: 6/29/2023 7:09:54 AM

Macro Note:

Select Notes

Edit List

Refresh List

To add a new Macro Note click the right arrow with a star/ asterisk behind it. This will create a new blank record. Close to save.



To edit an existing Macro Note use the bottom left “**Record**” arrows or “**Previous Note**” and “**Next Note**” to scroll through all your Macro Notes till you locate the one you’d like to edit. Close to save.

To delete a Macro Note click on the far right brown/black box, once it has been selected the box will turn grey, next click Delete on your keyboard. A pop-up window will appear asking for you to confirm “Yes” you’d like to delete or “No” you do not want to.

Updating manually entered Note lock time period

The amount of time before a manually entered note is locked defaults to 24 hours; this can be edited to either 24 hrs, 48 hrs, 72 hrs, 1 wk, 2 wks, 1 month, 2 months, or 3 months. To edit it, please use the steps below.

- Setup
- Site Configuration
- Edit Control Table
- Application Settings
- Miscellaneous Settings
- Lock Manual Notes after

- Use the drop-down to select the desired time frame to lock notes

Miscellaneous Settings

☒ Enable Procedure and Teeth Association

☐ Display SSN and DOB on Ledger and Statement

☒ Show Patient\Ref Dr Pwds

☒ Lock Manual Notes after: 24 Hours ▾

Note: Locked notes cannot be deleted or edited.

Lock time cannot be changed for TDO generated Notes

For HIPPA compliance the lock period for TDO generated notes cannot be customized or edited. Extending the lock period is only for manual notes, it will not apply to notes generated through TDO.

Additional Tab Features

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

Filter: Tooth/Patient: Private: Administrative Hidden: Show Show Hide

Print SOAP Note Internal Email Task List Non-Private Notes

Print

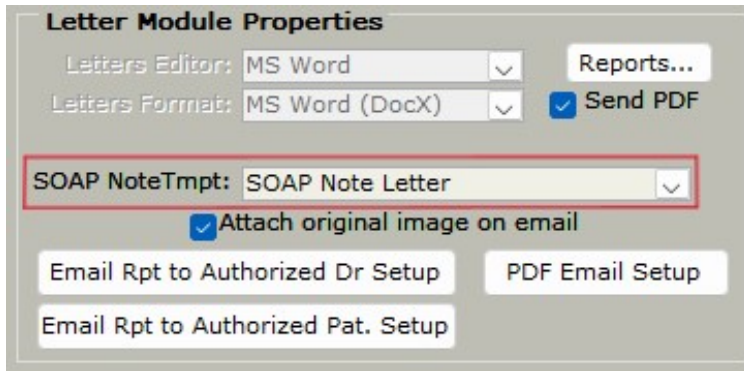
This will allow you to print all (private and non-private) notes associated with the patient. To print, either right-click and select “Print” or simultaneously click CTRL+P on your keyboard.

SOAP Note

SOAP = Subjective, Objective, Assessment and Plan

This button will open up Letters, if you have created a Letter Template for SOAP then you can apply or update it by following the below instructions. Once applied clicking the SOAP Note button will open the template in Letters.

- Setup
- Site Configuration
- Edit Control Table
- Application Settings
- Letter Module Properties
- SOAP NoteTmpt:
- select desired template to be used for SOAP Note
- close to save



Letter Module Properties

Letters Editor: MS Word

Letters Format: MS Word (DocX) ☒ Send PDF

SOAP NoteTmpt: SOAP Note Letter

☒ Attach original image on email

Email Rpt to Authorized Dr Setup

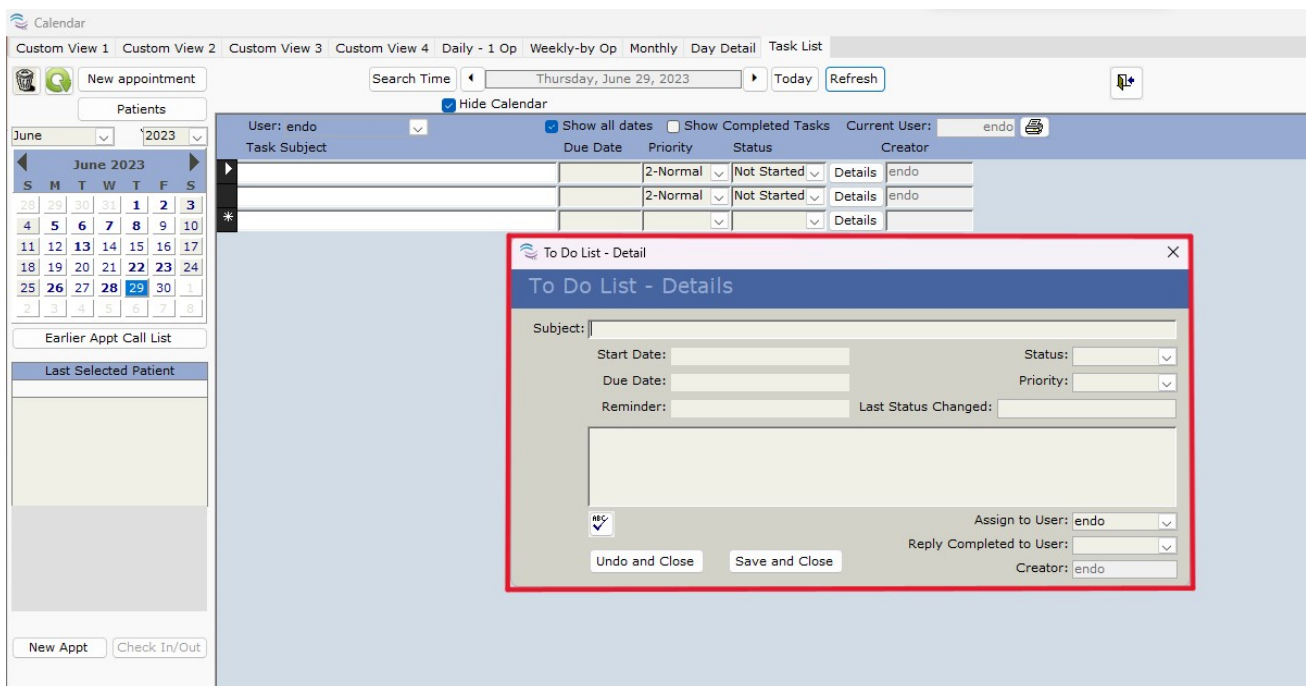
Email Rpt to Authorized Pat. Setup

Internal Email

This will send the currently open note as a new message using TDO's Internal Email feature.

Task List

This will open the Calendar to the "Task List" tab, as well as the "To Do List - Detail" window where you can enter and assign a new future task.



Calendar application interface showing the Task List tab. The main window displays a calendar for June 2023 with a task list table below it. A "To Do List - Detail" window is open, showing fields for Subject, Start Date, Due Date, Reminder, Status, Priority, Last Status Changed, Assign to User, Reply Completed to User, and Creator. The window also includes buttons for "Undo and Close" and "Save and Close".

User:	Task Subject	Due Date	Priority	Status	Creator
endo			2-Normal	Not Started	endo
			2-Normal	Not Started	endo

Non-Private Notes

This will create a printable PDF of all notes that are not marked as "Private." To print either right-click and select "Print" or simultaneously click CTRL+P on your keyboard.

"Clinical Findings at this Visit" section

On the right side of the Note tab, there is a "Clinical Findings at this Visit" section. This is an optional

section making it easy to document and view clinical findings for each appointment, once a line is checked it will highlight in yellow. When you are entering a note for the patient’s visit, simply click the findings that apply. The items you check will show as part of the patient note automatically.

Filter

Current View: All

Private: Show

Administrative: Show

Hidden: Show

ID#: 120461

R Date: 3/4/2023

Tooth: 20

Tooth

Patient

Private

Administrative

Sort Descending

New Note

Delete Note

Date: 6/29/2023 7:09:54 AM

Macro Note:

Select Notes

Category: General Note

Hide Note

Show on web to referring

Comment by: endo

Manual Entry

Print

SOAP Note

Internal Email

Task List

Non-Private Notes

Clinical Findings at this Visit

☒ Asymptomatic

☐ Improved but slightly tender

☐ Intermittent pain

☐ Constant pain

☐ Initially asymptomatic with recent pain

☐ Initially painful but now asymptomatic

☐ Temp sensitivity

☒ Swelling reduced

☐ Swelling

☐ Palpation soreness

☐ Percussion sensitivity

☐ Sinus tract present

☐ Sinus tract healed

Needed

☐ XRay from General Dentist

☐ XRay from prior Endodontist

☐ Send XRays to Oral Surgeon

☐ Send XRays to Periodontist

☐ Speak with physician

☐ Need prior Endodontist's final report

☐ Speak with General Dentist

☐ Speak with prior Endodontist

☐ Speak with Periodontist

☐ Speak with Orthodontist

☐ Speak with Oral Surgeon

☐ Speak to patient after Doctors

☐ Record to be Completed

☐ Predetermination of Fees

☐ Send new referral report to referring doctor

☐ Send new referral report to:

“Needed” section

On the right side of the Note tab, under “Clinical Findings at this Visit,” is the “**Needed**” section. This is an optional section where you can check off what needs to be done - once a line is checked, it will highlight in yellow, making it easy to view at a glance.

Filter

Current View: All

Private: Show

Administrative: Show

Hidden: Show

ID#: 120461

R Date:

Tooth:

Tooth

Patient

Private

Administrative

Sort Descending

New Note

Delete Note

Date: 6/29/2023 8:41:13 AM

Macro Note:

Select Notes

Category: General Note

Hide Note

Show on web to referring

Comment by: endo

Manual Entry

Print

SOAP Note

Internal Email

Task List

Non-Private Notes

Clinical Findings at this Visit

☐ Asymptomatic

☐ Improved but slightly tender

☐ Intermittent pain

☐ Constant pain

☐ Initially asymptomatic with recent pain

☐ Initially painful but now asymptomatic

☐ Temp sensitivity

☐ Swelling reduced

☐ Swelling

☐ Palpation soreness

☐ Percussion sensitivity

☐ Sinus tract present

☐ Sinus tract healed

Needed

☐ XRay from General Dentist

☐ XRay from prior Endodontist

☐ Send XRays to Oral Surgeon

☒ Send XRays to Periodontist

☐ Speak with physician

☐ Need prior Endodontist's final report

☒ Speak with General Dentist

☐ Speak with prior Endodontist

☐ Speak with Periodontist

☐ Speak with Orthodontist

☐ Speak with Oral Surgeon

☐ Speak to patient after Doctors

☐ Record to be Completed

☐ Predetermination of Fees

☐ Send new referral report to referring doctor

☒ Send new referral report to: General Dentist

Related KBs

Notes Module	Viewing Patient Notes	Clinical Findings at this Visit	Custom Macro Notes option
Entering Custom Notes	Updating viewed	Entering Notes	

	Category		
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Online URL: <https://kb.tdo4endo.com/article.php?id=924>