

[v12] Appointments Page

936 [TDOKB2](#) February 24, 2026 [Pages](#) 2.59K

Overview

A breakdown of the Appointments Page of TDO with information and how-to's. Located on the pages area it is defaulted to show as the second page link. Highlighted in yellow, Select **Appointments**. When the option of right-clicking **New Appointment** is performed on the **Calendar**, TDO will log the new creation on the **Appointments Page**. It will keep all appointments except for anything that gets deleted.

Viewing Only

No changes can be made on this screen, you will need to either open the appointment or make the change on the calendar.

FILEMainMessagingImagingSetupHelp

CalendarRegister PatientClinicalFront DeskAdministrativeDoctorsReportingInsuranceNoteseRxOrganizerAcquireDrawScreen Capture - AllAreaTask ReminderCloseLog Off

Kevin Clay

Last Name: 2023First Name: EndoconPhone: 8585583696

T1T2T3

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

Tooth	Initial Date	Doctor	Comp Date	DI	Recall Date	ReportDate	Location
4	9/25/2023	Carr	11/10/2023	0	11/13/2023		ONE

PatientAppointmentsFeesLedgerInsuranceMedical History SummaryPain HistoryPainFull Mouth ProbingMulti Tooth InfoDiagnosis

Case PresentationTreatmentFinal ReportNotes to FrontLettersPrescriptionsRecallNotesSurgical DiagnosisSurgical TreatmentEval

11/13/2023Monday

From: 3:00:00 PMTo: 3:30:00 PM

ScheduledRecall

Tooth: 4Type: Archive:

Recall: Recall Date: Doctor: CarrLocation: ONE

Recall Appointment Made? Recall Card Sent

Open

11/10/2023Friday

From: 3:30:00 PMTo: 4:00:00 PM

ScheduledConsult&PossSt

Tooth: 4Type: Archive:

Recall: Recall Date: Doctor: CarrLocation: ONE

Recall Appointment Made? Recall Card Sent

Open

9/25/2023Monday

From: To:

Scheduled

Tooth: 4Type: InitialArchive:

Recall: 3 daysRecall Date: 11/13/2023Doctor: CarrLocation: ONE

Recall Appointment Made? Recall Card Sent

Open

Record: 1 of 3

No Filter

Search

User: kevin BP: Pulse: Temp: Alert: Ref Dr: Dr. Kevin Clay (P): Gen Dr: Dr. Kevin Clay (P):

NUM LOCK POWERED BY MICROSOFT ACCESS

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Initial Appointment

An initial appointment is a "Created Tooth/Case". When a Tooth or Case is added by either a Referring Doctor through the **Referring Doctor Portal** when a **Tooth Needing Treatment** is selected, also, by clicking the + button, TDO can log this in the appointments page as an **Initial Appointment**. Lastly, to also add a Tooth/Case you can download a tooth from the **Multi Tooth Testing Page** and a Case will be added in.

Initial Appointment Open

"**Open**" button doesn't work with this type of appointment. Error Message Below.

Hide Initial Appointments

This can be hidden or enabled from your edit control table. **Setup> Site Configuration> Edit Control**

Table> Application Settings> Tooth Entries in the appointment history> when the box for **Show Tooth Entries** is selected it will add the **Initial Case** to the **Appointments Page**.

Control Table Information

Practice Information Application Settings Network Settings Workstation Settings

Video Files Location
Video Path: C:\Images

Tooth entries in the appointment history
☒ Show Tooth Entries

Action on mark appointment
as Cancelled / No Show / Rescheduled:
Move appointments [v] to column: Cancel/Res [v]

Letter Module Properties
Letters Editor: MS Word [v] Reports...
Letters Format: MS Word (DocX) [v] ☒ Send PDF
SOAP NoteTmp: SOAP Note Letter [v]
☒ Attach original image on email
Email Rpt to Authorized Dr Setup PDF Email Setup
Email Rpt to Authorized Pat. Setup

Automatic Financial Tickler
Insurance Auto Fin. Tickler Delay (days): 20
Non-Insurance Auto Fin. Tickler Delay (days): 5
☒ Enable Ins. Financial Tickler Pop-ups
☒ Enable Non-Ins. Financial Tickler Pop-ups
☐ Automatically Update Future Dates

Insurance
Delta Claim ID:
☒ Insurance Estimating ☐ Default to Non-Assigned
☐ New patient default to NO insurance
☐ Disable Insurance Comparison

Index Name Caption
Singular form: Tooth Plural form: Teeth

Message Viewer
☐ Run Messenger at Startup

Phone/Fax
Phone Prefix: 01

International
Culture: UNITED STATES [v]
☒ Disable State Autofill ☐ General Dentist
Insurance Form: US ADA [v]

Medical History
Type: Customizable [v] Lang. Short Med Hist: English [v]
☒ Show Pref. Language on Patient Chart Customize
☒ Enable allergy pop-up in prescription form

Diagnosis Form
Default Form Size: Short Diagnosis Form [v]

Multiple Fee
☒ Enable Multiple Fee Schedules

SMS Options
☒ Allow Staff group to send SMS
☒ Check Send SMS automatically

Miscellaneous Settings
☐ Enable Procedure and Teeth Association ☒ Lock Manual Notes after: 48 Hours [v]
☐ Display SSN and DOB on Ledger and Statement
☒ Show Patient\Ref Dr Pwds

Default Image Category
Clinical 10 [v]

Google Accounts - Calendar Sync ERX ID Setup
Integrated Devices

Close

Recall Appointment & Recall Card Sent

To apply checkmarks, for the initial appointment, you will need to **schedule a recall**. When adding a Recall Type appointment you are then able to mark an initial appointment with a checkmark for **Recall Appointment Made** and/or **Recall Card Sent**. The Second Image shows a Recall appointment being made with a Pop up box allowing now to add checkmarks.

9/25/2023 Monday

From: [v] Scheduled Tooth: 4 Type: Initial Recall: 3 days Recall Date: 11/13/2023 Doctor: Carr Location: ONE

To: [v] Archive: [v]

☒ Do not show on calendar

☒ Recall Appointment Made? ☒ Recall Card Sent

Open

The screenshot displays a dental software interface with a menu bar (FILE, Main, Messaging, Imaging, Setup, Help) and a user profile (Kevin Clay). The main window is titled 'Appointments' and contains several tabs: Appointment, Medical Info, and Properties. The 'Appointment' tab is active, showing a form for editing an appointment. The form includes fields for Patient Name (Last Name: 2023, First Name: Endocon), Referring Doctor (Dr. Kevin Clay), General Dentist (Dr. Kevin Clay), Tooth (4), For (Recall), Appointment Type (Scheduled), Doctor (Carr), and Location (ONE). It also shows the Date (11/12/2023), Start Time (02:45 PM), Finish Time (03:15 PM), Duration (00:30), and Outstanding Balance (\$1,200.00). There are checkboxes for 'Needs premedication', 'Need to confirm appt', 'Appointment confirmed', 'Called, left message', 'Do not show on calendar', and 'Send SMS'. A 'Recurrence...' button is also present. Below the form is an 'Appointment History' table.

Date	Day	Type	Tooth
11/13/2023	Monday	Recall	4
11/10/2023	Friday	Consult&PossStart	4
9/25/2023	Monday		4

An 'Exam Dates - Initial Only' sub-window is open, showing fields for First Name (Endocon) and Last Name (2023). It includes a 'Close' button and a section for 'Exam Dates' with a date (9/25/2023), a 'From' field, a 'To' field, a 'Scheduled' button, a 'Tooth' field (4), a 'Type' field (Initial), a 'Recall' field (3 days), a 'Recall Date' field (11/13/2023), a 'Doctor' field (#Name?), a 'Location' field (#Name?), and checkboxes for 'Do not show on calendar', 'Recall Appointment Made?', and 'Recall Card Sent'. An 'Open' button is also present.

Open Edit Appointment Window

On the **Appointment** page is the clickable button, **Open** this will allow you to open the **Edit Appointment** without having to open the **Calendar**.

Open Initial Appointment

"Open" button doesn't work with **the Initial** type of appointment.

View in Calendar

On the far left is a **Calendar Icon** that will open your **Calendar** to the time and date of that appointment.

Do Not Show on the Calendar

This box cannot be clicked in the **Appointment Page** but indicates that the initial appointments will not show on the calendar. However, you can opt to hide an appointment from the **Edit Appointment** or the **Open button**, on this screen if the appointment does not need to be shown on the calendar. This can be helpful if you wish to Hide the **no shows**, **cancelled**, and **rescheduled appointments** so they do not appear on your main calendar.

The screenshot shows the 'Appointments' window with the 'Properties' tab selected. The 'Do not show on calendar' checkbox is highlighted with a red circle. The window contains various appointment details and a table of appointment history.

Appointment Details:

- Last Name: 2023
- First Name: Endocon
- Referring Doctor: Dr. Kevin Clay
- General Dentist: Dr. Kevin Clay
- Tooth: 4
- For: Recall
- Appointment Type: Scheduled
- Doctor: Carr
- Location: ONE
- Date: 11/10/2023
- Start Time: 12:45 PM
- Finish Time: 02:30 PM
- Duration: 01:45
- Outstanding Balance: \$0.00
- Operator: Block more Operators: Dr. A, Dr. B, Dr. C, Dr. D, Op 6, Cancel/R, Dr. D, OpTest, Op 7, Op 9, Op 11, Op 8, Cancel/R, Last minute
- Patient: Needs premedication, Need to confirm appt, Appointment confirmed, Called, left message, **Do not show on calendar** (checked), Send SMS
- Appointment made by: Patient (checked), Family Member, Referring Dr, Office
- Macro Note: Transfer to Patient
- Would like earlier appt if available

Appointment History:

Date	Day	Type	Tooth
11/13/2023	Monday	Recall	4
11/10/2023	Friday	Consult&PossStart	4
11/10/2023	Friday	Recall	4
9/25/2023	Monday		4

Footer:

- Last Modified By: kevin
- Last Modified Date: 11/10/2023 5:07:40 PM
- Taken By: kevin
- Taken Date: 11/10/2023 5:07:39 PM

Related KBs

New Patient Appointment	Deleting an Appointment

Online URL: <https://kb.tdo4endo.com/article.php?id=936>

