How to Generate an AI Consultation Report & AI Final Treatment Report in TDO

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TDO AI-Powered Report Generation

TDO's AI-powered report generation pulls directly from the patient's chart with the option of dictation to automate documentation, saving time, improving consistency, and boosting clinical efficiency for both Consultation and Final Treatment reports. Free trial period to all users until December 31st, 2025.

Requirements

- TDO Cloud Services must be active
- OpenVPN must be connected
- AI Reports must be enabled (contact TDO Support)
- Chrome browser as default

Installation:

1. Visit TDO4endo.com and log in
2. Go to Downloads
3. Download and run TDO AI Reports Install.exe
4. A desktop shortcut will be created on your desktop. TDO and AI Reports need to be running at the same level. For example, if you run TDO as Admin, you'll need to have the AI exe running as Admin.

Generating a Consultation Report

- Ensure Required Data Is Entered
    - Medical and Pain History completed by the patient
    - Clinical findings and diagnosis entered
    - Multi Tooth Summary Note saved

- Launch the AI Reports Tool
    - Open the AI Reports Tool from the desktop or menu option.
    - The current user is logged in automatically—no need to enter credentials
    - Start recording dictation or click Skip to skip this step
    - Review/edit if needed
- Send to TDO
    - Click Send to TDO
    - Refresh the Notes Page in TDO to view the generated note
    - Use the Letters module to auto-fill your Consultation template

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?? Generating a Final Treatment Report

- Confirm All Data Is Entered
    - Medical and Pain History
    - Diagnosis
    - Multi Tooth Summary Note
    - Treatment Page completed and marked “Completed”
- Launch the AI Reports Tool
    - Open the AI Reports Tool from the desktop or menu option.
    - The current user is logged in automatically—no need to enter credentials
    - The system detects case completion
    - Review/edit if needed
- Send to TDO
    - Click Send to TDO
    - Refresh the Notes Page in TDO. The summary note will be on the note page and the final report page.

- Use the Letters module to populate your Final Treatment template

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Optional: Dictation & Transcription

You can add voice dictation at any stage. The AI tool will transcribe and merge it into the final report.

To Use Dictation:

1. Open the AI Reports Tool
2. Click Start Recording
3. Dictate additional notes
4. AI transcribes and merges content with the notes from the chart
5. Review and click Send to TDO

Tips for Success:

- Use a good microphone - we had success with the Logitech Yeti Nano
- Speak clearly at a moderate pace
- Minimize background noise
- Always review the final note before submitting

Note: If you receive the error - TDO is not currently running to open patient record ErrorCode:-2147221021, when launching the AI Reports from the desktop, please contact TDO support. This means that TDO and AI Reports are not running at the same level.

Online URL: https://kb.tdo4endo.com/article.php?id=995