

Denticon Onboarding Guide



WELCOME TO THE Denticon Onboarding Guide

We're excited to welcome you to Denticon. This resource is designed to help your dental office confidently onboard, set up, and begin using Denticon's cloud-based practice management system. Whether you're transitioning from another platform or starting fresh, this guide will walk you through each step to ensure a smooth and successful onboarding experience.

Purpose of the Guide

The goal of this guide is to support your team throughout the onboarding and configuration of Denticon. It offers clear documentation and resources to help you stay organized and transition smoothly into daily use. You can also rely on it as a reference throughout your onboarding journey, with key items to review before meetings and revisit during calls.

Who Should Use This Guide

This guide is intended for anyone involved in the Denticon onboarding process. This includes:

- **Dental professionals** who will use the system daily
- **Project leads** managing the rollout
- **Operational leads** coordinating timelines and team responsibilities

How To Use This Guide

Think of this as your roadmap for the Denticon onboarding process. It provides helpful resources, outlines what to expect during each phase, and keeps your team aligned with assigned tasks. Several sections are designed to help you prepare for meetings, so reviewing them ahead of time will support productive discussions and informed decisions. You'll also find homework items—tasks your team completes independently between onboarding calls.

If you need help or something isn't covered, your Implementation Coordinator (IC) is available to support you.

Table of Contents

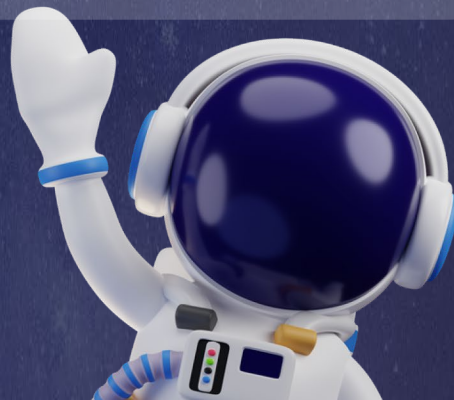
Preparing for Onboarding	Resources for Apteryx XVWeb Implementation
Your Planet DDS Support Teams	Learning and Adoption
It's a Team Effort: Client Resource Needs	Logging into the PlanetDDS Learning Management System (LMS)
Customer Onboarding Journey	Denticon Learning
Unlock Strategic Value	Apteryx Learning
Key Project Milestones	Go Live Preparation
Managing Organizational Change	Go Live Prep/Gap Data
Understanding Your Software Billing	Sign for Your Practice During Go Live
Setup: Getting Denticon Ready	Live on Denticon!
Overview: Setup Calls	Post Go Live Support: What to Expect
Customer Workflow Discovery	Go Live Certificate
System Setup and Conversion Prep	Apteryx & Denticon Support Overview
Insurance and Fee Schedule Setup	Introducing Account Management
Clinical Setup	Appendix
Additional Setup	Integrations
Best Practice Setup Guides	Planet DDS Pay
Conversion: Bringing your Data Over	Denticon Patient Communication
Conversion Policy	MyTooth
Denticon Conversion Overview & FAQ	AutoEligibility
Data Validation Guidelines	Denticon Practice Analytics
Post Conversion Process	Nightly Data Downloads (NDD)
Imaging: Setting Up Imaging Tools	Denticon Data Share
XVWeb Installation & Image Quality Guide	AI Assist
Understanding Drivers vs Extensions	Pearl
What to Expect: XVWeb Imaging Setup Call	Apteryx Analytics Dashboard
XVWeb User Accounts – Best Practices	Planet DDS API Program
Imaging Audit Guide	

Preparing for Onboarding

This section gives you a clear overview of how your Denticon onboarding will be organized and supported.

Objectives:

- 1. Understand your Planet DDS resources**
Meet the Planet DDS team involved during implementation and post go live.
- 2. Define your internal team**
Identify key roles on your side and what each person is responsible for.
- 3. Get familiar with the onboarding phases**
Review the structure of your journey and what happens in each phase.
- 4. Learn how to unlock strategic value**
See how our governance framework supports long-term success.
- 5. Track milestones**
Reference key checkpoints from start to finish.
- 6. Prepare for change**
Learn how to support your team through organizational change.



Your Planet DDS Support Teams

IMPLEMENTATION

Implementation

- Main point of contact
- Schedules meetings and tracks action items to completion

Conversion

- Responsible for data, document, and image conversions from your existing systems
- Coordinates QA audits of conversion to ensure accuracy

Imaging

- Technical team to help with hardware installations and image quality calibrations

Learning & Adoption

- Works with your team to develop workflows and training approach
- Facilitates training sessions

POST LIVE

Account Manager

- Ongoing support and resources to optimize your Denticon journey

Support

- Dedicated resources for any questions or troubleshooting needs

It's a Team Effort: Client Resource Needs

PROJECT LEAD

- Primary contact for implementation team
- Complete system setup for account and practices
- Ensure team is adhering to milestones and deadlines
- Attend setup and implementation sessions to ensure successful onboarding

CLINICAL LEAD

- Establish clinical operations policies and processes (e.g., define clinical note templates and consent forms)
- Assist with clinical and imaging configuration
- Participate in clinical training discussions and setup sessions

OPERATIONS LEAD

- Understands, adapts, and develops standardized practice workflows
- Partner with Planet DDS team to develop training approach and plan
- Organize training sessions
- Ensures team completion of Denticon Learning Center learning paths

TECHNICAL EXPERT

- Assists with data extractions and conversions from legacy platforms
- Work with Planet DDS to install imaging software and test hardware
- Provide technical support during implementation

EXECUTIVE CHAMPION: Final decision-maker. Provides strategy and insights. Supports implementation success. Recommends the champion attend recurring sync meetings and stay involved throughout the onboarding process.

Customer Onboarding Journey



Denticon Go Live is typically **7 to 9 weeks** from Launch.

*Timeline is based on a standard implementation and milestone dates being met.

Unlock Strategic Value

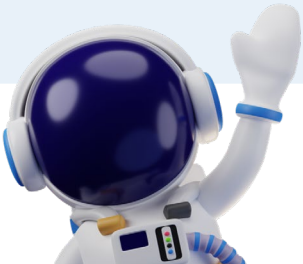
At Planet DDS, we're here to make your onboarding experience smooth and reassuring.

Our project governance framework is built to give you confidence every step of the way—with real-time visibility, proactive risk management, and open, transparent communication. We're committed to making your implementation strategic and successful.

BENEFIT	DESCRIPTION
Visibility & Control	Real-time insights into project status, risks, and milestones. Enables informed, proactive decision-making.
Proactive Risk Management	Early identification and mitigation of risks. Structured review processes for accountability.
Swift Problem Resolution	Clear escalation paths minimize delays. Fosters a culture of continuous improvement.
Stakeholder Engagement	Regular, transparent communication builds trust. Assigns clear ownership for decisions and deliverables.

Key Takeaway:

Project governance is our toolkit for delivering value, managing risk, and achieving strategic success.



Key Project Milestones

MILESTONE	OWNER	
	PDDS	CLIENT
Complete Operational Workflow Session	X	
Configure your Denticon System		X
Configure Planet DDS Integrations <i>(Planet DDS Pay, Denticon Analytics, Denticon Patient Communications, etc)</i>		X
Initiate Trial Data Conversion	X	
Complete and Submit Data Mappings <i>(Providers, Operatories, & Procedures)</i>		X
Complete Trial Data Audit and Submit Findings		X
Configure third-party Integrations <i>(DentalXChange, DoseSpot, etc)</i>		X
Complete Imaging Launch Call	X	
Imaging Configuration Calls	X	
Initial Imaging Conversion <i>(including Audit)</i>	X	
End User Training <i>(Basic and Advanced Clerical, Clinical, and Imaging)</i>		X
Final Conversion <i>(Data and Imaging, including Audits)</i>	X	
Go Live with Denticon		X
Scanned Document Conversion	X	
Post Live Support	X	
End User Training <i>(Claims Management and Reporting)</i>		X

Managing Organizational Change

Switching to a new practice management system can be a challenging step forward. Thoughtful planning and communication can make the transition smoother. Our change management approach ensures your team stays informed, supported, and ready for success.

Key Recommendations

Build a Communication Plan

Keep partners and stakeholders aligned with clear, consistent updates.

Establish Governance

Set up processes for clinical, operational, and system requests, including SOPs.

Manage Escalations

Surface and resolve issues quickly before they affect your practice.

Share Updates

Share regular progress reports and key milestones.

Manage through Change

Proactively address concerns and support staff through change.

Celebrate Wins

Build momentum by recognizing progress and success.

Our Approach

Evaluate Readiness

Assess each office's readiness to adopt Denticon. Use metrics to group and sequence offices for early wins and long-term success.

Tailor Strategies

Customize plans based on each office's needs. Identify champions, address concerns, and promote inclusion, education, and outreach.

Mitigate Risks

Identify adoption risks and create strategies that build confidence and ensure a smooth transition.

Communication Plan

To ensure a smooth Denticon rollout, we keep all stakeholders informed, engaged, and prepared:

- Share goals like improved patient care, streamlined admin tasks, stronger compliance, and better billing accuracy.
- Highlight training opportunities and the support available before, during, and after go-live.
- Show how standardized processes create long-term efficiency and value.
- For equity partners, reinforce the benefits of scaling on a unified platform.

Together, we'll drive adoption, build confidence, and celebrate milestones as your practice moves forward with Denticon.

Check out our e-books:

**Change Management for
DSOs and Dental Group:
Laying the Groundwork**

[Read Now](#)

**Change Management for
DSOs and Dental Groups:
Leading Teams Through
Transition**

[Read Now](#)



Understanding Your Software Billing

As the next step in your onboarding process, please use the link below to schedule a **Billing Onboarding meeting** with our billing team.

[Schedule a Meeting](#)

During this session, we will:

- Confirm your billing email address
- Verify your payment information
- Answer any billing-related questions you may have



Prior to the meeting, our billing team will be sending you an email with your customer portal login information. This email will come from ar@planetdds.com. Please ensure you can log in prior to the scheduled meeting.

Scheduling this session promptly will help ensure your account setup is smooth and your billing information is accurate from the start.

SETUP

Getting Denticon Ready

As part of onboarding, we'll begin with a series of calls designed to get your account fully configured and ready for use. Each call follows a clear agenda to ensure a smooth transition.

We will:

- Begin with a discovery session.
- Complete account and office setup.
- Proceed to insurance and fee schedules.
- Continue with clinical setup.
- Address any miscellaneous setup activities.
- Conclude with integration setup.

These steps collectively ensure the system is tailored to your practice needs.



Overview: Setup Calls

SESSION	WHO SHOULD ATTEND	TOPICS COVERED
<p>Workflow Discovery</p>	<p>Project, Clinical, & Operations Leads</p>	<ul style="list-style-type: none"> • Client Operations Review • Best Practice Recommendations • Determine Optimal System Setup • Develop Training Plan
<p>System Setup</p>	<p>Project Lead</p>	<ul style="list-style-type: none"> • Practice and Location(s) • Employees & Permissions • Providers • Schedules • Procedure Codes
<p>Insurance</p>	<p>Project & RCM Leads</p>	<ul style="list-style-type: none"> • UCR Fee Schedule • PPO, HMO, and Other Schedules • Fee Schedule Assignment • Insurance Plan Entry
<p>Clinical</p>	<p>Project & Clinical Lead</p>	<ul style="list-style-type: none"> • Clinical Note Macros • Consent Forms • Medical History Form • Explosion Codes • Denticon Prescriptions
<p>Misc. Setup</p>	<p>Project Lead</p>	<ul style="list-style-type: none"> • Integrations • Payment & Adjustment Types • Dental Labs • Referrals • System Review

Customer Workflow Discovery

Teach us about your operations! We are looking to learn how you operate and help you identify the best Denticon workflows for your team. We will use this information to develop your training plan, share our best practice recommendations, and determine the optimal system setup for your organization.

Please let us know:

1. **Who** owns the process? Are there any other players in the process?
2. **What** is the goal of your process? What steps are being taken to complete the process? What tools are used to complete the process?
3. **Where** and **when** do these processes take place?
4. **Why** does this process work that way?

When you think about these questions and your current process, please identify the processes that you would like to do differently going forward. We will provide you with our Best Practice recommendations to optimize Denticon in your practice(s), but if there are pain points you are experiencing today, let us know!

Workflow Discussion Topics

1. What do you really like about your existing practice management system?
2. What are your current pain points with your existing practice management system?
3. What other applications do you use in your practice(s), and what processes do they support?
4. What steps do you take to prepare for an upcoming workday?
5. What is your process for confirming appointments?
6. What types of insurance do you accept today? (Indemnity, PPO, DMO, Discount, Medicaid, other?)
7. What is your process for verifying insurance plans today?
8. Walk through your new patient's workflow. How do the processes change for a patient of record?
9. What types of Providers practice in your office(s)?
10. Do providers or patients travel to other offices within your organization?
11. How are your providers paid? (Collections, Production, or a different model)
12. Do you refer treatment to a Provider within your organization? Outside your organization?
13. How does your team know where to schedule for your providers?
14. What information do you capture in your appointments today?
15. Walk through a typical diagnosis visit (new patient, periodic, and other exam).
16. Do any of your providers complete traditional bracket or clear aligner orthodontics?
17. Walk through your treatment planning process.
18. Walk through your charge out process.
19. Walk through your insurance billing process.
20. What reports do you run today? What metrics do you track today?

System Setup and Conversion Prep

Purpose: Define the setup items required to complete system and conversion preparation.

System and conversion prep includes Account Info, Office Setup, Provider Setup, Scheduler Setup, Procedure Code Setup, and User Setup. All information should be associated with the first office scheduled to convert to Denticon.

Account Info

The items entered here will affect the entire PGID. Each decision impacts all users and offices.

- Corporate information (address, phone number, main point of contact)
- Corporate Logo (file format JPG, PNG, GIF, BMP; max 2MB, 2:1 ratio)

Office Setup

Each office requires the following information. Note: The Office ID (OID) is assigned as each office is added. If office numbers are important for your organization, enter offices in the desired order.

- Office Name
- Treating Address
- Phone number, fax number, office email
- Tax ID #
- Scheduler interval (10 or 15 minutes)
- Number of columns or operatories (consider a naming convention for the column name)
- Office schedule
- Finance charge
- Sales tax
- Default place of service (office, hospital, mobile, etc.)

Provider Setup

Providers include dentists, hygienists, and dental assistants. Some requirements apply only to dentists, as noted below. Operatories must be set up before assigning providers. Each provider receives a short ID (4–6 characters) used as a unique identifier throughout Denticon.

- Provider Type (Dentist, Hygienist, Dental Assistant)
- Provider Name
- Provider main working location (address and phone)

System Setup and Conversion Prep

- NPI number
- Tax ID (SSN or HCFA ID Number; required for dentists)
- Provider specialty
- Locations where provider works
- Which operatories (columns) the provider will work out of
- Provider schedule per location

Scheduler Setup

Each office will have custom views of their schedule created. Prior to creating the schedule views, each office must have operatories entered as well as providers assigned to the operatories.

- All providers working at the location
(ideally all providers are set up, but adjustments can be made later)
- Order of columns in current system

Procedure Code Setup

Denticon includes current ADA codes. Any internal codes must be created separately.

- List of all internal (non-ADA) codes
- For internal codes that use the odontogram, provide a description of the draw type

User Setup

When creating users in Denticon, each username must be unique across all Denticon users, both inside and outside your organization. Consider a naming convention similar to provider short IDs to ensure successful setup.

- First and Last Name
- Personal or work email
- Personal or work phone number
- Location(s) the user can access
- Membership group
- Whether user is an ortho assistant or not
(applicable to offices/groups using the Ortho Treatment Card)

Insurance and Fee Schedule Setup

Purpose: Identify what insurance plan information and fee schedule documents to have available for the session.

The session for insurance plan and fee schedule entry will review the process for entering fee schedules into Denticon, creating insurance plans and linking fee schedules to the appropriate carrier or plan. To jump-start the process of entering this information, it is recommended that certain items be brought to the session so that real data may be entered into the live environment.

These items include:

- **Fee schedule(s)**

Please bring an example of each of the following that are applicable to your organization:

- **UCR**
- **Commercial Insurance (PPO/HMO)**
- **Medicaid**
- **Discount Plan**

- **Insurance Plan**

Please bring an example of each of the following that are applicable to your organization. This insurance plan should include details of the plan including but not limited to covered percentages, covered services, frequency limitations, age limits, and waiting periods:

- **Commercial Insurance (PPO/HMO)**
- **Medicaid**
- **Discount Plan**

- Understand which fees belong to which provider and are accessible in each office or have knowledge of the organization's credentialing..

By the end of the session, your organization will have the tools to understand how to properly enter different types of fee schedules, create different types of insurance plans, and how to link those fee schedules to the appropriate plans or carriers.

The result will be an accurate population of fees and insurance estimates during the treatment planning process, resulting in better accounting, an easier to read ledger, and happier patients.

Clinical Setup

Purpose: Identify the documents and materials required to complete clinical setup in Denticon.

Clinical setup will cover Procedure Code Setup, Explosion Codes, Charting, Pick Lists and Notes Macros, Medical Setup, Labs, and Prescriptions. It is recommended to bring existing materials to this session to help start the process of entering information into your system.

Procedure Code Setup

While some Procedure Code Setup was discussed during the System and Conversion Prep session to ensure that mappings can be completed for the converting offices, this session will dive deeper to identify gaps or duplicates in existing procedure codes and help set a standard for which procedure code should be used by offices. This can affect both ADA Codes as well as proprietary codes that you will create and utilize (called 'Z-Codes' in Denticon).

Additionally, the process for setting up explosion codes will be discussed.

- Master copy of procedure codes
- Examples of existing Explosion Codes

Charting

The charting section will cover the colors, pattern of materials as well as periodontal charting pathways.

- List of different perio pathways

Pick Lists and Notes Macros

The templates that providers and team members use to write their clinical notes, also called Progress Notes in Denticon, are developed through Notes Macros and Pick Lists. The Notes Macros are the templates themselves, while the Pick Lists determine the answer list to certain questions or prompts within the Notes Macros.

- Existing Note Templates including the lists of questions and answers within the prompts

Medical Setup

Medical Setup is divided into three different sections, Medical Alerts, Medical Questionnaire and a Dental Questionnaire. The Medical alerts section is a series of Yes or No questions the patient will answer, typically covering areas such as allergies and existing medical conditions. The Medical Questionnaire dives deeper into their medical history and typically includes questions such as descriptions of previous medical issues and medication lists. Finally, the Dental Questionnaire is designed to provide information about a patient's dental history and may include questions such as whether or not the patient ever had orthodontic treatment and how frequently they brush and floss.

- Copy of existing Medical History

Labs

Denticon's lab tracking feature requires that lab cases be tied to a lab that has been set up within Denticon.

- **List of existing labs including the lab's address and phone number**

Prescriptions

The prescription feature within Denticon requires that all prescriptions be setup so that users are not able to add new prescription drug names without the proper permissions.

- **List of drug names, along with Sig, Directions, number of refills and whether or not the medication must be dispensed as written**
- **Note:** If you have signed up for DoseSpot, prescription setup will not be completed within Denticon; instead, all prescription setup will be handled directly in DoseSpot.

Additional Setup

Purpose: Identify the outstanding areas of Denticon setup and define what materials are needed to complete this process.

This setup preparedness guide will comprise of the outstanding areas of setup that haven't been covered during the other sessions. These sections will include referrals, the custom toolbar, payment and adjustment types, miscellaneous setups and custom letter.

Referrals

The Referrals section allows an organization to record their referral sources as well as sources that are referred to. There are several reports within Denticon that can show productivity by referral source.

- Existing referral source that includes name, phone number, address, and referral category

Payment and Adjustment Types

This section of setup will dictate the different methods of payments and adjustments available in Denticon. During this discussion, each of the payment and adjustment types will be made to available in specific sections within the system.

- Existing list of payment types
- Existing list of adjustment types

Custom Toolbar

The Custom Toolbar will dictate which icons will be available to users in Denticon. Several toolbars can be created in the system and users can choose which of the available toolbars they would like to see

Miscellaneous Setup

Areas of setup that don't have a concrete home may fall under the Misc Setups section. The following areas are a general guideline of areas that will be discussed during this session.

- Different existing document type categories
- Referral types
- Scheduler production types (color assigned to appointment by type of appointment)

Custom Letter

This section will contain the documents that will be used for things like consent forms, referral forms, appointment letters, financial communications and more. Providing examples of these documents will make the document entry process happen more smoothly.

- Treatment Consent Form(s)
- Financial Disclosure(s)
- Appointment Letter(s)
- Referral Letter(s)

Best Practice Setup Guides

Whether you're launching a new location or refining your existing configuration, **Denticon's Best Practice Setup Guides** are here to help you build a strong foundation. These step-by-step resources are designed to empower system administrators and key team members with the knowledge to configure Denticon confidently and efficiently.

Inside, you'll find expert guidance on everything from provider schedules and clinical settings to user permissions and payment codes. By following these proven practices, you'll streamline setup, reduce errors, and ensure consistency across your organization.

Account and Office Setup Guides

- [Account Setup](#)
- [Office Setup – New Office](#)
- [Office Setup](#)
- [Users & Security Groups](#)
- [Custom Toolbar](#)
- [Security Groups](#)
- [Procedure Code Setup](#)
- [Provider Setup – New Provider](#)
- [Provider Setup – Edit Provider](#)
- [Scheduler Setup](#)
- [Office Assignment](#)

- [Notes Macros and Pick Lists](#)
- [Prescriptions](#)
- [Medical History Setup](#)
- [Charting](#)

Misc. Setup Guides

- [Misc. Setups](#)

Insurance Setup Guides (Financials and Revenue Cycle)

- [Payment & Adjustment Types](#)

Clinical Setup Guides

- [Explosion Codes](#)

[Practice Setup Planet DDS
Knowledge Base:
Best Guides](#)



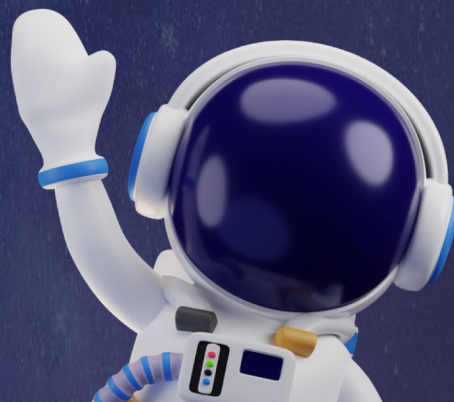
CONVERSION

Bringing Your Data Over

To complete your onboarding successfully, we'll also focus on your data conversion. This ensures that your existing information is carried over accurately and securely into Denticon. We will:

- Review the overall **conversion policy**.
- Walk through the **trial data conversion** process to preview how your data will appear.
- Proceed to the **final data conversion**.
- Follow with **imaging** and **scanned document conversions**.

These steps ensure your practice starts with a **complete and reliable system**.



Conversion Policy

Embarking on a conversion from your legacy PM system to Planet DDS Denticon or Cloud 9 software is an exciting journey towards enhanced efficiency and modernized operations. To ensure a smooth transition, it's crucial to adhere to our policies regarding data extraction, cancellation, and rescheduling of appointments. Following these guidelines will help avoid unnecessary delays and additional costs, enabling you to successfully implement your new software.

Every customer's data is different and has evolved over time. We need your data to set realistic goals and timelines, your Implementation Coordinator will be instrumental to you in defining and committing to due dates. Data received late from your existing PMS vendor may delay the go-live date, so proper planning and communication is essential.

Communication

Denticon customers should include **implementation@planetdds.com** on any communication regarding your data extracts (trial extract, final extract, or your final data upload) so a representative from the implementation team can assist you.

Cloud 9 customers should include **cloud9implementations@planetdds.com** on any communication regarding your data extracts (trial extract, final extract, or your final data upload) so a representative from the implementation team can assist you.

Please don't hesitate to reach out throughout your implementation if you have any questions or concerns.

Data Extract Late Policy

Clients who do not connect the PlanetDDS team or provide required data more than 20 minutes after the data capture appointment will be charged a \$175 fee and will be required to reschedule the capture time.

Any rescheduled data captures will be scheduled based on current availability which could impact your selected go live.

Cancelling or Rescheduling Final

Rescheduling or cancellations must be submitted in writing. If notice is provided less than 14 business days before the go-live date, a one-time fee of \$1,000 per conversion will be applied.

Rescheduled data captures will be arranged based on current availability. Clients unable to provide final data by the scheduled data pull date will incur the specified surcharges

Cancelling or Rescheduling Trial

Rescheduling or cancelations of a Trial Data Extract less than 24 hours prior to the scheduled appointment will result in a one-time \$175 fee per location.

Rescheduling or cancelations of a Trial Data Conversion after conversion is in process will be charged a one-time \$175 fee per location.

Deadline to Add Extracts to Calendar

To minimize disruption to clients and allow our conversion team time to plan appropriate resources to ensure the best conversion results, the data conversion schedule locks every Thursday at 11:59pm PT for the following week; this means we will not add new conversions to the calendar for the following week beyond the mentioned deadline.

Data Conversion Timing

Our standard conversion timeline is 7-9 weeks.

Our standard conversion checklists specify the data points that are converted for each Practice Management System. Any data points not included in the standard checklist will require custom programming. Please note that not all custom programming requests can be fulfilled, as they depend on the availability and integrity of data from the source system.

Custom programming requests will be assessed by our Conversion team, who will provide an estimate of the applicable fees to research and program and an adjusted timeline for the go-live date.

Blackout Periods

Below is a list of Federal Holidays PlanetDDS observes where we do not process conversions or complete data extracts. Your assigned implementation coordinator can give you specific closure dates based on the current calendar year.

- Memorial Day
- Independence Day
- Labor Day
- Veteran's Day
- Thanksgiving Day
- Christmas Day
- New Year's Day

Denticon Conversion Overview

Trial Extract Process Overview

Depending on your current system, you'll either:

- Upload trial data to your designated SFTP site, or
- Receive a LogMeIn code via email from a technician to begin the transfer.

SFTP Credentials will be provided before your scheduled appointment if you're uploading data directly.

For both trial and final data extracts, a confirmed appointment may be required depending on your software.

Work closely with your Implementation Coordinator to ensure your data is correctly formatted. If your data is password-protected, be sure to share the password with your coordinator.

Early Uploads

If you have your data ready before your appointment, you can upload your data as soon as it's available; no need to wait for your scheduled appointment.

You will use the same credentials throughout your Denticon onboarding for your trial and final data uploads.

Post-Trial Extraction Steps

After your trial data is extracted your Implementation Coordinator will guide you through a two-part mapping process:

Configuring fields in Denticon:

- Mapping Providers, Operatories, and Procedure Codes
- Once mappings are complete, your trial conversion will be executed during its scheduled week (or sooner).

You'll then begin auditing your data in the Conversion Environment.

Important: After trial extraction begins, avoid adding new operatories, codes, or providers to your legacy system as well as changing these fields in Denticon without consulting your coordinator.



Denticon Conversion Overview

Audit Questions

For audit questions:

- Submit any audit findings to your Implementation Coordinator.
- They will collaborate with the Engineer Team to investigate and resolve issues.
- If needed, a re-trial conversion will be performed, and revised data will be loaded into the Conversion Environment for your review and approval.

Why a Thorough Trial Audit Is Essential

A comprehensive trial audit ensures your data conversion is accurate, complete, and aligned with your office's workflows.

Your Expertise Matters

- Your insights help validate how data is used in daily operations, catching nuances our team might miss.

Time to Resolve Issues

- Identifying discrepancies early allows time to address complex workflows or data relationships.

Dual-Layer Audit Process

- Internal Audit: Our team reviews common issues (e.g., missing notes, unusual appointment times, insurance formatting).
- Client Audit: You audit based on your workflows and patient scenarios to catch critical elements.

Avoid Go-Live Disruptions

- Skipping or rushing the trial audit can lead to data inaccuracies, workflow interruptions, and staff frustration.

Mapping Updates: Timely Communication Is Crucial

If you make changes to mappings in Denticon or your legacy system after the trial conversion:

- Notify your Implementation Coordinator immediately.
- Uncommunicated updates can impact the data accuracy of appointments, ledgers, and treatment plans in your live environment at final conversion.

Deadlines

- **Confirmation:** Verify mappings at least one week before your final extract.
- **Submission Cutoff:** Submit updates by 5 PM PST the day before your final extract.
- **Late Submissions:** May incur additional fees due to reset and reprocessing.
- **Post Pre-Final Discovery:** Mapping changes after the pre-final audit are more complex and costly.

Denticon Conversion Overview

Final Data Extracts: Meeting Deadlines Matters

Timely submission of final data is essential to maintain your Go Live schedule.

Key Points:

- **Processing Time:** Pre-final load can take several hours. Delays may jeopardize Go Live.
- **Vendor Coordination:** Follow your coordinator's instructions—third-party vendor timelines vary.
- **Avoid Last-Minute Requests:** Afternoon requests on extract day often cause delays. Early coordination is key.

Final Conversion Process

Once you've approved the trial conversion:

- Later issues may be harder to fix and could cause delays or extra fees.
- You'll work with your Implementation Coordinator to schedule your final data extract based on your go-live date and office hours.
- On your appointment day, a Conversion Technician will perform the final data and document extraction (same process as the trial).
- Your final data will be loaded into the Conversion Environment for a pre-final audit.
 - Once approved, your final data will be loaded into your live Denticon environment.

Trial Data Conversion

- Obtain data from legacy system
- Review trial conversion specifics
- Perform data audits and report findings
- Address audit findings
- Customer approves results

Final Data Conversion

- Pull final data a few days before Go Live to reduce gap data
- Final Conversion on weekend before Go Live date
- PDDS and customer complete final audit to ensure data integrity

Image Conversion

- Initial and final (delta) image conversion completed
- Images mapped to Denticon patient record after final image conversion
- PDDS provides Exception Report for all unmapped images



Scanned Document conversion begins **post** Live on Denticon
(can take up to 4 to 6 weeks to complete)

Data Validation Guidelines

One of the most important aspects of your transition to Denticon is the process of **validating the integrity of the data converted from your legacy practice management system into Denticon.**

Attached you will find a copy of the audit form that you are to complete and return to us by the established deadline provided by your Implementation Coordinator.

In addition, you will be provided with the conversion checklist from your legacy practice management system which will outline all the items that are included as part of the standard conversion from that system.

Should you identify discrepancies during the audit, you must provide screenshots from your legacy practice management system so that our team can research. Please make sure that your document includes the patient's name, date of birth and outlines in detail what is missing that should have been included based on the conversion checklist provided.

Please note that audit findings will result in a reload of the data once the issues are identified and resolved; you will be notified that the fix has been deployed and asked to review the data again to confirm the change made meets expectations.

Thank you in advance for your time and efforts to ensure that your converted data is reflected correctly in Denticon.

Should you have any questions about the auditing process, please contact your Implementation Coordinator for clarification.

Because we want to ensure that the audit process is comprehensive, **we are asking you to audit a minimum of 15 patients** and are providing patient guidance below on the types of patient records to include in your review.

- Those with a long history at the office (complicated, phased treatment plans, extensive ledger histories, etc.)
- Cases with both primary and secondary insurance coverage
- Instances where the insurance subscriber is not a record-holder or responsible party at the office
- Records involving multiple providers within the practice
- Cases with multiple family associations attached
- Histories including implants, dentures, or partials completed at the office
- Records reflecting scaling and root planing procedures
- Cases with mixed dentition
- Those with various types of insurance coverage, such as: PPO, Medicaid, & HMO

Data Validation Guidelines

Your Implementation Coordinator will schedule a call to review audit instructions and guide you through the data auditing process.

You will receive a PDF copy of the document shown below, which will guide you through your data audit.

CLIENT AUDIT FORM | Denticon

Please use the following as a guide to audit your converted data. Please note that depending on your legacy software and any special arrangements you have made, there may be additional pieces of information that you need to audit. For some conversions, certain elements listed below may not be available or they may not have been input into your legacy software. This guide can be filled out digitally or you can print it out and mark it up as you audit your converted data.

CONVERSION DATA EXTRACT DATE =

All data from the conversion is before this date

Check Patient-Specific Information for Each Item Below																
Patient Overview Section	Patient Overview 01	Patient Overview 02	Patient Overview 03	Patient Overview 04	Patient Overview 05	Patient Overview 06	Patient Overview 07	Patient Overview 08	Patient Overview 09	Patient Overview 10	Patient Overview 11	Patient Overview 12	Patient Overview 13	Patient Overview 14	Patient Overview 15	Comments:
Patient Information	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	Click on the Patient Overview icon. Patient Information is on the left. Some items require you to click "Edit" to view details.
Patient Name																
Age																
Gender																
Birthdate																
Cell Phone #																
Email Address																
Chart ID																
Preferred Provider																
Home Office																
First Visit																
Home Phone #																
Work Phone #																
Address																
Referral Type																
Last Perio Chart																
Patient Type																
Active/Inactive <i>edit view</i>																
SSN (when available) <i>edit view</i>																
Marital Status <i>edit view</i>																
Relationship to Responsible Party <i>edit view</i>																

Review our supported systems conversion frameworks here:
[**Supported Systems for Denticon Conversions**](#)

Post Conversion Process

During the conversion process, your final data extraction will typically be scheduled on the Thursday prior to the final conversion upload, which happens the Saturday before your GO LIVE date.

Any updates, changes, additions, and/or deletions that take place in your current practice management and/or clinical charting applications that are made after the final data extraction WILL NOT be included in your final data conversion.

These items will need to be manually entered in Denticon. Your current practice management system may have audit reports available for items like schedule changes, new patients, and transactions.

You will need to update the schedule to make any appointment/changes/additions/cancellations, etc. This should be given the highest priority to avoid possible double booking of appointments.

We recommend holding all entries into the LIVE Denticon environment until the final conversion is completed and audited. If you choose to continue working in your current system after the final data extraction, you will need to zero the fee in Denticon or zero out the fee in your current system to avoid double billing patients.

Great job making it this far!
Remember: any changes after data extraction won't carry over—update your schedule and keep Denticon accurate. You've got this!



Post Conversion Process

Progress Notes

- Open the chart note in your previous application and highlight the text and copy (Ctrl C).
- Open the corresponding patient in Denticon and select progress notes.
- Click **Add New Note** from the bottom of the screen.
- Click into the note area and paste the note text (Ctrl V).
- Next, select the calendar in the upper right corner of the screen to modify the date to the correct date of service.

Progress Notes For Test, Teddy

TOOTH#, SURF, REGION Tooth# [dropdown] DOS (MM/DD/YYYY) 05/19/2025 [calendar icon]

DIAGNOSTIC

SELECT MACRO

Comprehensive Evaluation

Consultation

Denture Adjustment

Endodontic Referral

Fractured Tooth Test

Limited Oral Evaluat

Metro Exam

Pedo Recall

Pedo Treatment

Periodic Exam

Periodontal Treatmen

Pulp Test

Quick Exam

+ ADD MACRO

Patient presented for initial, comprehensive evaluation. Chief Complaint: None Medical History reviewed: Reviewed - Patient reports change in [unclear] see updated medical history Soft Tissue Exam completed. Findings: Neck/Nodes: Within normal limits Skin: Within normal limits Lips: pierced Mucosa: No significant findings Tongue: No significant findings Floor of Mouth: torus Palate: No significant findings Pharynx: No significant findings Gingiva: recession generalized TMD: clicking right Oral Cancer Screening: No significant findings Occlusion Classification: Right Class I, Left Class II Oral Habits: None Home Care/Oral hygiene: Good Assistant: Tara Training Dr. Trina Larkin

ATTACHMENTS (Max File Size: 10 MB, Allowed File Extensions: .Gif, .Jpg, .Jpeg, .Png & .Pdf)

SCAN No Scan File Chosen CHOOSE FILE No File Chosen CLEAR

CHANGE USER LOAD SIG. FROM FILE

Note: Please install ePadLink Systems Inc. Signature Pad. Get it for IE / Chrome / FireFox. For more visit Downloads and Links.

User Name [input] LOAD MY SIG

Password [input] (PDD53063)

Hide Macro Preview SAVE CANCEL

Transactions

- If you are charging out in Denticon, verify that the patient insurance has been linked prior to posting transactions. (If you already billed out the procedures in your legacy software, **DO NOT** rebill them again in Denticon. You should enter the procedures and zero out the fees.)
- Charges can be entered in the transaction entry screen in Denticon. Modify the
- **Transaction Date** to the actual date of services, then select **Go** to set the date.

Post Conversion Process

- Enter the services that were provided.
- If you previously charged out the transactions in your previous software, you will need to -0- the fee in Denticon to avoid duplicate billing.
- To update charges to -0- fee and remove insurance billing in Denticon:
 - Go to the transaction screen or ledge screen.
 - Select the date blue hyperlink.
 - Input **0.00** in the **Fee** field.
 - Select the **Advanced** button.

- Set the billing order to **None** (this will remove insurance billing from these transactions).

Post Conversion Process

You can audit the entries using the Daily Journal Detail report found in **Reports > Daily Reports**. Select the appropriate date range and select **Print Preview**.

The screenshot displays the 'Daily Reports' interface. On the left, a sidebar lists various report types, with 'Daily Journal' selected. The main area is titled 'REPORT CRITERIA' and includes a 'CLEAR CRITERIA' button. The criteria are organized into several sections: 'REPORT FORMAT' (Detail selected, Summary unselected), 'PRINT FORMAT' (PDF selected, Excel unselected), 'OFFICE/GROUP' (Office selected, Office Group unselected), 'PROVIDER/USER' (Provider: ALL, User: ALL, both with 'SELECT' buttons), 'DATE RANGE' (Transaction Date selected, Created Date unselected), 'Start Date' (05/19/2025), 'End Date' (05/19/2025), 'PATIENT TYPE' (Both selected, General unselected, Ortho unselected), 'TRANSACTION TYPES' (Services, Payments, Adjustments all checked), 'OTHER OPTIONS' (Show All, Include Resp. Party Type, Show Datewise Summary all unchecked), and 'GROUP BY' (None selected, Provider unselected, User unselected). At the bottom right, there are 'PRINT / PREVIEW' and 'ADD TO MY FAVORITES' buttons. The top right corner shows 'PGID:3063 / OID:100'.

As balance information does not convert, continue to work your balances off/down in your legacy system. Most clients find about six months to be sufficient.

IMAGING

Setting Up Imaging Tools

As part of onboarding, we'll also focus on **imaging and related tools to ensure your practice is set up for success**. We'll start with an overview of imaging and how it integrates with Denticon, followed by installation and a hardware check to confirm everything is working properly.

We'll also provide **FAQs and educational resources to support your team**.



Implementation Prep Checklist

To ensure a successful Go Live, follow these steps to prepare for key events:

Software Installation & Capture Device Setup

- Log workstations in as ADMIN for software download.
- Reset XVWeb login credentials in preparation for appointment.
- Install drivers for capture devices (refer to the manufacturer)
- Ensure a Technical Expert is available to connect the Planet DDS Install Technician for software installation and hardware checks.
- Ensure a Clinical Lead (preferably a Clinician) attends the meeting to approve image quality.

XVWeb Setup & Configuration

- Bring a user list with proposed roles and permissions.
- Bring a capture station (workstation) list, including computer names.

Imaging Database Conversions (Initial and Final)

- Know where the existing image folders are stored.
- Be prepared to connect the Conversion Technician to the server via LogMeIn123.com.
- Have any required passwords ready.
- Verify appropriate amount of storage space available on the server.
- Disable sleep/restart settings for the duration of the conversion.
- Assign a Clinical Lead to complete the audit after the initial conversion is completed.

Image Conversion Audits (Initial and Final)

- Compile a list of 15 patient names with images that have had recent appointments for auditing.
- Ensure meeting attendee has access to the legacy imaging software and Apteryx imaging site.

Patient ID Mapping

- Verify legacy imaging software has bridge setup with at least 4 of these 5 data fields without manual input: First name, Last Name, Birthdate, Gender, PMS ID Number
- Contact your Practice Management System if an Excel export of patient IDs is required.

End User Training

Pre-Training:

- Complete XVWeb Learning Path before Shared Guided Practice Session.
- Download Microsoft Teams on 1 - 2 capture stations prior to training session (if applicable)
- Ensure all team members attend Guided Practice and have XVWeb login credentials on hand.

Post Training:

- Participate in Training Q&A

Go Live

- Call (949)482-2541 for 30-day Post Go Live Implementation troubleshooting
- Transition to General Support after 30 days

XVWeb Installation & Image Quality Check

System Requirements

- 2.0 GHz or higher processor (faster is always better, especially for servers)
- 4GB of RAM (again, more is always better)
- 500 GB Hard Drive
- CD-R/DVDR Drive
- 100/1000Mbps or higher Local Area Network (TCP/IP preferred)

Pre-Installation Prep

1. Connection & Communication

- Provide the best phone number for the technician to reach you at the time of your appointment.
- The technician will call you and guide you through connecting to each workstation via LogMeIn123.com.

2. Administrator Access

- Log into each workstation as an Administrator. This access is required to install software and device drivers.
- Need help? [How do I log on as an administrator? – Microsoft Support](#).

3. XVWeb Login Credentials

- Confirm that your XVWeb login credentials are accessible and reset, if needed.
- Denticon clients: Ensure your installation contact also has Denticon login credentials.
- If you haven't received login instructions, contact your company administrator or review: [XVWeb Login Instructions – Apteryx](#).

4. Device Driver Preparation

Imaging devices (e.g., sensors, intraoral cameras) require specific drivers to function with Windows and XVWeb.

- If previously used, drivers may already be installed but could need updates.
- If not yet installed, download the latest drivers from your device manufacturer before the appointment.

XVWeb Installation & Image Quality Check

5. Device Specific Image Quality Settings

Post-capture image filters are per sensor brand, per workstation.

- Please refer to the following Support article for help setting up device specific settings for XVCapture – [XVCapture Device Specific Settings](#).
- For XVWeb Capture please follow this link – [XVWeb Capture Device Specific Settings](#)

Important: Device driver installation is not in the scope of the Install appointment, and the install technician will not be able to assist with driver installation. We strongly recommend having your internal IT support available during the appointment, as admin permissions may be required to install or update drivers.

6. Who Should Attend

- A team member with admin access to all workstations.
- An IT representative, if available, to assist with network or permission-related issues.
- If the install contact is remote or unfamiliar with the hardware, have a clinical team member (e.g., dental assistant) available to assist with image testing.

Installation & Testing

What to Expect

At the start of your appointment, the technician will:

- Call your designated contact and request remote access to all workstations.
- Guide the connection process (one by one or all at once, depending on your setup).
- Install and configure XVWeb on each applicable computer.

Estimated Time: 15–30 minutes per workstation, depending on performance and setup.

What We'll Do

- Install XVWeb and necessary device extensions.
- Confirm functionality of imaging devices by performing test captures on each connected workstation, **when possible**.
 - *(This confirms sensor connection and image return only)*

Client Responsibilities

- Power on all workstations before the appointment.
- Ensure the designated contact is available to grant remote access and assist as needed.
- Close unnecessary applications to improve system performance.
- Confirm each workstation meets minimum system requirements.

A short walkthrough will follow to confirm functionality and answer immediate questions.

XVWeb Installation & Image Quality Check

Post Install Image Quality Check

This appointment occurs separately and must be completed before your go-live date.

Hardware Check Overview

The technician will confirm that all imaging hardware is properly integrated with XVWeb by:

- Capturing test images with each device connected to your workstations.
 - *Example:* If Operatory 1 uses Sensor Brand X, Brand Y, and an intraoral camera, test images will be captured with each device.
- Adjust settings to align with your office's imaging workflow and preferences.

Estimated Time: 1 hour, but it can take longer depending on devices

Who Should Be Present

- A staff member familiar with imaging equipment (e.g., office manager, lead assistant).
- A licensed clinician or decision-maker to review and approve image quality.
- A staff member who is able to capture images using the software.

Please note: If a licensed clinician or decision-maker is not available to join the Image Quality Check appointment, the appointment will need to be rescheduled, and a \$175 rescheduling fee will be incurred.

Image Quality Check

To ensure the system is ready for clinical use, the technician will:

- Assist your team in capturing X-rays on real teeth using each applicable device.
- Adjust XVWeb filters and settings to match or improve previous image quality.

Image Quality Note: Our goal is to provide diagnostic quality while attempting to produce image quality as close to your previous imaging software as possible. While we will work closely with your team to optimize the settings within XVWeb, **we cannot guarantee that image quality will be improved**, as there are many external factors—such as exposure settings, hardware condition, and room setup—that directly influence imaging results. Please note that **our team's scope is limited to software installation and configuration**.

For additional reference, please review the **Image Quality Guide** here:

- [Image Quality Article – Apteryx Imaging](#)

Important:

- Default image filters may differ from your previous software.
- Once image quality is approved on the first workstation, our technician can replicate the final settings across the remaining workstations. However, it is always recommended to test each workstation individually, when possible, to ensure optimal performance.

XVWeb Installation & Image Quality Check

- **Typodonts or inanimate objects will not suffice**—a live capture of human dentition is required for accurate image quality evaluation.

Important: Any time imaging software or hardware changes occur, we recommend reviewing your X-ray generator settings. Proper exposure time is critical for image quality. Please use the attached **Exposure Reference Chart** to verify that your settings match your equipment and fall within recommended guidelines **prior to your appointment**. Adjustments may be needed for optimal results.

MFR.	Model	kV/mA	Adult		Child	
			Anterior	Posterior	Anterior	Posterior
			Anterior	Posterior	Anterior	Posterior
Progeny	Preva	65*/7	.080-.125	.125-.200	.040-.064	.064-.100
Sirona	Heliodent Plus	70*/7	.06-.10	.10-.16	.04-.06	.04-.08
Sirona	Heliodent DS	60/7	.08-.12	.12-.20	.04-.06	.04-.10
Gendex	765DC/Expert DC	65/7	.080-.125	.125-.200	.040-.063	.040-.100
Gendex	770	70/7	6-7 Pulses	7-10 Pulses	4-5 Pulses	5-7 Pulses
PlanMeca	Intra	66*/8*	.080-.120	.120-.200	.040-.080	.040-.100
Belmont	Belray	70/7*	.06-.10	.10-.16	.04-.06	.04-.08
Aribex	NOMAD	60/2.5	.34-.40	.40-.50	.25-.30	.30-.36
Aribex	NOMAD Pro2	60/2.5	.34-.40	.40-.50	.25-.30	.30-.36
Air Techniques		See MFR	.06-.08	0.1	See MFR	See MFR
Trex Trophy		3 RVG	.07-.08	0.1	See MFR	See MFR
Lumix		65kV	0.04	0.05	See MFR	See MFR
Kavo	Focus	Click Here				

XVWeb Installation & Image Quality Check

Clinician Sign-Off Required

A licensed clinician must review and confirm that captured images meet diagnostic standards. This approval is necessary to finalize the image quality check and proceed with go-live.

Best Practices for Success

- Connect and power on all imaging hardware before the appointment.
- Have a patient or staff member available for live image testing.
- Have IT contact (if applicable) available if needed for technical assistance during sessions.
- Inform the technician of any prior imaging preferences or known issues.

Reference Materials and Helpful Links

- [Capture Knowledge Base Articles](#)
- [XVWeb Device Integration List](#)
- [XVWeb System Requirements](#)
- [Supported Operating Systems](#)

XVWeb Installation Checklist

- Confirm administrator access for software and device driver installation
- Confirm XVWeb and/or Denticon login credentials are accessible
- Ensure imaging device drivers are already installed (if applicable)
- Ensure internal IT support is available for driver installation or updates and/or permission-related issues (if applicable)
- If the install contact is remote or unfamiliar with the hardware, have a clinical team member available to assist with image testing and confirm image return
- Confirm XVWeb installed and configured on each applicable workstation
- Ensure bridge is configured (if applicable)

XVWeb Installation & Image Quality Check

XVWeb Image Quality Checklist

- Confirm drivers are updated by IT contact (if applicable depending on sensor)
- Confirm captured images meet diagnostic standards and are comparable to legacy imaging software
- Capture X-rays on **real patients/volunteers** using each relevant device
- Licensed clinician has reviewed and approved image quality
- Adjust XVWeb filters and settings to closely match your previous software's image quality
- Check that each workstation returns images after your IT Team completes the driver updates
- Duplicate any image quality settings on any other workstations (if applicable)

Important: Make sure a licensed clinician has reviewed and approved image quality!



Understanding Drivers vs Extensions

How Hardware Drivers and Software Extensions Work Together in Your Imaging Workflow

What is a Driver?

A **driver** is software provided by your hardware manufacturer that lets your computer's operating system (Windows) recognize and communicate with the physical device.

- Enables communication between the device and your computer
- Required for the device to function at all
- Must be installed first

Examples: Imaging device driver, printer driver, keyboard or mouse driver

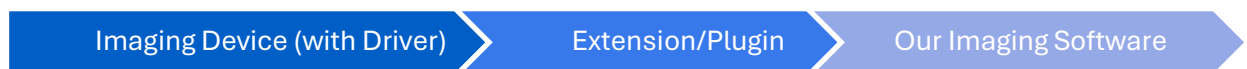


What is an Extension?

An **extension** (sometimes called a plugin) connects your imaging device to our software. It ensures that captured images display correctly and work within our system.

- Translates device output into a format our software understands
- Installed after the driver
- Essential for full software compatibility

Examples: Direct Video Extension, Gendex Extension



Putting it All Together

To get your imaging device working smoothly with our software, you need both a driver and an extension:

1. The driver helps your computer (Windows) recognize and talk to the device.
2. The extension allows our imaging software to communicate with the device and display the images correctly.

Think of it this way:

- The driver is the translator for your computer.
- The extension is the translator for our software.

You need both for a smooth and functional experience.

Understanding Drivers vs Extensions

TWAIN is a separate method that some devices use to connect to imaging software. While it works for basic scanning, it often lacks the full functionality that extensions provide.

Feature/Aspect	Driver	Extension/ Plugin	TWAIN
Purpose	Allows Windows to recognize and communicate with the device	Connects the hardware (via driver) to our imaging software	Acts as a universal driver interface for imaging devices
Who Provides it	Hardware manufacturer	Planet DDS or integration team	Device manufacturer (often bundled)
Required For	Windows to detect and use the hardware	Our software to use and control the hardware	Some older devices using TWAIN protocol
Installation Timing	Installed first	Installed after driver	During or after driver setup
Typical Devices	Sensors, pan units	Devices with drivers needing software control	Legacy Scanners, Cameras
Visible to Windows?	Yes; in Device Manager	No; only in Imaging Software	Sometimes; as a Scanning Source
Example	Dexis IXS Driver	Gendex Extension	

What to Expect: XVWeb Imaging Setup Call

Purpose: This session is designed to walk your team through the configuration of your XVWeb imaging software. Our goal is to make sure your team is aligned on the processes for managing user accounts and configuring capture stations. In addition, you will understand which image layouts are available to your team for use and how to create your own layouts when needed. We will also review the process of completing a conversion audit.

What Will Be Covered

User Roles & Permissions:

- Overview of user types and how to assign the right privileges for your team's workflow.
- Best practices for managing users and maintaining security.

Location & Capture Station Setup:

- How to add, edit, or remove office locations in XVWeb.
- Assigning imaging devices (capture stations) to specific locations for accurate data mapping and analytics.

Customization Options:

- Ways to tailor layouts, image enhancements, and site settings to fit your clinical needs.
- Guidance on assigning a decision-maker for customization to keep your workflow streamlined.

Imaging Conversion Audit:

- What to expect from the data conversion process.
- Steps for completing initial and final audits to ensure your imaging data is accurate and complete.

What You'll Gain

- A clear understanding of the onboarding process and your role in it.
- Knowledge of how to manage users, locations, and devices in XVWeb.
- Resources and best practices for customizing your imaging workflow.
- Confidence that your data conversion will be handled accurately and securely.

How to Prepare

- Please have your key team members (IT, clinical leads, office managers) attend the call.
- Bring any questions about your current imaging workflow or data conversion needs.
- Review your current user list and location setup in advance and bring a list of your capture workstation names to the meeting.

We are committed to making your transition to XVWeb Imaging as seamless as possible. If you have any questions before the meeting, please let us know.

XVWeb User Accounts – Best Practices

The following are recommended best practices for a successful XVWeb implementation:

User Types

XVWeb accounts start with a single Admin. Clients manage additional users and permissions.

- **Admin Account:** Full privileges; cannot be deleted or restricted.
- **Standard User:** Customizable set privileges.
- **Temporary User:** Limited-time access with query privilege; optional export access.

Privileges Overview

- **Admin:** Full site control, user management.
- **Query:** Search patients and data.
- **Share:** Share patients/studies (not for AD FS).
- **Export:** Download images and share links.
- **Print:** Print images or series.
- **Capture/Import:** Add new images to patient records.
- **Edit:** Modify patient/study/series metadata.

User Account Best Practices:

- Use unique email and password per user or location.
- Avoid shared accounts or passwords.
- Limit admin access to essential personnel.
- Avoid reusing passwords from other systems.
- Document account ownership clearly.
- Remove unused accounts promptly.
- Use clear and consistent naming conventions.
- Review user accounts regularly.
- Educate users on account security.
- Change passwords at regular intervals.



Denticon Integration Setup:

- *To locate XVWeb credentials:*
- In Denticon, navigate to **Setup** → **Offices** → **Office Setup** → **Integration tab**

XVWeb User Accounts – FAQs

Frequently Asked Questions:

- **Why create multiple users?** Better security, accountability, and flexibility.
- **Do I need a user for every team member?** Not necessarily, but at least one user per location is recommended.
- **Does each user need a unique email address?** Yes, for recovery purposes. Multiple users can share the same email if necessary.
- **If I reset my XVWeb password, do I need to update the Denticon Integration tab?** Yes, update your credentials within Denticon's integration settings.
- **What privileges should full admin user have selected?** Assigning the Admin privilege does not automatically grant all system capabilities. For a user to function as a true administrator with full access, all privileges should be selected in addition to Admin.


Imaging Audit

You will need the following to complete your imaging audit:

- Access to your Apteryx Imaging site. The URL is typically sent to you via email and should include your temporary login information. Please reach out to your implementation coordinator or our support team if you need assistance with this.
- Access to your original imaging software.
- The Imaging Client Audit Form sent by our conversion team for notation. (We recommend printing this document, so it is easily accessible)
- List of 15 patient names with images that have had recent appointments

STEP 1

Open your internet browser, go to your Apteryx Imaging URL, and sign in using your login details.



planet DDS | apteryx XWEB CLOUD IMAGING

Log On

Username

Password


Stay logged in (24 hours)

[Log In](#)

[Reset Your Password](#)

STEP 2

On the search screen of your Apteryx Imaging, initiate a blank search by clicking the Search button without entering any criteria. This will display a list of patients transferred from your original imaging software. Quickly scan through the list to identify any duplicate patients. (Note: a few duplicates may occur and are not always problematic, as they can result from duplicates in Denticon or your previous imaging system.)



planet DDS | apteryx XWEB CLOUD IMAGING

Primary Id First Name Last Name Date of birth Gender Modality

Please select...

[Search](#) [Clear](#) [Import](#) [XVCapture](#) [Shortcuts](#) [Capture](#)

STEP 3

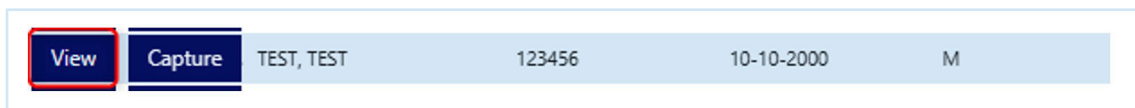
Using the audit document containing your patient list, locate your first patient by their last name. After finding the patient, confirm that the following details correspond with those in your previous imaging software and are accurate:

- Patient's full name, date of birth, and gender

If any information is inaccurate or the patient cannot be found, please record this in the comment section of your audit form.

STEP 4

Access the patient's images in Aptyx Imaging by clicking the "View" button located to the far left of the patient's name.

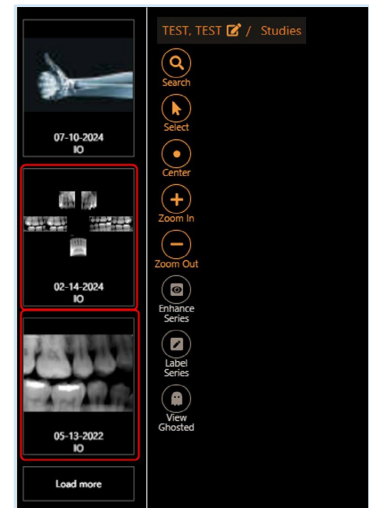


STEP 5

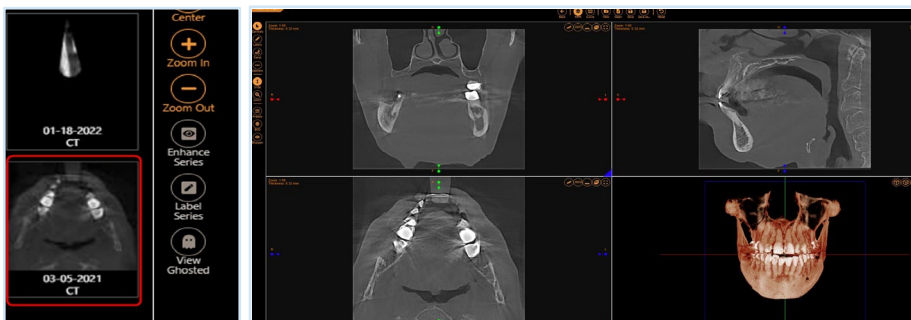
From the view screen in Aptyx Imaging, review the image preview bar on the left side of the screen. Compare this to your previous imaging software to ensure all images are present and correct. Notate the audit form with any discrepancies.

We recommend checking the following:

- Single images and series (bwx, fmx, pan, etc.) are present
- Dates of images are correct and match previous software
- Series template positions and orientation are correct
- Image quality of converted images is comparable to previous software.



If your practice is converting CBCT's, please left click on the study on the left side of the screen and allow the software to load the CT.



Your Implementation Coordinator will schedule a call to review audit instructions and guide you through the imaging auditing process.

You will receive a PDF copy of the document shown below, which will guide you through your imaging audit.

Check Patient-Specific Information for Each Item Below																
Patient Image Audit	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Patient Unique ID	Comments:
Patient Information	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	
Patient present as expected																
Patient Name																
Patient ID																
Birthdate																
Gender																
All single images present																
All series images present																
All image capture dates correct																
Series template positions correct																
Series orientations correct																
3D CBCT open properly																

Apteryx XVWeb Resources

XVWeb Links

[System Requirements](#)

[Hardware Plugins/Extensions and Simulator Download](#)

[XVCapture New Workstation Walk-Through](#)

[Imaging Database Conversion Process](#)

[Image Conversion Audit Form](#)

[Apteryx Learning Path](#)

XVWeb Login links

[XVWeb Login and Support Instructions](#)

[Submit a Support Request Ticket](#)

[XVWeb Status Page](#)

[Creating Users in XVWeb](#)

[XVWeb User Roles and Privileges](#)

FAQs

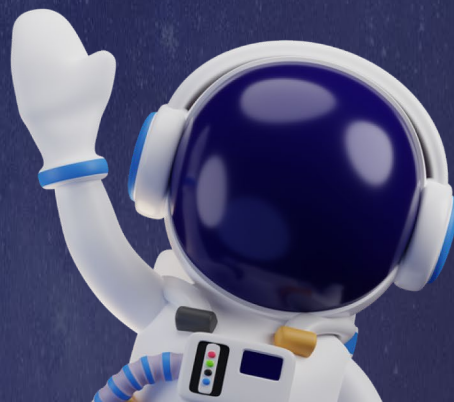
[Apteryx Knowledgebase](#)

[Apteryx Frequently Asked Questions](#)

Learning and Adoption

Our Denticon training program offers a **flexible blend of self-paced eLearnings and immersive virtual sessions designed to** support users at every stage of adoption.

Learners gain hands-on experience with core workflows in a collaborative environment, while post-training resources and support ensure continued success beyond the classroom.



Logging into Denticon Learning Center

1. Go to planetdds.learnupon.com
2. Click “Register now.”

The screenshot shows the 'Sign into Denticon Learning Center' page. On the left, there is a banner with the 'planet | denticon' logo and an astronaut. The main content area has a 'Sign into Denticon Learning Center' heading. Below this are three input fields: 'Email', 'Password', and 'Forgot your password?'. Each input field has a red border and a small 'This field is required' message. At the bottom right, there is a blue 'Log in' button. In the top right corner, there is a link: 'Don't have an account? Register now'.

3. Enter your **email address** associated with your Denticon account and create a password. Click “Register”.

The screenshot shows the 'Register for Denticon Learning Center' page. It features a heading 'Register for Denticon Learning Center'. Below the heading are three input fields: 'Email', 'Password', and 'Confirm password'. Each input field has a red border and a small 'This field is required' message. At the bottom, there is a blue 'Register' button and a white 'Log in' button.

4. You will be sent a confirmation email from LearnUpon. Click on the blue hyperlink.

The screenshot shows a confirmation message from Planet DDS. It starts with the 'planet | DDS' logo. Below the logo is a green checkmark icon followed by the text 'Confirmation link sent'. The message says: 'Please confirm your account. An email has been sent to the following address: @ymail.com'. Below this, it says: 'If you do not receive an email within a few minutes, please check your spam folder.' At the bottom, there are two links: 'Login' and 'Sign up with different email'.

The screenshot shows an email titled 'LearnUpon Confirmation Instructions'. The sender is 'Planet DDS Academy <notifications@learnupon.com>'. The email content says: 'Hello @planetdds.com. Please click on the link below to confirm your email and access the support center.' Below this is a blue hyperlink: https://planetdds.learnupon.com/support_desk_users/confirmations/update/e796e8fd48bd26bbd2f469d5abe4c9f. The email ends with 'Regards, Planet DDS Academy'.

5. Enter your name, PGID and OID of your office.

The screenshot shows a registration form with two sections: 'Basic Info' and 'Custom User Data'. The 'Basic Info' section has two input fields: 'First Name: *' and 'Last Name: *'. The 'Custom User Data' section has two input fields: 'PGID: *' and 'OID: *'. Each input field has a red border and a small 'This field is required' message.

Denticon & Apteryx Learning Program

Overview

Our training program is designed to give your team confidence from day one. Through self-paced eLearning, guided live sessions, and ongoing support, you'll have the tools and resources needed to learn and succeed. This program builds a strong foundation, provides hands-on practice, and ensures your team is ready to apply knowledge with confidence.

Step 1: Self-Paced Learning in Denticon Learning Center

- Access comprehensive eLearning courses for all users.
- Includes interactive, click-through tutorials for hands-on workflow practice.
- Covers foundational concepts to prepare your team for live sessions.
- Available on-demand for flexibility and convenience.

Step 2: Guided Training Sessions

- Attend live learning sessions tailored to your training package (e.g., front office, clinical).
- Join a hands-on Apteryx guided practice session led by an Imaging expert.
- Focuses on reinforcing Learning Center concepts and providing real-time practice.
- Includes role-based workshops, deep dives, and Q&A for collaboration.
- Structured agenda to ensure consistency across teams.

Step 3: Ongoing Support

- Access the Denticon Help Portal for articles, videos, and searchable “how-to” content. Continuous updates and quick answers help reinforce learning and keep teams confident.
- Attend our live Q&A sessions as needed for additional support.

Access the **Live Learning Session Schedule** [here!](#)



Go Live Preparation

As we move closer to go-live, preparation is key to making the transition smooth and successful. We'll start by:

- Covering gap data management to ensure all remaining information is captured and organized.
- Reviewing best practices to help your team prepare for day one.
- Sharing available resources to support and guide you and your team throughout the process.



Go Live Prep/Gap Data

Within the Patient Chart

- ❑ Edit the Patient Type and the Preferred Provider in the Patient Information section to remove the update information status.
- ❑ Attach Insurance Plans in Patient Overview. Re-estimate treatment plans.
- ❑ Edit the Responsible Party Type and select the correct type, then Save.
- ❑ Enter balances carried over from previous software under each patient and assign to the correct provider unless you will be using your previous software to close out claims/balances. If using your previous software to pay balances and close out claims create flash alerts for patient accounts for reference.
- ❑ Change patient dentition under the restorative chart and backdate it to one day before the first pre-existing item.
- ❑ Update any family members listed on accounts by repeating the same steps above.

On the Schedule

- ❑ Edit appointments to change Scheduled Production Type from crown default to correct production type.
- ❑ Attach procedures to the appointment either through Quick Add or from Treatment Plan. If adding from Treatment Plan, go to analog treatment planner to add procedures then go back to the appointment on the schedule and add from treatment plan tab available.
- ❑ If applicable, make any lab case designations within the appointment.

Gap Data

- ❑ Add appointments into Denticon that were scheduled, moved/rescheduled or cancelled after the final data extraction was completed.
- ❑ Copy most recent clinical notes into Denticon.
- ❑ Print out latest perio chart exam from previous software and manually enter in Denticon Any new or updated treatment plans need to be added to Denticon.
- ❑ Send out Patient Links, Print Routing slips (write outstanding balances from old legacy on RS) new or updated treatment plans need to be added to Denticon.
- ❑ For recent services provided and charged out in previous software, enter them into Denticon backdated with the correct DOS. Once services as posted they need to be marked as 0.00 and change the billing order to None.

We're Upgrading for You!

This office is transitioning to Denticon
a modern, cloud-based system from Planet DDS.

Why the Change?

Denticon helps us deliver faster, smarter, and more personalized care —
all while streamlining our work behind the scenes.

What This Means for You

You may notice a few extra steps or brief delays as our team gets familiar with
the new system. We appreciate your patience and support as we make this
exciting upgrade!

Better Systems. Better Care.

We're committed to making your experience even better —
and Denticon helps us do just that.

Thank you for bearing with us during this transition.

We're excited about what's ahead —
and grateful to have you with us!

Powered by

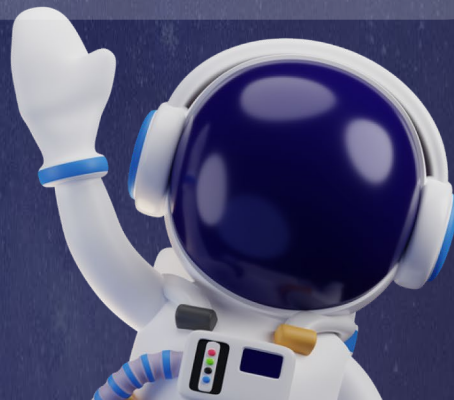


Live on Denticon!

As we wrap up onboarding, our goal is to make sure you feel fully supported as you transition into ongoing use of Denticon. We'll start by:

- Providing access to the **New Client Guide**, highlighting key information and resources at your fingertips.
- Overviewing our 30-day post live implementation support model.
- Reviewing the **handoff process** to our Support and Account Management teams, so you know exactly where to go for help and guidance.

Together, these steps help set you up for **long-term success.**



Post Go Live Support: What to Expect

As you go live with our products, we want to ensure your transition is smooth, successful, and fully supported. That's why your Implementation Coordinator will continue to work closely with you for 30 days after go live to finalize all implementation activities.

Continued Support from Your Implementation Coordinator

For the first 30 days post go live, your Implementation Coordinator will:

- Address any outstanding setup or configuration needs
- Ensure all implementation tasks are fully wrapped up
- This dedicated support period is designed to give you confidence and continuity as you begin using our products in a live environment.

Transition to Post Live Support

- After the 30-day wrap-up period:
- You'll transition to our **Post Live Support Model**, which includes:
 - Access to our expert Support Team
 - Self-service resources and knowledge base
 - Ongoing customer success check-ins (if applicable)

We're here to support you every step of the way—from onboarding to long-term success!





This certifies that
Your Dental Office
has
SUCCESSFULLY COMPLETED
IMPLEMENTATION
of Planet DDS software

Date _____



Apteryx & Denticon Support Overview

When Should I Contact Imaging Support?

Contact Denticon support for any of the following reasons listed below. If you have an imaging specific issue or question, please contact Apteryx imaging support.

Issue Type	Details
Technical Issues	Problems with software you cannot resolve on your own.
Product Questions	“How to” questions about features or processes.
Billing Questions	Questions about invoices or billing.
Service Interruptions	Outage or partial loss of service affecting product use.
Feedback	Suggestions or feedback about features or functionality.
Additional Training	Additional remote or on-site training needs.
Data Needs	Questions regarding how to access or obtain data.

When Should I Contact Imaging Support?

Contact Apteryx support for any of the following reasons listed below. If you have an imaging specific issue or question, please contact Apteryx imaging support.

Issue Type	Details
Technical Issues	Problems with software you cannot resolve on your own.
Account Problems	Trouble logging in or resetting your password.
Product Questions	“How to” questions about features or processes.
Billing Questions	Questions about invoices or billing.
Service Interruptions	Outage or partial loss of service affecting product use.
Feedback	Suggestions or feedback about features or functionality.
Image Capture Failure	Issues capturing images with a particular device and getting it to display in our capture software.
Image Transfer Failures	Image is captured and visible on local computer, but not in XVWeb.
Image Quality non-diagnostic	Image quality is non-diagnostic, and you need assistance improving the image quality.
Out of Tokens	Cannot launch XVCapture due to insufficient licenses or computer names changed. Support can release tokens for you.
Cannot find images	Cannot find images due to insufficient legacy data, incomplete data mapping, or image acquired under wrong patient.
Image Capture Templates/Layouts	Images do not capture or display in an order or orientation that the user is expecting.
Patient Bridging issues	Unable to launch imaging software with patient data automatically transferring from Practice Management Software. Or if the bridge works, but no/incorrect data is being passed to the imaging software, potentially resulting in duplicate patient records with different IDs.
Apteryx Analytics	Unexpected results in the Apteryx Analytics dashboard.
AI Overlay issues	AI Features not working as expected.

Ticket Priority & Definitions

Priority	Definition & Examples
Critical Inoperability	Prevents access, no workaround (e.g., can't login).
Issue Hindering Workflow	Major feature impacted, workaround exists.
How To/Integration	Minimal loss, inquiry into product capabilities.
General Question	Feedback, minor errors, workaround exists.

Best Practices for Submitting a Ticket:

- Include full error messages and steps taken.
- Specify affected hardware and provide screenshots.
- For patient-specific issues, include examples.

Support Resources & How to Contact Support

Support Hours & Channels

Denticon Support:

Monday – Friday, 7 a.m. – 8 p.m. EST

Support Portal:

<https://support.planetdds.com/hc/en-us>

AI Chat Widget – available 24/7

Tickets created after hours will be triaged the next business morning.

Apteryx Support:

Monday – Friday, 7 a.m. – 8 p.m. EST

Support Portal:

<https://apteryximaging.planetdds.com/hc/en-us>

Tickets created after hours will be triaged the next business morning.

How to Chat with Denticon Support

1. Go to the Denticon Portal: <https://support.planetdds.com/hc/en-us>
2. Use the Chat widget in the bottom right corner.
3. Type your question.
4. If your issue is not resolved, select 'No' when prompted.
5. The chatbot will create a ticket and a technician will follow up.

How to Enter a Support Ticket

Denticon:

1. Go to <https://support.planetdds.com/hc/en-us>
2. Click 'Submit a request'
3. Select 'Denticon Support' in the 'Support Request Type' field
4. Enter subject, description, priority, and attach relevant files

Apteryx:

1. Go to <https://apteryximaging.planetdds.com/hc/en-us>
2. Click 'Submit a request'
3. Enter email, phone number, priority, subject, description
4. Select 'Apteryx' in the 'Request For' dropdown
5. Attach relevant files

Support Resources

- Denticon New Customer FAQ: [New Client Guide](#)
- Denticon Training: [Denticon Learning Center](#)
- Apteryx New Customer FAQ: [New Client Guide](#)

Introducing Account Management

At Planet DDS, we believe that exceptional customer experiences are built on deep partnerships and personalized support. Our Account Management team serves as your dedicated advocate, working to understand your unique business goals and connecting you with the resources and expertise needed to achieve measurable outcomes.



Organizational Understanding

We take time to deeply understand your practice structure, workflows, and strategic objectives to provide tailored guidance.



Driving Business Outcomes

Our focus is on measurable results that align with your growth targets and operational excellence goals.



Ongoing Solution Optimization

Through regular reviews and assessments, we continuously refine your platform usage to maximize value and efficiency.

Personalized Customer Experience

With the Account Manager understanding your business goals, we partner with the below teams and connect you with the best resources to enable you to reach those desired outcomes.

Expert Teams		Self-Service Resources
Professional Services	Assigned team of SMEs from implementation or training .	Denticon Learning Center On-demand training
Support Services	Platform experts available to assist with questions or concerns Support@planetdds.com	
Product	Share feedback, needs, and special access to betas	Planet DDS Knowledgebase On-demand resources for answers, tips and best practices
Marketing	Providing newsletters, podcasts, and events giving you access to hear and learn from other thought leaders	

Structured Engagement Model

Our partnership is built on regular, meaningful touchpoints designed to keep you on track toward your goals:

Monthly Business Reviews

Quarterly Product Roadmap Alignment



Quarterly Goal Optimization

Bi-Annual Maturity Assessments

Appendix

Helpful Resources

- [Denticon Supporting URLs](#)
- [How Does Denticon Protect my Data?](#)
- [Denticon Status Monitoring](#)

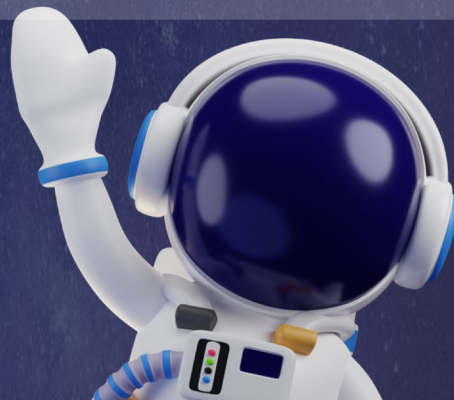


Integrations

This section provides informational resources to help you get familiar with Planet DDS and our advanced system features available for use with Denticon.

Objectives:

- **Review Planet DDS Integrations**
Planet DDS offers features like Planet DDS Pay, Denticon Patient Communication, and Denticon Practice Analytics to enhance your workflows.
- **Understand API options**
Find out how these connections can streamline your workflows and support your practice's needs.



Planet DDS Pay

Revolutionize your practice's payment experience

Running a profitable dental practice can be challenging with inefficient and non-embedded payment systems. Our customers often face manual processes prone to errors, limited features, and disjointed systems.

Planet DDS Pay is a secure, unified and scalable solution designed for Denticon and Cloud 9 platforms. With Planet DDS Pay customers can simplify financial operations, enhance patient satisfaction, and drive growth all with seamless integration and cutting-edge technology.

Why Choose Planet DDS Pay?



EFFICIENCY

Streamline billing and reduce administrative workload.



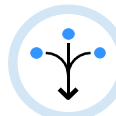
SCALABILITY

A payment solution designed to grow with your practice.



PATIENT SATISFACTION

Modern payment options improve patient experiences.



TRANSPARENCY

Simplified processes for practices and patients alike.

Automated Payment Posting

Post payments and refunds directly to Denticon or Cloud 9, eliminating manual entry, reducing errors, and saving time.

Secure Payment Processing

Protect patient data with PCI-compliant encryption, ensuring world-class security and fraud prevention.

Surcharge

Offset credit card fees with surcharge functionality to reduce costs and enhance financial sustainability.

Flexible Payment Options

Accept a variety of payment methods, including credit, debit, ACH, and contactless options like Apple Pay and Google Pay.

Automated Onboarding

Streamlined registration and setup to reduce effort and accelerate time-to-value for new and existing locations.

Dedicated Support

Personalized onboarding and troubleshooting to maximize the benefits of Planet DDS Pay.

Enhanced Reporting & Reconciliation

Track trends, reconcile transactions, and resolve discrepancies with integrated reporting tools.

Card on File

Securely store payment details for seamless one-click payments, reducing billing delays and administrative effort.

Automated Financial Campaigns

Boost collections with automated text and email reminders, reducing overdue balances and improving cash flow.



STRIPE READER S700

Sleek countertop terminal
\$349 Purchase or \$25/month



STRIPE WISEPOS E

Portable and cost-effective
\$249 Purchase or \$15/month

Explore how Planet DDS Pay can transform your practice's payment experience!

Denticon Patient Communication

A tech-forward way to stay in touch with patients

People are now in constant communication, whether it's by text, email, or even the traditional telephone. This constant communication also extends to their dental healthcare provider, but **patients are expecting more than a mere interaction; they want a customized communication experience.**

Bridging this connection presents challenges: dental practices are burdened by manual repetitive tasks, have a hard time filling their schedules, and miss opportunities to identify and inform patients of potential treatment plans.

Denticon Patient Communication eliminates these challenges.



Focus on the Tasks That Matter

Remove manual, repetitive tasks with patient messaging, leaving you more time to focus on direct and meaningful client interactions and provide a more personalized, better patient experience.



Keep Schedules Full

Increase production by finding gaps in your schedule, automatically identifying potential patients who can fill those gaps, and then quickly reaching out to those patients.



Customize Messaging and a Treatment Plan For Your Patients

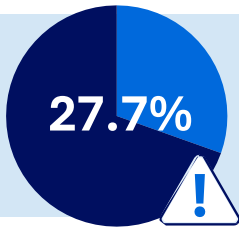
Segment your patients into custom groups, allowing you to message to the patients to whom the message is relevant and inform them of potential new treatment plans and help grow your business.



We are already seeing the added value of Denticon Patient Communication across many of our KPIs, especially our show rate which went **up 18% since our implementation.**

RANDA SEIF

COO, CaliDental



27.7% of all adults switch dentists due to poor communication leading to poor patient experience.

Source: *Coming together: How DSOs can address growing pains, Becker's*

Automated Email and Text Campaigns

Create prescheduled, automated campaigns to improve use of time and focus on the most important tasks.

Two-Way Texting

Quickly message to patients in real-time to answer questions, send forms, or reschedule an appointment, all within Denticon.

SmartAssist

An interactive and real-time checklist that ensures forms and tasks are completed for an appointment, providing a more efficient and better experience for patients and staff.

Copy and Edit Existing Campaigns

Quickly create new campaigns by leveraging existing, similar campaigns to reduce repetitive workflows.

Appointment Messaging

Create automated new patient welcome messages, save the date notifications, confirmations and reminder texts and emails to reduce patient no-shows and last-minute cancellations.

Personalized Campaigns

Stay in touch with your patients throughout the year with personalized communications.

One-Time Announcements

Easily create and send ad-hoc messages such as emergency notifications to keep patients informed.

Customizable Templates

Represent your dental organization's brand with easy-to-use, modern templating which features generative AI functionality.

Quick Fill

Fill last minute cancellations and/or schedule holes by sending an on-demand message to patients wanting to be seen sooner than scheduled and eliminate holes in the schedule.

Automate Patient Recall Notifications

Automatically message patients who are due or overdue for an appointment.

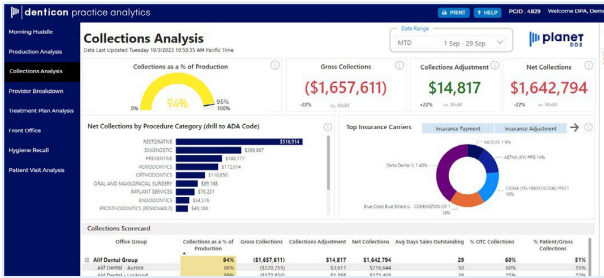
Custom Audience Lists

Create custom audience lists to reach your target audience and tailor messages specific and relevant to them.

Patient Recare, Remaining Benefits, & Treatment Acceptance Notifications

Create automated messaging geared to keep schedules full and patients returning to the practice and reduce patient churn.

Denticon Patient Communication brings you a comprehensive, best-in-class patient engagement solution.



Collections Analysis

Maintain Financial Health with Precision

Get a comprehensive overview of collections performance at every location. Act swiftly to close collection gaps and enhance cash flow.

Financial Efficiency: Identify and address collection gaps promptly, ensuring financial targets are consistently met.

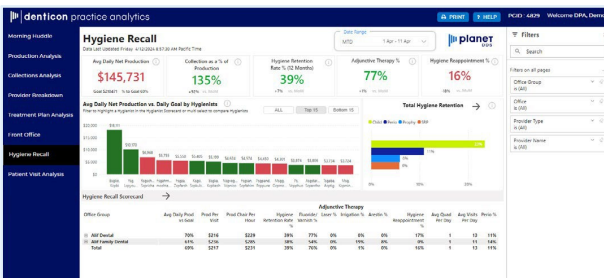


Provider Breakdown

Enhance Performance with Data-Driven Coaching

Provide your providers with precise performance data to drive their development. Identify growth areas and offer targeted coaching for sustained improvement.

Performance Management: Boost provider satisfaction and retention by aligning personal goals with organizational success through actionable insights.

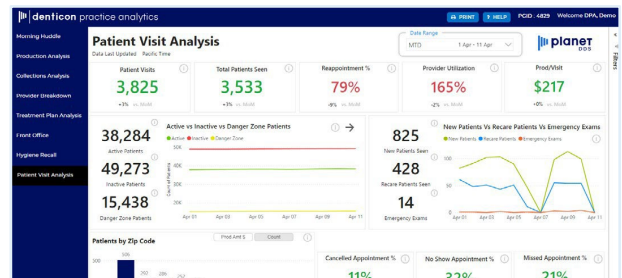


Hygiene Recall

Boost Retention & Optimize Hygiene Revenue

Track patient retention rates and hygiene production metrics to maintain a steady revenue stream and enhance patient loyalty.

Sustainable Revenue Growth: Focus on patient retention strategies that drive consistent hygiene appointments and revenue.



Patient Visit Analysis

Gain Strategic Insights into Patient Demographics

Understand your patient base with detailed demographic data, enabling more targeted marketing and operational strategies.

Data-Driven Marketing: Leverage patient demographics to refine marketing campaigns and attract new patients strategically.

Discover the full potential of your data with Denticon Practice Analytics

Your partner in sustainable growth and operational excellence

Denticon Practice Analytics

Nightly Data Downloads (NDD)

Why NDD might be right for your practice

Nightly Data Download (NDD) is a data management solution designed to help small dental practices efficiently manage and share their data. It enables practices to copy large volumes of data or storage without the need for complex IT infrastructure. NDD is particularly well-suited for practices looking for a simple and secure way to handle data without the need technical expertise.



Ideal for Small Practices

NDD is specifically designed for small dental organizations with 1-5 offices. It's a straightforward solution that fits well with practices that don't require large-scale data management.



No IT Team? No Problem

If your practice doesn't have a dedicated IT team or technical expertise, NDD is an excellent option. It's easy to use and doesn't require any complex setup or ongoing maintenance.



Secure File Transfers

With NDD, all data transfers are encrypted, ensuring that your sensitive patient and practice information is protected during every download.



Scheduled Syncing

NDD syncs daily at 9 PM PST, ensuring that your data is consistently updated. The process typically takes between 30 minutes to 1 hour, minimizing any disruption to your operations.



Quick and Easy Onboarding

Get up and running with NDD in just 3-4 weeks. The onboarding process is designed to be smooth and efficient, allowing your practice to start benefiting from the program without delay.

Get the Most from Your Data

Make data exchange easy and improve your decision-making.



THE DIGITAL PATIENT EXPERIENCE. BUILT FOR DENTICON.

Make every impression count across every location. MyTooth is the only patient forms and booking solution built directly into Denticon. It gives DSOs and dental groups a **branded experience that's easy to customize and simple for patients to use.**

THE CHALLENGES YOU FACE	HOW MYTOOTH SOLVES THEM
Patients want to handle everything before they arrive.	 Bookings and forms are accessible from any device.
Every location runs scheduling and intake differently.	 Set standard forms and workflows across all practices and select forms by location as needed.
Patients forget or skip paperwork.	 Forms are sent ahead of time — patients are ready, and front desk time goes down.
Staff spend time manually tracking updates or confirming appointments.	 Any patient updates show up instantly in Denticon.
Teams rely on multiple tools that fragment the patient experience.	 Scheduling and forms are integrated into Denticon for one connected DSO-branded journey.



Online Appointment Booking

Give patients a simple way to schedule, confirm, or reschedule visits.



Digital Intake Forms

Send and receive forms that patients can complete from any device.



Custom DSO or Location Branding

Present a unified, branded patient experience without relying on third-party portals.



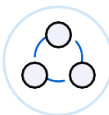
Real-Time Denticon Sync

Get instant visibility into every patient update in Denticon.



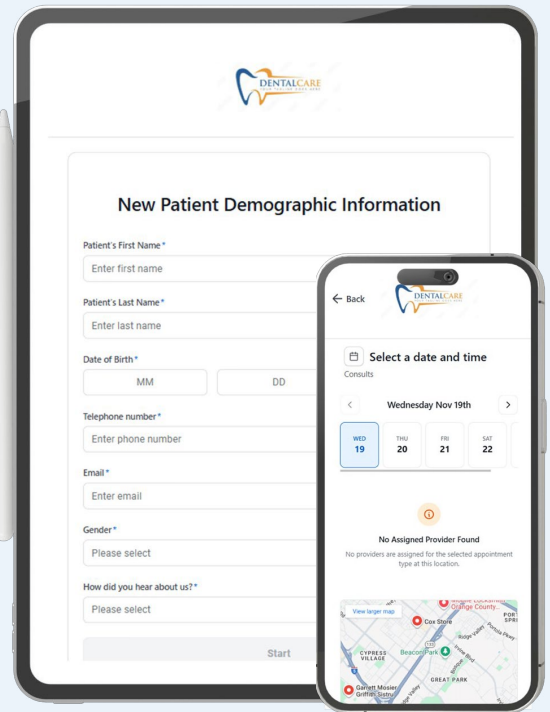
Customizable Workflows

Set the right forms and steps by location or appointment type from one dashboard.



Centralized Administration

Manage forms, scheduling, and practice settings across your entire organization in one place.



WHY MYTOOTH?

DSOs don't need another patient engagement app. They need a digital front door that runs on the same system as their back office.

MyTooth keeps booking, forms, and patient updates inside Denticon, giving patients a smoother path and teams cleaner data with less manual work.

Make the Patient Experience Easier!









AutoEligibility

ELIGIBILITY, AUTOMATED. FAST, ACCURATE & SCALABLE

Manual eligibility checks waste hours and stall RCM. **AutoEligibility brings real-time coverage details** including deductibles, waiting periods, frequency limits, and Medicaid directly into Denticon for fewer denials, stronger cash flow, and scalable workflows.

The screenshot displays the 'AUTOELIGIBILITY REVIEW' screen for a patient named Aaron Watson. It includes a navigation menu at the top, a search bar, and a table of patient information. Below this, there are two main sections: 'BENEFIT INFORMATION' and 'COVERAGE AND LIMITATIONS'. The 'BENEFIT INFORMATION' section compares 'Existing (Denticon)' and 'AutoEligibility (DXC)' plans, showing details for Deductible, Annual Max, and Ortho. The 'COVERAGE AND LIMITATIONS' section compares the same two plans across various categories like Restorative, Diagnostic, and Endodontics, listing Ded. Waived, Coverage, Frequency, Age Limit, and Waiting Period.

AUTOELIGIBILITY REVIEW										
Patient	Patient ID	Subscriber	Date Of Birth	Carrier	Employer	Group No	Plan Type	Network Type	Effective Date	
Watson, Aaron	4307	Watson, Aaron	08/20/1977	Delta Dental of Delaware	Delta Dental PPO	4512-001	Non-PPO	Unknown		
Existing (Denticon)					AutoEligibility (DXC)					
	Ind.	Ind Rem.	Fam	Fam Rem.	Ind.	Ind Rem.	Fam	Fam Rem.		
Deductible	\$50.00	\$50.00	\$150.00	\$150.00	\$50.00	\$0.00	\$150.00	\$100.00		\$100.00
Annual Max	\$2,500.00	\$2,500.00	\$99,999.00	\$99,999.00	\$1,500.00	\$1,132.80				
Ortho	\$1,500.00	\$1,500.00								

THE CHALLENGES YOU FACE	HOW AUTOELIGIBILITY CAN HELP
 <p>Time Drained at the Front Desk Manual portal checks can take up to 30 minutes per patient.</p>	 <p>Turn Hours into Seconds Automated checks run inside Denticon around the clock.</p>
 <p>Inaccurate Data and Frustrated Patients Surprise bills, reduced treatment acceptance, and lost trust.</p>	 <p>Surface Coverage Details Upfront Deductibles, waiting periods, frequency limits, and Medicaid info at your fingertips.</p>
 <p>Collections Delayed by the Denial Cycle Unreliable eligibility data causes denials, rework, and delayed collections.</p>	 <p>Break the Denial Rework Cycle Accurate eligibility data reduces denials and keeps claims moving.</p>
 <p>Tough to Scale Across Locations Inefficiencies compound as you grow.</p>	 <p>Standardize RCM at Scale Consistency across locations improve cashflow and organizational efficiency.</p>

Scheduler Patient Transactions Charting Reports Utilities Setup Help My Page Logout Office DXCTEST [211]

AutoEligibility PGID :3129 / OID :211

Appointment Date 03/03/2025 REVIEW ELIGIBILITY Print Report

Filter By Plan Status All

Patient ID	Patient Name	Appt Provider	Appt Time	Subscriber Name	Subscriber ID	Carrier Name	Type	Eligibility Status	Verified Date	Benefits	Plan Status	Last Modified	Actions
4307	Watson, Aaron	Brox, Soxx DDS	09:30 AM	Watson, Aaron	14724035288	Delta Dental of Delaware	P	Eligible	01/01/2001		Pending Review	02/08/2024 05:30 PM PT	Review/Update
4308	Musgraves, Kacey	Brox, Soxx DDS	10:00 AM	Musgraves, Kacey	14724035371	Delta Dental of Delaware	P	Eligible	01/01/2001		Plan Updated	03/03/2025 12:54 PM PT	
4309	Lawrence, Taylor	Brox, Soxx DDS	10:30 AM	Lawrence, Taylor	14723989074	Delta Dental of Delaware	P	Eligible	01/01/2001		Pending Review	02/08/2024 05:30 PM PT	Review/Update
4310	McCollum, Parker	Brox, Soxx DDS	11:00 AM	McCollum, Parker	14724019924	Delta Dental of Delaware	P	Eligible	01/01/2001		Pending Review	—	Review/Update
4311	Bryan, Zach	Brox, Soxx DDS	11:30 AM	Bryan, Zach	14724003952	Delta Dental of Delaware	P	Eligible	01/01/2001		Pending Review	03/03/2025 12:44 PM PT	Review/Update
4312	Strait, George	Brox, Soxx DDS	01:00 PM	Strait, George	14724012619	Delta Dental of Delaware	P	Eligible	01/01/2001		Pending Review	06/12/2024 02:42 PM PT	Review/Update
4313	Lambert, Miranda	Brox, Soxx DDS	02:00 PM	Lambert, Miranda	14724057042	AETNA PPO (CA)	P	Not Eligible	01/01/2001		Pending Review	02/08/2024 05:30 PM PT	Review/Update
4314	Johnson, Cody	Brox, Soxx DDS	04:00 PM	Johnson, Cody	14724012870	Delta Dental of Delaware	P	Eligible	01/01/2001		Pending Review	—	Review/Update

Key Features

- **Native in Denticon** Work faster with real-time answers directly in the system your staff already uses.
- **Comprehensive Eligibility Data** See deductibles, waiting periods, frequency limits, and Medicaid details upfront.
- **Enterprise Scalability** Standardize eligibility performance consistently across every location.

Eligibility is the front door to your revenue cycle. With AutoEligibility, DSOs move beyond basic “yes/no” checks to get the real-time coverage data needed for:

- Cleaner claims that reduce denials and rework
- Faster collections that strengthen cash flow
- Higher patient and staff trust in the billing process
- Consistent workflows that support confident scaling

Take denials off your team’s plate—for good.

Denticon Data Share

Power your analytics with quick and reliable data sharing.

Data Share is a robust cloud-based data sharing service, designed to facilitate the secure and efficient exchange of data between practice management systems and their analytics tools. By eliminating manual data transfers and complicated processes, it provides DSO executives and their analytics teams with the necessary data to turn information into actionable insights, driving business growth and informed decision-making.

TECHNICAL PREREQUISITES

- 1 Azure Subscription:**
Ensure you have an active Azure subscription to accept the Data Share invitation.
- 2 Azure Entra ID:**
Set up Azure Active Directory with the email address designated to receive the data share.
- 3 Configured Data Service:**
Have a data service configured for the target, such as a storage account or database account.
- 4 Internet Connectivity:**
Maintain a stable internet connection to facilitate seamless data sharing.



Efficient Handling of Large Volumes of Data

Ensure your team can access data swiftly and convert it into actionable insights with advanced data transfer capabilities and performance features.



Made to Scale as You Grow

Support smooth data sharing across various platforms, sources, and organizations, adapting to your expanding needs.



Ease IT Workload & Enhance Data Accessibility

As a fully managed service, let Data Share take care of your infrastructure, maintenance, and updates. It allows your IT team to focus on strategic initiatives rather than maintenance, saving time and resources.



Prioritize Data Security

With advanced security features, including end-to-end encryption and firewalls, know that your sensitive data is protected from unauthorized access and potential breaches.

Sync Time Options

SYNC NAME	DATE CUTOFF TIME <i>Time data is copied from Denticon</i>	APPROX TIME CLIENT RECEIVES SYNC
Default	9:00 PM PST	11:00 PM PST
Late Night Sync	12:00 AM PST	1:00 AM PST
Early Morning Sync	3:00 AM PST	4:00 AM PST
Mid-Day Update	11:00 AM PST	12:00 PM PST
Afternoon Wrap-Up	2:00 PM PST	3:00 PM PST
Evening Sync	5:00 PM PST	6:00 PM PST

Make data exchange
easy and improve your
decision-making today.



AI Assist

Elevating clinical standards across your organization.

Empower Your Clinicians with Smarter, More Consistent Diagnostics

AI Assist, powered by Pearl, ensures that every patient receives the highest standard of care across all your locations. Directly integrated into Denticon’s interface, this AI-powered solution standardizes diagnostics, enhances clinical consistency, and helps your team deliver better outcomes—every time.

The Challenges You Face



Inconsistent Standards of Care

With varying clinical approaches, ensuring uniformity in diagnostics and treatments across locations can feel like an uphill battle.



Missed Diagnoses, Missed Opportunities

Manual processes increase the risk of critical errors, impacting patient outcomes and losing revenue potential.



Balancing Clinical Excellence with Operational Efficiency

It’s hard to optimize care quality without tools that also improve workflow efficiency for busy clinicians.

How AI Assist Can Help



Consistent, High-Quality Care Across Locations

Standardizes diagnostics across all locations, helping clinicians identify treatment opportunities with confidence and ensuring every patient receives exceptional care.



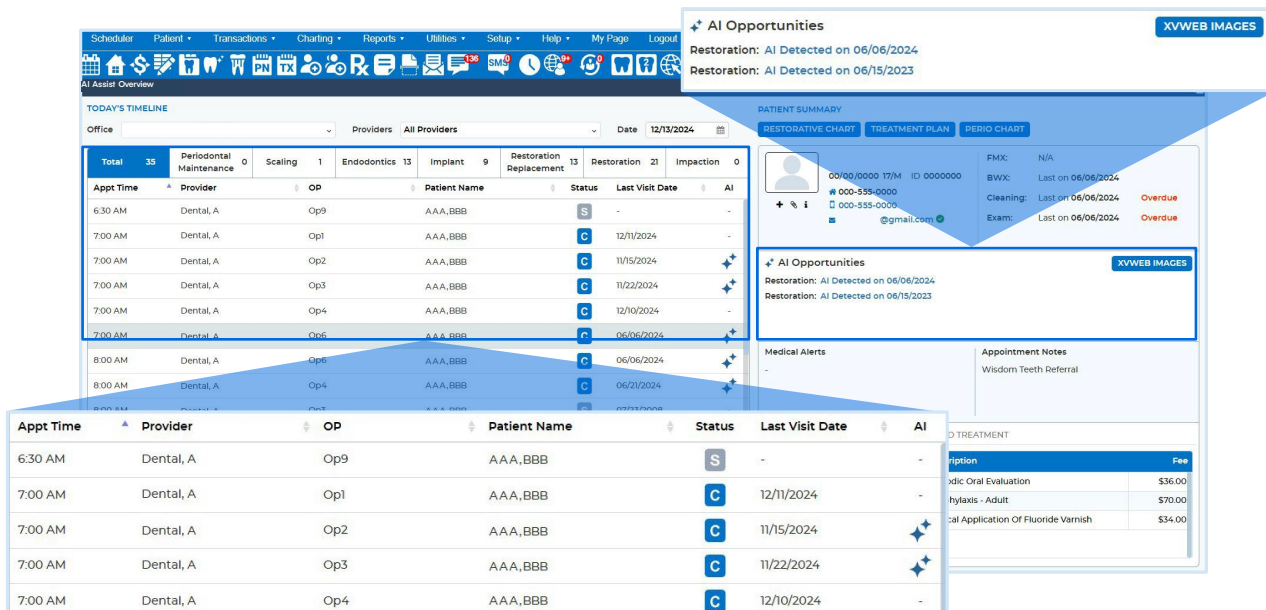
Proactive, AI-Powered Support

Automatically surfaces potential diagnoses and treatment needs, reducing missed opportunities, improving outcomes, and building patient trust.



Seamless Workflow Integration

Embedded directly into Denticon, the tool consolidates patient data, imaging, and AI findings into one interface—eliminating friction in the clinical process.



AI Assist scans patients who have appointments, up to 7 days in advance to look for treatment opportunities.

POWERED BY *pearl*
**The Future of Dentistry,
 Powered by AI**

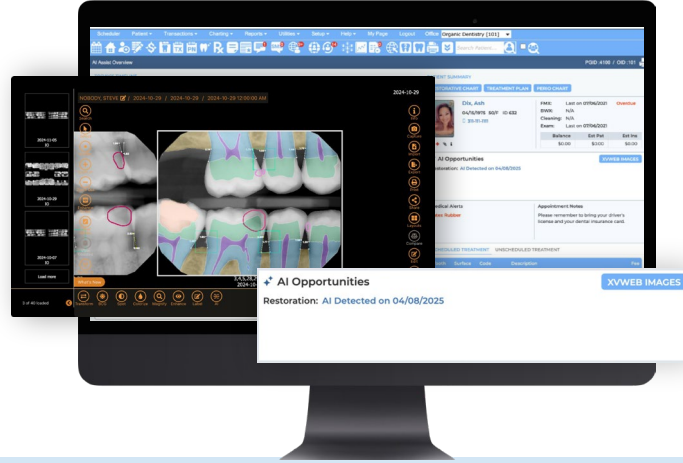
Pearl is the first FDA-cleared AI capable of reading and identifying diseases in dental x-rays, with regulatory clearance in 120 countries. Its precise, real-time diagnostics empower clinicians to make accurate decisions, reduce missed diagnoses, and improve patient outcomes. Trusted globally, Pearl sets the standard for diagnostic excellence in dentistry.

LEARN MORE AT PEARL

“ AI Assist helps clinicians feel more confident in diagnosing cases and improves how we communicate with patients—it’s made a real difference across all our locations. ”

ROD GANJIFARD
 VP of Technology, Onsite Dental

Build Consistency. Deliver Excellence.



Pearl & Planet DDS

Pearl AI has partnered with Planet DDS to develop a successful project plan for conversion, training, implementations and support to Pearl’s award-winning and best-in-class Radiographic Artificial Intelligence Suite of products.

Migration Plan to Include:

- Full Project Scope and Proposal for Entire Organization
- Workflow Analysis
- Customized Training
- Metric-driven Customer Success Program

Pearl is the world’s largest dental artificial intelligence software solution

200+ employees

Deployed in 120+ countries

30+ Integrations with leading dental practice management and imaging solutions

Comprehensive AI-driven product suite



Pearl’s mission is to positively impact billions of lives by elevating the standard of care in the dental industry.

Why Pearl?

Enhanced Diagnostic Accuracy

Pearl is the first FDA-cleared radiographic AI solution that uses advanced computer vision to identify issues often missed by the human eye, leading to more precise diagnoses and better treatment planning.

Natively Integrated with Planet DDS

Seamlessly integrate Pearl’s AI Suite into your Planet DDS workflow. When an x-ray is taken, Second Opinion will automatically populate within the system, ensuring 100% utilization.

Increased Efficiency

By automating image analysis, Pearl AI reduces time spent on diagnostics, allowing dental professionals to focus more on patient care.

Cost Effectiveness

By reducing misdiagnosis and unnecessary treatments, helps Pearl AI DSOs save on costs and improve overall practice efficiency.



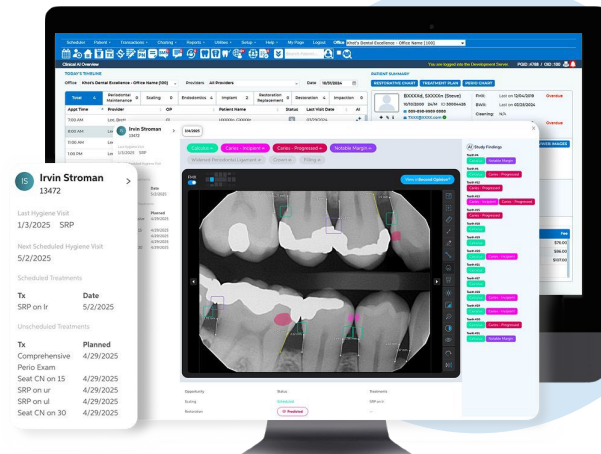
AI Essentials

XVWeb Overlay, which includes Second Opinion embedded directly into XVWeb. With settings default-on, clinicians can access AI insights within the imaging software and ensure 100% utilization of Pearl’s Second Opinion product.



AI Plus

XVWeb Overlay and Second Opinion Cloud Software, offering both in-platform AI and full access to the cloud platform for enhanced image review and functionality.



AI Premier

XVWeb Overlay, Second Opinion Cloud Software, Practice Intelligence, and the AI Assist module, brings diagnostic accuracy, operational insights, and workflow efficiency into one seamless experience. From instant, default-on AI detections in XVWeb to performance analytics that uncover trends in case acceptance and production, and real-time guidance in Denticon to support diagnostics, care planning, and scheduling, these tools work together to elevate care quality, streamline operations, and drive growth across every location.

[List of Integrations](#)

[FDA Clearances](#)



[Terms & Conditions](#)

[Pearl Insights & Case Studies](#)

Apteryx Analytics Dashboard

Turn imaging data into better care at scale

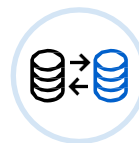
The **Apteryx Analytics Dashboard**, embedded within XVWeb, gives practices and DSOs the visibility they need to improve imaging performance. By tracking retakes, spotting coaching opportunities, and guiding equipment decisions, the dashboard helps standardize quality across locations, reduce unnecessary exposure, and save valuable time on reporting.

THE CHALLENGES YOU FACE	HOW THE DASHBOARD HELPS
<p>Retakes keep happening, wasting time and creating liability.</p>	 <p>Spot Retake Trends</p> <p>Identify retake frequency by user, device, or location to reduce unnecessary exposure.</p>
<p>Without data, managers miss opportunities to identify who needs coaching.</p>	 <p>Coach with Confidence</p> <p>Pinpoint where staff or sites need training support.</p>
<p>Equipment decisions feel like expensive guesswork.</p>	 <p>Decide with Data</p> <p>Use device-level performance trends to guide repairs and upgrades.</p>
<p>Leaders are chasing spreadsheets instead of acting on insights.</p>	 <p>Simplify Reporting</p> <p>Access ready-to-use metrics that save time and enable faster decisions.</p>



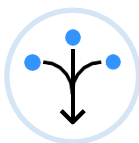
Built into XVWeb

No extra logins or training



Exportable Data

Pull CVS reports instantly



Granular Filters

View by operator, device, or location



Admin-only Access

Secure with existing credentials

Powered by Planet DDS

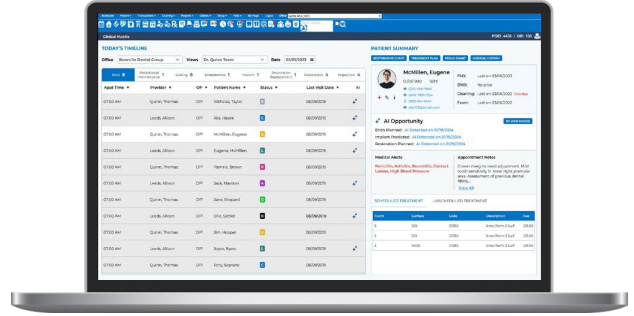
Trusted by **13,000+ practices** and more than half of the top 60 DSOs, Planet DDS hosts **1.7 billion images** and manages **1.2+ petabytes of data**. The Apteryx Analytics Dashboard is built on this proven foundation to help practices improve imaging quality and consistency at scale.

See the BIG Picture

Planet DDS API Program

The ultimate solution for DSOs.

Future-proof your dental operations with the industry's most open API program, facilitating timely data exchange, streamlined workflows, and unparalleled scalability.



Discover how a unified system can facilitate seamless data sharing, informed decision-making, and a superior patient experience with Planet DDS APIs.

Whether you're integrating with third-party solutions or developing custom applications, our platform guarantees consistent and accurate data flow.



Facilitate Timely Data Exchange

Achieve smooth and timely data exchange across your DSO, ensuring up-to-date patient and operational information.



Solve Interoperability Challenges with a Unified Platform

Integrate and synchronize your practice management solution with diverse applications for reliable, consistent data across your organization.



Streamlined Workflows with Reduced Manual Data Entry

Automate labor-intensive processes like insurance verification and ledger updates, reducing the administrative burden.



Future-Proof Your Integration Plans

Our platform's robust and scalable infrastructure ensures that your systems remain interoperable and efficient.



Drive Innovation with Freedom

Planet DDS APIs enable you to tailor your tech stack to meet the growing needs of your DSO, fostering continuous innovation and enhancing the patient experience.

Our rapidly expanding network of growth partners



KEY FEATURES

New Writebacks

Facilitate data exchange from external sources to Denticon through “write” processes, including patient information, documents, medical history, and appointment status.

New Endpoints

Provide comprehensive access to diverse data sets within your practice management system, allowing for extensive integration possibilities.

Unmatched Security

Ensures the highest industry standards for data protection with SOC2 Type 2 Certification and HIPAA compliance.

Scalability

Our cloud-based infrastructure supports resilience and scalability, accommodating the growth and evolving needs of your DSO.

Highest Interoperability in the Industry

Designed to integrate with the broadest range of third-party systems, across your entire technology ecosystem.

TECHNICAL BENEFITS

- ✓ Access to Patient Medical History Data
- ✓ Access to Recall Data
- ✓ Access to Responsible Party Data
- ✓ Access to Financial Data
Insurance, Ledger, Account Balance
- ✓ Access to Clinical Data
Treatment Plan, Charts, Prescriptions
- ✓ Access to Practice Data
Procedure Codes, Providers, Operatories
- ✓ Secure Connection
- ✓ Cloud-Based, Remote Access
- ✓ Webhooks
- ✓ Event-Based Architecture
- ✓ Facilitate Data Warehousing
- ✓ Patient Documents Writeback
- ✓ Patient Medical History Writeback
- ✓ Patient Information Writeback
- ✓ Online Scheduling Writeback
- ✓ Appointment Status Writeback
- ✓ Insurance Eligibility Writeback

SUPPORT & RESOURCES

- ✓ Dedicated API Portal
- ✓ Early access to APIs
- ✓ Sneak previews of product roadmaps
- ✓ Gain early access to beta releases to be at the forefront of innovation

Let's chat about how Planet DDS can help future proof your integration plan!

