

# Cloud 9 Onboarding Guide



# WELCOME TO THE Cloud 9 Onboarding Guide

We're excited to welcome you to Cloud 9. This resource is designed to help your ortho practice confidently onboard, set up, and begin using Cloud 9'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 Cloud 9. 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 Cloud 9 onboarding process. This includes:

- **Ortho 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 Cloud 9 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.

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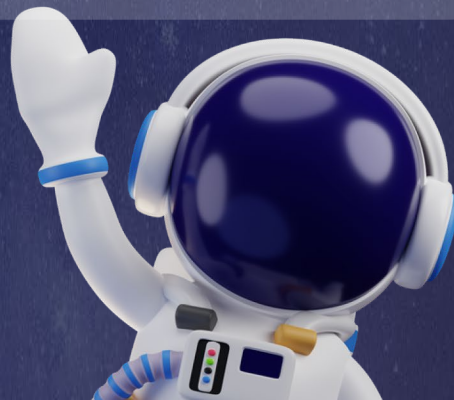
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# Preparing for Onboarding

This section gives you a clear overview of how your Cloud 9 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



# 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 Cloud 9 Learning Center trainings

## 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

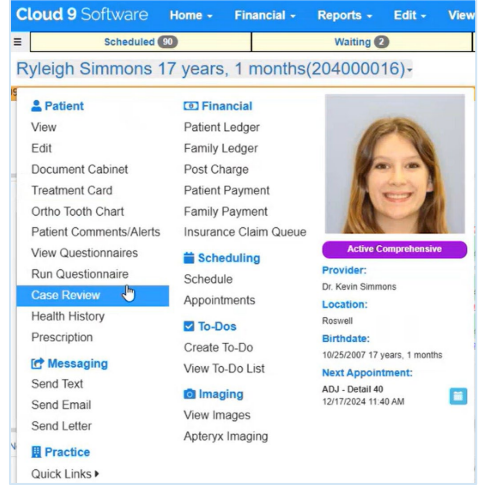
**EXECUTIVE CHAMPION:** Final decision-maker. Provides strategy and insights. Supports implementation success. Recommends the champion attend recurring sync meetings and stay involved throughout the onboarding process.

# Cloud 9 for the Orthodontist



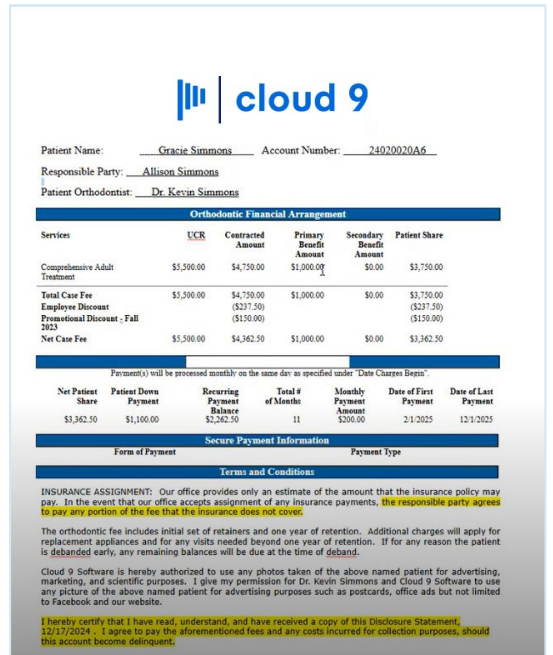
## Save Time, Increase Efficiency

- Access one central, cloud-based patient record that contains all information from patient visits across the organization.
- Log in from anywhere, any time with appropriate user permissions.
- Easily generate letters, case review links, and debond certificates.



## Collect More Revenue

- Present customized payment options with the Financial Arrangements case presentation slider bars.
- Generate practice-branded contracts for electronic signature.
- Securely save on file a primary and a secondary method of payment for approved auto-debiting.
- Transactions auto-post to the patient ledger, providing seamless revenue recording.
- Automated text and email payment reminders include link to patient portal.

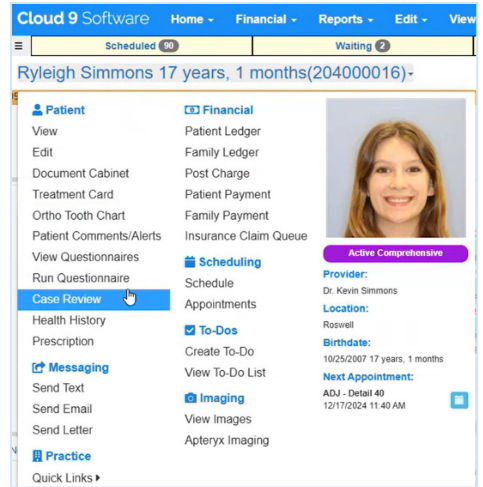


# Cloud 9 for the Practice Manager



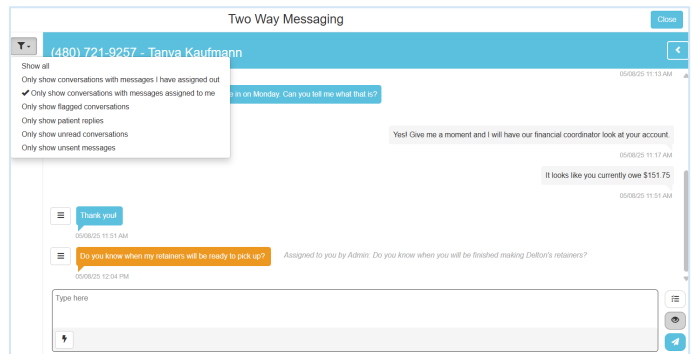
## Save Time, Increase Efficiency

- Access one central, cloud-based patient record that contains all information from patient visits across the organization.
- Easily set up letter templates to merge and send out.
- Generate and send insurance claims electronically from within Cloud 9.



## Communicate Easily with Patients

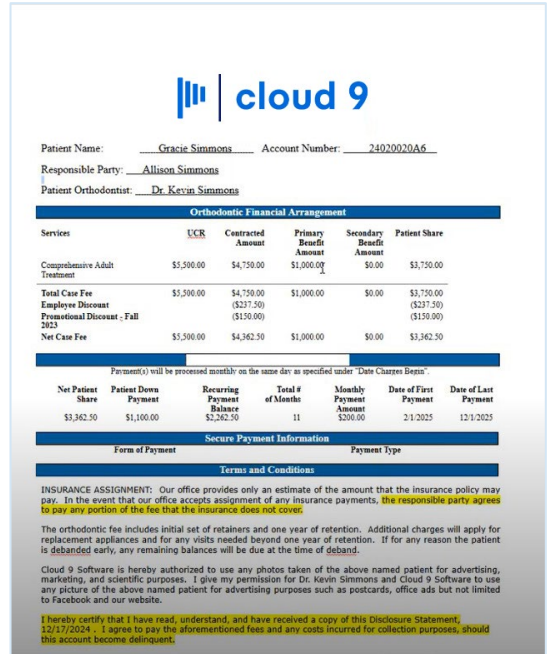
- Set automated, fully configurable text and email appointment reminders that reduce no-shows and cancellations.
- Keep patients from slipping through the cracks with Patient Spotlight tracking and reports.
- Create event-based messaging sequences based on the appointment type and outcomes.
- Route text messages to appropriate team members for responses
- Send automated messages for birthdays, promotions, office updates, etc.
- Enjoy two-way texting directly from Cloud 9 patient profiles with a permanent record of the conversation.



# Cloud 9 for the RCM Coordinator

## Save Time, Increase Efficiency

- Present customized payment options with the Financial Arrangements case presentation slider bars.
- Assign contracted insurance rate and eligible office discounts.
- Customize the downpayment amount and the monthly payment plan.
- Generate practice-branded contracts for electronic signature.
- Securely save on file a primary and a secondary method of payment.
- Set-and-forget automated payment processing schedule.
- Auto-post transactions to the patient ledger.
- Send automated text and/or email messages to patients to let them know the payment has been processed.
- Automate text and email billing reminders with link to payment portal for patients without card-on-file.
- Receive alerts if there is an outstanding balance during patient checkout.



**cloud 9**

Patient Name: Gracie Simmons Account Number: 24020020A6  
 Responsible Party: Allison Simmons  
 Patient Orthodontist: Dr. Kevin Simmons

Orthodontic Financial Arrangement					
Services	UCR	Contracted Amount	Primary Benefit Amount	Secondary Benefit Amount	Patient Share
Comprehensive Adult Treatment	\$5,500.00	\$4,750.00	\$1,000.00	\$0.00	\$3,750.00
<b>Total Case Fee</b>	<b>\$5,500.00</b>	<b>\$4,750.00</b>	<b>\$1,000.00</b>	<b>\$0.00</b>	<b>\$3,750.00</b>
Employee Discount		(\$237.50)			(\$237.50)
Promotional Discount - Fall 2023		(\$150.00)			(\$150.00)
<b>Net Case Fee</b>	<b>\$5,500.00</b>	<b>\$4,362.50</b>	<b>\$1,000.00</b>	<b>\$0.00</b>	<b>\$3,362.50</b>

Payment(s) will be processed monthly on the same day as specified under "Date Charges Begin".

Net Patient Share	Patient Down Payment	Recurring Payment Balance	Total # of Months	Monthly Payment Amount	Date of First Payment	Date of Last Payment
\$3,362.50	\$1,100.00	\$2,262.50	11	\$200.00	2/1/2023	12/1/2023

**Secure Payment Information**

Form of Payment	Payment Type

**Terms and Conditions:**

INSURANCE ASSIGNMENT: Our office provides only an estimate of the amount that the insurance policy may pay. In the event that our office accepts assignment of any insurance payments, the responsible party agrees to pay any portion of the fee that the insurance does not cover.

The orthodontic fee includes initial set of retainers and one year of retention. Additional charges will apply for replacement appliances and for any visits needed beyond one year of retention. If for any reason the patient is debanded early, any remaining balances will be due at the time of deband.

Cloud 9 Software is hereby authorized to use any photos taken of the above named patient for advertising, marketing, and scientific purposes. I give my permission for Dr. Kevin Simmons and Cloud 9 Software to use any picture of the above named patient for advertising purposes such as postcards, office ads but not limited to Facebook and our website.

I hereby certify that I have read, understand, and have received a copy of this Disclosure Statement, 12/17/2024. I agree to pay the aforementioned fees and any costs incurred for collection purposes, should this account become delinquent.

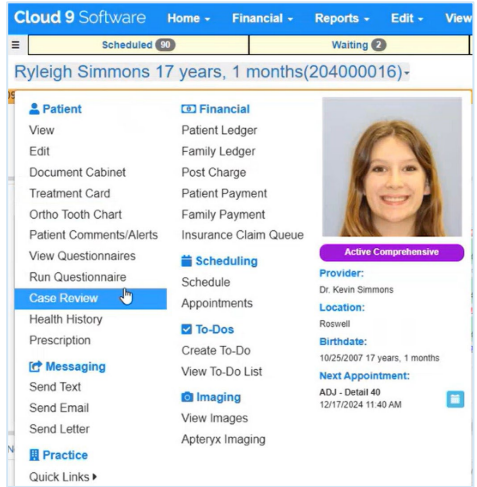
## Enjoy Robust Reporting

- Track key performance indicators (KPIs) to make data-driven decisions.
- View individual practice data and roll-up data to identify trends and issues.
- Receive full daily data downloads for deeper insights.
- Build custom reports via the Data Miner.

# Cloud 9 for the Treatment Coordinator

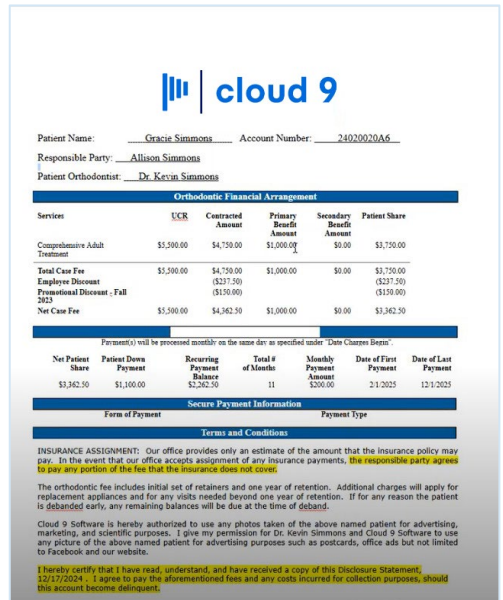
## Save Time, Increase Efficiency

- Access one central, cloud-based patient record that contains all information from patient visits across the organization.
- Apply exam questionnaire and treatment card templates specifically designed for ortho.
- Save time with exam questionnaire answers that autopopulate the treatment card.
- View native 2D imaging with presentation tools direction in Cloud 9.



## Collect More Revenue

- Present customized payment options with the Financial Arrangements case presentation slider bars.
- Generate practice-branded contracts for electronic signature.
- Securely save on file a primary and a secondary method of payment.
- Transactions auto-post to the patient ledger, providing seamless revenue recording.
- Automated text and email payment reminders include link to patient portal.



# Customer Onboarding Journey



# Unlock Strategic Value

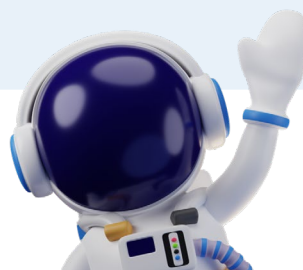
At Planet DDS, we're here to make your onboarding experience smooth and reassuring.

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
<b>Visibility &amp; Control</b>	Real-time insights into project status, risks, and milestones. Enables informed, proactive decision-making.
<b>Proactive Risk Management</b>	Early identification and mitigation of risks. Structured review processes for accountability.
<b>Swift Problem Resolution</b>	Clear escalation paths minimize delays. Fosters a culture of continuous improvement.
<b>Stakeholder Engagement</b>	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
<b>Complete System Workflow Session</b>	X	
<b>Configure your Cloud 9 URL</b>		X
<b>Configure Planet Integrations</b> (Planet DDS Pay, Cloud 9 Connect, etc.)		X
<b>Planet DDS Pay Launch Call</b>	X	
<b>Complete Cloud 9 Learning Center Sessions</b> (Required self-guided training)		X
<b>Initial Trial Data Conversion</b>	X	
<b>Complete Trial Data Audit and Submit Findings</b>		X
<b>Complete Data Mapping Documents</b>	X	
<b>Configure third party integrations</b> (, Cloud 9 Signature, etc.)		X
<b>Final Conversion</b> (Data and Imaging, Including Audits)	X	
<b>End User Training</b> (General, Scheduling, Clinical, and Financial)		X
<b>Complete Data Cleanup</b>	X	
<b>Go Live with Cloud 9</b>		X
<b>Post Live Support</b>	X	
<b>Complete Token Transfer</b> (If available)	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 Cloud 9. 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 Cloud 9 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 Cloud 9.

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](#)



# SETUP

## Getting Cloud 9 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
<b>Workflow Discovery</b>	<b>Project, Clinical, &amp; Operations Leads</b>	<ul style="list-style-type: none"> <li>• Client Operations Review</li> <li>• Best Practice Recommendations</li> <li>• Determine Optimal System Setup</li> <li>• Develop Training Plan</li> </ul>
<b>System Setup</b>	<b>Project Lead</b>	<ul style="list-style-type: none"> <li>• Practice and Location(s)</li> <li>• Employees &amp; Permissions</li> <li>• Providers</li> <li>• Schedules</li> <li>• Procedure Codes</li> </ul>
<b>Insurance</b>	<b>Project &amp; RCM Leads</b>	<ul style="list-style-type: none"> <li>• UCR Fee Schedule</li> <li>• PPO, HMO, and Other Schedules</li> <li>• Fee Schedule Assignment</li> <li>• Insurance Plan Entry</li> </ul>
<b>Clinical</b>	<b>Project &amp; Clinical Lead</b>	<ul style="list-style-type: none"> <li>• Clinical Note Macros</li> <li>• Consent Forms</li> <li>• Medical History Form</li> <li>• Explosion Codes</li> </ul>
<b>Misc. Setup</b>	<b>Project Lead</b>	<ul style="list-style-type: none"> <li>• Integrations</li> <li>• Payment &amp; Adjustment Types</li> <li>• Dental Labs</li> <li>• Referrals</li> <li>• System Review</li> </ul>

# General Setup

This session will guide you through the foundational setup of your Cloud 9 system. By the end of this session, you will have a clear understanding of how to configure and manage your practice details, ensuring smooth day-to-day operations.

## Purpose

- Establish the core elements required for successful Cloud 9 implementation.
- Ensure all practice and location information is correctly configured.
- Provide a foundation for future setup and training sessions.

## Session Topics

- Practice and Location Information
- Employee Setup
- Schedule Views
- Patient Statuses

## Preparation Checklist

### Practice Information

#### 1. Email Setup:

- Cloud 9 allows email configuration at three levels: Practice, Location, and Employee.
- Employee-level settings override Location and Practice-level settings.
- Please provide the email addresses you plan to use for sending documents.
- Depending on your email host, you may need to generate a new password or provide the existing one for Cloud 9 setup. Please have this ready for the meeting.

#### 2. Logo Setup:

- Provide your logo, header, and footer.
- Specify if different locations will use different logos.
- Check-In (Kiosk Station)
  - If your practice has a patient check-in station, what message would you like displayed during check-in? For example: “Welcome! Please brush your teeth and take a seat in the on-deck area. We’ll be with you shortly.”

## 3. Location Setup

Please have the following information ready for each location:

- Location Name: Internal identifier
- Printed Name: Name that appears on receipts
- Billing & Insurance Information:
  - Billing Name or Claims
  - Billing Address for Claims
  - Provider Number (NPI)
  - License Number
    - Tax Identification Number (TIN/EIN)

## 4. Employee Setup

- Review the [Employee Permissions](#) document before the session.
- Identify your employee types
- Prepare a list of all employees, including their first and last name, employee type, and login name (EX: c9.test)
- During the session, we will add 2–3 employees; the rest can be added afterward.

Provider Insurance Information:

- Provider Number (NPI)
- License Number
- TIN

Optional – Treatment Provider Override:

- Name
- Billing Information Override

## 5. Schedule Views

- Determine time increments for appointments (e.g., 5, 10, or 15 minutes).
- Prepare the number of chairs and their names/order (e.g., Exam, Consult 1, Consult 2, Chair 1, Chair 2, Virtual).

## 6. Patient Statuses

- Prepare a list of patient statuses and their associated codes and colors.

## Homework:

- Complete adding all remaining employees
- Add any remaining schedule views
- Add all remaining patient statuses
- Add all remaining E-Mail Server (SMTP)

# Schedule Setup

## Purpose

The objective of this session is to provide clients with a thorough understanding of the scheduling functionalities within the Cloud 9 system. This session is designed to ensure that all scheduling configurations are established accurately, supporting effective appointment management and resource allocation.

Our Implementation Consultants (ICs) will guide you through the setup and customization of the scheduling module, including the creation of schedule templates, appointment types, and time blocks. By the conclusion of this session, participants will have the knowledge and confidence to configure and manage schedules within Cloud 9 successfully.

## Session Topics

- Appointment Statuses
- Appointment Types
- Appointment Classes
- Schedule Templates
- Document Editor

## Preparation Checklist

To ensure a productive session, please prepare the following information in advance:

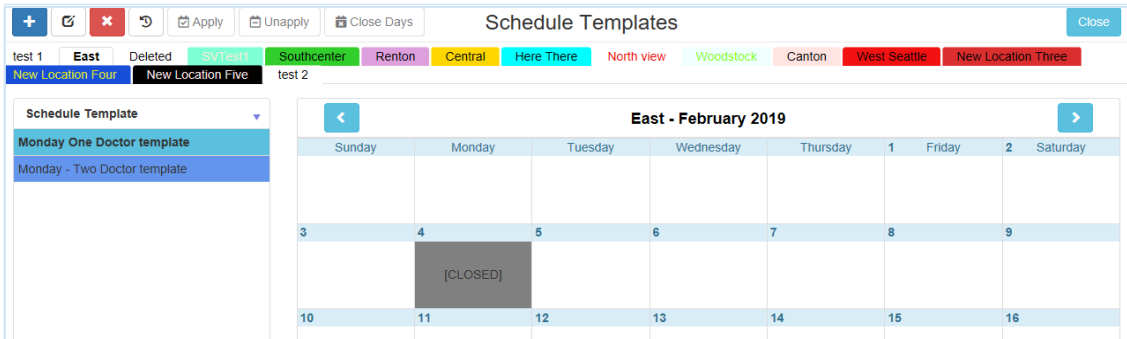
- **Appointment Types**  
Provide a list of appointment types with corresponding codes, duration (in minutes), and associated colors.
- **Appointment Classes** (categories for appointment types)  
Provide a list of appointment classes with corresponding codes, duration, and colors.
- **Schedule Templates**  
Have available all schedule templates that you intend to use within the Cloud 9 system.
- **Document Editor**  
Prepare a list of letters and documents in **Word format** that you would like added to Cloud  
**Please note that these will need to be entered manually into the system.**

## Homework

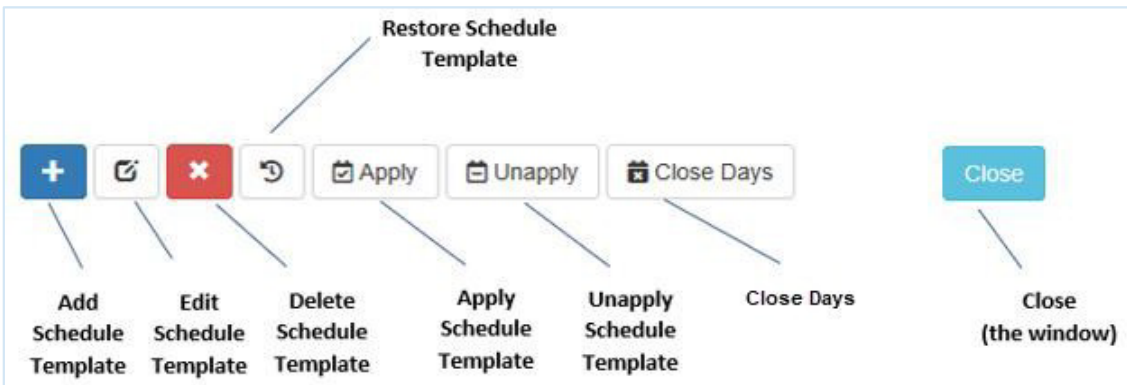
- Add any remaining appointment types
- Add any remaining appointment classes
- Add any remaining schedule templates
- Apply schedule templates to the calendar for the next six months

# Schedule Setup

You have access using HTML5 to set up schedule templates and permissions.



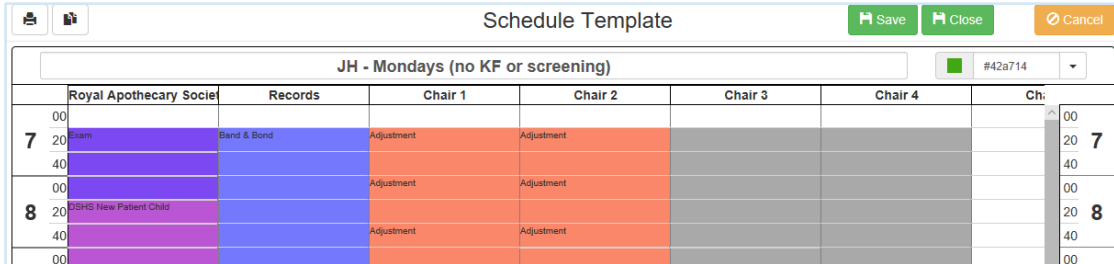
## Buttons





FIELD	DESCRIPTION
Add Schedule Template	Create a new schedule template
Edit Schedule Template	Modify an existing schedule template
Delete Schedule Template	Remove an unwanted existing schedule template
Apply Schedule Template	Apply the selected template to the selected days of the month
Un-Apply Schedule Template	Remove any applied template on a selected day(s)
Close Days	Indicate the days the office is closed
Close (the window)	Close the window

## Schedule Template Window

When you click **Add** or **Edit**, the Schedule Template window displays. Here you set up the template.



In the upper left-hand corner, there are **Print** and **Copy** buttons:

BUTTON	DESCRIPTION
 <b>Print</b>	<b>Print the template</b>
 <b>Copy</b>	<b>Copy and save the template under a different name.</b>

## Permissions

Users must have the following permission set to create and manage templates:  
**Edit > Employees > Add or Edit > Edit Schedule Templates**

## Schedule Template Options

Before creating your templates, you might want to consider how you want to search for appointments. There are several ways that you might want to search:

- **Option One** – Open Template
- **Option Two** – Partial Template
- **Option Three** – Full Template Using Appointment Types
- **Option Four** – Full Template Using Appointment Classes

## Option One – Open Template

This template may look like this example:

M 1 W 1 D 1 Monday, March 25th, 2019 1 D 1 W 1 M				
	Consult-Lisa	Chair 2	Chair 3	
10:00				10:00
10:15				10:15
10:30				10:30
10:45				10:45
11:00				11:00
11:15				11:15
11:30				11:30
11:45				11:45
12:00				12:00
12:15				12:15
12:30				12:30
12:45				12:45
1:00				1:00
1:15				1:15
1:30				1:30
1:45				1:45
2:00				2:00

Some offices prefer to have their schedule with no specific designated appointment types. They may want to display only their closed time, leaving the front desk free to schedule any type of appointment that fits into the open time.

Keep in mind that if you decide to use this type of open template, you will NOT be able to use the Search feature in scheduling the patient's next appointment. This also means that you will not be able to search using the Treatment Card Next Visit section either. Every appointment needs to be scheduled manually.



## Option Three – Full Template using Appointment Types

This template may look like this example:

M 1 W 1 D 1		Monday, March 25th, 2019			1 D 1 W 1 M	
	Consult-Lisa	Chair 2	Chair 3			
8	00 Retainer Check (15)	Adjustment (30)		00	8	
	15 Adjustment (15)		Adjustment (30)	15		
	30 Band 2 arch (90)	Adjustment (30)		30		
	45		Band 2 arch (90)	45		
9	00	Band 2 arch (90)		00	9	
	15			15		
	30			30		
	45			45		
10	00			00	10	
	15 IPR 2 arches (45)		Seat 1 Appl (30)	15		
	30	Remove Herbst (120)		30		
	45		Retainer Delivery (15)	45		
11	00		IPR 2 arches (45)	00	11	
	15			15		
	30 RPE/LA	Adjustment (30)		30		
	45			45		
	00			00		

Some offices prefer to have their schedules displayed using a comprehensive template. With this type of template, the day is planned out, with every appointment type added to the template.

Consider the following if you decide to use this type of template: When using the Search feature, appointments are only available if the appointment type has not been scheduled. Busy practices find they can plan their time management easier with this template. Make sure that ALL appointment types are on the template in order to use the search feature.

## Option Four – Full Template using Appointment Classes

This template may look like this example:

M 1 W 1 D 1 Monday, March 25th, 2019 1 D 1 W 1 M											
		Exams	Chair 1	Chair 2							
8	00				8	00					
	15					15					
	30	Exam-30Min	15Min	15Min		30					
	45		15Min	15Min		45					
9	00		30Min	30Min	9	00					
	15					15					
	30	Exam-30Min	Band-90Min	15Min		30					
	45			15Min		45					
10	00			Bond-60Min	10	00					
	15					15					
	30	Exam-30Min				30					
	45					45					
11	00		45Min	60Min	11	00					
	15	Consult-30Min				15					
	30					30					
	45		Ret/Obs-15Min			45					

Some offices prefer to have their schedule with a comprehensive template not by appointment type but by appointment class. Appointment classes are used to group specific appointment types together. For example, the doctor may not be concerned with the TYPE of appointment but with the TIME LENGTH of the appointment. Any appointment that lasts thirty minutes can be scheduled within this timeframe.

Consider the following if you decide to use this type of template: Each class contains several appointment types. The Exam-30Min class contains the NP Exam/Adult appointment as well as the NP Exam/Child appointment since they are the same time length. When using the Search feature, appointments will only be available if the appointment class has not been scheduled. This template is easier to create as many appointments belong to one class, rather than templating each appointment type.

**NOTE:** This type of template works great as long as the practice is a little more flexible on the scheduling of specific appointment types. Make sure that ALL appointment classes are on the template in order to use the search feature from the Treatment Card.

## Setting up Appointment Classes and Types and Schedule View

Classes are used to group specific appointment types together. All appointment types should be the same time length that belongs to a specific class. You can create as many classes as you need but remember if you have more than 15 classes it might be difficult to place them all on a single day without constricting the day.

### **EXAM-30Min** (Appointment Class)

- *New Patient Exam – Adult* (Appointment Type)
- *New Patient Exam – Child* (Appointment Type)
- *Exam – Transfer* (Appointment Type)
- *Exam – Second Opinion* (Appointment Type)

### **30Min** (Appointment Class)

- *Adjustment* (Appointment Type)
- *Impress Appliance* (Appointment Type)
- *IPR 1 Arch* (Appointment Type)
- *Seat 1 Appliance* (Appointment Type)

### **Records-30Min** (Appointment Class)

- *Records Final* (Appointment Type)

### **Consult-30Min** (Appointment Class)

- *Consultation* (Appointment Type)

You can create appointment classes and types from the **Edit Menu > Setup > Appointment Classes > Add or Edit** and **Edit Menu > Setup > Appointment Types > Add or Edit**.

The schedule view contains options on how a specific schedule is displayed. You create the start and end times as well as the columns/chairs in this setup. If you open another office location, here you'll specify the parameters for each location. You can access this from the **Edit Menu > Setup > Schedule View > Edit or Add**.

## Create and Apply a Schedule Template

### Create a Schedule Template

From the Schedule Template window:

1. Click **Add Schedule Template**. A blank Schedule Template displays.
2. Click in the **Untitled-1** block. The cursor displays.
3. Type in a descriptive name; for example, *Monday 9:00 – 2:00*.
4. Select a **color** for the template for easy identification on the schedule's mini calendar.
5. Click **Save** or **Close**, to save and close the window. The schedule template displays

### Set Close Time

From the Schedule Template window:

1. Click on the day(s) to be closed. The day is highlighted.
2. Click **Close Days**. The day(s) are shaded gray and are marked Closed.

Sunday	Monday	Tuesday
3	4	5
[CLOSED]		[CLOSED]

### Apply Appointment Class

From the Schedule Template window:

1. Click on the **start time** of the **Appointment Class**.
2. Click **Reserve Appointment Class** item.  
*The Reserve Appointment Class window opens.*
3. In the **Appointment Class** field, select the class you want to reserve for the highlighted time.

# Schedule Setup

4. Select one of the following:
  - **Reserve Only One** should be used when only clicking on one unit for the start time.
  - **Reserve As Many As Will Fit** should be used when highlighting an area that you want several of one type of class reserved.
5. Click **Reserve**.

## Apply Appointment Types

*From the Schedule Template window:*

1. Click the **start time** of the **Appointment Type**.
2. Click **Reserve Appointment Type** item. *The Reserve Appointment Class window opens.*
3. In the **Appointment Type** field, select the class you want to reserve for the highlighted time.
4. Select one of the following:
  - **Reserve Only One** should be used when only clicking on one unit for the start time.
  - **Reserve As Many As Will Fit** should be used when highlighting an area that you want several of one type of class reserved.
5. Click **Reserve**.

## Apply a Template

By default, your schedule does not have any templates applied. You want to open each month and apply the appropriate template or close the day.

1. From the **Edit** menu, click **Schedule Templates**.
2. Click the tab of the **location**, if necessary. *The templates that have been created for this location are displayed.*
3. Click on the **days of the month** that the office is closed.
4. Click **Close Days**. *The days selected are now indicted as closed.*
5. Click the **days of the month** to apply a specific template to.
6. Click on the **template name** listed on the left. *The name highlights.*

# Schedule Setup

7. Click **Apply**. *The days turn the color of the template and display the name.*
8. Continue this method and complete the month.
9. Click **OK** when finished. The mini calendar on the schedule displays the color of the template applied to that day.

## Copy a Template

Rather than starting from a blank template, you might have one that you want to start with and then make slight modifications. For example, every Wednesday you want to add more New Patient Exams for the summer months. Your template is only used for the summer months, so you do not want to change the regular Wednesday template. Making a copy of the regular Wednesday template, giving a descriptive name and making your changes creates a new one with minimal effort.

1. From the **Edit** menu, click **Schedule Templates**.
2. Select the desired **schedule**.
3. Highlight the **name of the template** to be copied.
4. Click **Edit**.
5. Click **Copy** to duplicate the template.
6. Type a **descriptive name** and click **OK**.
7. Modify the template as desired.
8. Click **Save and Close** to have changes applied. *The new template has been created and ready to apply to the summer months.*

## Modify a Schedule Template

Every template now and then needs modifying. We give you the choice of modifying a template that has been applied for just that specific day or changing the template that changes all future days the template is applied to. An example of changing just one day might be the need to extend a lunch break because of a presentation to the office. This would only affect one day, not any other day in the future. A change to every day in the future might be that you are changing the open and close times or simply the need to add a few more specific appointments to your schedule for a specific day of the week.

## Modify a Single Day

When you modify a single day in the schedule, you do not need to edit the template master. These changes are done directly on the day in the schedule and will not change any other day in the future.

1. Open the **Calendar** to the day that needs changing. In this example, the lunch break is going to be extended by 30 minutes.
2. Highlight the **range** that needs to be closed.
3. Click **Close Time** item. The additional time is closed. You can now correct any other appointment class/type in order to fill in time. In Chair 1, a 45-minute block of time was reserved. You might want to add a 15-minute appointment in its place.
4. Click the **class/type** to be corrected, select **Reserve Appointment Class/Type** and select a 15-minute slot. The template may look similar to this.

## Clear Overrides

If you found that you changed an incorrect day and need to have the template back to its original format. This is an easy process.

1. Highlight the **times** that were modified.
2. Click **Clear Overrides** item. The template reverts back to the original times.

## Modify a Template to Change All Future Days Applied

When changing a template master, all future days the template is applied to are changed. Be very careful how you use this template.

1. From the Edit menu, click **Edit Templates** icon.
2. Select the correct **schedule**, if applicable.
3. Highlight the **name of the template** to be corrected, click **Edit** icon.
4. Click on the **Appointment Class/Type** that needs to be changed.
5. Select the **appropriate item** from the list. Continue to change the template as desired.
6. Click **Save and Close** to have changes applied.

## Delete a Template

If you have unused templates, you may choose to remove them from the list so that no one accidentally applies it. Be careful, if the template was applied to a future day and is deleted, the day no longer has a template applied. You need to apply a template to that day.

1. From the Edit menu, click **Edit Templates** icon.
2. Select the correct **schedule**, if applicable.
3. Highlight the **name of the template** to be removed, click **Delete** icon.
4. Click **OK** to acknowledge the action.
5. Click **OK** to close the **Schedule Template** window.

# Clinical Setup

## Purpose

The purpose of this session is to ensure that all clinical functionalities within the Cloud 9 system are properly configured and tailored to meet your practice's needs. This session is designed to provide a comprehensive understanding of the clinical tools and features available, supporting efficient patient care and streamlined clinical operations.

Our Implementation Consultants (ICs) will guide you through the setup and customization of the clinical modules, including treatment card configurations, treatment plans, clinical questionnaires, and imaging setups.

## Session Topics

- Treatment Card Configuration
- Treatment Plans
- Clinical Questionnaires
- Imaging

## Treatment Card Configuration

- |   |   |
|---|---|
| <ul style="list-style-type: none"><li>• Doctor</li><li>• Assistant</li><li>• Upper Arch</li><li>• Lower Arch</li><li>• Elastics Right</li><li>• Elastics Left</li></ul> | <ul style="list-style-type: none"><li>• Oral Hygiene</li><li>• Cooperation</li><li>• Appliances</li><li>• Broken Bracket</li><li>• Procedure</li><li>• Next Visit Appointment</li></ul> |
|---|---|

Each column represents potential selections available during an appointment.

**Action Required:** Please prepare a proposed layout and list of items for **each** column.

For example:

- **Upper Arch (UA):** .0175 twist, 012 niti, 014 niti, 014 ss, 016 TMA, 016 niti, 016 ss, 018 ss, 16x16 cn, 16x16 niti, etc.

## Treatment Plans

- Cloud 9 offers three methods for creating treatment plans:
- **Step-by-Step Treatment Plan** – A detailed plan created in sequential steps.
- **Treatment Plan Notes (Best Practice)** – Paragraph-style notes that can be generated from questionnaires.
- **Manual Entry** – Free-form text entry.

### Action Required:

If you prefer to set up a step-by-step treatment plan, please come prepared with:

- The treatment plan name.
- Each step included.
- The number of weeks between steps.  
(*Example: “Bond U 6-6” scheduled four weeks from the previous step.*)

If you prefer the treatment plan notes from the questionnaire, please come prepared with:

- The questions you want included on your treatment plan

## Clinical Questionnaires

We will review the **New Patient Exam Questionnaire** during this session.

**Action Required:** Please identify any items you would like to add, remove, or customize before this session.

### Imaging

**Action Required:** Please confirm the order in which patient photographs should be taken to ensure proper imaging setup in Cloud 9.

- Include a list of the type of images you take in the office (EX: Pano, Ceph, etc)

### Homework

- Add remaining items to the treatment card  
(UA, LA, EL-R, EL-L, OH, CO, APPL, TX NOTES)
- Add remaining treatment plans if using the step-by-step option
- Finish editing the new patient exam questionnaire with items you want to add or remove

# Cloud 9 Letters

In Cloud 9, a “Document” is a template used to generate letters by reusing standard content with merge fields for customization.

All templates are created in the built-in **Document Editor**; therefore, no external word-processing software is needed. All correspondence is managed directly within Cloud 9.

Your Cloud 9 Software includes the following standard letters. If you have your own versions, we can guide through how you can import, update, and format them. Please review the list and note any changes or deletions you’d like to make.

Letter Name	Keep & Update	Delete
C90-Welcome Letter-Adult		
C90-Welcome Letter-Child		
C90-8 Image Collage with Pan		
C90-Blank Letterhead		
C90-Contract		
C90-Contract with AutoPay Auth		
C90-Debond Certificate		
C90-Early Debond Release		
C90-Extraction Request		
C90-Insurance Terminated		
C90-NP Exam Letter-Detailed-DR		
C90-NP Exam Letter-Detailed-PT		
C90-NP Forms-Adult		
C90-NP Forms-Child		
C90-Treatment Request		
C90-Poor OH Letter		
C90-Debond Certificate		
C90-Debond Letter-Patient		
C90-Past Due 30 days		
C90-Past Due 60 days		
C90-Past Due 90 days		
C90-Payment Options		
C90-Poor OH Letter		
C90-Treatment Request		
C90-Financial Arrangement		

# Financial Setup

## Purpose

The purpose of this session is to ensure that all financial settings, patient portal configurations, and outstanding homework tasks from prior sessions are accurately reviewed and completed. This session provides a comprehensive overview of the financial functionalities and patient portal features within the Cloud 9 system, ensuring that all configurations are properly established to support your practice's operations.

Our Implementation Consultants (ICs) will guide you through the setup and customization of financial settings, including payment processors, fee schedules, and insurance configurations.

## Session Topics

- Transaction Types
- Contracts
- Financial Arrangements (*optional feature*)
- Fee Schedules (*optional feature*)
- Patient Portal (*optional feature*)

## Transaction Types

***Accurate configuration of transaction types is critical to ensuring reliable financial reporting and operational efficiency within Cloud 9.***

### Action Required:

Please provide a complete list of the transaction types that your practice will use in Cloud 9. For each transaction type, include the following details:

- Description
- Code
- Amount
- Color (font color in ledger)
- Whether it affects production
- Whether it should appear on the Practice Summary Report
- CDT Code (if applicable)

## Financial Arrangements *(Optional)*

If your practice contracts with insurance companies and uses fee schedules, the **Financial Arrangements** feature can significantly reduce administrative work. This feature pulls fee schedules directly into financial arrangements and auto-populates them into contracts/proposals.

### Action Required:

If you wish to use this feature, please prepare the following in advance:

- The types of arrangements you plan to offer (e.g., Invisalign, braces, high plans, low plans).
- Default down payment amounts.
- Max Number of Payments allowed.

## Fee Schedules *(Optional)*

- If your practice uses fee schedules (UCR, PPO, HMO), please confirm the details of each schedule to ensure they are set up accurately within Cloud 9.

## Patient Portal *(Optional)*

- Include what appointment types you want featured on patient portal
- Include if you want to allow Online Payments through the patient portal

## Homework

- Add remaining transaction types
- Add remaining financial arrangements
- Add remaining fee schedules

# Transaction Types

For this setup item, please provide a complete list of all **charge types, payment types, and discount types** your office plans to use.

Cloud 9 will supply a standard set of transaction types for your selection; however, if your office utilizes any additional transaction types, please include those as well.

For each transaction type, indicate how it will be used within the system and specify whether it should be included or excluded from reports.

- Contract Charges are set as **Medium Orchid**
- One-Time Charges are set as **Red**
- Payments are set as **Green**
- Adjustments and Discounts are set as **Blue** (Colors can be edited)

### Add Transaction Type

Transaction Type    Transaction Codes    Fee Schedules

Type Code  Code

Description

Category  Gaidge

Amount  Fore Color

Tracking

Show in Treatment Card	Show on Deposit Report	Is Paid-In-Full Discount
Affects Production	Is Contract	Show On Practice Summary
Show on Adjustment Report	Is Late Fee	Is Courtesy Discount
Is Credit Card	Is Discount	Is Insurance
Is No Show Fee	Is Optional For FA	Use House Doctor
Treat As Ortho <input type="checkbox"/>	Is Payment Arrangement	Is Origin Of Start
Exclude from Insurance	Show on Route Sheet <input type="checkbox"/>	Is NSF Fee

## Transaction Types

Below is a list of available options to select when creating a transaction type, along with their corresponding definitions.

<b>Show in Treatment Card</b>	Check when the charge is a procedure to display on the patient's treatment card
<b>Show on Deposit Report (Payment)</b>	Check this to show on deposit report. This is not used for credit cards and ACH items.
<b>Is Paid-In-Full Discount (Adjustment)</b>	Check this item when creating a PIF discount. This will make it selectable when creating contracts.
<b>Affects Production (Charge Type)</b>	Check when the transaction should be considered a production item
<b>Is Contract (Charge)</b>	Should this transaction type be selectable when creating contracts? This item is checked when adding treatment fees
<b>Show on Practice Summary</b>	Check this to include this transaction type in the Practice Summary Report
<b>Show on Adjustment Report (Adjustment)</b>	Check when the transaction should appear on the adjustment report
<b>Is Late Fee (Charge)</b>	Check when the transaction is considered a late fee. Works correspondingly with the late fee queue.
<b>Is Courtesy Discount (Adjustment)</b>	Check this item when creating a courtesy discount. This should be selectable when creating contracts.
<b>Is Credit Card (Payment)</b>	Check when the office is integrated with Planet DDS Pay, Open Edge or FIS for credit card payment processing
<b>Is Discount (Adjustment)</b>	Check this item when creating discounts. This should be selectable when creating contracts.
<b>Is Insurance</b>	Check to indicate bulk insurance payments and bulk insurance adjustments. Not for one off insurance payments.
<b>Is No Show Fee (Charge)</b>	Check when the transaction is a no show fee. This works correspondingly to marking patients as a No Show
<b>Is Optional for FA</b>	Transactions marked as " <b>Is Optional for FA</b> " are imported into <b>Financial Arrangements</b> as " <b>Optional</b> " only if they were selected in the <b>Questionnaire</b> completed before the Financial Arrangement was created.
<b>Treat As Ortho? (Charge)</b>	Check when using this transaction type as part of a Fee Schedule
<b>Is Payment Arrangement</b>	Check when tracking the Payment Arrangement type. Not used for actual payments, but when creating a contract, the user is able to select the Payment Arrangement for reporting purposes.
<b>Is Origin of Start (Charge)</b>	Check when tracking the Start of a Contract. Not used for actual charges, but when creating a contract, the user is able to select the Origin of Start for reporting purposes.
<b>Show on Route Sheet</b>	Check this to include the transaction type on the Route Sheet
<b>Is NSF Fee (Charge)</b>	Check when the transaction type is charged when an ACH payment is returned. This works correspondingly with Scheduled Contract Payments or can be used as a one-time charge

## Transaction Types

### Charges:

Charges used for Contracts (i.e., Comprehensive Adult Treatment) will need to be marked “Is Contract”.

If the amount for charges change across locations or on a per-case basis, leave it at \$0.00. When posting the contract charge or one-time charge, the user can enter in a custom amount.

Listed below are the Charge Types provided in Cloud 9 (Contracts are in Medium Orchid / One-Time Charges are in Red)

Description	Keep, Delete or Change? (Add any details)
Aligner Adult Treatment	
Aligner Limited Treatment	
Aligner Teen Treatment	
Comprehensive Adolescent Treatment	
Comprehensive Adult Treatment	
Comprehensive Child Treatment	
Limited Adolescent Treatment	
Limited Adult Treatment	
Medicaid Comprehensive Treatment	
Medicaid Phase I Treatment	
Phase I Treatment	
Phase II Treatment	
Appliance Charge – Fixed	
Appliance Charge – Removeable	
Appliance Repair Charge	
Broken Bracket Charge	
Insufficient Funds Charge	
Late Fee	
No-Show Fee	
Office Visit Charge	
Records Charge	
Retainer Repair Charge	
Retainer Replacement Charge	



**Payments:**

Typical Payment types are Check, Cash and Credit Card. Marking “Is Insurance” will work correspondingly with the Insurance Bulk Payment feature in Cloud 9

**Listed below are the Payment Types provided in Cloud 9:**

Description	Keep, Delete or Change? (Add any details)
Cash Payment	
Check Payment	
Credit Card Payment	
Insurance Check Payment	
Insurance Credit Card Payment	
Insurance EFT Payment	
Insurance Payment Bulk Check	
Insurance Payment Bulk Credit Card	
Insurance Payment Bulk EFT	
Money Order / Travelers Check	
Third Party Financing (Care Credit)	

**Please list additional payment types you would like to add in the table below:**

Description	Code	Show on Deposit Report	Is Credit Card	Show on Practice Summary	Is Insurance (Bulk)	Show on Route Sheet
Insurance Check	PMT-INSCK	Yes	No	Yes	No	No

### Adjustments:

Adjustments are used to move money around or on/off a patient's ledger. The standard Adjustments provided to you by Cloud 9 cannot be deleted but the Description can be renamed. Additional Adjustments can be added as well.

**Below is a list of Adjustment Types provided to you by Cloud 9:**

Description	How is it Used?	Rename Description?
Balance Adjustment	Moving money between Receivables and Future Due	
Refund	Balance is added back to ledger after refunding patient. Typically followed by a Write-Off	
Transfer	Transfer credit or balance between ledgers	
Write-Off	Removing balance from ledger	
Write-Off - Collections	Removing balance from ledger	
Write-Off – Discontinuation of Treatment	Removing balance from ledger	
Write-Off - Insurance	Removing balance from ledger	
Write-Off – Transfer Out of Practice	Removing balance from ledger	

**Please list additional adjustment types you would like to add in the table below:**

Description	Code	Affects Production	Show on Adjustment Report	Show on Practice Summary	Is Insurance (Bulk)	Show on Route Sheet
Write-Off	WO	Yes	No	Yes	No	No

**Discounts:**

Discounts are applied when creating a contract only and will always affect production. Discounts can also have a set amount assigned to it or leave it at \$0.00 to customize at the time the contract is being created.

**Below is a list of Discount Adjustment Types provided to you by Cloud 9:**

Description	Keep, Delete, or Change?
Courtesy Discount	
Employee Discount	
Family Discount	
In-Network Discount	
Paid in Full Discount	
Phase I Discount	
Professional Discount	

**Please list additional discounts you would like to add in the table below:**

Description	Code	Affects Production	Show on Adjustment Report	Show on Practice Summary	Is Insurance (Bulk)	Show on Route Sheet
Insurance Check	PMT-INSCK	Yes	No	Yes	No	No

# Financial Arrangements Setup

## Financial Arrangement Types

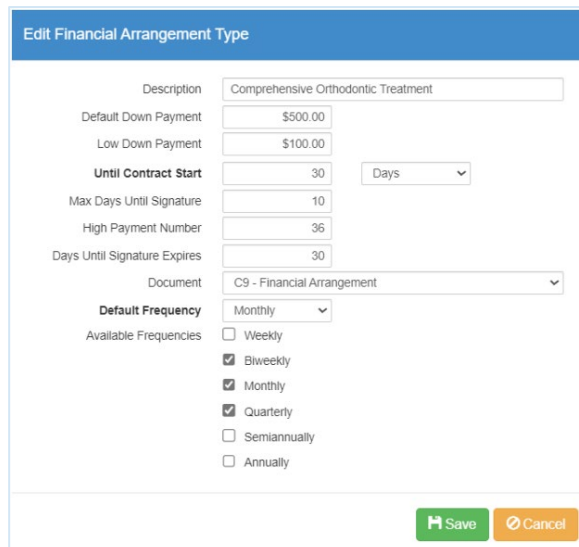
You can create different financial arrangement types based on treatment plans (e.g., Invisalign, Braces, Comprehensive). Examples include High Plans, Low Plans, or a single standardized option for the entire practice.

These arrangement types specify the payment options available to each patient, simplifying the process for both the practice and the patient.

Examples of arrangement types include High Plans, Low Plans, or a single option for the entire practice.

- **Description:** A unique name or identifier for the financial arrangement type.
- **Default Down Payment:** Set a default down payment that applies across the practice.
- **Low Down Payment:** Define the lowest allowed down payment for patients.
- **High Payment Number:** Establish a limit on the number of installments a patient can make, preventing excessively long payment plans that reduce monthly charges.
- **Until Contract Start:** When the first charge is set to roll out.
- **Max Days Until Signature:** Number of days allowed to sign a financial arrangement before an error is given. This cannot be bypassed.

## Edit Financial Arrangement Types



The screenshot shows a form titled "Edit Financial Arrangement Type" with the following fields and options:

- Description: Comprehensive Orthodontic Treatment
- Default Down Payment: \$500.00
- Low Down Payment: \$100.00
- Until Contract Start: 30 (Days)
- Max Days Until Signature: 10
- High Payment Number: 36
- Days Until Signature Expires: 30
- Document: C9 - Financial Arrangement
- Default Frequency: Monthly
- Available Frequencies:  Weekly,  Biweekly,  Monthly,  Quarterly,  Semiannually,  Annually

Buttons: Save, Cancel

# Financial Arrangements Setup

Description	Default Down Payment	Low Down Payment	High Payment Number	Until Contract Start	Max Days Until Signature
Default	\$500	\$350	30	30	90

A Financial Arrangement (FA) document can be attached to any of these financial arrangement types to default. Cloud 9 provides a standard Financial Arrangement document under **Home > Document Editor**. Customers can make a copy by selecting "Save As" and make any changes necessary to the verbiage.

## Fee Schedule Types

When creating your fee schedules, you must select the type of fee schedule this is.

You will need a UCR and typically PPO and HMO. PPO and HMO should be selected to **Default to UCR** if that specific insurance fee schedule item does not have a contracted rate.

Edit Fee Schedule Type

Description

Code

Is UCR Default to UCR

Use Chargeable Amount  Use Patient Copay

Edit Fee Schedule Type

Description

Code

Is UCR  Default to UCR

Use Chargeable Amount  Use Patient Copay

# Financial Arrangements Setup

## Transaction Types

To ensure the specific transaction types apply to fee schedules, the team must add a few additional items to the Transaction Type setup:

- Ensure the CDT Code is also on the **Transaction Type Tab** in EDIT (Not only in Transaction Codes tab)
- Mark "Treat as Ortho" for the Plan Amount in the FA to pull from the patient's benefits tab.
- *Example for correct setup is pictured to the right:*

**Edit Transaction Type**

Transaction Type | Transaction Codes | **Fee Schedules**

Type Code: TX-G/A-12-18 | Code: D8090 | Description: TX-Comprehensive Ortho-Adult 12-18 Months

Category: Charge | Amount: 50.00 | Fore Color: mediumorchid

Tracking: Description: No matching records found

<input checked="" type="checkbox"/> Affects Due Now	<input checked="" type="checkbox"/> Affects Total Due	<input type="checkbox"/> Is System
<input type="checkbox"/> Show in Treatment Card	<input type="checkbox"/> Show on Deposit Report	<input type="checkbox"/> Is Paid-In-Full Discount
<input checked="" type="checkbox"/> Affects Production	<input checked="" type="checkbox"/> Is Contract Default Payments: 12	<input checked="" type="checkbox"/> Show On Practice Summary
<input type="checkbox"/> Show on Adjustment Report	<input type="checkbox"/> Is Late Fee	<input type="checkbox"/> Is Courtesy Discount
<input type="checkbox"/> Is Credit Card	<input type="checkbox"/> Is Discount	<input type="checkbox"/> Is Insurance
<input type="checkbox"/> Is No Show Fee	<input type="checkbox"/> Is Optional Fee	<input type="checkbox"/> Use House Doctor
<input checked="" type="checkbox"/> <b>Treat As Ortho</b>	<input checked="" type="checkbox"/> <b>Is Payment Arrangement</b>	<input type="checkbox"/> Is Origin Of Start
<input type="checkbox"/> Exclude from Insurance	<input type="checkbox"/> Show on Route Sheet	<input type="checkbox"/> Is NSF Fee

Save | Cancel

## Fee Schedules: Edit > Setup > Fee Schedule

Set up **UCR** up first!

1. Name: Ex: Practice UCR / Location UCR
2. Type: UCR
3. Make sure you have your list of charges and how much they are
4. Click ADD+ all

## CONTRACTED INSURANCES

1. Add
2. Name: Insurance Ex: BCBS
3. Type: PPO
  - bring in one transaction type at a time / + with circle around it is to bring in all fee schedule transaction types at once

# Financial Arrangements Setup

**Edit Fee Schedule**

Name: Practice  
 Type: UCR  
 Parent: <None>  
 Order: 0

Entries: Location: <All> Provider: <All> Fee Schedule Tools

Procedure	CDT Category	CDT Code	Location	Provider	Amount
<input type="checkbox"/> Comp Oral Eval	Diagnostic	D0150			\$75.00
<input type="checkbox"/> REC-Panoramic X-Ray	Diagnostic	D0330			\$125.00
<input type="checkbox"/> REC-Cephalometric X-Ray	Diagnostic	D0340			\$125.00
<input type="checkbox"/> REC-Oral/Facial Images	Diagnostic	D0350			\$125.00
<input type="checkbox"/> Study Models	Diagnostic	D0470			\$125.00
<input type="checkbox"/> Limited Tx Child	Orthodontics	D8030			\$2,860.00
<input type="checkbox"/> TX-Limited Tx Adult	Orthodontics	D8040			\$3,680.00
<input type="checkbox"/> TX-Comprehensive Ortho-Child 12-18 Months	Orthodontics	D8060			\$6,000.00
<input type="checkbox"/> TX-Comprehensive Ortho-Child 18-24 Months	Orthodontics	D8090			\$6,500.00

Print Save Cancel

## Practice/Location UCR

For the correct UCR fees to pull onto the Financial Arrangement, you have to attach the UCR to the office location.

If the office has multiple locations, but uses the **SAME** UCR fees for all the locations:

- **Edit > Practice Information**
- Under the **Insurance** tab, attach the UCR under Fee Schedule

**Practice Information** Save Save and Close Cancel

Name: Cloud9 Orthodontics

Addresses: Street: 1945 Shiloh Rd, City: Kennesaw, State: GA, Postal Code: 30144

Contact Info: Type: Work, Contact Info: 800-867-5309, Description: [Empty]

Practice Code: [Empty] House Doctor Mode: Disabled

Options: **Insurance** Check-In Forms Images Electronic Claims License EDI

eStatements Payment Processor E-Mail Server Patient Portal Security Third Party

Modules: Add Patient

Use Practice Information as Billing Entity ...

Provider Number: 1447375654  
 License Number: 11673  
 TIN: 052363949

Fee Schedule: Practice [Search Icon] [Close Icon]

Default New Claim Status: New

- Use Patient Location as Treating Address.
- Use Patient Location for Billing ID Numb...
- Use Patient Location Claim Address as B...
- Use Patient Location Claim Name as Bill...
- Use Patient Location for Treating Phone...
- Use Patient Location for Billing Phone N...

# Financial Arrangements Setup

If there are different UCR fees per location, the UCR fee schedule needs to be added to the Location Setup

- Edit > Setup > Locations
- Under the **Insurance** tab, attach the UCR under Fee Schedule

**Edit Location**

**Name** Phoenix

Printed Name Cloud 9 Ortho - Phoenix

Parent Code

**Code** PHX

**Contact Info**

Type	Contact Info	Description
Work	(602) 555-5555	

Showing 1 to 1 of 1 rows

**Street** 1234 Main St

**Postal Code** 85201

**City** Phoenix

**State** AZ

**Time Zone** (UTC-07:00) Arizona

**Insurance** | Check-In | Payment Processor | Patient Portal | Images

E-Mail Server | Forms | Add Patient | Other

Provider Number 12345678

License Number 4562

Tax ID 1564877

Billing Name For Claims Cloud 9 Ortho Phoenix

Billing Address For Claims 1234 Main St  
Phoenix, AZ 85201

Fee Schedule UCR - Phoenix

Save Cancel

# C9 Agent Installation

C9 Agent is used for connecting printers, X-ray machines, document scanners, and Topaz signature pads to Cloud 9. This is completed via an installation on a computer running Windows 8.1 or later.

**NOTE:** C9 Agent is not available for Mac users.

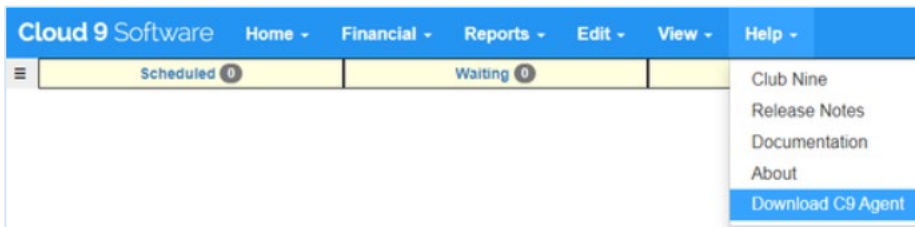
**Printers** connected to the PC running C9 Agent can be used to print from anywhere while logged into Cloud9. Not every screen supports this type of printing, and normal printing can also be used for any of these situations. Offices may have numerous virtual printers and may also specify defaults per individual or on a site-wide basis.

**X-ray** machines connect to C9 Agent to upload images directly into Cloud9 under Home > Images. When an X-ray is taken, a copy is stored in the user's **document/twainexport** folder on that PC until another X-ray is taken.

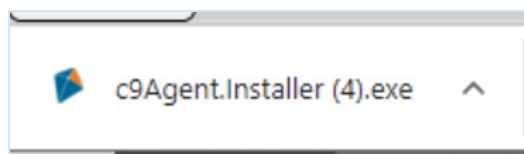
**Document Scanners** connect to C9 Agent to upload documents directly into Cloud9 under Home > Document Cabinet. Documents have a 10 MB limit.

**Topaz Signature Pads** connect to C9 agent and are used for signature-based functions when merging letters in Cloud 9.

## Installation

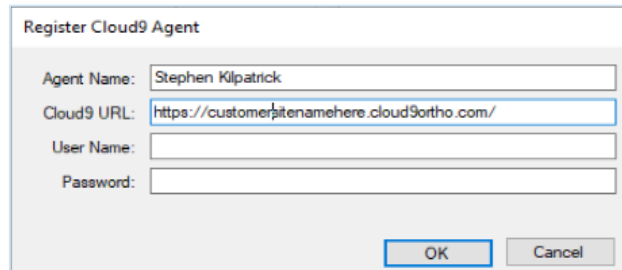


1. In Cloud 9, go to Help > Download C9 Agent

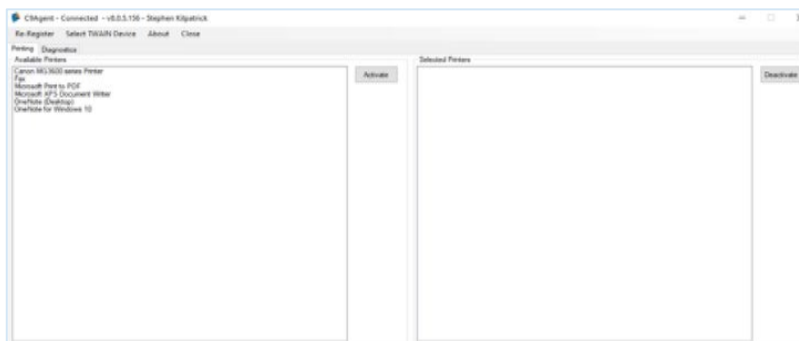


# C9 Agent Installation

2. Follow installation prompts.
3. Register C9 Agent.



- a. The **Agent Name** is just a name for this agent.
  - b. **Cloud9 URL** will be <https://sitename.cloud9ortho.com/> (no "html5" at the end).
  - c. **User** and **Password** can be any user on this practice's URL.
4. Once C9 Agent is connected, it will look like this.



## Setup Scanners and X-Ray

1. Select Twain Device and hit OK (not cancel).
  - a. **TWAIN Device** – use this for scanners only.
  - b. **Ceph Device** – use this for Cephalometric/Ceph X-Ray machines or for taking image series.
  - c. **Pan Device** – use this for Panoramic X-Ray machines.
2. Allow 1 – 2 minutes for the agent to appear in Cloud 9.
3. Go to **Home > Images** or **Home > Document Cabinet** in Cloud 9.
4. In Images – Acquire a pan, ceph, series
5. In Document Cabinet – Acquire a document.
6. Select the name of the C9 Agent that is connected to the device you are trying to use.
7. The scanner or X-Ray console/window will pop-up if successful.

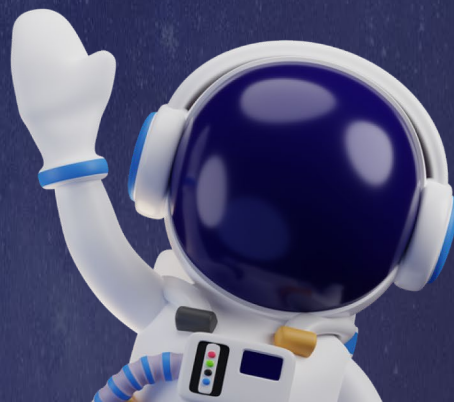
# CONVERSION

## 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 Cloud 9. 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](mailto: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](mailto: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 Planet DDS 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.

## Canceling 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 Planet DDS 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

# Data Validation Guidelines

One of the most important aspects of your transition to Cloud 9 is the process of **validating the integrity of the data converted from your legacy practice management system into Cloud 9.**

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 that 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 Cloud 9.

**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.

- Patients with varying statuses (e.g., active, observation, retention)
- Patients with insurance coverage
- Patients with multiple relationships
- Patients with active contracts
- Patients with current and/or past due balances
- Patients with documented referral sources
- Patients with past and future appointments

# Understanding Token Transfers

## What Is a Token Transfer?

Token transfer is the process of securely moving stored payment tokens from your current payment processor to a new one when you switch services. A payment token is a substitute value for your customer's real card number, used for transactions like recurring payments or card-on-file purchases. Instead of storing the actual card number, your processor keeps a unique token that represents the card and maintains the secure link between that token and the original card details.

Because each payment processor creates and manages its own tokens in a proprietary way, the tokens from your old processor typically can't be used directly by the new provider. The mapping between the token and the card number exists only in the original processor's system, making it impossible for the new processor to interpret them.

To migrate tokens, special steps are needed:

- The old processor “detokenizes” the card internally and securely sends encrypted card data to the new processor.
- The new processor then creates new tokens (“retokenizes”) for those cards in its system.
- Throughout this process, merchants never handle the raw card data. This helps ensure a seamless transition for recurring billing and card-on-file transactions, minimizing disruption for your customers.

If a direct token migration (sometimes called “retokenization”) isn't possible—because the processors don't have a token exchange program—customers will need to re-enter their payment details so new tokens can be created by the new processor.

## Important Notes

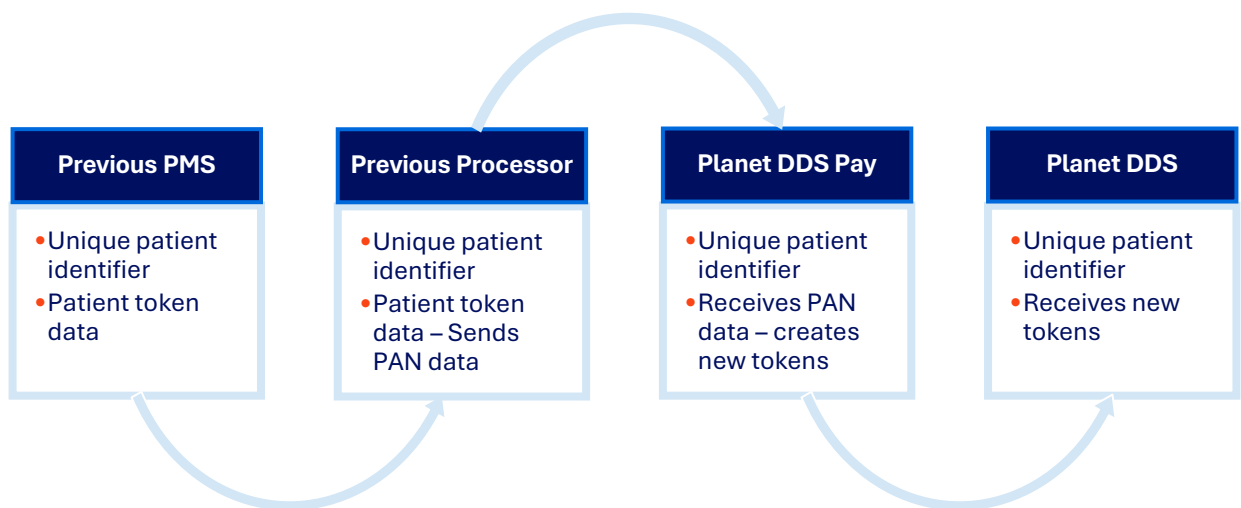
- Planet DDS does not guarantee the ability to complete token transfers.
- Token transfers are best-effort; success depends on file quality and mapping accuracy.
- Delays may occur due to third-party processors. Planet DDS provides guidance and support but cannot control external timelines.
- Do not cancel your legacy payment processor immediately. This ensures you can continue processing payments while the migration is underway and prevents any interruption in service for your customers.
- Migration fees may apply from your legacy payment processor.

# Token Transfer Overview

Note: The exact process may vary based on your legacy processor. We will review your specific case during the onboarding process.

- **Step 1:** Request token file from your current processor. Ensure token file includes patient identifiers, encryption details, and file specs.
- **Step 2:** Planet DDS initiates token migration.
- **Step 3:** Migration takes 4–6 weeks.

## Migrating Contracts, Recurring Payments, & Cards on File from the Previous Payment Provider



Payment tokens are unique, secure identifiers that replace card numbers in Cloud 9, ensuring payment security and privacy.

**Credit Card Number or PAN:** 4111 1111 1111 1111

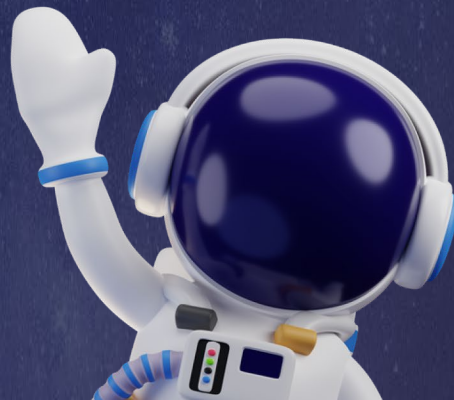
**Payment Token:** TKN-8F2A9E374G6H

The process of moving tokens can take four to six weeks.

# Learning and Adoption

Our Cloud 9 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.



# Cloud 9 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 Cloud 9 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).
- Focuses on reinforcing Learning Center concepts and providing real-time practice.
- Structured agenda to ensure consistency across teams.

### Step 3: Ongoing Support

- Access the Cloud 9 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.

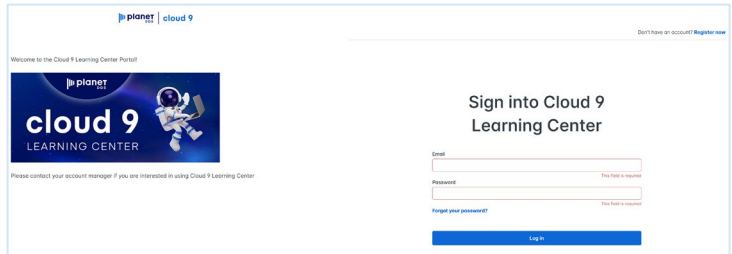
Access the **Live Learning Session Schedule** [here!](#)



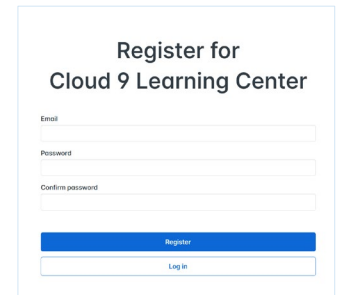
# Logging into Cloud 9 Learning Center

1. Go to [planetdds.learnupon.com](https://planetdds.learnupon.com)

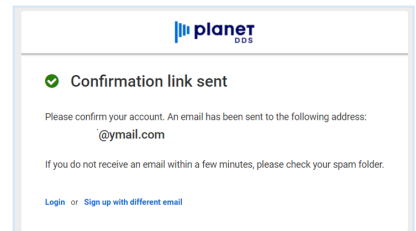
2. Click “Register now.”



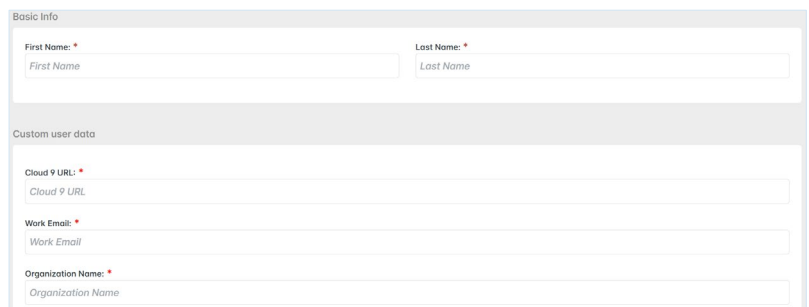
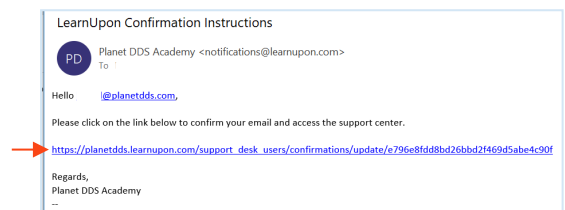
3. Enter your **email address** associated with your Cloud 9 account and create a password. Click “Register”.



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



5. Enter your office’s Cloud 9 URL, your work email, and Organization Name.



# 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.



# Customer Sign-Off Form

<b>Practice Name:</b>	
<b>Client Project Lead:</b>	
<b>Implementation Coordinator:</b>	
<b>Implementation Live Date:</b>	

**Instructions:** Review each deliverable and confirm work is completed. If all issues are closed or if open issues exist but a satisfactory plan to address them is in place, mark **Yes** under Confirmed. If you are not prepared to take the system live and there are outstanding concerns without a satisfactory plan to resolve, mark **No**. Document any gaps or issues and the plan to resolve in the Open Issues section below.

<b>Deliverables</b>	<b>Acceptance Criteria</b>	<b>Confirmed</b>
System Setup	The system is fully set up, and no pending actions or decisions are required.	
Trial Conversion Audit	Client was provided with the Audit Guide and reviewed at least 15 patients in detail.	
LMS Completion	End users have completed their designated classes and/or learning paths in the Planet DDS Learning Management System.	
Office Setup	Office is ready for training and go-live. All users have successfully logged in and all computers have successfully accessed the application. Local agents have been installed as needed.	
Payment Processing (If Applicable)	The system is ready to process payments. Any needed security/token files have been exchanged and accepted. Credentials have been entered. Hardware (if applicable) has arrived and been tested.	
Training Preparation	Office areas have been identified for classroom style and independent hands-on learning. Staff are scheduled for appropriate sessions. The office will be closed during training sessions, with reduced patient load for Go Live, as agreed with the Planet DDS trainer.	

# Customer Sign-Off Form

**Open Issues with Corresponding Closeout Plans and Additional Comments:**

--

**Client Representative:**

By signing below, the Client acknowledges that the setup, software implementation, and trial data conversion have been completed to their satisfaction and meet the agreed-upon acceptance criteria. The Client is ready to go live.

<b>Printed Name:</b>	
<b>Title:</b>	
<b>Date:</b>	
<b>Signature:</b>	

# Cloud 9 Data Clean-Up & Merge Utilities

## Purpose

This document outlines best practices and expectations for managing Cloud 9 data clean-up and merge utilities. These practices are designed to ensure data accuracy, reduce risk, and drive successful project completion through clear ownership, client collaboration, and controlled system access.

## Implementation Coordinator Responsibilities

Overall Ownership	Client Partnership & Collaboration	Provide Client Action Items
<ul style="list-style-type: none"> <li>Lead, initiate, and manage all <b>data clean-up</b> and <b>data merge utilities</b>.</li> <li>Ensure all activities follow internal best practices and established processes.</li> </ul>	<p>Work closely with the <b>Client Project Lead</b> to:</p> <ul style="list-style-type: none"> <li>Confirm scope, expectations, and timelines.</li> <li>Validate decisions and ensure clarity on required action items.</li> <li>Request client input for merge decisions where business judgment is needed.</li> </ul>	<p>Deliver a clear, itemized list of client-required clean-up tasks, such as:</p> <ul style="list-style-type: none"> <li>Insurance companies</li> <li>Insurance billing centers</li> <li>Postal codes</li> <li>Practice-specific reference data</li> </ul> <p>Offer clarification or guidance as needed.</p>
Documentation & Training	Security & Access Control	Communication & Risk Management
<ul style="list-style-type: none"> <li>Document all data mapping and clean-up decisions.</li> <li>Provide training or explanations to support client understanding and usage of Cloud 9 tools.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure "Run Utilities" permission is <b>never enabled</b> for customer users unless explicitly required and approved.</li> <li>Confirm that the permission is <b>removed</b> once all cleanup and merge utilities have been completed.</li> </ul>	<ul style="list-style-type: none"> <li>Proactively communicate expectations throughout the project.</li> <li>Identify, document, and escalate risks or client-readiness concerns using the <b>R&amp;I process</b>.</li> <li>Validate that all clean-up and merge activities are complete before moving the project to <b>final completion</b>.</li> </ul>

# Cloud 9 Data Clean-Up & Merge Utilities

## Client Responsibilities

Participation & Collaboration	Readiness & Accountability	Decision-Making Input	Security & Access Adherence
<ul style="list-style-type: none"> <li>Designate a <b>Client Project Lead</b> to partner with the IC.</li> <li>Provide timely responses, decisions, and clarifications when requested.</li> </ul>	<ul style="list-style-type: none"> <li>Complete assigned tasks within agreed-upon timeframes.</li> <li>Report internal delays, issues, or concerns that may impact implementation.</li> <li>Ensure internal staff understand requirements, deliverables, and timelines.</li> </ul>	<ul style="list-style-type: none"> <li>Provide necessary business insights to support accurate merge and data-mapping decisions.</li> <li>Review materials shared by the IC and approve or request adjustments as needed.</li> </ul>	<ul style="list-style-type: none"> <li>Do <b>not</b> enable or assign the <b>"Run Utilities"</b> permission to any staff.</li> <li>Follow all access control guidance provided by the IC.</li> </ul>

### Client-Owned Clean-Up Tasks

The client is responsible for completing the clean-up items assigned by the Implementation Coordinator, which may include:

- Reviewing and correcting **insurance companies**
- Validating **insurance billing centers**
- Confirming **postal codes**
- Updating **practice-specific reference data**
- Completing any additional clean-up items identified during the project

## Summary Table

Category	Implementation Coordinator	Client
Ownership of Clean-up & Merge Utilities-Up & Merge Utilities	Leads, manages, and executes all utilities	Supports with required information
Data Clean-up-Up	Identifies required clean-up and provides task list-up and provides task list	Completes assigned clean-up items-up items
Merging Decisions	Provides recommendations and performs merges	Provides business context and approvals
Documentation & Training	Documents all decisions and provides training	Reviews documentation and applies training
Security	Controls "Run Utilities" permission	Follows permission guidance
Risk & Communication	Escalates via R&I, proactively communicates	Raises internal risks and collaborates

# We're Upgrading for You!

This office is transitioning to **Cloud 9**  
a modern, cloud-based system from Planet DDS.

---

## Why the Change?

Cloud 9 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 Cloud 9 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 Cloud 9!

As we wrap up onboarding, our goal is to make sure you feel fully supported as you transition into ongoing use of Cloud 9. 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**.





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

Date \_\_\_\_\_



# 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!**



# Cloud 9 Support Overview

## When Should I Contact Cloud 9 Support?

Contact Cloud 9 support for any of the following reasons listed below.

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.

## Ticket Priority & Definitions

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

#### Cloud 9 Support:

Monday – Friday, 8 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.

# Cloud 9 Support Overview

## How to Chat with Cloud 9 Support

1. Go to the Cloud 9 Portal: <https://cloud9support.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

1. Go to <https://cloud9support.planetdds.com/hc/en-us>
2. Click 'Submit a request'
3. Select 'Cloud 9' in the 'Request For' field
4. Enter subject, description, and attach relevant files

## Additional Resources

[Cloud 9 Status Monitoring](#)

# 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
<b>Professional Services</b>	Assigned team of SMEs from implementation or training .	<b>Cloud 9 Learning Center</b> On-demand training
<b>Support Services</b>	Platform experts available to assist with questions or concerns <a href="mailto:Support@planetdds.com">Support@planetdds.com</a>	
<b>Product</b>	Share feedback, needs, and special access to betas	<b>Planet DDS Knowledgebase</b> On-demand resources for answers, tips and best practices
<b>Marketing</b>	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

# Integrations

This section provides informational resources to help you get familiar with Planet DDS and our advanced system features available for use with Cloud 9.

## Objectives:

- **Review Planet DDS Integrations**  
Planet DDS offers features like Planet DDS Pay, Cloud 9 Connect, and Cloud 9 Customer Backup Solutions (CBS) to enhance your workflows.
- **Explore third-party integrations**  
Connect your Cloud 9 system with external trusted partners such as DentalXchange and Cloud 9 Signature to extend its capabilities.
- **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.



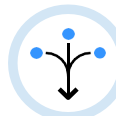
#### SCALABILITY

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!

# Cloud 9 Connect

## Built-In Patient Communications

### BUILT DIRECTLY INTO CLOUD 9 ORTHODONTIC PRACTICE

Cloud 9 Connect is a native patient communication platform designed specifically for orthodontic practices using Cloud 9. With **automated reminders, two-way texting, and financial messaging**, Cloud 9 Connect ensures your practice runs smoothly while reducing no-shows, improving collections, and enhancing patient satisfaction.

### Why Cloud 9 Connect?

- **100% Build into Cloud 9**

No third-party syncing, no extra dashboards.

- **Automated & Hands-Free**

Free up staff time with pre-set communication flows.

- **Seamless Patient Experience**

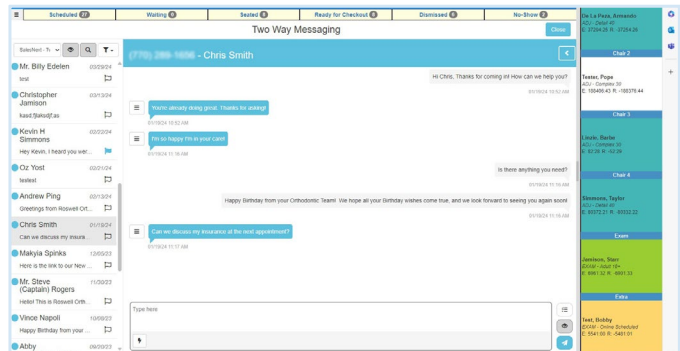
Keep patients informed, engaged, and on time.

- **Scales with Your Practice**

Works for single offices or multi-location groups.



Connect's automated appointment reminders **keep your schedule on track**. Simply set your routine, and Connect takes care of the rest.



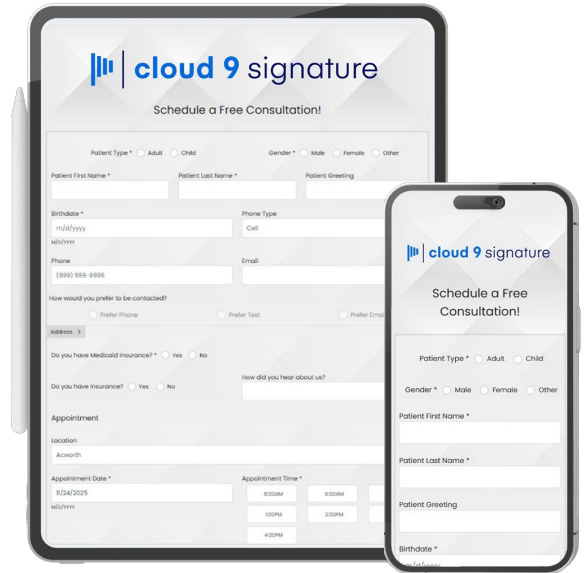
With Connect, you can easily send appointment reminders, one-off emails, and text messages, **even while you're on the phone with patients**, keeping communication **clear and convenient**.

<p><b>Automated Appointment Reminders</b> Reduce no-shows and keep schedules full.</p>	<ul style="list-style-type: none"> <li>• Fully configurable daily, weekly, or custom schedules.</li> <li>• Real-time triggers for scheduled, rescheduled, or canceled.</li> <li>• Instant patient confirmation updates inside Cloud 9.</li> </ul>
<p><b>Two-Way Texting</b> Text your patients, directly in Cloud 9.</p>	<ul style="list-style-type: none"> <li>• No external logins—text patients from their Cloud 9 profile.</li> <li>• Permanent conversation history for complete records.</li> <li>• Smart routing: Send billing questions to the right team member.</li> </ul>
<p><b>Recurring Patient Campaigns</b> Automate ongoing engagement without manual effort.</p>	<ul style="list-style-type: none"> <li>• Automated email &amp; texting campaigns for birthdays, check-ins, and more.</li> <li>• Mass messaging for office updates, closures, and promotions.</li> <li>• Easy 3-step setup: Pick a template, select an audience, and schedule.</li> </ul>
<p><b>Financial Campaigns for Billing &amp; Collections</b> Encourage timely payments &amp; improve revenue cycle.</p>	<ul style="list-style-type: none"> <li>• Automated text &amp; email billing reminders to reduce overdue accounts.</li> <li>• Payment prompts &amp; follow-ups to encourage timely payments.</li> <li>• Direct links to payment portals for a frictionless experience.</li> </ul>

# Cloud 9 Signature

GO PAPERLESS WITH DIGITAL FORMS

Cloud 9 Signature is our integrated digital forms tool that gives patients the convenience they need, while keeping your teams on top of their game.



## HOW IT WORKS

- ✓ **Collect** patient information and consents securely via text, email, or desktop.
- ✓ **Customize** forms with your practice logo and colors.
- ✓ **Store** completed PDFs automatically in each patient's Cloud 9 record.
- ✓ **Book** new patient appointments directly through the online form so they're instantly visible in your schedule.
- ✓ **Complete** forms in-office on kiosks or workstations.



### Eliminate Chasing & Scanning

Keep records updated with automatically uploaded patient forms.



### Give Patients Flexibility

Complete mobile-friendly forms anywhere, on any device.



### Start Fast

Access pre-built ortho forms for new-patient intake, health history, and consents.



### Integrate Seamlessly

Add form or payment links to reminders using Cloud 9 Connect or other engagement tools.

## WHO BENEFITS



### Front Office

Simplified workflows and reduced follow-up



### Clinicians

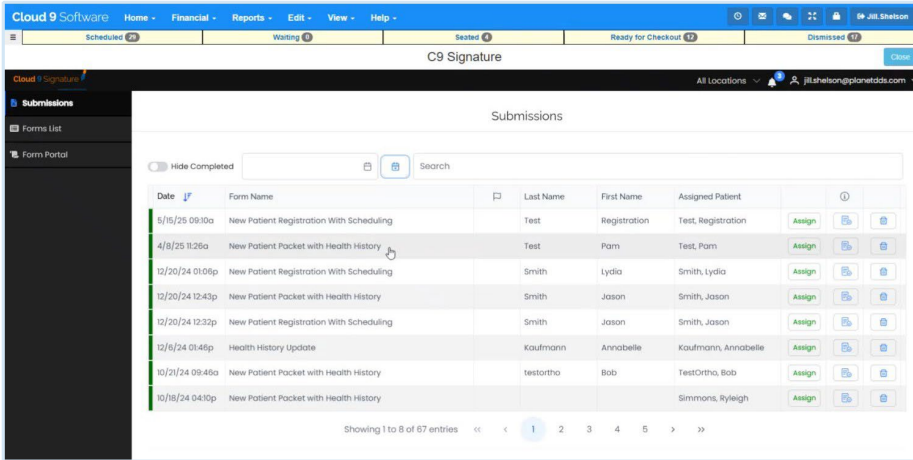
Accurate records and easier chart access



### Patients

Faster check-ins and a smoother experience

# Cloud 9 Signature



Choose the plan that best fits your practice:

**LIMITED**

**UNLIMITED**

	LIMITED	UNLIMITED
Pre-built ortho form templates	✓	✓
Mobile-friendly patient forms	✓	✓
Automatic form storage in Cloud 9	✓	✓
Form and payment link delivery via text, email, or website	✓	✓
Integration with Cloud 9 Connect and other engagement tools	✓	✓
Custom forms and unlimited form count		✓
Reputation management dashboard (reviews and responses)		✓

## Benefit from Seamless Interoperability

### Planet DDS Pay

Secure, simplified patient payment processing

### Cloud 9 Connect

Automated reminders, two-way texting, and campaigns

Pair with Cloud 9 Connect or any integrated patient engagement tool to ensure no patient falls through the cracks.

See the full list of integrated partners: [planetdds.com/api-partners-grid](https://planetdds.com/api-partners-grid)

**Boost the Patient Experience with Integrated Digital Forms.**

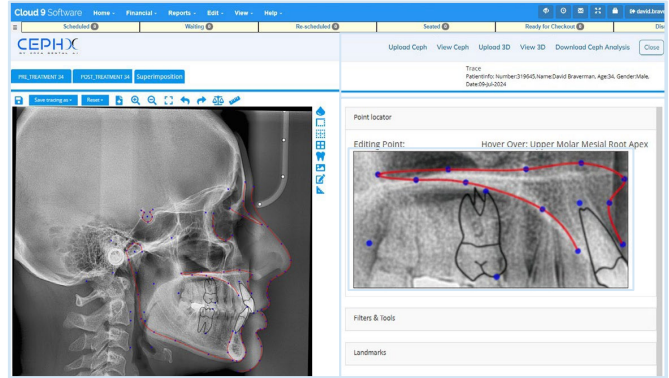
# Cloud 9 + CephX Integration

## THE SHIFT

### From Manual to Intelligent Imaging

Orthodontists often spend valuable time tracing films or working in third-party tools just to plan and present complex cases.

CephX changes that. With AI-powered cephalometric tracing and 3D imaging built into the patient record, clinicians can analyze and visualize anatomy quickly and consistently without leaving Cloud 9.



## How orthodontic imaging evolves with CephX inside Cloud 9

BEFORE	AFTER
<b>Time-consuming manual cephalometric tracing</b> introduces inconsistencies in treatment planning.	<b>Faster, more consistent treatment planning</b> is powered by AI-driven cephalometric tracing.
<b>Juggling multiple logins and platforms</b> fragments the workflow and slows productivity.	<b>Simplified workflows</b> with imaging are accessed directly inside Cloud 9.
<b>Managing imaging and treatment data across locations</b> adds administrative overhead and reduces visibility.	<b>Centralized imaging workflows</b> improve consistency and oversight across multi-location organizations.
<b>Limited visual tools for case presentation</b> make patient communication less effective.	<b>More confident treatment discussions</b> are supported with interactive 3D visualizations.
<b>High case volumes and manual planning demands</b> contribute to provider fatigue and slower turnaround.	<b>Efficient case management</b> reduces repetitive work and cognitive load for clinicians.

## Cloud 9 + CephX Integration



### AI-Driven Precision

FDA-cleared cephalometric tracing and 3D segmentation improve accuracy and confidence in treatment planning.



### Efficiency at Scale

Simplified workflows support busy orthodontic practices and DSOs without adding extra tools or steps.



### Consistent Results Across Every Location

Centralized, AI-assisted imaging ensures diagnostic uniformity, reduces oversight burden, and supports scalable growth.



### Engaging Visual Communication

The embedded 3D viewer enhances case clarity, builds patient confidence, and supports higher case acceptance during consults.

## The Difference from Day One

Teams using CephX within Cloud 9 report:

- ✓ **Save 5–10 minutes per ceph analysis** (≈8 hours per provider each month)<sup>1</sup>
- ✓ **Faster analyses with reduced operator fatigue vs. manual tracing**<sup>2</sup>
- ✓ **No extra logins or software downloads inside Cloud 9**
- ✓ **Greater consistency across staff with AI-assisted outputs**

<sup>1</sup> Public clinician testimonial (CephX)

<sup>2</sup> Peer-reviewed study: *Comparison of AI-assisted cephalometric analysis and orthodontist-performed digital tracing analysis*, *Progress in Orthodontics*, 2024.

## Scalable. Compliant. Built for Growth.

CephX and Cloud 9 work together to scale with the accuracy, security, and reliability that enterprise dental organizations demand.



### Enterprise-ready

Supports multi-location DSOs with centralized imaging standards



### Data-secure

HIPAA-aligned and SOC 2 Type 2 certified to protect patient data



### Performance-driven

Delivers consistent imaging accuracy and scalability across providers and locations

## Experience AI imaging inside Cloud 9.

Simplify complex cases with integrated ceph tracing and 3D imaging.