

How to Set Up and Use iTero Integration

Note: This feature is under development and not yet available for general use, but it will be available for all Sensei Cloud customers in an upcoming release.

Customers can now initiate acquisition and link those scans from their iTero Scanner within Sensei Cloud. Before you can use the iTero integration, you must have this feature activated.

Setting Up a Location for iTero

To link a location to your iTero scanner:

- 1. From the Administration tab, select Imaging. The Imaging Settings are displayed.
- If you have more than one location, under Actions, select the location you are setting up. The imaging settings for the selected location are displayed. Select Edit Imaging Settings to make changes.

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3. Scroll to the iTero Integration section at the bottom of the settings, and then click **Link Account** to activate the iTero Integration for the selected clinic. A prompt is displayed; click **Yes** and you are redirected to the iTero login page to enter your iTero credentials.

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4. After logging into iTero, you are redirected back to Sensei Cloud and prompted to select which iTero account to link the location to. Select the appropriate account from the drop-down list, and then click **OK**.

Note: You can only select one iTero account per location.



5. Once a location is successfully linked to an iTero account, you will receive a confirmation message. You now have the options to **Re Authenticate** or **Unlink** the account.

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Acquiring and Accessing iTero Scans

Once the location is successfully linked, users can initiate iTero from the Clinical screen, which adds the patient to iTero worklist.

To acquire iTero scans from a Patient tab:

- 1. From the **Patient** tab, select **Clinical > Hard Tissue Chart** or **Clinical > Intra-Oral Scans**.
- 2. Under Actions, click Acquire iTero Scan. A prompt is displayed directing you to select an iTero doctor.
- Select an iTero doctor from the drop-down list and then click Request Scan. A pop-up message confirms that a scan has been requested.
 Note: The doctors included in the list come from the connected iTero account, not Sensei Cloud.
- 4. To take the scan, navigate to your iTero program and click **Orders**, and the patient is populated under the **In Progress** list. Follow your typical iTero workflow to acquire and save the scan. A link to the scan populates in Sensei Cloud once iTero uploads the scan to their Cloud.

After a scan is successfully captured and uploads to the iTero Cloud, a link to the patient's captured scan can be accessed in the following clinical screens:



Patient Clinical Notes: Patient tab > Clinical > Hard Tissue Chart

This note contains a link to return to iTero to the scan and see any additional details.

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Intra-Oral Scans List: Patient tab > Clinical > Intra-Oral Scans Here you can access a list of all scans completed for this patient, including details like request

Here you can access a list of all scans completed for this patient, including details like request date, scan date, etc.

Home Patient Record Medical History	Insurance • Clinical • Financials • To	reatment Plans Correspondence Questionna	ires Patient Files Notes		
tony O'Regan (234) 567-1223 (Self) (0) ▲ (0) ▲ (0) ▲	Intra-Oral Scans for iTero Account 'CareStream clinic' for tony O'Regan				
Actions Acquire ITero Scan	Order Id	Scan Date	Procedure	Status	View
	07/12/2023	07/12/2023	Study Model/iRecord	Exporting to Doctor Site	8

Clinical Chart (EMR): Patient Tab > Clinical > Clinical Chart (EMR) This card contains a link to return to the scan and soo any additional

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(234) 567-1223 (0)▲ (0)▲ 43 yrs (Self) (0)♣	No Current Medical Alerts	No Current Allergies	
Actions	Mon, Aug 7, 2023	Add to Chart	~
Start Walk-In Appointment			
Create New Lab Case	Wed, Jul 12, 2023	Add to Chart	×
Collect Data			
Print Current View	Itero Tony O'Regan Scanned 07/12/2023 04:35 am		æ
Filter Chart Reset			
Mouth Region Filter All			

Note: For existing iTero users, the patients that are already included in the iTero program do not upload to Sensei Cloud or link to patients in Sensei Cloud automatically. For example, John Smith of iTero will not be linked to John Smith of Sensei Cloud, unless they were linked through Sensei Cloud in the first place.