

# How to Set Up and Use iTero Integration

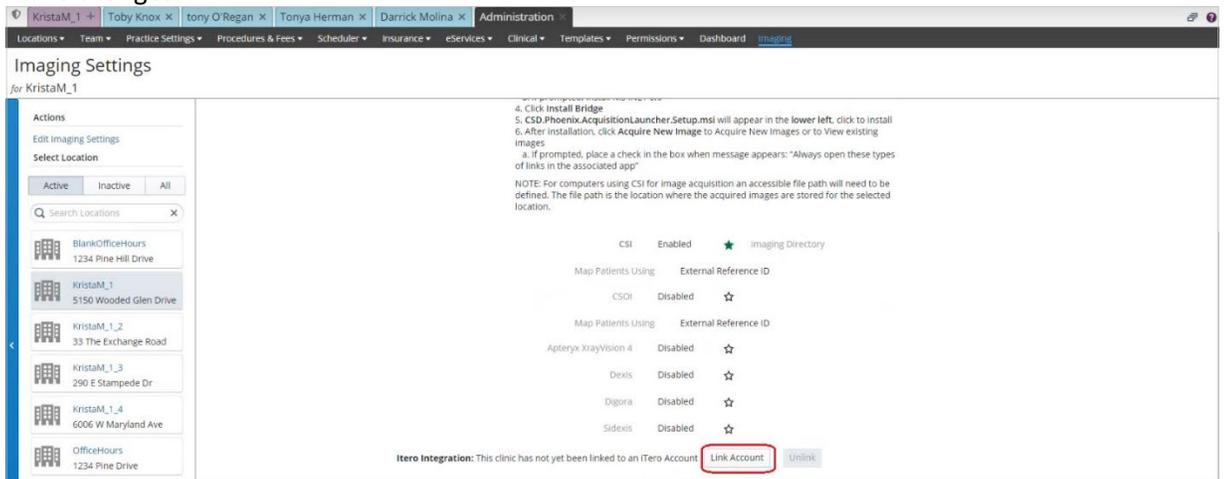
**Note:** This feature is under development and not yet available for general use, but it will be available for all Sensei Cloud customers in an upcoming release.

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.

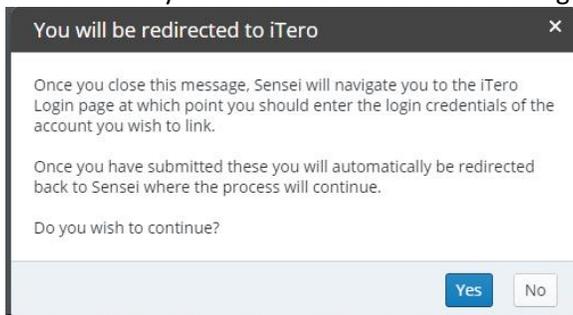
## Setting Up a Location for iTero

To link a location to your iTero scanner:

1. From the **Administration** tab, select **Imaging**. The Imaging Settings are displayed.
2. 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.



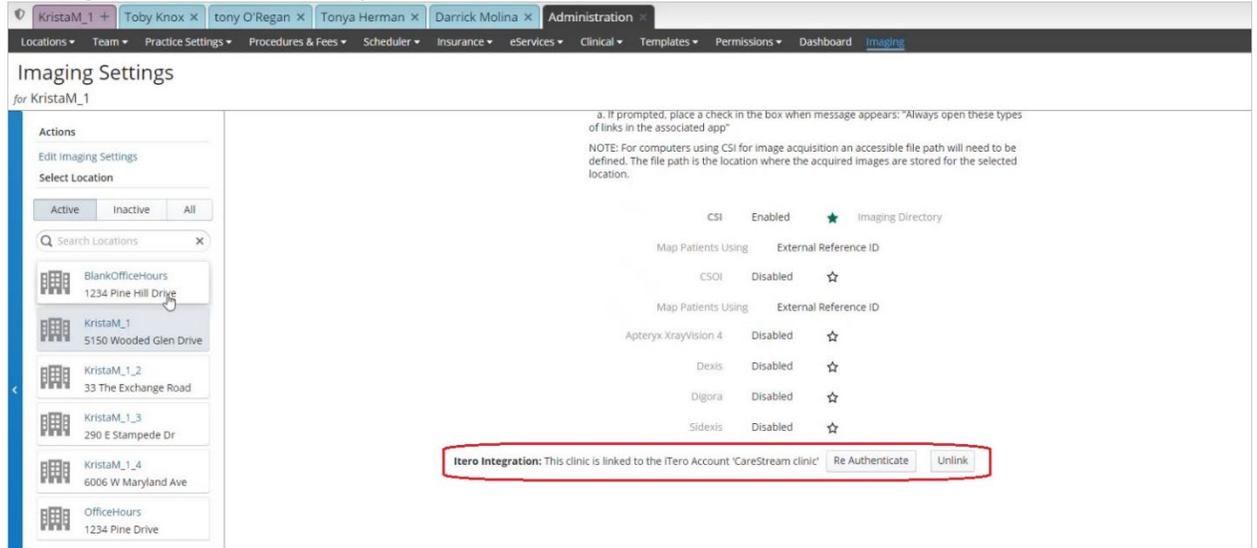
3. Scroll to the iTero Integration section at the bottom of the settings, and then click **Link Account** to activate the iTero Integration for the selected clinic. A prompt is displayed; click **Yes** and you are redirected to the iTero login page to enter your iTero credentials.



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.

- 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.



The screenshot shows the 'Imaging Settings' page for user 'KristaM\_1'. On the left, there is a sidebar with 'Actions' and a list of locations. The main area displays a table of imaging devices with columns for 'Map Patients Using', 'External Reference ID', and a status indicator (star). A red box highlights a row with the text: 'iTerro Integration: This clinic is linked to the iTero Account 'CareStream clinic''. Below this text are two buttons: 'Re Authenticate' and 'Unlink'.

## 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.

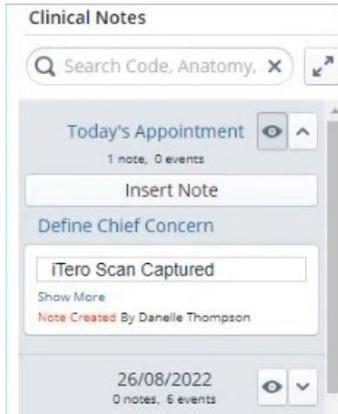
To acquire iTero scans from a Patient tab:

- From the **Patient** tab, select **Clinical > Hard Tissue Chart** or **Clinical > Intra-Oral Scans**.
- 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.
- 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:

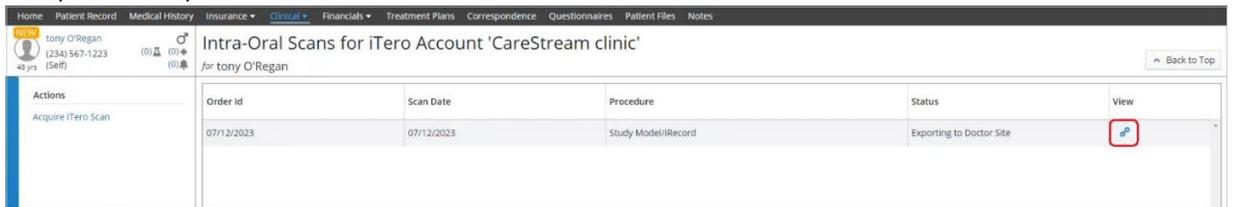
- **Patient Clinical Notes: Patient tab > Clinical > Hard Tissue Chart**

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



- **Intra-Oral Scans List: Patient tab > Clinical > Intra-Oral Scans**

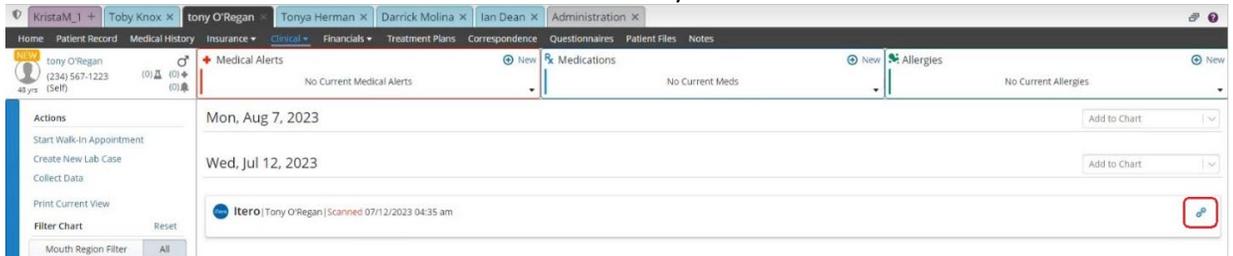
Here you can access a list of all scans completed for this patient, including details like request date, scan date, etc.



Order Id	Scan Date	Procedure	Status	View
07/12/2023	07/12/2023	Study Model/Record	Exporting to Doctor Site	

- **Clinical Chart (EMR): Patient Tab > Clinical > Clinical Chart (EMR)**

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



**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.