



2026 Orthodontic Practice Management Solution Buyer's Guide

for OSOs and Ortho Groups

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The New Standard: Orthodontic Practice Management Software

Orthodontic organizations have invested heavily in technology over the past decade.

Digital imaging, automated reminders, online forms, and integrated financial workflows are now common across many teams.

Even with that progress, performance gaps persist. Limited visibility, fragmented workflows, and inconsistent patient experiences remain common challenges. As orthodontic groups expand, **maintaining operational alignment becomes harder** when systems and processes function differently across locations.

Patient volumes continue to rise while orthodontic groups grow in size and complexity. The global orthodontics market is projected to reach **approximately \$8 billion this year**, reflecting broader access to care, continued clinical advancement, and increased patient demand.

This guide outlines how to evaluate orthodontic practice management software through an enterprise lens, focusing on the capabilities that drive consistent execution and performance at scale across your organization.



The global orthodontic market
is projected to reach
\$8 billion in 2026.

Source: CephX

What OSOs and Ortho Groups Should Prioritize

Orthodontic practice management software has advanced in response to the operational growth of modern orthodontic support organizations (OSOs) and ortho groups. Earlier systems were built around server-based environments designed for single-location practices. **Cloud-based platforms now provide real-time, integrated functionality across locations.** Automation has reduced repetitive work and helped teams operate with greater consistency.

AI has become part of that maturity curve, increasingly through tools that support operational workflows such as scheduling and patient confirmations directly within the platform.

Most ortho groups have already moved beyond server-based environments. They now evaluate whether the orthodontic practice management system can enable consistent daily operations across:

- ✓ Consult workflows and treatment coordination
- ✓ Multi-location scheduling and recurring visits
- ✓ Imaging and treatment planning
- ✓ Financial reporting and oversight
- ✓ AI-enabled operational workflows

The modern orthodontic platform is evaluated by how well it supports the full arc of orthodontic care—**from initial consult through treatment start, recurring adjustments, debond, and retention**—and how reliably it enables repeatable execution at scale.



Infrastructure and Scalability

An advanced orthodontic software platform should **maintain organization-wide oversight while reducing dependency on disconnected systems**. As ortho groups add locations, the platform must keep scheduling, clinical workflows, financial activity, and reporting aligned across the organization without adding administrative burden.

Features should include:

- ✓ A fully cloud-native platform with no local server dependency
- ✓ Secure, role-based access across all locations
- ✓ Real-time reporting without manual consolidation
- ✓ An architecture that scales as new locations are added
- ✓ Multi-location scheduling consistency and operational oversight

Cloud-based solutions have become the operational baseline. The next question is whether the platform maintains continuity across consult scheduling, treatment coordination, recurring adjustment workflows, and financial activity so performance tracking stays consistent across every location.

Cloud 9 by Planet DDS was built as a fully cloud-based orthodontic practice management solution, bringing scheduling, communication, and payment workflows into a shared environment that provides multi-location visibility and control.

Ortho Workflow Standardization and Treatment Coordination

As orthodontic groups expand, **inconsistencies often appear in daily operations**: Consult workflows vary, intake processes differ, treatment coordination handoffs break down, and scheduling approaches drift across locations.

Standardized workflows protect performance by making execution more repeatable across every team member and every location, **from the initial consult through treatment completion**.

Consult and treatment start workflows

The consult-to-treatment start process is one of the most high-stakes workflows in orthodontic operations. How well a platform supports treatment coordinators in managing consult handoffs, case presentation, and same-day starts can meaningfully affect case acceptance rates and production.

Organizations should look for a platform with:

- ✓ Configurable new-patient and consult workflows
- ✓ Treatment coordinator tools for managing case handoffs and acceptance
- ✓ Digital forms and consents that reduce manual steps at the consult and start visits
- ✓ Communication tools that stay connected to the patient record throughout the process

Recurring adjustment scheduling

Unlike general dentistry, **orthodontic care is built on long-term treatment cycles**. Patients return for recurring adjustment appointments over months or years, and the platform must support that rhythm without creating scheduling issues.

Key capabilities include:

- ✓ Recurring appointment scheduling for adjustment visits
- ✓ Consistent scheduling workflows across locations
- ✓ Automated patient communication tied to the appointment and treatment record
- ✓ Debond and retention scheduling as part of the core workflow



Family scheduling and responsible-party management

Orthodontic practices frequently treat multiple members of the same family. Managing siblings, parents, and responsible parties within a shared record structure is one of the most practical ways an orthodontic practice management system can reduce administrative work and improve patient and family experience.

Look for platforms that support:

- ✓ Linked family records connecting siblings and responsible parties
- ✓ Family scheduling that allows multiple appointments to be managed together
- ✓ Shared financial arrangements visible across family members
- ✓ Clear responsible-party designation within the patient and ledger record



Automation matters most when it strengthens consistency without creating new handoffs.

When communication, documentation, and scheduling operate within the same system as treatment coordination and financial workflows, execution becomes easier to manage across locations.

“Automation can help scale operations without hiring additional staff,” explained CFO Stephen Fong of Planet DDS.

“With many already facing labor shortages, automation allows them to **do more with less.**”

Cloud 9 supports structured automation through integrated scheduling workflows, automated communication with Cloud 9 Connect, digital forms with Cloud 9 Signature, and **embedded payment processing through Planet DDS Pay.**

“It has been amazing to move to Cloud 9,” expressed Allison Hale, chief operations officer at Parks Orthodontics. “What changed the game was having a cloud-based solution so we could work from anywhere. Cloud 9 Connect and Signature have also increased our ability to communicate with patients as well as improved the patient experience.”



Planet DDS Pay allows orthodontic practices to securely process payments within Cloud 9 using Stripe terminals.

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ALLISON HALE
COO, Parks Orthodontics



Patient Communication and Digital Forms

Consistent patient communication is one of the most operationally demanding parts of running an orthodontic practice and one of the areas where fragmented systems create the most issues. When communication tools live outside the practice management platform, staff spend time manually coordinating outreach, tracking responses, and reconciling information that should already be in the system.

For orthodontic organizations managing long-term treatment relationships across multiple locations, **communication and form workflows need to be embedded in the platform**, not bolted through disconnected third-party tools.

Automated patient communication

Orthodontic care involves frequent, recurring touchpoints: appointment reminders before each adjustment visit, confirmation requests, recall outreach for patient retention, and balance notifications tied to payment plans. **Managing this volume manually is not scalable.**

Organizations should look for platforms that offer:

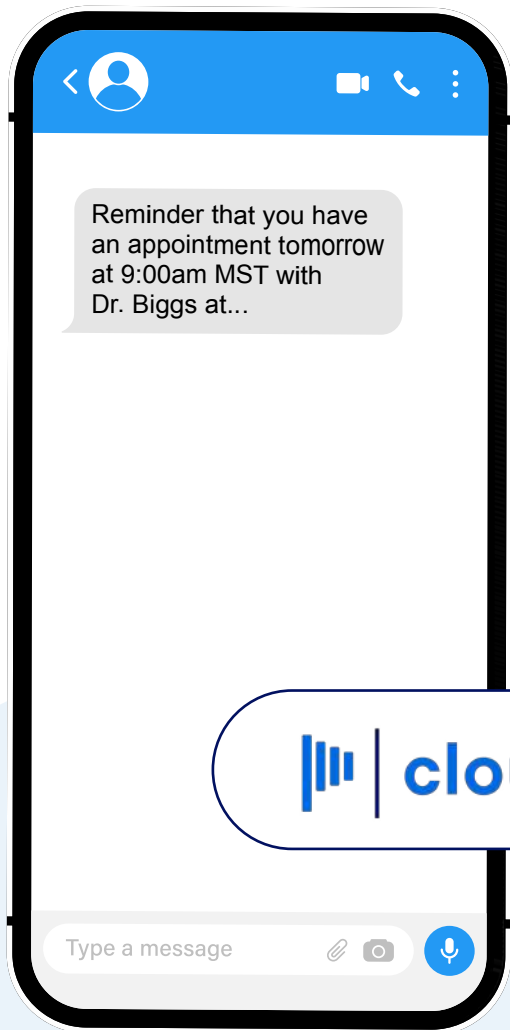
- ✓ Automated appointment reminders and confirmations connected to the scheduling workflow
- ✓ Two-way messaging that keeps communication tied to the patient record
- ✓ Recall and reactivation outreach for patients in retention or overdue for follow-up
- ✓ Consistent communication standards that can be configured and replicated across locations
- ✓ Notifications tied to financial workflows, including payment plan reminders and balance alerts

Cloud 9 Connect delivers automated patient communication directly within Cloud 9, keeping messaging connected to the scheduling and patient record rather than operating as a separate system. Reminders, confirmations, and outreach are triggered by activity within the platform, reducing manual follow-up and helping teams maintain consistent communication across every location.

“Cloud 9 Connect is an absolute game changer,” said Dr. Larry Moray, founder of MyOrthodontist. “The real-time patient communication, seamless appointment reminders, and the two-way texting feature have revolutionized our workflow.”

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DR. LARRY MORAY
Founder, MyOrthodontist



Send automated appointment reminders to patients using Cloud 9 Connect.

Digital forms and consent management

Paper-based intake and consent processes slow down the consult and treatment start experience for both staff and patients. Digital forms reduce manual data entry, minimize transcription errors, and give patients a smoother experience from their first interaction with the practice.

Key capabilities to evaluate include:

- ✓ Digital intake forms completed by patients before the consult visit
- ✓ Electronic consent forms tied to the patient record and treatment workflow
- ✓ Forms accessible on mobile devices for in-office or remote completion
- ✓ Completed form data flowing directly into the patient record without manual re-entry
- ✓ Configurable form templates that can be standardized across locations

Cloud 9 Signature provides digital forms and electronic consent management within the Cloud 9 platform, **allowing orthodontic organizations to standardize intake and consent workflows across locations** while eliminating paper-based processes at the consult, treatment start, and throughout the course of care.

When communication and forms operate inside the same system as scheduling, treatment coordination, and financial workflows, the patient record stays complete, and staff spend less time chasing down missing information or manually transferring data between systems.

Revenue, Contracts, and Financial Controls

Orthodontic financial management is fundamentally different from general dental billing.

Treatment fees are typically contracted upfront. Payments are collected over the full course of treatment, and financial arrangements—including payment plans and autopay—and must be tracked against long-term case timelines, not just individual visits.

Financial performance depends on visibility and control, **especially as volume grows across multiple locations**. Even small inconsistencies in contract setup, posting, and reconciliation can create downstream reporting issues that affect forecasting and organizational oversight.

Contracts, payment plans, and autopay

As orthodontic organizations expand across locations, **maintaining consistency in contract setup, payment tracking, and reconciliation becomes critical**. Variations in financial workflows can affect reporting accuracy, forecasting, and organizational oversight.

Orthodontic groups should look for:

- ✓ Contract and financial arrangement setup tied to the treatment record
- ✓ Flexible payment plan configuration, including down payments and recurring installments
- ✓ Autopay enrollment and management within the core platform
- ✓ Balance and payment tracking across the full treatment duration
- ✓ Patient billing and payment notifications connected to financial workflows

Multi-location financial insights

Leadership needs reliable insights into starts, production, and collections across the organization. When payment processing, posting, and reconciliation operate inside the system of record, reporting integrity is maintained without manual workarounds.

Key financial control priorities include:

- ✓ Embedded payment processing tied directly to the ledger
- ✓ Automated posting and reconciliation to reduce manual cleanup
- ✓ Ledger transparency with full audit history
- ✓ Cross-location financial reporting for production and collections oversight
- ✓ Real-time claims visibility and insurance workflow tracking

“Managing payments and revenue across multiple locations is a significant challenge,” said Eric Giesecke, CEO of Planet DDS. “Planet DDS Pay streamlines this process by accelerating payment collection, automating revenue cycle management, and enhancing both security and the patient experience.”

“Cloud-based financial integration, with centralized oversight and built-in compliance safeguards, has become a nonnegotiable component of improved strategy,” added Fong.

Financial workflows must operate inside the core platform to preserve reporting integrity. When orthodontic payment plans, autopay, and reconciliation sit outside the system of record, leadership often ends up relying on manual workarounds to get trustworthy numbers.

AI-Enabled Orthodontic Operations

AI-enabled capabilities depend on the same principle that drives operational consistency: unified records, structured data, and standardized workflows. Platforms that build AI into core operational processes, rather than adding it as a disconnected feature, deliver more practical value for orthodontic organizations.

When evaluating orthodontic software, look beyond surface-level feature claims. **Focus on whether AI tools are embedded in the workflows your teams use daily.**

AI agents for scheduling and confirmations

Cloud 9 Scheduling and Confirmation AI Agents represent a practical application of AI in orthodontic operations. These agents interact directly with schedules, workflows, and patient data within the platform, handling routine operational tasks such as appointment scheduling outreach and confirmation workflows without requiring staff intervention.

For multi-location organizations, AI-enabled scheduling and confirmations can meaningfully reduce front-desk workload, improve schedule fill rates, and maintain consistent patient communication standards across every location.



As we bring AI agents into the revenue cycle, clinical coordination, and beyond, we're building a workforce that strengthens our customers' business at every level.

NATHAN JAMES
Chief Product Officer
Planet DDS



When evaluating AI solutions, look for:

- ✓ AI tools embedded within the core platform
- ✓ Operational AI agents that interact with scheduling and patient communication workflows
- ✓ AI capabilities that reduce routine administrative work without creating new handoffs
- ✓ A credible product roadmap showing continued AI investment alongside core platform development

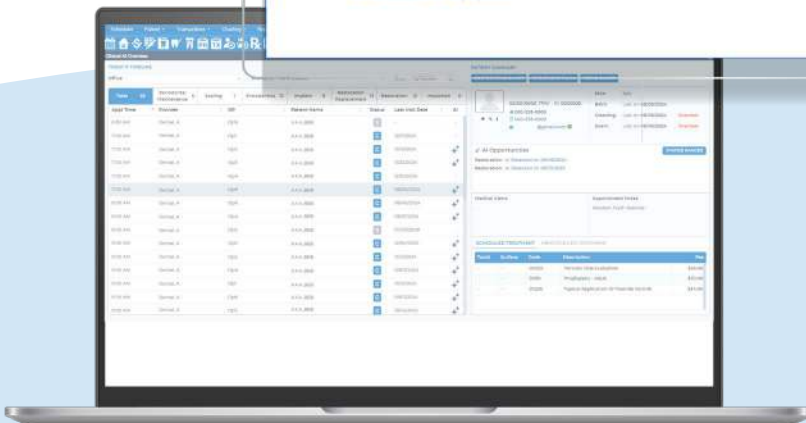
AI should be evaluated alongside scheduling, financial management, treatment coordination, and reporting, not as a standalone selling point. As AI continues to expand within orthodontic scheduling software and practice management platforms, organizations with unified, well-structured systems will be best positioned to benefit.

Appt Time	Provider	OP	Patient Name	Status	Last Visit Date	AI
6:30 AM	Dental, A	Op9	AAA, BBB	S	-	-
7:00 AM	Dental, A	Op1	AAA, BBB	C	12/11/2024	-
7:00 AM	Dental, A	Op2	AAA, BBB	C	11/15/2024	+
7:00 AM	Dental, A	Op3	AAA, BBB	C	11/22/2024	+
7:00 AM	Dental, A	Op4	AAA, BBB	C	12/10/2024	-
7:00 AM	Dental, A	Op6	AAA, BBB	C	06/06/2024	+

AI Opportunities XVWEB IMAGES

Restoration: AI Detected on 06/06/2024

Restoration: AI Detected on 06/15/2023



Automatically analyze patient data to provide AI-powered treatment suggestions within the appointment schedule up to 7 days in advance.

Evaluating Ortho Practice Management Systems

Orthodontic platforms may look similar on the surface, but the underlying structure can differ significantly. The chart below shows how legacy systems, cloud-based platforms, and modern solutions with AI compare across the areas that matter most to orthodontic operations.

Ortho Practice Management Comparison Chart			
Evaluation Area	Legacy Systems	Cloud-Based Platforms	Modern Platforms with AI
Infrastructure and Scalability	Server-based; manual updates; hardware at each location	Cloud-hosted; centralized management; reduced local server reliance	Cloud-native; centralized oversight across locations; built for automation and AI
Consult and Treatment Start Workflows	Manual consult intake; limited coordinator support; paper or disconnected forms	Digital intake and consents; configurable new-patient workflows; basic coordinator tools	Standardized consult-to-start workflows; automation at key handoffs
Recurring Adjustment Scheduling	Appointment scheduling by single location; limited recurring visit configuration	Integrated scheduling with recurring appointments; automated reminders	Consistent recurring adjustment scheduling; AI-enabled scheduling reducing front-desk workload
Family and Responsible-Party Management	Limited family linking; responsible-party management outside platform	Basic family record linking; shared financial arrangement visibility	Linked family and responsible-party records; family scheduling; shared financial arrangements within ledger
Treatment Coordination	Manual coordination workflows; handoffs not tracked in system	Coordinator tools for consult handoffs and case acceptance; communication tied to record	Structured treatment coordination workflows; automated handoffs and follow-up
Contracts, Payment Plans, and Autopay	Contracts and payment plans managed outside platform or in disconnected tools	Payment plan configuration in platform; basic autopay support	Integrated contracts and payment plans; autopay enrollment; balance tracking across treatment
Revenue and Financial Controls	Manual reconciliation; financial data outside system; limited cross-location visibility	Real-time reporting; connected payment workflows; improved collections oversight	Unified financial data; auto posting and reconciliation; production and collections visibility by location
AI-Enabled Operations	No AI support; scheduling and confirmations handled manually	AI tools via third-party integrations	AI Agents embedded in scheduling and confirmation workflows; reduced administrative work

Use this scorecard to evaluate whether a platform supports the infrastructure, orthodontic workflows, financial controls, and AI-enabled capabilities required for modern orthodontic operations.

<h2 style="text-align: center;">Ortho Practice Management Vendor Scorecard</h2> <p style="text-align: center;">Rate each vendor on a 1–5 scale (1 = Poor, 5 = Excellent)</p>		
Evaluation Area	Key Question	Score (1–5)
Infrastructure	How well does the platform enable cloud-native deployment and reliable access across multiple locations?	
Security	Does the platform maintain enterprise-level protections such as SOC 2 Type 2 certification and HIPAA-aligned safeguards?	
Consult and Treatment Start Workflows	How effectively does the platform support consult intake, treatment coordinator workflows, and treatment starts?	
Recurring Adjustment Scheduling	Does the platform support consistent, repeatable scheduling for recurring adjustment and retention visits across locations?	
Family and Responsible-Party Management	Can the platform link siblings, parents, and responsible parties within the patient and financial record structure?	
Treatment Coordination	How well does the system support treatment coordinator handoffs, case acceptance, and long-term case management?	
Contracts, Payment Plans, and Autopay	Does the platform support orthodontic payment plans, contract management, and autopay within the core system?	
Financial Controls and Visibility	How well are payments, posting, reconciliation, and cross-location production and collections reporting integrated within the platform?	
Workflow Standardization	How effectively does the system standardize intake, scheduling, communication, and operational workflows across locations?	
AI-Enabled Operations	Does the platform offer practical, embedded AI tools, such as AI Agents for scheduling and confirmations, that reduce routine operational work?	
Scalability	Can the system support organizational growth across locations without adding operational complexity?	
Total Score: / 55		

Choose a Modern Orthodontic Platform for Growth

Orthodontic organizations no longer evaluate software as a collection of separate features. The most effective orthodontic practice management systems support the full cycle of care—from consult and treatment start through recurring adjustments, debond, and retention—within a unified operating platform.

Cloud-native architecture sets the baseline. Operational maturity comes from standardized treatment coordination workflows, integrated contract and payment plan management, family account handling, and financial controls built into the core system. Orthodontic software for multi-location practices must also provide leadership with reliable visibility into starts, production, and collections across every location.

As AI continues to expand within orthodontic operations—from scheduling and confirmations through broader platform-level capabilities—ortho groups with cohesive systems and structured data will be best positioned to strengthen consistency and improve oversight at scale.



Learn how Cloud 9 delivers modern orthodontic solutions for growth.

SCHEDULE A DEMO



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Dental software is broken. We aim to fix it.

As a partner in growth for DSOs and dental groups outgrowing legacy systems and fragmented tools, Planet DDS delivers a cloud-based AI platform designed to scale alongside growing organizations. Powered by DentalOS™ with AI, Planet DDS is built on connection—connecting people, partners, and technology across an open ecosystem that includes Denticon Practice Management, Cloud 9 Ortho Practice Management, and Apteryx Cloud Imaging. Trusted by leading DSOs and emerging dental groups nationwide, Planet DDS supports more 100+ location DSOs than any other cloud-based dental practice management provider, enabling 14,500 practices and 175,000 users to move beyond outdated legacy software with seamless integrations, optimized workflows, and scalable technology built for growth.

To learn more, please visit PlanetDDS.com