



DPMS Integration with iTero - Overview

Tamar Kariv

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1 Introduction

Integration with Align allows dental clinics have the [iTero](#) scanner an integral part of their offices.

Clinics that own an iTero scanner(s) can have it a part of their Dental Practice Management System (DPMS), such that they save doctors' and patients' time and errors. Pushing the patient's RX to the scanner before scanning saves time for the doctor and the patient. Clinics also save time fetching and storing the scans back into their DPMS.

Having the RX fed by the DPMS patient's information also makes sure that the DPMS patients' data is consistent with the iTero patients' data and comprehensive.

The DPMS serves as a 'master' meaning it controls the patient's data, while the iTero scanner is the 'slave' using the data pushed from the DPMS.

This document refers to APIs V1 and V2. For V0 please contact Professional Services iTeroAPISupport@aligntech.com.

2 Generic API

2.1 Authentication and Pairing APIs

Name	Description	How and When to Use	Comments
Authorization	Provide Align's credentials to the system	Allow generic APIs to be used by registered users only	
Get Token	Get a token to be used for pairing	Token is required for pairing process	Two tokens are returned: access token and refresh token. Access token is used for the next steps
Refresh Token	Refresh a token that expired	Access token expires after one hour and has to be refreshed to allow continued work	Refresh token should be passed to receive new access token
Revoke Token	Stop using a token	Similar to a log out operation	
Discovery	Provide Align's regional URL's that must be used for all of the future API calls.	Before Get Available Companies for Pairing Before calls to Refresh Token	For more information about the Discovery API, please refer to the "Authentication and Pairing Process V2" specification.
Get Accounts for pairing	User gets a list of accounts he is can pair to	User selects the account he want to pair to	

Name	Description	How and When to Use	Comments
Pair	User pairs to a selected account	User will be able to work with orders that are related to the account he selected	A new set of tokens is provided. The new set will be used for the next subsequent API calls.
Un Pair	Pairing is terminated after this call	When user wishes to stop working with this account	

2.2 DPMS APIs

Name	Description	How and When to Use	Comments
Get Practice Configuration	Returns practice information and a list of doctors associated with the clinic	Use this API to find all data that is required for the Scan Request	
Scan Request	Push RX to scanner	User can create an RX in his DPMS and send it to iTero	Rx is also available on myitero portal
Get Orders	Returns list of orders of the practice	User can get the metadata for the clinic's ready orders. Returned list can be filtered by date or by chart number.	Ready order is a scan that: <ul style="list-style-type: none"> • uploaded to Align's storage • Ready to be viewed in myitero portal • All artifacts are ready for download
Download Order	Download scan artifacts for the order ID provided	Download a scan to DPMS. User can download all scan files or just specific files.	Download options: <ul style="list-style-type: none"> • STL/PLY file • Thumbnails • Screen capture
Scan notification (webhook)	A push mechanism to notify the clinic that a scan is ready	Allows DPMS use a 'Push' mechanism in which a notification is sent with every scan that is ready.	Scan notification is triggered when a scan is ready.

Name	Description	How and When to Use	Comments
Get Order By RxID	Returns order's metadata for RxId Provided	Returns the same metadata as in 'Get Orders' for one specific order with the provided RxID. User should use this endpoint when using the Scan Notification webhook as it returns the RxID.	

2.3 Patient's Details Management APIs

Name	Description	How and When to Use	Comments
Patient search	Search by matching (first name, last name) + chart number	Search all permutations of a patient's name (and update the name if necessary) before sending an RX	Avoid creating a new patient if the patient exists.
Patient details Update by Patient ID	Update patient first name and/or last name and/or chart number	Update patient's record using patient GUID returned from search	This call can update first name, last name, chart number
Scan request with update	Allow scan request to update patient first name or last name	Keep patients data base coherent while creating new patients	Requires configuration from Align side to enable this feature.
Patient details update by chart number	Update patient first name and/or last name by patient's chart number	The API should be used in the case of changing name or last name (marriage for example).	Can serve to fix typos as well
Paring warning	Warn user if there are multiple patients sharing the same chart number or patients missing a chart number	Use before starting the integration	Requires configuration

3 High level DPMS flow

