

Dental/DSO Industry Newsletter

Dental/DSO Industry Market Intelligence

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CALENDAR OF EVENTS

American Academy of Dental Group Practice (AADGP) 2026

FEBRUARY 4–6, 2026

Austin, TX

(Hyatt Regency Lost Pines Resort & Spa)

Group Dentistry Now's event listing promotes the AADGP 2026 meeting, scheduled for Feb. 4–6, 2026, at the Hyatt Regency Lost Pines Resort (Austin, Texas). The agenda shown includes arrival/welcome programming on Feb. 4 and workshops plus a “State of the Industry” address and payer-focused sessions on Feb. 5 (including topics like revenue cycle strategies, leadership development and payer decision-making such as PPO vs. fee-for-service). The listing positions this as a group/DSO-focused setting for operational, leadership and payer strategy discussion relevant to multisite dental operators.

For more information, please click [here](#).

Dental VIP (Venture, Innovation & Partnering) Summit 2026

FEBRUARY 18, 2026

Chicago, IL

This event listing describes the Dental VIP Summit as a limited-attendance conference held Feb. 18, 2026, at the InterContinental Chicago Magnificent Mile, positioned immediately before the Chicago Midwinter Meeting. The program is framed around dental innovation and partnering, keynotes, panels and “shark tank”-style showcases of emerging tech, aimed at connecting innovators, investors and industry executives (including DSO leadership) around scaling innovation and strategic partnerships. The listing also highlights a “Top 20 Dental Innovators” awards component and heavy emphasis on networking and deal/partnering conversations.

For more information, please click [here](#).

emPower Networking—“Beyond Automation: Using AI to Unlock Potential and Purpose,” Women in DSO

FEBRUARY 19, 2026

Virtual

Women in DSO's events calendar lists a virtual “emPower Networking” session scheduled for Feb. 19, 2026, (1:00–2:00 PM CST) with a theme focused on AI and workforce potential. This is relevant for DSOs as a lightweight, webinar-style forum for leadership/community learning (often attended by HR, ops and functional leaders) and can be positioned in your report as a staffing/talent-adjacent event given the focus on enabling people and productivity through technology.

For more information, please click [here](#).

Women in DSO® Empower & Grow 2026

MARCH 5–7, 2026

Caesars Palace, Las Vegas, NV

Group Dentistry Now's listing describes Women in DSO's Empower and Grow 2026 conference at Caesars Palace (Las Vegas), running Mar. 5–7, 2026. The agenda overview explicitly includes functional breakouts for DSO Operations Leaders, DSO Clinical Leaders, DSO HR & Recruiting Leaders, DSO Finance & Technology Leaders and DSO Marketing Leaders, plus broader general sessions and networking. This makes it especially relevant for DSOs as it is structured around the exact leadership functions that drive growth, standardization, recruiting and multisite performance.

For more information, please click [here](#).

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CALENDAR OF EVENTS (cont'd)

IADR/AADOCR/CADR General Session & Exhibition

MARCH 25–28, 2026

San Diego Convention Center, CA

The combined General Session & Exhibition hosted by the International Association for Dental Research (IADR), American Association for Dental, Oral and Craniofacial Research (AADOCR) and Canadian Association for Dental Research (CADR) is one of the largest scientific and research-oriented dental events worldwide.

For more information, please click [here](#).

International Conference on Dentistry and Oral Health (Dental 2026 – Hybrid)

APRIL 20–22, 2026

Paris, France & Online

The International Conference on Dentistry and Oral Health (Dental 2026) is a global hybrid event designed to bring together dental professionals, practice managers, researchers and innovators from around the world.

For more information, please click [here](#).

Midwest Dental Conference 2026

APRIL 23–26, 2026

Kansas City, MO

Hosted by the University of Missouri–Kansas City School of Dentistry, the Midwest Dental Conference is a longstanding regional event that blends educational programming, vendor exhibits and networking for dental professionals across the central United States.

For more information, please click [here](#).

2026 ADSO Summit

JUNE 15–17, 2026

Chicago, IL

The ADSO Summit is positioned by ADSO and Group Dentistry Now as a flagship DSO leadership gathering, scheduled for Jun. 15–17, 2026, in Chicago. The Group Dentistry Now event page characterizes it as a multiday forum for thought leadership, innovation and networking “planned by DSOs for DSOs,” aimed at senior DSO leaders and partners. This is the clearest “must-flag” large-scale DSO conference on the calendar because it typically draws executive decision-makers (ops/strategy, payor relations, growth and vendor ecosystems).

For more information, please click [here](#).

Florida Dental Conference 2026

JUNE 25–27, 2026

Orlando, FL

Situated at the Gaylord Palms Resort & Convention Center in Orlando/Kissimmee, this event offers comprehensive continuing education, a large exhibit hall featuring new dental products and services, and business forums. The conference addresses specific challenges and opportunities for DSOs in fast-growing markets like Florida.

For more information, please click [here](#).

The Dental Exchange—First Ever Annual Dental Industry Event 2026

OCTOBER 8–10, 2026

Grapevine, TX

This upcoming event is billed as “The first ever Annual Dental Industry Event” and will be held in Grapevine, Texas (Gaylord Texan). According to the listing, it intends to bring “all of dentistry together” but is included in the DSO-events category on the calendar, signaling relevance to multi-location practices, DSOs and their partners.

For more information, please click [here](#).



Please contact us if you would like to post information regarding our upcoming events or if you'd like to guest author an article for this newsletter.

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INDUSTRY SPOTLIGHT

Interview with Richard Uria, President, orthobrain®

Richard Uria is president of orthobrain®, a dental technology and practice growth company reimagining how orthodontic care is delivered through general dentistry and DSOs. Guided by a belief that high-quality orthodontics should be accessible, scalable and seamlessly integrated into everyday practice, orthobrain provides a comprehensive ecosystem of education, orthodontist-led treatment planning, U.S.-based clinical support, proprietary technology and practice activation. Its award-winning SimplyClear™ clear aligner system is helping fuel consistent case growth, strong clinical outcomes and sustainable expansion across multi-location organizations.



A visionary, results-oriented executive, Richard brings a unique blend of strategic, financial and operational leadership to complex organizations. His career began in corporate finance and investment banking and evolved through more than two decades of senior leadership roles within a global manufacturing enterprise, where he led growth initiatives across sales, operations and business development.

As president, Richard partners closely with the Board of Directors to shape long-term strategy and unlock enterprise value. He leads cross-functional teams spanning operations, technology, sales and marketing, fostering a culture of accountability, innovation and disciplined execution through the Entrepreneurial Operating System (EOS). His leadership is focused on building scalable platforms, empowering teams and positioning orthobrain at the forefront of the evolving orthodontic landscape.

Beyond the business, Richard is committed to giving back through active involvement in community initiatives supporting the arts, charitable organizations and nonprofits. Richard has a passion for being on the golf course, keeping up with Springbok Rugby, traveling with his wife and three boys, or unplugging for a weekend away.



How was your company started? What led you to start the business?

Founded in 2016 by Dr. Daniel German, D.D.S., orthobrain® was created to address a clear gap in the market: general dentists wanted to offer orthodontic care but lacked the systems, infrastructure and confidence to do so at scale. The company was built to simplify orthodontic workflows while providing the clinical and operational support needed to deliver predictable, high-quality outcomes.

As the model gained traction, I joined orthobrain® as an investor and partner to help professionalize, scale and lead the business into its next phase of growth. My role has focused on building a repeatable, growth-oriented platform, aligning technology, education and operational execution to support DSOs and multi-location practices in expanding orthodontics in a sustainable, disciplined way.

What services does your company offer?

orthobrain® is a dental technology and practice growth company that enables general dentists and DSOs to integrate orthodontics profitably and predictably through a single, end-to-end platform. Our full orthodontic product suite—including [SimplyClear™ Clear Aligners](#) and [SimplyBraces™](#) ready-to-bond brackets—is supported by orthodontist-led treatment planning, with every case guided by a U.S.-based orthodontist. The platform combines digital tools, proprietary AI-driven systems, clinical training and ongoing operational and growth support, enabling practices to deliver specialist-level orthodontic care with confidence and consistency.

Talk a little about your company's work in the dental industry

orthobrain® operates as a comprehensive orthodontic enablement ecosystem, supporting both the clinical and business sides of orthodontics. By pairing advanced technology with orthodontist-led treatment planning, mentorship and

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INDUSTRY SPOTLIGHT (cont'd)

Interview with Richard Uria, President, orthobrain®

operational guidance, we help practices deliver consistent clinical quality while improving case acceptance and profitability.

This approach allows single-location practices and multi-location DSOs alike to build scalable, predictable orthodontic programs without adding unnecessary complexity to their teams.

What challenges or opportunities are you seeing in the dental industry?

DSOs and group practices face increasing pressure to drive growth while maintaining quality and consistency across multiple locations. Orthodontics represents a significant opportunity, but success requires more than clinical expertise; it demands standardized workflows, robust clinical oversight and dedicated case management to ensure scalability.

The orthobrain® ecosystem combines AI- and human intelligence-driven digital platforms with hands-on clinical and operational support. This model gives teams the confidence to deliver predictable outcomes while enabling practices to expand orthodontic services efficiently and profitably for both doctors and patients.

What do you enjoy outside of work?

Outside of work, I value experiences that allow me to reset, stay curious and connect with family. I'm passionate about travel, especially returning to my South African roots in Johannesburg and Cape Town, exploring the arts and collecting pieces that inspire me.

I stay active through sports, particularly golf, which blends strategy, competition and perspective; lessons that carry over directly into leadership. I also enjoy cheering on the Springbok rugby team and, most importantly, spending time with my amazing wife and our three boys.

To learn more about **orthobrain®**, please click [here](#).

KEY FINDINGS

DSOs are Prioritizing Standardization, Governance and Compliance as Scale Increases

Clinical standards, coding changes and organizational governance are converging into a larger “controls” moment for multi-site dental groups

Across late December 2025 and early January 2026, multiple developments point to a broad tightening of standards and oversight that directly affects DSOs as they scale. At the industry level, the ADA's decision to launch a comprehensive governance and organizational health study in 2026 signals a heightened focus on governance structures, accountability, internal controls and decision-making frameworks within organized dentistry. While ADA-specific, this type of review often foreshadows changes to bylaws, committee authority and control documentation that can ripple outward to state societies, affiliated organizations and industry partners, raising expectations around formalized governance and process discipline more broadly.

On the operational side, ADA-driven clinical and coding standards are simultaneously evolving. CDT deletions effective January 1, 2026, particularly around preventive resin restorations and sedation/anesthesia coding, require updates to revenue cycle workflows, documentation standards, payer mappings and staff training. Similarly, updated ADA guidance on radiographic imaging and CBCT use emphasizes necessity-based imaging and reinforces ALARA principles, which increases the importance of standardized imaging justification, QA processes and audit readiness across multi-location organizations. Research highlighted by Dental Tribune US on high-risk medications in pediatric dentistry further reinforces the need for DSOs to harmonize prescribing protocols, consent practices, supervision and documentation—especially in pediatric and sedation-heavy environments.

Trend takeaway: As DSOs grow, the “compliance surface area” is also expanding. Governance frameworks, clinical protocols, coding accuracy and documentation consistency are becoming as central to scalable growth as acquisitions or de novo openings. These developments collectively suggest increased demand for centralized policy setting, training and internal monitoring across DSO platforms.

Sources: ADA News; Dental Tribune US

Growth Continues, but With a Sharper Focus on Density, Infrastructure and Capital Efficiency

Consolidation, tech enablement and disciplined capital deployment are shaping the next phase of DSO expansion

Year-end reporting shows DSO growth continuing, but with a more measured and strategic profile than in earlier consolidation waves. Group Dentistry Now's December roundup reflects sustained activity across affiliations and de novo builds, with large platforms emphasizing state density, specialty expansion and multi-office partnerships rather than isolated single-practice additions. Executive commentary from The Group Dentistry Now Show reinforces the fact that DSOs are prioritizing same-store growth, service-line expansion and operational efficiency heading into 2026, alongside continued interest in technology-enabled workflows and scalable models.

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KEY FINDINGS (cont'd)

Macroeconomic context is shaping how this growth unfolds. An industry analysis from OTEXE highlights expectations that interest rate relief and improved financing conditions could unlock additional M&A activity in 2026, particularly for mid-sized platforms (roughly 25–70 clinics) rather than very small tuck-ins. The article underscores growing attention to post-merger integration, EBITDA quality and fragmented technology stacks—factors increasingly influencing valuation and deal structure. On the capital side, private equity activity reinforces this shift toward enablement: Vista Equity Partners' investment in Dentira and Eir Partners' \$1B healthcare-tech fund closings both point to sustained capital interest in infrastructure, procurement, automation and analytics platforms that support DSO scale rather than purely practice roll-ups.

Regulatory change is also intersecting with innovation and growth strategies. Georgia's new teledentistry law, [effective](#) January 1, 2026, illustrates how state-level reforms can accelerate virtual care adoption, but also require DSOs to align supervision rules, documentation standards, payer billing and multistate compliance as remote care models expand.

Trend takeaway: DSOs are still growing, but growth is increasingly paired with investments in infrastructure, technology and disciplined capital deployment. The emphasis is shifting from “how fast can we add locations” to “how well can we integrate, standardize and operate at scale.”

Sources: Group Dentistry Now; OTEXE; PE Hub; Wall Street Journal

GENERAL DENTISTRY NEWS

DECEMBER 15, 2025

[ADA to Conduct Governance and Organizational Health Study in 2026](#)

The ADA announced it will hire an outside consultant to evaluate the Association's governance and “organizational health” in 2026, following a House of Delegates resolution adopted in October 2025. The study is structured to deliver an interim progress report in April 2026 and a final report to the 2026 House of Delegates in October 2026, intended to assess the ADA's governance structure, internal controls, accountability expectations and leadership culture—along with causes of recent financial and operational challenges referenced in the announcement.

From an “issues that could create legal work,” standpoint, this kind of governance review often precedes revisions to bylaws, policies, committee authorities, delegation models and decision-rights frameworks, as well as changes to vendor selection/RFP processes, internal control documentation and accountability standards. The ADA also noted that a task force will advise the governance committee and stakeholder input will be gathered from multiple constituencies (e.g., early-career dentists, past leaders, state executive directors, House members and state dental leaders), which can foreshadow structural and process changes that ripple into state dental societies and organized dentistry partners.

Source: ADA News (American Dental Association)

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GENERAL DENTISTRY NEWS (cont'd)

DECEMBER 15, 2025

Deleted CDT Codes Dentists Need to Know For 2026

ADA News outlined key CDT Code changes taking effect January 1, 2026, focusing on six deletions within “CDT 2026” (which the article notes includes 60 total changes). The deletions include:

- D1352 (preventive resin restoration in a moderate–high caries risk patient, permanent tooth). The ADA explanation ties this deletion to an update around posterior composite restorations and reducing documentation confusion by consolidating coding pathways for similar procedures.
- Four COVID-19 vaccine administration codes (AstraZeneca and Janssen) removed because those vaccines are no longer manufactured/supplied, per the article’s rationale.
- D9248 (non-intravenous conscious sedation), deleted as part of broader anesthesia coding updates, with replacement codes introduced to reflect updated terminology and documentation detail.

Why it matters for larger practices/DSOs: CDT changes can trigger workflow updates across revenue cycle management, templates, clinical documentation prompts, payer mappings, claims edits and staff training, especially for multisite organizations trying to standardize coding behavior. The sedation/anesthesia recoding changes in particular can create compliance and reimbursement risk if entities keep legacy mappings or inconsistent charting standards across affiliated offices.

Source: ADA News (American Dental Association)

JANUARY 2, 2026

High-Risk Medicines in Children’s Dentistry Raise Safety Concerns, Study Finds

Dental Tribune US reports on research indicating that while prescribing high-risk medicines for pediatric dental visits is uncommon, it can carry meaningful safety implications, spotlighting patterns around opioid and sedative use and calling for tighter adherence to non-opioid pain management in pediatric dental care. For DSOs and larger groups, this is a governance and risk-management signal: it can affect prescribing protocols, supervision and training standards, clinical decision support, informed consent practices, documentation and incident response, especially where pediatric dentistry, sedation workflows or multi-site standardization is involved.

Source: Dental Tribune US

JANUARY 5, 2026

New ADA Recommendations Confirm Dental Imaging Most Effectively Used in Moderation

The ADA announced updated recommendations on patient selection for dental radiographic exams, the first in more than a decade to address both traditional planar imaging and CBCT use, emphasizing imaging only when clinically necessary after a thorough exam (ALARA principles). The guidance organizes recommendations by clinical scenario, visit type, patient age/development and risk factors, and states there is no evidence supporting CBCT for periodontal disease management except in complex treatment planning. Multisite DSOs may need to align clinical protocols, imaging justification templates and QA/audit processes, particularly where CBCT utilization, advertising claims or standardized care pathways could raise regulatory, payer or patient-safety scrutiny.

Source: ADA News

DSO EXPANSION & CONSOLIDATION

JANUARY 1, 2026

December DSO Affiliations and Multi-Site Expansion Activity (Month-End Roundup)

Group Dentistry Now's December roundup aggregates DSO affiliation and expansion activity reported across the market (rather than focusing on a single opening). Highlights include: (1) PDS Health reporting 15 de novo openings in December and noting it supports 1,000+ offices in 24 states; (2) Heartland Dental listing 11 new offices across five states and noting additional affiliations; (3) multiple multilocation partnerships/affiliations such as Smile Partners USA partnerships (including a three-office group), Guardian Dentistry Partners partnerships and additional practices joining Imagen Dental Partners; and (4) specialty growth examples (e.g., orthodontics/pediatric and oral surgery groups) and regional footprint expansions. Overall, the roundup reflects that late-2025 DSO growth remained active across de novo builds and practice affiliations, with several organizations emphasizing state-density and specialty expansion rather than isolated single-office openings.

Source: Group Dentistry Now

DECEMBER 31, 2025

Year-End Executive Discussion: What DSOs Prioritized in 2025 and What They Expect in 2026

In a year-end episode recapping 2025, Group Dentistry Now's hosts discussed themes that drove attention and activity across DSOs and dental groups. Topics included the continued shift toward group models, an emphasis on technology (including AI-related tooling and digital workflows), and operational priorities such as same-store growth and expanding service lines. The episode also references heightened interest in organizational strategy moves (e.g., scale and financing stories, and how emerging groups position for growth) and notes a forward-looking focus on 2026 events and industry programming (without positioning near-term events as the "news"). For monthly reporting purposes, it's a useful indicator of what DSO operators and vendors viewed as the most material levers at year-end: technology standardization, operational efficiency and scalable growth models.

Source: Group Dentistry Now (The Group Dentistry Now Show – Episode 238)

OTHER DSO NEWS

JANUARY 5, 2026

DSO Market Expectations - Interest Rates, M&A Dynamics & Consolidation Signals

A recent industry analysis highlights how macroeconomic conditions, particularly interest rate movements, are shaping DSO merger and acquisition trends heading into 2026. According to the article, while 2025 lacked record-breaking deal activity, experts see foundational deal momentum building behind the scenes that could lift M&A flow in the year ahead. The piece emphasizes that expected interest rate cuts and improvements in financing conditions could make capital more accessible, potentially increasing deal liquidity for mid-market and larger DSO transactions. It cites the Heartland Dental acquisition of the Smile Design Dentistry network (≈60 clinics) as a sign of renewed consolidation interest among major players, and notes that well-capitalized DSOs may pursue disciplined, strategic deals targeting mid-sized platforms comprising 25–70 clinics—rather than focusing exclusively on very small acquisitions. The article also touches on post-merger integration themes (such as centralizing overhead and retaining clinical staff), EBITDA quality pressures and fragmented tech/data systems impacting valuations. Lastly, it notes public market precedents (e.g., a DSO IPO) as indicators of sector maturity while stressing that broader regulatory and insurance reform trends continue to intersect with consolidation dynamics.

Source: OTEXE.com

PRIVATE EQUITY

DECEMBER 22, 2025

Vista Equity Partners Invests in Dental Procurement Platform Dentira

Vista Equity Partners made a growth investment in Dentira, a procurement and spend-management platform used by dental practices and multisite operators (including DSOs). The article highlights Dentira's scale (supporting more than 17,000 practices and roughly 200 DSOs) and positions the investment as a bet on "back-office infrastructure" that becomes more valuable as dental groups consolidate and standardize operations across locations. For DSO operators, the deal is a signal that PE interest is extending beyond practice roll-ups into the enablement layer, procurement controls, spend visibility and workflow systems that can support multisite growth and integration.

Source: PE Hub

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PRIVATE EQUITY (cont'd)

JANUARY 8, 2026

Eir Partners Closes a \$1B Fund for Healthcare Technology and Tech-Enabled Services

Eir Partners announced a \$1 billion final close for its third fund focused on healthcare technology and tech-enabled services. While not dental-only, it's a relevant capital-availability signal for the DSO ecosystem: DSOs increasingly rely on vendor platforms (RCM, procurement, automation, analytics, patient engagement), and dedicated healthcare-tech dry powder can translate into more investments in the dental/DSO vendor stack and related partnership opportunities.

Source: Wall Street Journal

PARTNERSHIPS AND INNOVATION

DECEMBER 29, 2025

Georgia Teledentistry Law Takes Effect Jan. 1, 2026, Expanding Permitted Virtual Dental Services and Coverage

Capitol Beat reported that Georgia's House Bill 567, effective Jan. 1, 2026, authorizes licensed dentists to provide online dentistry/teledentistry, placing oversight with the Georgia Board of Dentistry. The article also notes the law permits dental benefits plans to cover teledentistry services. For DSOs and multisite groups, this type of statutory change can accelerate adoption of virtual triage/consult pathways and requires operational alignment on supervision standards, documentation, vendor/platform selection, payer billing rules and multistate compliance (especially for organizations that centralize call centers or remote-care workflows).

Source: Capitol Beat News Service

LITIGATION

DECEMBER 17, 2025

Delta Antitrust Litigation

The Georgia Dental Association's legislative update recaps the ongoing antitrust litigation against Delta Dental Plans and the Delta Dental Plans Association (filed in 2019). It notes that plaintiffs sought class certification for a putative class of 240,000+ providers, but the federal court denied class certification and the Seventh Circuit declined a request to appeal that denial. The piece emphasizes the procedural impact: without a certified class, providers who want to pursue recovery must proceed individually, and the statute of limitations, paused during the class-certification fight, has resumed running. It also explains why class certification was denied, focusing on the court's view that issues of injury and market definition would require local-market proof rather than a single nationwide methodology.

Source: NDDS "News from the Capitol – Legislative Insider"

JANUARY 2, 2026

Delta Dental Hit with Class Action Over Out-of-Network Rates

A proposed class action was filed on December 31, 2025, in the U.S. District Court for the Southern District of New York against Delta Dental Insurance Co., alleging that the insurer misleadingly advertises that it will pay 100% of preventative care and 80% of "basic services" for out-of-network providers, but then systematically underpays those claims and leaves enrollees responsible for the balance. The lawsuit claims Delta Dental's conduct misleads patients about the scope of coverage and the actual reimbursements payable for out-of-network dental services, potentially violating consumer protection laws. Out-of-network payment disputes have sparked numerous class actions in recent years in the broader health insurance sector, though this one specifically targets dental out-of-network payment practices.

Source: Bloomberg Law

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STAFFING

DECEMBER 18, 2025

Highlights and Insights From Henry Schein's New Report Predicting 2026 Dental Data

Dental Economics summarized Henry Schein One's "[2026 Outlook Trends Report](#)," pulling out workforce-related signals relevant to DSOs heading into 2026. The report frames "workplace relations" and labor constraints as key operational themes and argues that technology (including AI-enabled workflows) is increasingly being positioned as a labor-shortage pressure valve—not a replacement for clinical roles, but rather a way to reduce administrative burden and accelerate onboarding/training for newly graduated clinicians. It highlights persistent recruiting challenges—particularly for dental hygienists—and explains how practices are increasingly relying on technology and workflow automation to support upskilling and maintain productivity amid rising wages and ongoing staffing shortages.

Three Key Principles Defining This Fundamental Shift:

Processes

Top Trends



**The AI
reckoning is here**



**Automation redefines
the way you work**



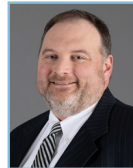
**Security is nonnegotiable
— and so is interoperability**

Source: Dental Economics

**For more
information
regarding our
Dental Industry/
DSO Practice, or
if you would like
to contribute to
the newsletter,
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