SureSmile® Advanced

Staff Level 1 – Module 1

Getting Started with the SureSmile Browser

Table of Contents

Training Case List

Patient Name	Lesson/Exercise	Description of Case	Purpose
Dina Miller	Navigate SureSmile Flag	Finished case status Finished wires, dx model, great case	Navigate finished case
Hunter Lane	Start a *New* Patient Record Edit Images Add Brackets Submit Thx Model	New Unerupted teeth Partially erupted tooth, not bonded Ok photos Extra photos No restorations	How to start case

Module 1 - Learning Objectives

Reinforce SureSmile basics

- Identify the benefits of SureSmile to the practice and patient
- Describe the principles of SureSmile technology
- Follow the patient workflow
- Work with the Digital Lab, Customer Care

Introduction to SureSmile via the browser

- Follow privacy guidelines when using SureSmile in a public place
- Navigate the interface and open/close records
- Sort and find patient records (Patients tab)
- Search for records by patient ID

Organize the browser workspace

- Zoom the view
- Open multiple views of the patient record

Add new records via the browser

- Add new SureSmile patient records
- Work with patient information
- Correct the patient's name

Build image sets to support Digital Lab modeling & treatment decisions

- Recognize and obtain quality photos
- Import photos/x-rays into image sets
- Edit or delete images/sets
- Edit images (not for users of integrated imaging systems)

Lesson 1: Describing SureSmile®

Discover why your practice chose SureSmile and what SureSmile can do for patient treatment.

Objectives

By the end of this section, you will be able to:

- List patient benefits
- List SureSmile's benefits to the practice
- List SureSmile's key technologies

Technology Components

DISCUSSION: What are SureSmile's components and their purpose?

▶ _____

▶ _____

▶ _____

▶ _____

Benefits for the Practice

DISCUSSION: From your practice's point of view, what are the reasons for implementing SureSmile? (If the doctor is present, the doctor can lead this discussion.)

▶ _____

▶ _____

▶ _____

▶ _____

▶ _____

▶ _____

Test Your Knowledge

How can your intraoral scanner be used for SureSmile treatment?

Where is the Digital Lab?

Where are the robots?

Lesson 2: Building the SureSmile® Process

To deliver on the promise of more efficient care, it is important to understand the steps and timing in SureSmile treatment.

Objectives

By the end of this section, you will be able to:

- Compare conventional orthodontics to SureSmile
- List treatment milestones
- Recognize doctor tasks vs. staff tasks vs. Digital Lab tasks
- Identify optional steps vs. required steps of the process
- Recognize SureSmile terminology
- List timing of phases, orders

Compare SureSmile wire therapy to conventional treatment

Conventional	SureSmile
Consultation/Records	Consultation/Records imported into SureSmile Option to produce 3D initial model
Diagnosis/Treatment Plan using records and ceph analysis	
Bonding Appointment	Bonding Appointment with SureSmile-supported brackets
Straight-Wire for initial leveling/alignment with auxiliaries	Straight-Wire for initial leveling/alignment with auxiliaries
Finishing Wires	
Wire adjustments	
Debond	Debond
Final Records	Optionally imported into SureSmile for storage or analysis of results

The primary differences in SureSmile treatment are the creation of the custom prescription (scan-plan-bend), more concurrent tooth movement, and the elimination of iterative, trial and error adjustments to the wires.

SureSmile® Process & Tasks
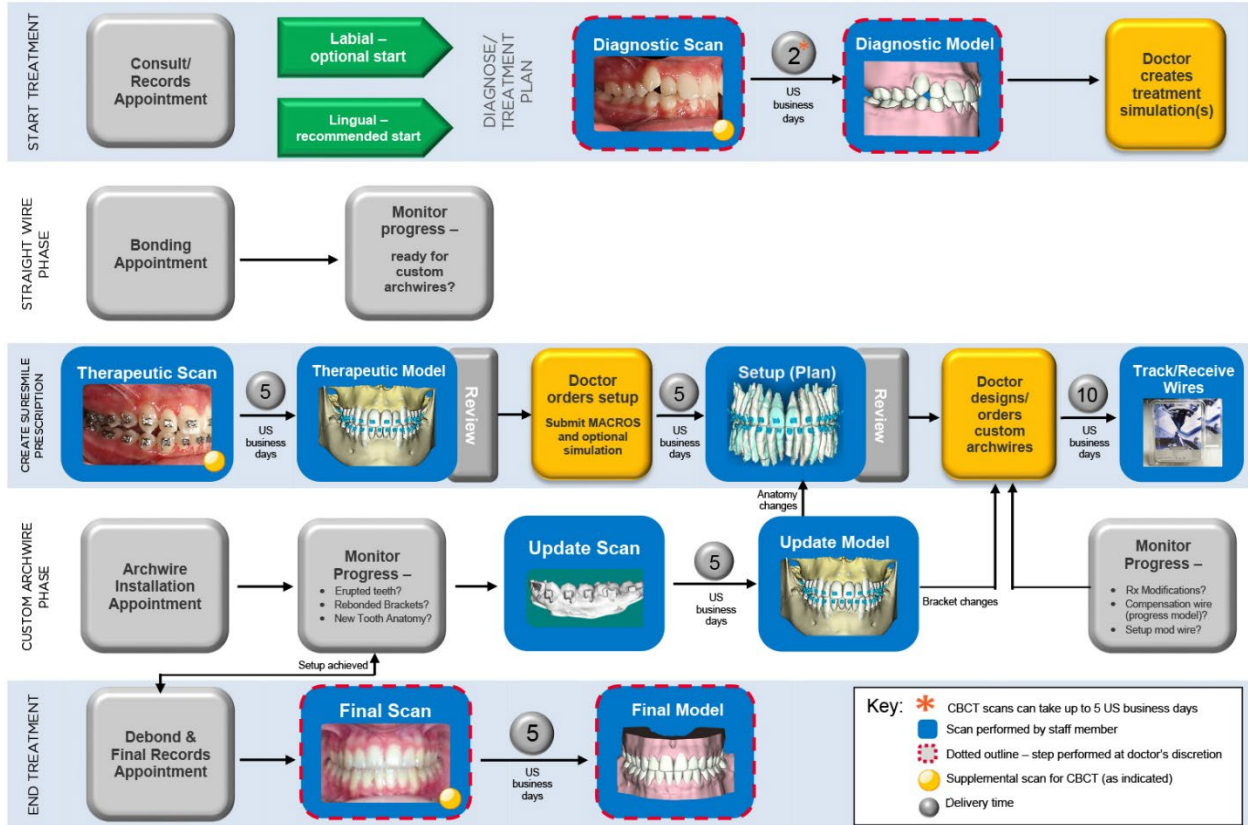
The doctor, staff members and the Digital Lab work together to complete critical tasks for building the custom prescription.

Treatment/Task Timing

When orders are sent to the Digital Lab, electronic products are delivered within 5 business days and wires are delivered within 10 business days.

See SureSmile protocols for the timing of individual tasks and treatment by patient type. In general:

- The straight-wire phase for a SureSmile patient is 3-6 months. The patient is ready for custom archwires when spaces are closed to 3 mm (per arch), there are less than 10 degrees of rotation per tooth and vertical steps of under 1.5 mm.

- Ideally, the custom archwires will be produced within 4-6 weeks after the intra-oral scan was taken (SureSmile may use up to 20 business days of this time). More, if there are setup modifications.

- Custom archwires take 6-8 weeks to fully express.

- The custom archwires phase is 2-6 months, depending on the number of wires the doctor requires to finish treatment.

Order States

Model orders pass through states on their way to completion:

- Not Ordered

- Ordered

- In Review

- Approved

Test Your Knowledge

What is the first model ordered for a SureSmile patient to initiate SureSmile treatment?

Which scan is captured for every SureSmile patient who will receive custom archwires?

What is the purpose of the Update Scan?

What is the <u>maximum</u> delivery time for SureSmile wires?

Lesson 3: Preparing to Login to the Cloud

A web browser interface provides easy access to your SureSmile patient records; and, you may have other system components in your office to incorporate your scan and imaging technology into SureSmile treatment.

Objectives

By the end of this section, you will be able to:

- Recognize SureSmile components
- Find SureSmile on the web
- Register for a SureSmile account
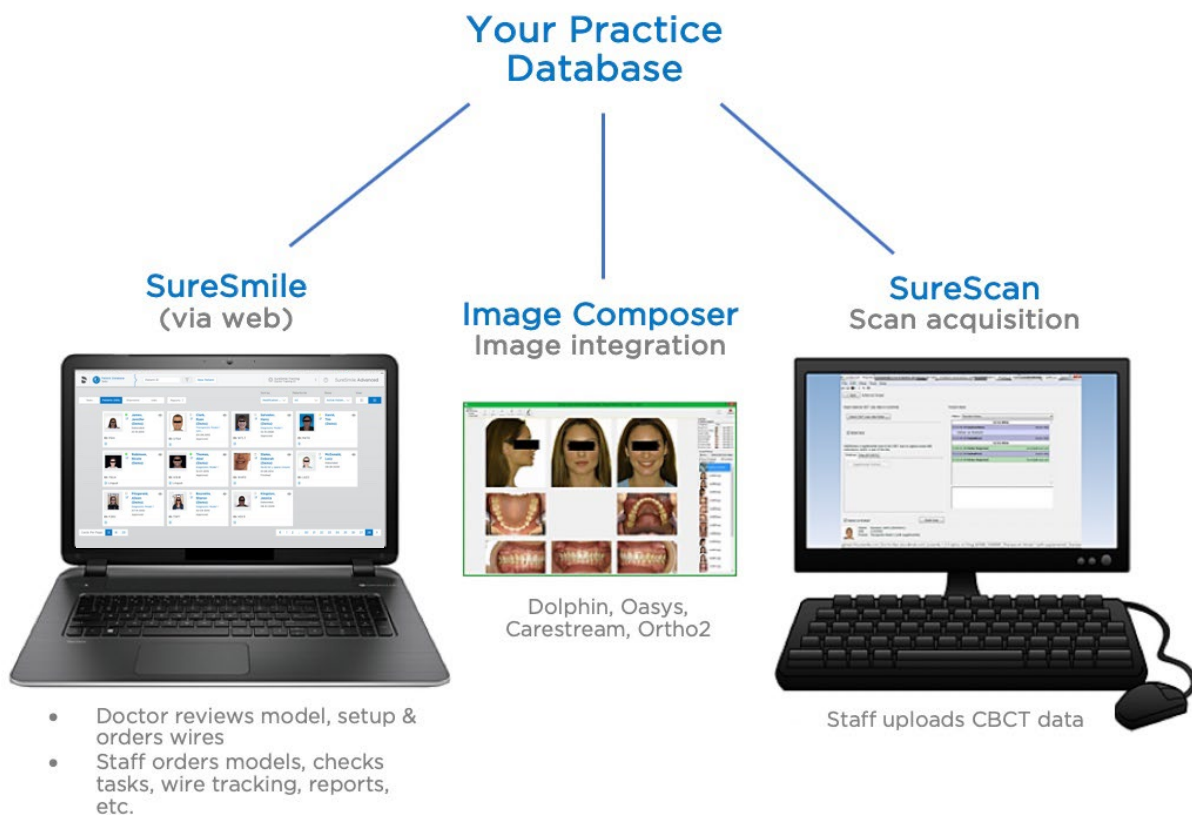- Consider patient privacy
- Login to SureSmile

Recognize SureSmile® Components

The SureSmile system consists of several components in your office to support efficient and effective treatment:

- **Image Composer**: If you are using an imaging system that is integrated with SureSmile, we are installing software to enable you to push records from your imaging system to automatically create patient records in SureSmile and the corresponding image set.

- **SureSmile**: A web version of SureSmile allows you to use a SureSmile-supported browser to view your SureSmile patient records. All functionality for doctors is located here including setup orders and wire orders. There are also staff functions such as tasks, wire tracking and reports.

- **SureScan**: Desktop software called SureScan is used for acquisition of CBCT scans. It contains an "engine" to move this large data directly to the Digital Lab.

  Note: If you are using a third-party certified scanner for all patient scanning, you will NOT need SureScan software.

Both the web version of SureSmile and SureScan are connected to your database in the cloud and remain in synch. For example, if you add a patient via the browser software, you will be able to see the same patient's record on SureScan within moments.

Your Practice Database

SureSmile (via web)

Image Composer Image integration

SureScan Scan acquisition

Dolphin, Oasys, Carestream, Ortho2

- Doctor reviews model, setup & orders wires
- Staff orders models, checks tasks, wire tracking, reports, etc.

Staff uploads CBCT data

https://login.suresmile.com/

First, we will learn how to use the features on the SureSmile browser. In the afternoon, we will switch to SureScan (if applicable to your office) according to this outline:
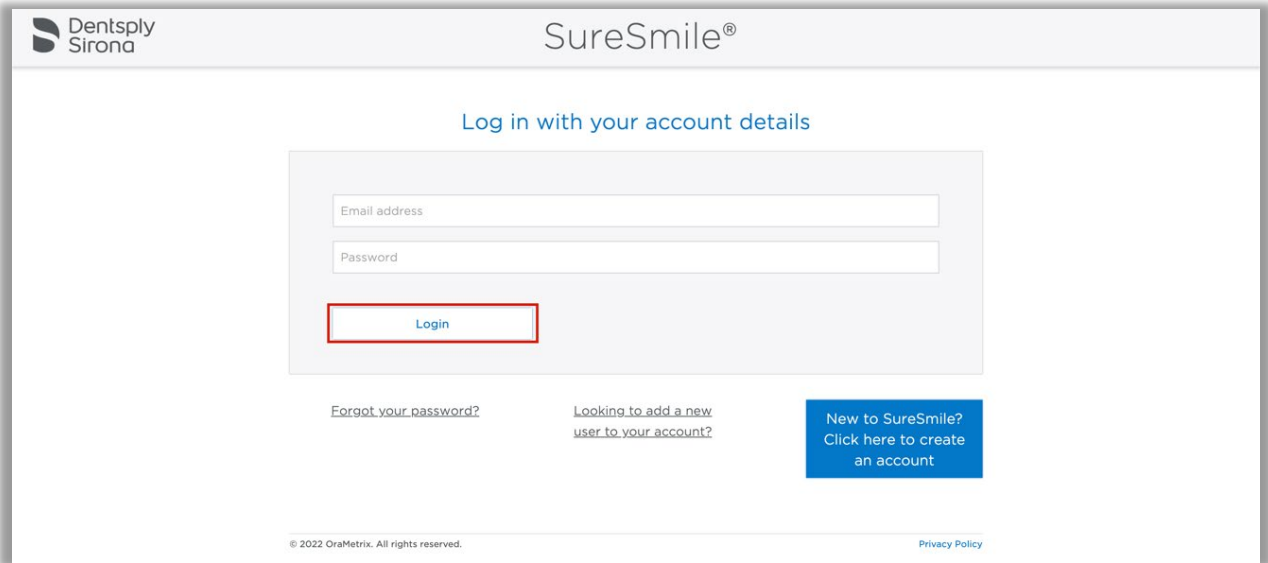
SureSmile (web software)	•Create patient record •Create image set (photos/x-rays) •Submit therapeutic model order
SureScan (desktop software)	•Capture scan •Upload orascan or CBCT scan into SureSmile •Attach supplemental scan data to CBCT scan
SureSmile (web software)	• Find and complete tasks • Resolve order issues (brackets, records)
SureScan (desktop software)	• Resolve order issues (scans) for CBCT scan data

Go to SureSmile® URL

The URL for SureSmile is:

https://login.suresmile.com/
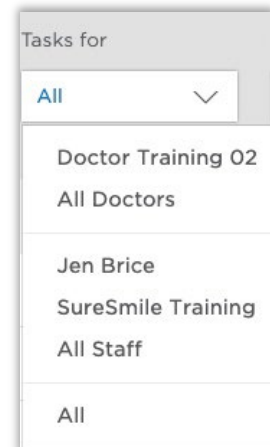
TIP: The first time you go to this URL, we recommend bookmarking it.

This window is the gate to all SureSmile practices. Your database is protected by:

- Registered username and password is required
- Access must be granted by your practice administrator

Register for a SureSmile® Account

If you have not yet registered for a SureSmile account for your real database, you can enter your information now.

1. Click **Register**.

2. Enter your username. Please type your name as you would like it to appear inside the software; for example, "Jane Doe" or "J Doe" or "Jane D."

   TIP: You can edit your username later, if needed. See the "Managing SureSmile User Accounts" (Module 4) for details.

3. Type your email address. Use a real address where you can open and read your emails since, the first time you login, SureSmile will prompt you to verify your email address. Be careful to type the address correctly in case you need to reset your password later!

4. Type your password and password confirmation.

   NOTE: If you need to reset your password in the future, you will click "Forget your password?" However, once you reset your password you will not have access to the practice database until your practice administrator reassigns you to your role.

5. Select the correct time zone, which will determine the timestamp whenever you enter a note or submit an order. (It is not necessary to change time zones when you travel.)

6. Click **Submit**. A confirmation email is sent to your address.

   Notify your practice administrator that you have created an account and include the email address on the account. The practice administrator will need to assign you to a role in the database before you may login. For more information, see the module on "user account" administration.

Information
Welcome to suresmile.com. Please contact your practice administrator to gain access to patients in your practice.

Follow Privacy Rules When Using Cloud Software

Now that you can access patient records using a web browser, please discuss how you will protect patient privacy.
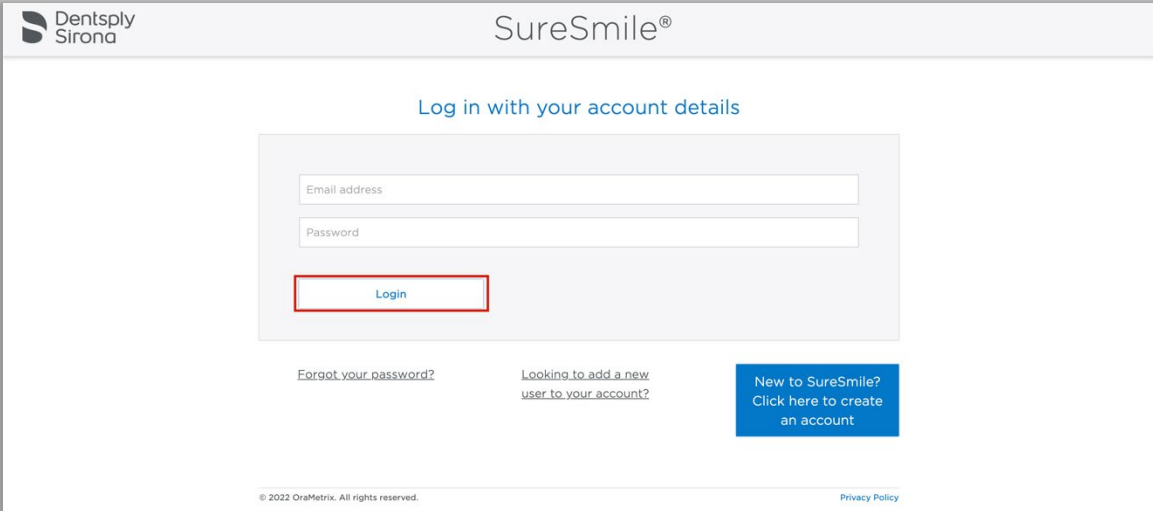
For U.S. practices, visit the web site of the U.S. Department of Health & Human Services for information on HIPAA:

http://www.hhs.gov/ocr/privacy/

Login to SureSmile

For class exercises, you will need to use a training username and password to access a training database.

1. Go to https://login.suresmile.com.

2. Enter the class username: StaffX (where X = your seat number)

3. Enter the class password: (ask your instructor).

4. Click the **Login** button.

NOTE: The password is case sensitive however the username is not.

TIP: SureSmile tracks usage history. See the "Managing SureSmile User Accounts" (Module 4) for details.

Test Your Knowledge

When you hire a new employee, how will you give him/her access to SureSmile?

What is the SureSmile URL?

Lesson 4: Navigating the Clinic Overview

First, we'll explore the cards that represent the patient records on a SureSmile database.

Objectives

By the end of this section, you will be able to:

- Toggle card/list view
- Navigate the patient's card
- Expand the timeline
- Add a card note
- Add a flag color
- Sort & filter cards
- Filter by patient ID to find patient records

Toggle Card/List View

After you login, a screen called the "Clinic Overview" appears. The Clinic Overview has four tabs that display records: Tasks, Patients, Shipments and Jobs. Since you don't have shipments to track yet or model export jobs, we will focus on the Tasks page and Patients page.

The Tasks tab contains the "to do's" needed to keep the SureSmile patient moving through treatment. By default, tasks are shown as a list. The Patients view lists your patient records. By default, the Patients view is shown as cards displaying a patient's photo to help you find and open the correct record.

You can toggle between list and card view.

1. Click **Patients** to view the SureSmile patients in the system. By default, the Patients tab displays a card view.

2. In the upper-right corner of the screen, click the ▦ list button. The cards are replaced by a list.

3. Click the icon again to switch back to a card view.
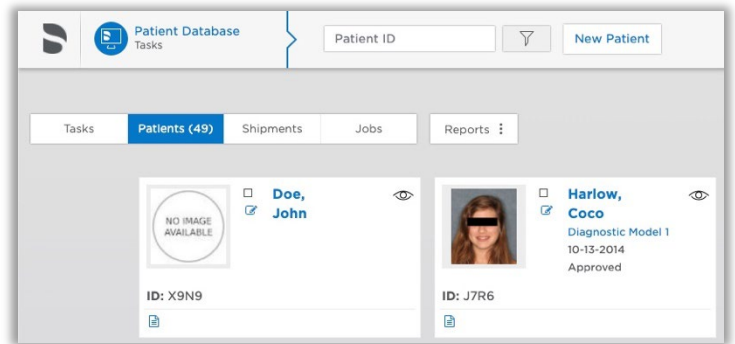
This list view will be more helpful as you add more patients to your system. While you are learning, it is easier to use the card view for the Patients tab.

TIP: You can control the default display for lists or cards in the Preferences under the Appearance tab.
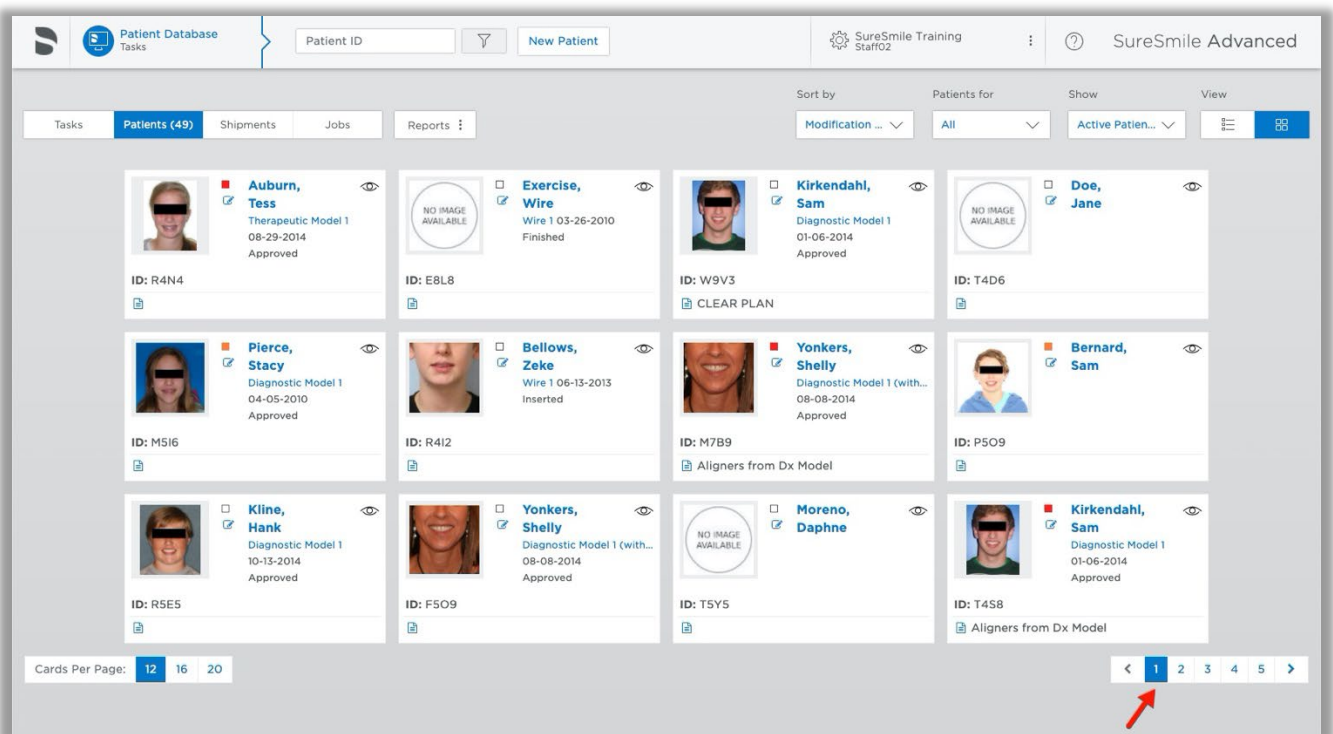
Adjust the Layout

There are 12 cards per page, but you can change to 16 or 20 per page. To move between the pages, use the page numbers in the lower-right corner.

To further adjust the layout, browser software will also let you change the zoom level per page.

1. Select **16**, **20** and then back to **12** cards per page.

2. Select page numbers in the bottom-right to move to more pages of cards, and then return to page 1.

Navigate the Patients' Cards View (Clinic Overview)

Take a closer look at a patient card. It contains:

- The patient's name

- Smile facial photo last imported

- Flag to color-code the card

- Edit icon to make changes to the patient profile

- Patient ID

- Last product (i.e. Therapeutic) or activity (i.e. debond date entered) completed for the patient

  NOTE: A "Plan" contains the doctor's setup.

- Notes area along bottom of card
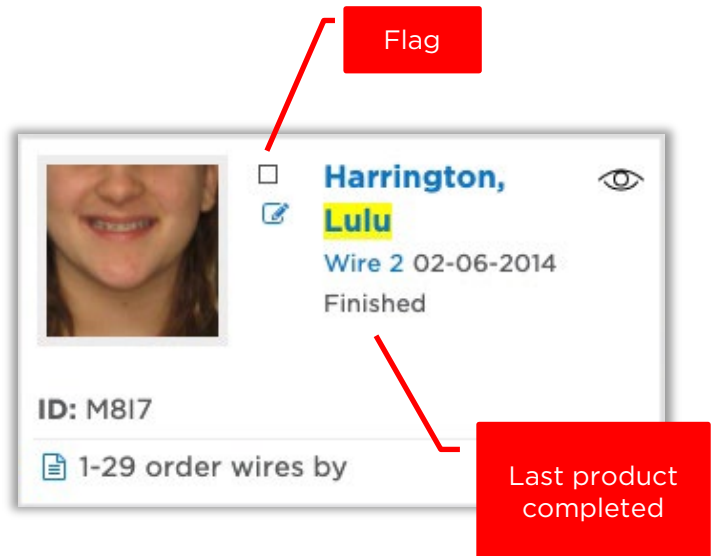
Notice new patient records are blank in the middle (no completed activities/products) and there may be no images imported yet.
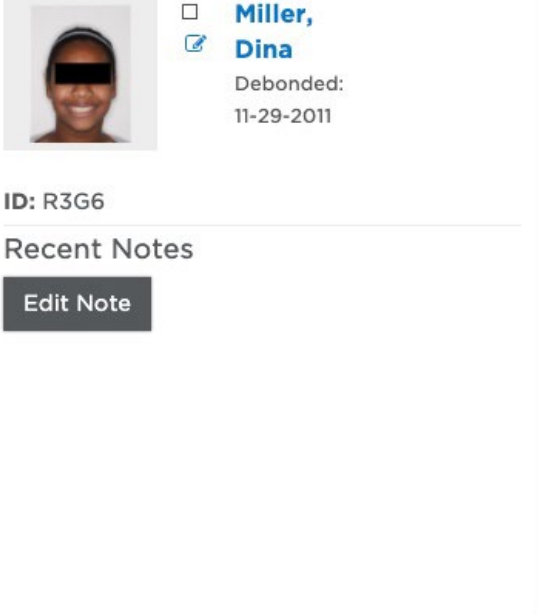
Expand the Timeline

The card displays the last finished product or activity. To see all activity for the patient, expand the timeline.

1. Point to **Dina Miller's** card.

2. Click the clock ⊙ in the corner of the card to drop down a timeline that lists all products/activities for this patient.

What products were ordered for this patient?

3. Notice the color-coded circles indicate the status of the activity:

✓	Green squares with checks indicate the item is complete.
✓	Yellow squares - with checks - indicate the item is in work at the Digital Lab, but nothing for the practice to do.
!	Yellow squares - with exclamation points - indicate the item is in work, and the practice has something to do.
!	Red squares with exclamation points indicate the item is overdue.

https://login.suresmile.com/

Set the Debond Date from the Card Timeline

1. Click the small arrows to the right of the dates. Notice that certain dates (for activities that occur outside of SureSmile software) are entered by the practice.

2. Click the arrow for the **Debond Date**.

3. Click the Estimated drop-down and choose **Actual**.

4. Click the date drop-down and select 2011/11/30.

5. Click the ✖ in the upper-right corner to close the timeline.

Add a Card Note

You can add a note to the card to help you with patient or task organization. For example, you can enter the patient ID from another system as a cross-reference.

1. Click the **Edit Note** icon 📄 . The card expands again—this time with the box ready to be edited.

2. Type **ABO Case** or **July Ad Model** (as an example for how to use this feature).

3. Click **Save**.

4. Click the ✖ to close the notes.

   Every time you save a note here, it is also logged into the Patient Notes inside of the record as you will see soon.

Add a Flag Color

You can choose a flag color for the card to help you with patient or task organization.

1. Point to a card near the bottom of the page.

2. Point to the small circle between the patient's photo and name until a hand appears.

3. Click the small circle. A list of colors appears in their order of sorting priority with red as the highest priority.

4. Select red.

   TIP: You can assign labels to the flags to help you remember your color-coding decisions. This feature is available to Admin users in your Preferences under the Flag Labels tab.

Sort & Filter Cards

To help you find or manage your records, you can sort the list of cards or narrow the number through filtering. Cards are listed from left to right in rows.

Notice the default settings – active records are displayed that have been previously assigned to you. A counter at the "Patients" tab shows the number of cases associated with your username.
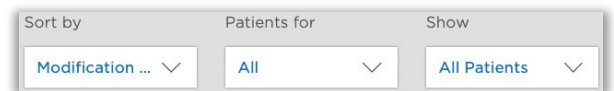

Patients (49)

1. Click the **Sort by** filter and select **Flag**. The records sort in order with your red-flagged card listed first. Within a flag color, records are sorted by Patient ID.

2. Click the **Sort by** filter and select **Modification Date**. This is the default filter. Dina's record and the flagged record are the most recently modified.

3. Click the **Sort by** filter and select **Patient ID**. The records sort in alphabetical order by patient ID (listed left to right in rows).

   NOTE: Notice Amber is listed before Casey since the list is alphabetized by Patient ID rather than name.

4. Click the **Patients for** filter and select **All**. The records for other users also appear (and the counter increased).

5. Click the **Show…Patients** filter and select **All**. You are now viewing all records in your database. Notice the counter on the Patients tab gives you your total number.

   How many patients are in the training database?

6. Filter for **Finished** patients.

7. Sort by **Debond Date**. Now you can see your finished records sorted by most recently debonded patients.
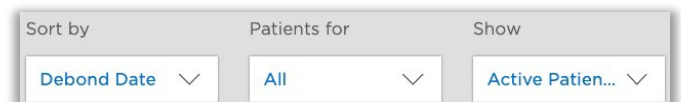
8. Filter for **Active** patient records. The patient records that are not active are hidden, and the active patient records remain sorted by debond date.

Enter Patient ID/Notes to Filter Records

To further reduce the records displayed, you can enter all or part of the patient ID. You can see the ID on the card under the patient photo. If you enter the entire patient ID, only this patient's card will display.

Patient ID	▽

- The quick search also finds words in card notes.

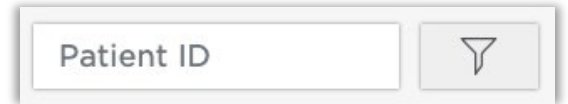- You can search using the patient's initials as before. For example, for patient "Lori Martin", enter "ML" in the search box. (Make sure you put the initial for the last name first.)

- Search by a patient's first or last name. For example, for patient "Lori Martin", you can search for "Lori", "Martin", "Lor", "Mar", or "Mart", etc. (You must enter at least three letters.)

- All patients added before update 7.4.4 will keep their old patient ID in the background indefinitely. It will not be visible in the software, but you can search for the patient using their old Patient ID as before. For example, for patient E7N9, if the old Patient ID was BS000002, you can enter BS000002 in the search box to find the patient. Note: You cannot just enter the short version of the patient ID, e.g., BS02, like you did before. This will not work. You must enter the full patient ID with all the zeros included.

Clear the quick search filter

Since the quick search filter is still in effect, click the blue **Clear** button. Multiple cards appear according to the selected filters.

mdl	⊗	1 ▽

TIP: You can also search by the Dolphin patient identifier if the patient record was created by pushing images from Dolphin.

Test Your Knowledge

I can't find my patient, why not?

How can I see the products ordered for the patient without opening the patient record?

Lesson 5: Navigating the Patient Overview

Next, we will explore the parts of a patient record. Looking at a finished record will give you an idea of the information required for a patient's SureSmile treatment.

Objectives

By the end of this section, you will be able to:

- Open a patient record
- Recognize product notes
- Add patient notes
- View image sets
- Open Image Sets
- View the full timeline
- Return to the Patient Overview
- Return to the Clinic Overview

Open a Patient Record

When you are in the Patient card view, there are several links on the card to open the patient record: name, photo, and last completed product. We will explore the patient overview page before looking at a specific product page.

1. Find and point to Dina Miller's card.

2. Click the patient's photo (or name) to open the record.
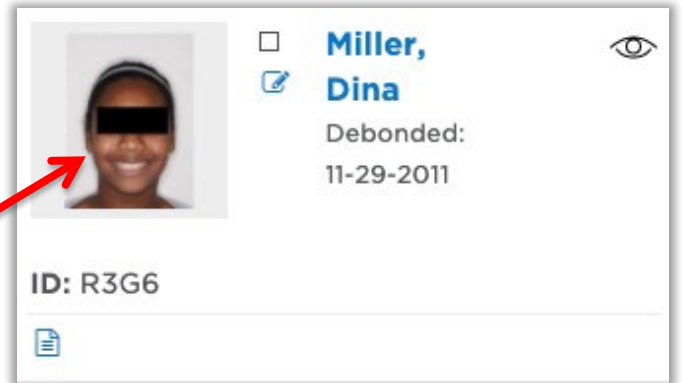
Identify the Purpose of the Patient Overview

The Patient Overview contains all the 2D and textual patient information needed for SureSmile treatment.

We will discuss some of these features at a later visit:

- Your Account Manager will cover uploading a patient's finished treatment card when you begin finishing patients. We use these statistics to show the doctor a "dashboard" of results.

- Reports – SureSmile can generate practice level and patient-specific reports. Your Account Manager will introduce you to this feature as you have more patients.

- Exports – in the future you may need to export images or 3D models from SureSmile. Contact us if you need assistance with this feature.

- Order prints – when you are ready to produce appliances such as aligners or surgical splints from the 3D models in the patient's record, you can use this feature to send print orders to SureSmile.

- Demo Copy – this feature is generally used by the doctor to save exemplary cases to open at treatment consultations.

- Diagnosis & Treatment – as you work in SureSmile, you may decide to "tag" patient records to help with searching and organization.

- Setup Prescription – this area is used by the doctor to start planning treatment.

Let's focus on the features you need to learn to find your way around a SureSmile record for new SureSmile patients.
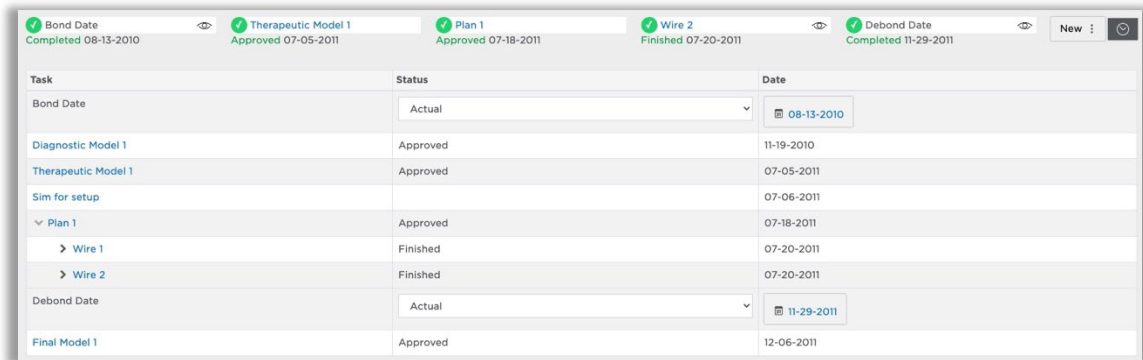
View the Full Timeline

At the top of the Patient Overview, you can see five key milestones displayed on the timeline. The same milestones are shown for every record: Bond Date, Therapeutic, Plan, Wire and Debond date.

The green checkmarks indicate completed milestones. In fact, you can see the status in green under the date:

- Activity – Completed

- Model – Approved

- Wire – Finished

    Remember there were more products/activities listed in the card?

1. To see the full timeline, click the clock icon to drop down the list. (You can click it again to roll up the timeline.)

    You can see the Final Model listed in the full timeline even though it is not mentioned in the horizontal timeline.

2. Notice the timeline here matches the timeline expanded on the card view. The blue items are links.

3. Click **Final Model** to go to the "Final Model 1" page. The Treatment Planning workspace opens. The doctor uses this area to plan patient care including reviewing models and ordering setups.

Return to the Patient Overview

You can use the "breadcrumbs" along the top of the page to move back to the Patient Overview.

1. Notice the page you are viewing is the "Final Model 1" page.

2. Click "**Dina Miller**" in the breadcrumbs to return to the Patient Overview page.

Recognize Product Notes

As you order products (models, setups, and wires), you can type notes to the Digital Lab and they can reply with the delivered product. This interaction is summarized as Product Notes, which are visible here on the Patient Overview as well as on other pages of SureSmile. The software also logs information in the Product Notes.

The notes are color-coded and can be filtered by level of detail.

- Notes created by the **practice** are color-coded purple.
- Notes created by **SureSmile,** including messages from Digital Lab technicians, are color-coded green.
- Notes are listed in order, with most recent entries listed first.

To conserve screen space, a drop-down menu allows you to view notes for each product in the same area.
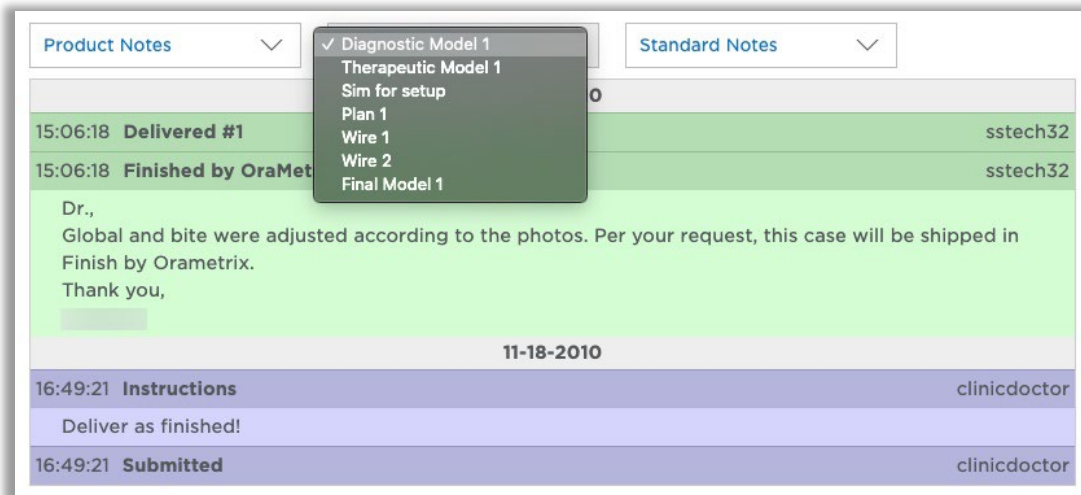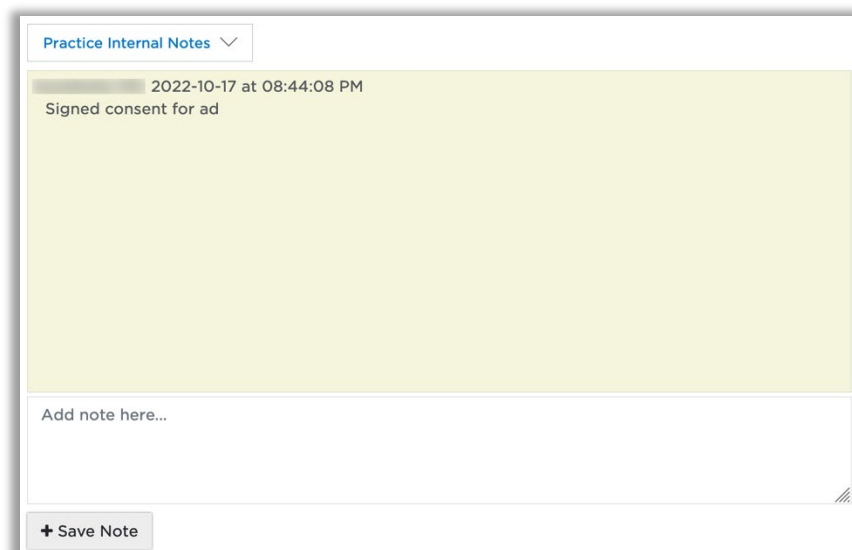
1. Click the menu button (**Final Model 1**) and select **Therapeutic Model 1**.

2. Click the **Standard Notes** drop-down and choose **All Notes**. Look through the notes logged.

3. Choose other products and review the associated notes.

Add Practice Internal Notes

In the same area of the screen, you can access Practice Internal Notes. This feature provides an area for intra-office communication between the treating doctor and team members who are involved in this patient's treatment.

1. Click the Product Notes drop-down and select **Practice Internal Notes.** It has a light-yellow background color.

2. Notice the note you typed into the card is logged into the Practice Internal Notes area. Any note typed here becomes part of a permanent log and includes a time and date stamp with your username.

3. Click in the "Add note here…" box.

4. Type "**Signed consent for ad**."

5. Click the **Save Note** button. This text becomes part of the permanent record.

View Teeth & Brackets

1. Click the Teeth & Brackets drop-down and select **Teeth** to view this area.

2. Click the Teeth & Brackets drop-down and select **Brackets** to view this area.

   Since orders in SureSmile on the web disappear after the model is delivered, the Patient Overview contains an area where you can view your "Dental Exam," which is the details on the patient's tooth properties and bracket assignments. This area is editable for two situations:

   - For offices that divide up the work between team members to build an order, you can delegate entering the dental exam before or during the patient appointment. If you choose this workflow, please note:

     o Enter information prior to starting the order so that the order displays correct tooth and bracket details to the team member capturing the scan.

   - The Teeth & Brackets area can be useful in between orders for unusual situations. For example, you can enter a bracket change due to an emergency rebond appointment when the Update Scan is scheduled for a separate appointment. When the next product is ordered, it will pull the updated information from this area.

   WARNING: Do NOT make changes to the Teeth & Brackets area when you have a model in work in the Digital Lab. If you realize the information is incorrect, you must contact Customer Care to let them know to return the order to you as a Resolve Hold so that you can take care of the issue inside of the current order.

   If you were to make a change to the Teeth & Brackets while the Digital Lab is working on your scan, they will not see what you enter and your model will not be produced with your updated information.

View Image Sets

Image sets contain records of the patient's treatment. We recommend taking a standard set of photos and x-rays each time you order a model. For a therapeutic model, the records are required.

1. Click the **Image Sets** drop-down and choose **Diagnostic Records**.

2. Scroll down to see a standard set was captured.

3. Click the Image Sets drop-down again and choose "**3D Scan**" to see the Therapeutic set.

4. Click the Image Sets drop-down and choose "**Finish Records**" to see the final set.

   Notice the user determines the name of the set.
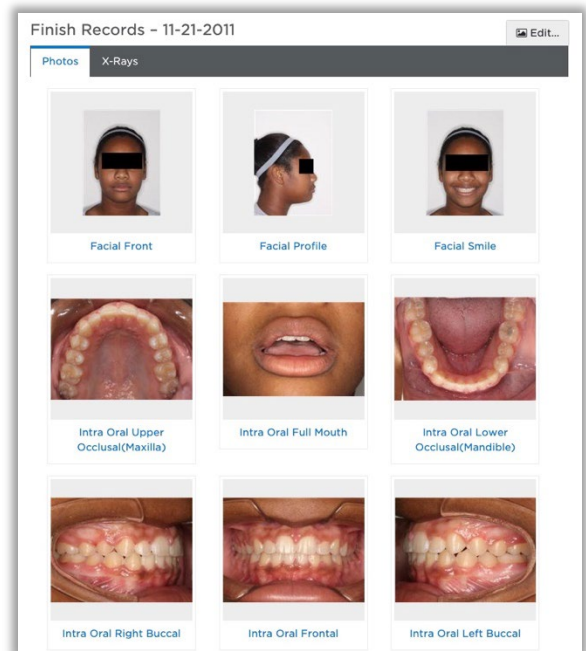
Open Image Sets

You can either select any image or click the "Edit" button to open the Image Sets page. Notice all image sets will be listed at the right.

1. Select any image in the "Finish Records" set to open it.

2. Click each image set name on the right side of the page, including "Untyped" to expand/collapse it. The Untyped image set is a holding area.

3. Select an image in the set to view it in the larger window.

   (When we create a new patient record, we will learn how to add an image set.)

Return to the Clinic Overview

You can use the "breadcrumbs" along the top of the page to move back to the Clinic Overview.

1. Notice the page you are viewing is the "Image Sets" page.

2. Click the database name in the breadcrumbs to go to the Clinic Overview page.

3. If the quick search filter is still in effect, click the blue **Clear** button.

Test Your Knowledge

What is the difference between product notes and patient notes?

Will entering patient notes in the yellow area on the Patient Overview affect the notes you enter on the patient card?

Where can I see the patient's timeline?

Why are some text labels in the timeline colored blue?

Lesson 6: Organizing Your Browser

It will save you time in working with SureSmile if you become familiar with the features for organizing your browser workspace. The following exercise is specific to the Google Chrome browser; however, all browsers have similar tools.

Objectives

By the end of this section, you will be able to:

- Open and switch between browser tabs
- Open multiple views of the same patient record
- Zoom the view with shortcuts

1. In the upper-right corner of the screen, click the ☰ Customize button. The menu opens.

2. In the Zoom area, click the minus sign or plus sign to change the zoom level.
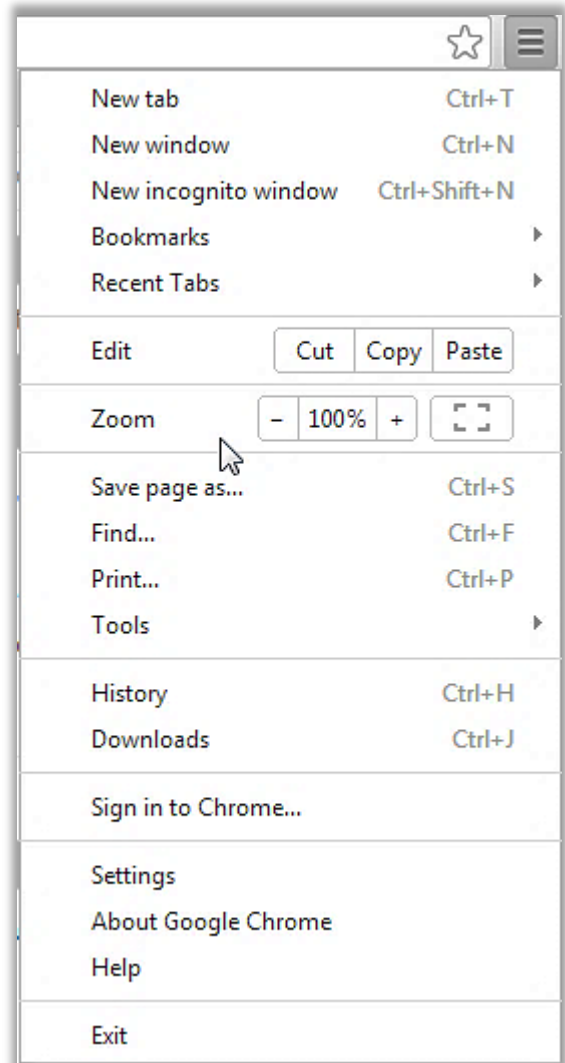
Open Link in New Tab

One of the greatest benefits of using browser software is the ability to open multiple views of the same record.

1. Right-click the first patient's name and choose the browser feature **Open link in new tab**.

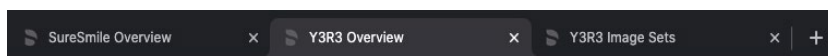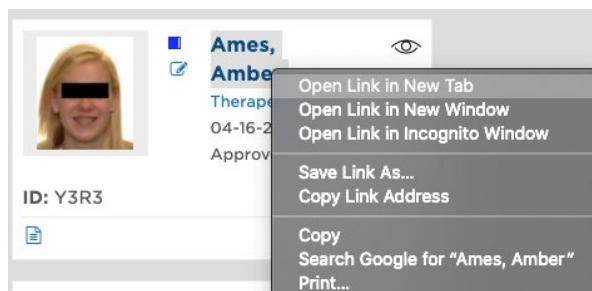2. Select the new tab (you can see the patient ID) to switch to it.

3. Right-click the patient's name on the breadcrumbs to open a third tab.

4. In the third tab, select an image set.

5. In the image set, select an intraoral photo. The Image Sets page opens.

6. Select each tab to see that you can move between the Clinic Overview and the views of the patient record without waiting for the screen to load.

Notice the names on the tabs help you find the one you need—the "SureSmile overview" tab is a view of the clinic overview.

Zoom the Browser View

1. Select the tab with the view of the Clinic Overview.

2. Change the zoom level, this time using a shortcut: Press <Ctrl + > or <Ctrl - > on your keyboard.

3. Close the extra tabs so that the tab with the Clinic Overview is the only visible tab.

   TIP: To improve performance, close tabs when they are no longer needed.

Lesson 7: Adding & Editing Patient Records

Use the browser to add new patient records to your database in the cloud.

WORKFLOW: Start the SureSmile patient record when you are ready to order the first SureSmile model for a patient or enter records.

Note for integrated imaging systems: You will not create new patient records manually. Instead you will push images (from Dolphin, for example) to start patient records automatically.

Objectives

By the end of this section, you will be able to:

- **Add a new patient record**
- Assign orthodontist/staff
- Assign the site
- Recognize the format for patient IDs
- Save a form
- Edit patient information
- Select a referring dentist

Add a New Patient Record

1. Click the **Add Patient** button. A form opens.

2. Enter the patient's first name: **Lane**. Press the <tab> key to move to the next field.

3. Enter the patient's last name: **Hunter**.

4. Enter the DOB: **July 1, 2000**.

5. Enter the gender: **male**. This is not a required field, but helpful when searching for patient records.

6. Notice the bond date can be entered here. If you do not know the date or the patient is not bonded yet, you can enter the date later using the timeline.

7. Estimated treatment time: **12** months. This number is used to calculate the estimated debond date to build the patient's timeline.

   TIP: If you want to create cases to practice placing orders on your real database, you can use the Demo option. The demo case type does not send orders to the Digital Lab and no fees are incurred. You can recognize demo cases in your database by the format for the patient ID: a four-digit number (assigned consecutively) followed by the word "demo." You can filter for demo patients using the *Show…Patients* filter on the Patient tab or by typing "demo" in the quick search box.

This page also indicates that a Standard Case Type was applied to the patient record. This is the default case type for new SureSmile practices. As your doctor becomes more experienced with SureSmile, he or she may want to offer other types. The choices are:

- **Standard Case Type** - includes 1 therapeutic model, 1 setup, and unlimited wires.

- **Standard w/ IDB Case Type** - includes 1 therapeutic, 1 setup, 1 set of IDB trays, and unlimited wires (including 1 pair delivered with the IDB trays).

- **Extended Case Type** - includes 5 therapeutic models, 5 setups, and unlimited wires.

- **Aligner Case Type** – aligner-only therapy; includes 1 therapeutic model, 1 setup, staged model sequence

- **None** – no case type. Order diagnostic model for an a la carte fee but no other services from our Digital Lab

Assign Orthodontist/Staff to Record

You can associate a specific orthodontist and staff member with the record to help with filtering the database for patients that have a treating doctor or patient manager.

1. Select the orthodontist: **Dr. Meredith Grey**.

2. Select the staff member: **Jennifer Lopez**.

Orthodontist	Meredith Grey
Staff	Jennifer Lopez

Assign the Site

Will your practice have one or more sites where wires will be shipped?

In our training database, there is only one site. However, if you have a multi-site practice, this field is very important. It determines:

- Where the case will be billed
- Where the wires will be shipped (although you can call us if you want an override in your account to ship all wires to one address).

  WARNING: At this time, you cannot edit this field once it is set. If you choose the wrong site, contact Customer Care for assistance.

Save a Form

Notice you have a "Save" button here but not on the Patient Overview. Generally speaking, cloud software saves every action unless you are completing a form.

1. Check to make sure you have entered all information correctly.

2. Click **Save** to save and close the "Add New Patient" form. Your new record opens automatically to the Patient Overview.

Edit Patient Information

Take a look at the timeline. It is built based on the parameters you entered: bond date and estimated treatment time. No images have been imported and there are no notes—the record is empty.

An **Edit** button next to the patient's name allows you to change some information. For example, you can correct typos in the patient's name, change the staff assignment, or change the case type for that patient.

1. Click **Edit**. The Patient Profile page opens.

2. Since the patient's name is switched, type **Hunter** for the first name and **Lane** for the last name to correct it. (Notice that this does not affect the patient ID.)

   TIP: If you change a patient's name to make a correction or if the patient gets married, for example, the patient's initials may no longer match the initials stored in the patient ID making searches more difficult. For this reason, SureSmile automatically stores the new initials (last initial, first initial) whenever they are changed making the record searchable on either the patient ID or the new initials.
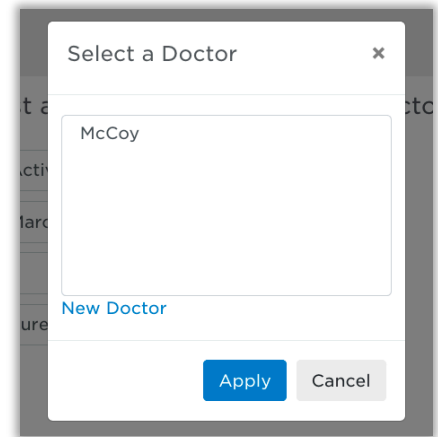
Select a Referring Dentist

It is a good habit to assign the GP to help you easily search for these cases, for example, when hosting an open house.

1. Click **Select Doctor…**

2. Select **McCoy**.

3. Click **Apply**.

4. Click **Save**. Keep your case open for the next section.

Update the Bond Date

For the most efficient approach, you can enter the actual bond date as you create the record. Or, you can enter the bond date at your convenience using the patient's card on the Clinic Overview or timeline on the Patient Overview. Notice that the bond date will be marked as "completed" if you left it blank.

1. Click the clock icon on the timeline next to the Bond Date.

2. Click the drop-down and select **Actual**, if set to another value.

3. Click the date drop-down and select the first clinic day of last month.

4. Click the x to close.

5. Notice the status is set to "Completed" in green.

6. Click **Save**. The Patient Overview appears.

7. Update the Bond Date.
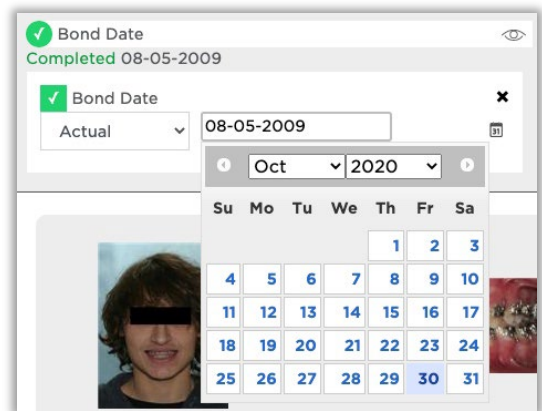
Change the Case Type

After further diagnosis, the doctor may then decide a different treatment approach and/or offer other case types for the patient.
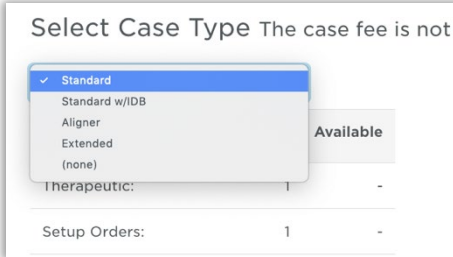
1. While in the edit screen of the Patient Profile, locate Case Type section.

   Click on Change Case Type to modify.

2. Make desired changes in **Select Case Type** screen.


3. Click Save Changes or Cancel to return back to Patient Profile.

Access Patient Profile Via Shortcut

To quickly access the patient profile to make a change, use the shortcut on the patient card.

1. Return to the Clinic Overview.

2. Use quick search box to narrow down displayed options.

3. Click the Edit Patient icon. The Patient Profile opens.

4. For the Staff assignment, select your username.

5. Click **Save**. The Patient Overview displays.
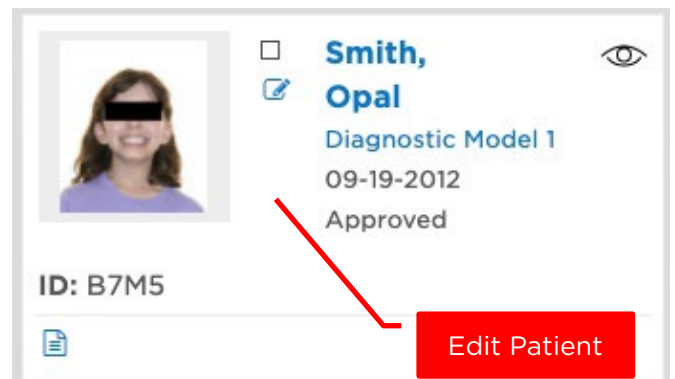
Lesson 8: Adding & Editing Image Sets

Since the Digital Lab technicians cannot see the patient in person, they rely on a full set of quality records to help them accurately model the patient's condition.

WORKFLOW: Although records are required for a therapeutic model order, they are imported into a separate page of the software. Since they are separate, that means you can enter the records before or after you place the order—whichever is best for your workflow. Don't wait too long, though, or the Digital Lab will place your order on hold!

Objectives

After viewing/discussing the SureSmile protocol for therapeutic photographs, you will be able to:

- Identify the purpose of intraoral photographs
- Identify the purpose of extraoral photographs
- Identify required records for therapeutic model orders
- List tips for capturing high-quality photographs

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Protocol for Therapeutic Photographs

Therapeutic Models require a set of standard photos (3 facial, 5 intraoral) taken within 4 weeks before or 2 weeks after the scan. The "full mouth" and "overjet" photos are strongly recommended. Required x-rays: a current panorex and a current or previously imported ceph.
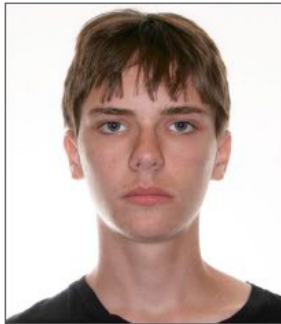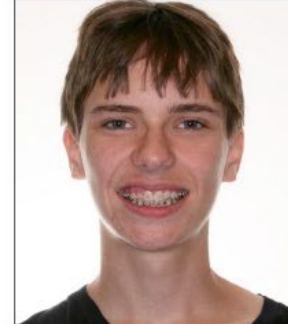

Front
- Patient looking forward
- Head leveled, ears visible
- Lips together & relaxed
- Capture collarbone, top of head

Profile
- Hair behind ears
- Lips together & relaxed
- Patient looking forward
- Capture collarbone

Smile
- Patient looking forward
- Head leveled, ears visible
- Patient's natural smile
- Capture collarbone, top of head

submit additional photo if 3-3 not in view

Upper Occlusal
- Use articulating paper
- Take photo of reflection in mirror
- Rest mirror behind lower molars
- Capture all teeth including 2nd molars

Full Mouth
- Slightly open to see incisal edges
- Capture 2nd molar to 2nd molar

Lower Occlusal
- Use articulating paper
- Take photo of reflection in mirror
- Retract tongue with mirror
- Rest mirror behind upper molars
- Capture all teeth including 2nd molars

Right Buccal
- Capture class relation of bite
- Straight shot of cuspid, bicuspid & molars
- Capture 1st cusp tip of 2nd molar
- Use buccal mirrors if necessary
- Place a colored "O" ring on one bracket

Frontal
- Patient's true bite
- Parallel to occlusal plane & centered
- Capture 2nd molar to 2nd molar

Left Buccal
- Capture class relation of bite
- Straight shot of cuspid, bicuspid & molars
- Capture 1st cusp tip of 2nd molar
- Use buccal mirrors if necessary

(Overjet)
- Capture bite 3-3 at 45° angle

The Digital Lab (DL) requires a standard photo set to create a therapeutic model from your scan data. They also require a panorex (must be current) and a ceph (any date is ok). These images are stored in Image Sets in SureSmile.

Objectives

By the end of this section, you will be able to:

- Start a new image set
- Add images to an image set
- Add optional images
- Delete images
- Add untyped images
- Add x-rays
- Work with image sets
- View images
- Adjust brightness/contrast
- Keep view
- Mirror images
- Edit images

Start a New Image Set

1. Select the Image Sets drop-down and choose **Add Image Set**.

2. Type **Therapeutic Scan** for the name of the set. Today's date is correct—this should be the date the records were taken.

3. Click **Save**. The Image Sets page opens.

Add Image Files

1. Click the "Upload Files" icon in the upper-right corner of the set.

   TIP: You can also click an open slot in the set to add one or more images.
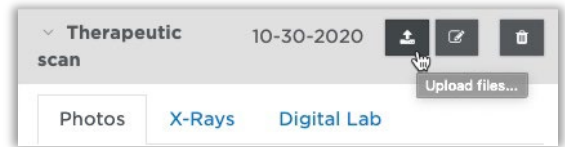

2. Find Hunter Lane's folder, and use one of the following methods to select his files:

   - Drag a bounding box around all the files.

   - Select the first file, and then SHIFT + click to select the last file so that all are selected.

   - Press CTRL+A on the keyboard to select all.

3. Click **Open**. The files are encrypted and copied to your database in the cloud, and then appear in the "Untyped" image set.

   The Untyped image set is available in every patient record, and you cannot delete it. Use this image set as an overflow bin for images that have not been dropped into an image set yet.

4. Drag the standard photos (3 facial, 6 intraoral) from the Untyped image set to your new "Therapeutic Scan" image set, dropping them into the appropriate slot.

   TIP: If your destination image slot is not in view, drag the image to the top of the scroll bar and wait for the area to scroll up.

5. In the image set, select an image you just added to see a larger view.
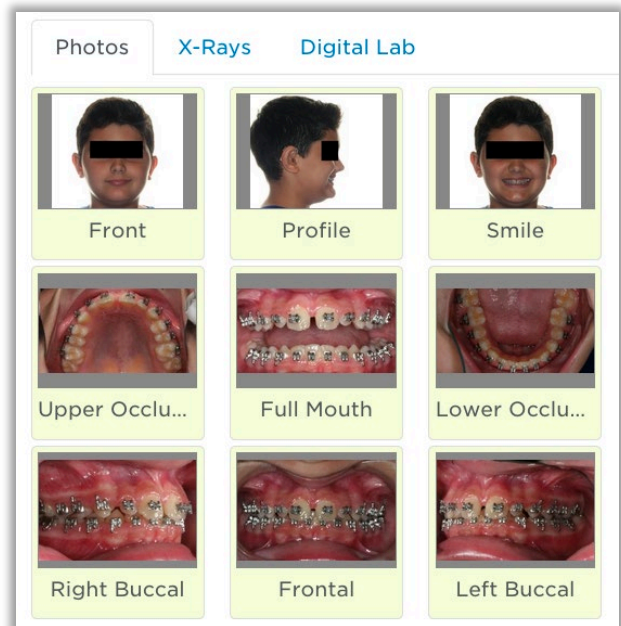
Add Images to the x-ray tab

1. Select the **x-rays** tab.

2. Drag and drop the ceph in the Untyped image set into the Lateral Ceph image slot.

3. Drag and drop the panorex into the image set.

Add Optional Images

Each image set has room for more images beyond the standard set.

1. Select the **Photos** tab.

2. Scroll down the "Therapeutic Scan" image set so you can see there is room for more photos.

3. Add the extra photos to the slots "Photos #1" and "Photos #2."

4. To change the label, click the name "Photo 1." A dialog opens.

5. Type a more descriptive name, such as "overjet" or "spacing" and click **Apply**.

6. Repeat steps 3-4 to change the label for "Photos 2."

7. In the image set, switch the images to see that the label stays with the image.

You can create standard names for extra images and save them permanently by labeling an empty slot in the image set. Be careful not to do this if you simply meant to name an image for one patient record!

Add/Delete Images

Add another image to learn how to delete images.

1. Click the empty "Photos 3" slot in the image set. A dialog opens. You can fill in this information or skip these fields and accept the default name.

2. Add any image.

3. Point to the image and notice a trash can icon appears in the lower-right corner.

4. Click the trash can icon and click **OK** to confirm.

Work with Image Sets

The Add Image Set button is available in two areas: the drop-down menu on the Patient Overview and in the upper-right corner of the Image Sets page. You can also rename or delete sets.

1. Click the **Add Image Set** button. A dialog opens.

2. Type an interesting name such as "Bad Set"—it cannot be the same name you already used for the first image set—and click **Save**. Notice your new set is listed.

3. To change the name of the set, click the **Edit** button ⬚ next to the name **Bad Set**.

4. Change the date of the set to yesterday and click **Save**.

5. Click the **Remove...** button ⬚ next to the name **Bad Set** and then click **OK** to confirm.

Compensating for Photo Problems

While the goal is to obtain high-quality photos, sometimes imperfect photos are captured. SureSmile contains several editing tools for improving image quality.

Look in the image sets palette to see your options.

View Images

1. In the "Therapeutic Scan" photos image set, select the Smile photo.

2. Point to the smile photo when it appears in the large windowpane. Notice some controls are available in the large view—a large circle and a small rectangle. These controls are called Camera Navigation.
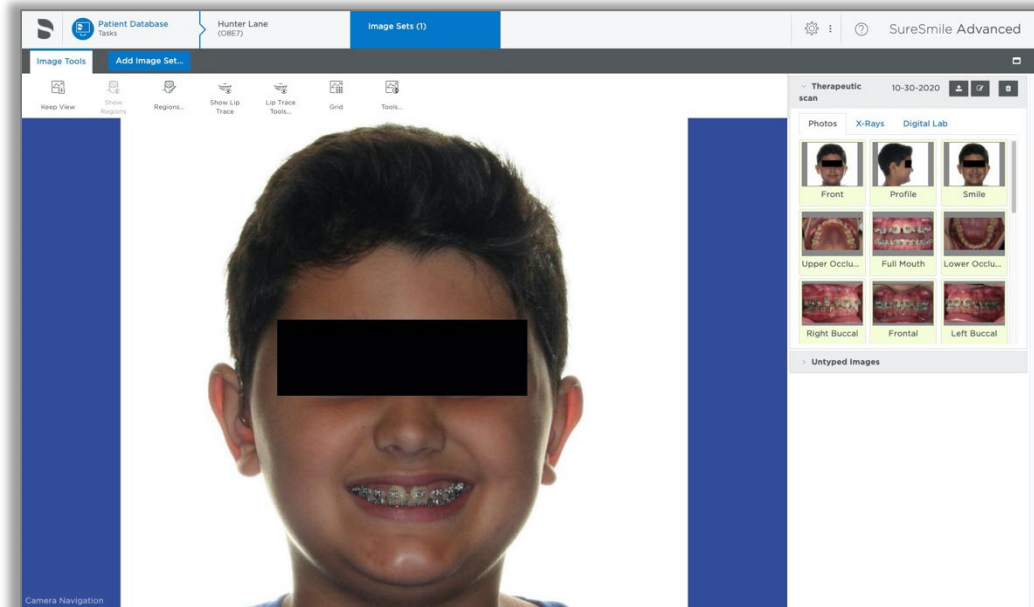

3. Point in the small rectangle in the center of the screen and drag down to zoom in (or up to zoom out).

   Tip: You can click in the window and use your mouse wheel to zoom in and out.

4. After you zoom in, point inside the circle and drag the photo to center it.

5. Point outside the large circle and drag to experiment with rotating.

Adjust Brightness/Contrast

1. Select the Lower Occlusal photo.

2. In the Image Sets palette, select the **Tools Menu** icon.

3. Drag the Brightness slider to the right to lighten the photo.
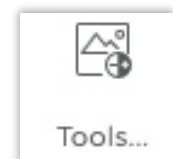
Keep View

The changes you just made to the photo will NOT be saved unless you click the "Keep View" tool. SureSmile stores the imported image so that you can always return to its original state.

1. When the image displays as needed, select the **Keep View** icon.

2. Make an extreme change, such as moving the contrast to the highest setting, and select **Keep View** again.

3. In the Tools menu:

   - Choose **Restore View** to return the image to its orientation the last time you selected the Keep View option

   - Choose **Reset View** to go all the way back to its original settings.

4. (Keep the Image Tools dialog open for the next section.)

Mirror Images

The buccal photos were taken with mirrors and must be flipped.

1. Select the **Right Buccal** image slot.

2. Click **Mirror Horizontally** in the Image Tools controls.

3. Click the **Keep View** icon.

4. Repeat these steps for the **Left Buccal** image.

5. Close the Image Tools controls.

Edit Images

1. In the Photos image set, select the **Upper Occlusal** photo.

2. Select the **Grid** icon to turn on gridlines. You can see the perspective is off.

3. Point outside of the large circle and drag slightly to rotate the image as needed. Don't forget to Keep View.

4. Use the zoom feature on the rest of the intraoral photos, as needed, to trim away the retractors, nose and lips from the image. Choose Keep View for each.

5. When you are finished editing images, return to the Patient Overview.

   Tip: The Digital Lab will rotate the smile photo when it is linked to the model during production.

NOTES

NOTES

Learning Resources

Search the **Help Center** in SureSmile for:

- Online help topics with step-by-step instructions
- Downloads including forms and reference documents
- Video demonstrations of software features
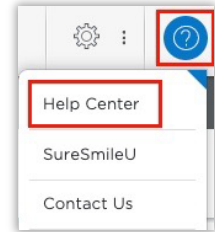
To open the Help Center, click the question mark button and select **Help Center**.

Visit www.suresmileu.com for online learning resources including:

- Archived SureSmile webinars
- Recordings of presentations from events
- Class materials
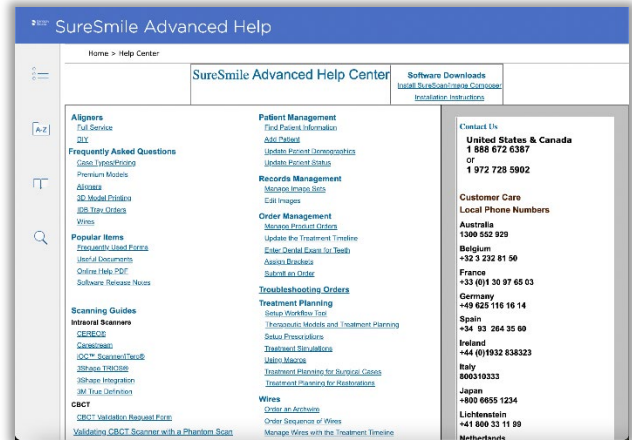
To open SureSmileU from the SureSmile software, click the question mark button and select **SureSmileU**.