



SureSmile[®] Advanced

Staff Level 1 - Module 2

Building Complete Model Orders

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Module 2 - Learning Objectives

Order Therapeutic Models

- Recognize scan purpose/type
- Find, start, complete and cancel model orders
- Enter the dental exam and apply a bracket set
- Correct bracket assignments
- Use camera navigation to check scans
- Order a Therapeutic Model

Order Therapeutic Models - CBCT

- Work with patient records in sure scan
- Find, start, complete and cancel model orders
- Enter the dental exam and apply a bracket set
- Order a Therapeutic Model from a CBCT scan

Order Therapeutic Models – CBCT with Supplemental Scan

- Add a Supplemental Scan to a CBCT order
- Add/remove scan segments
- Navigate 3D scan data

Order Update Models

- Recognize indications Update Scan is needed
- Recognize and complete update model orders
- Communicate modeling requests to the DL
- Order an Update Model

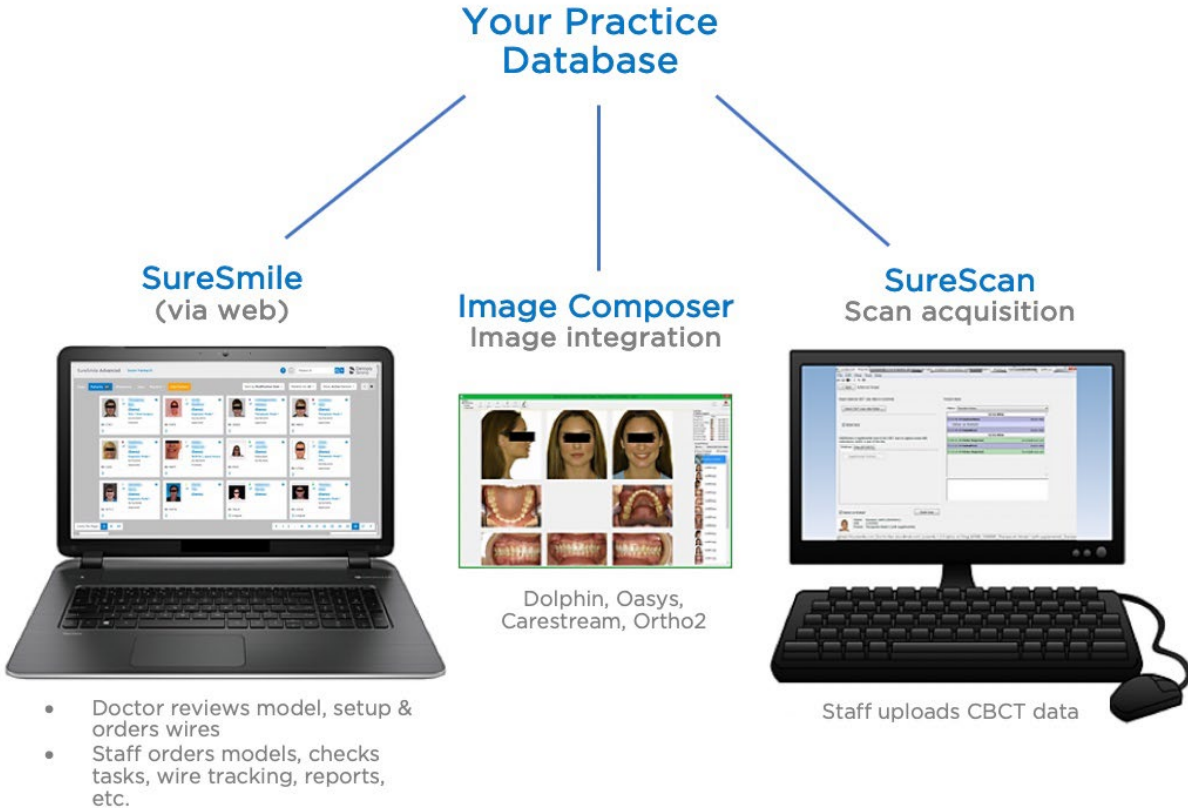
Recognize SureSmile® Components

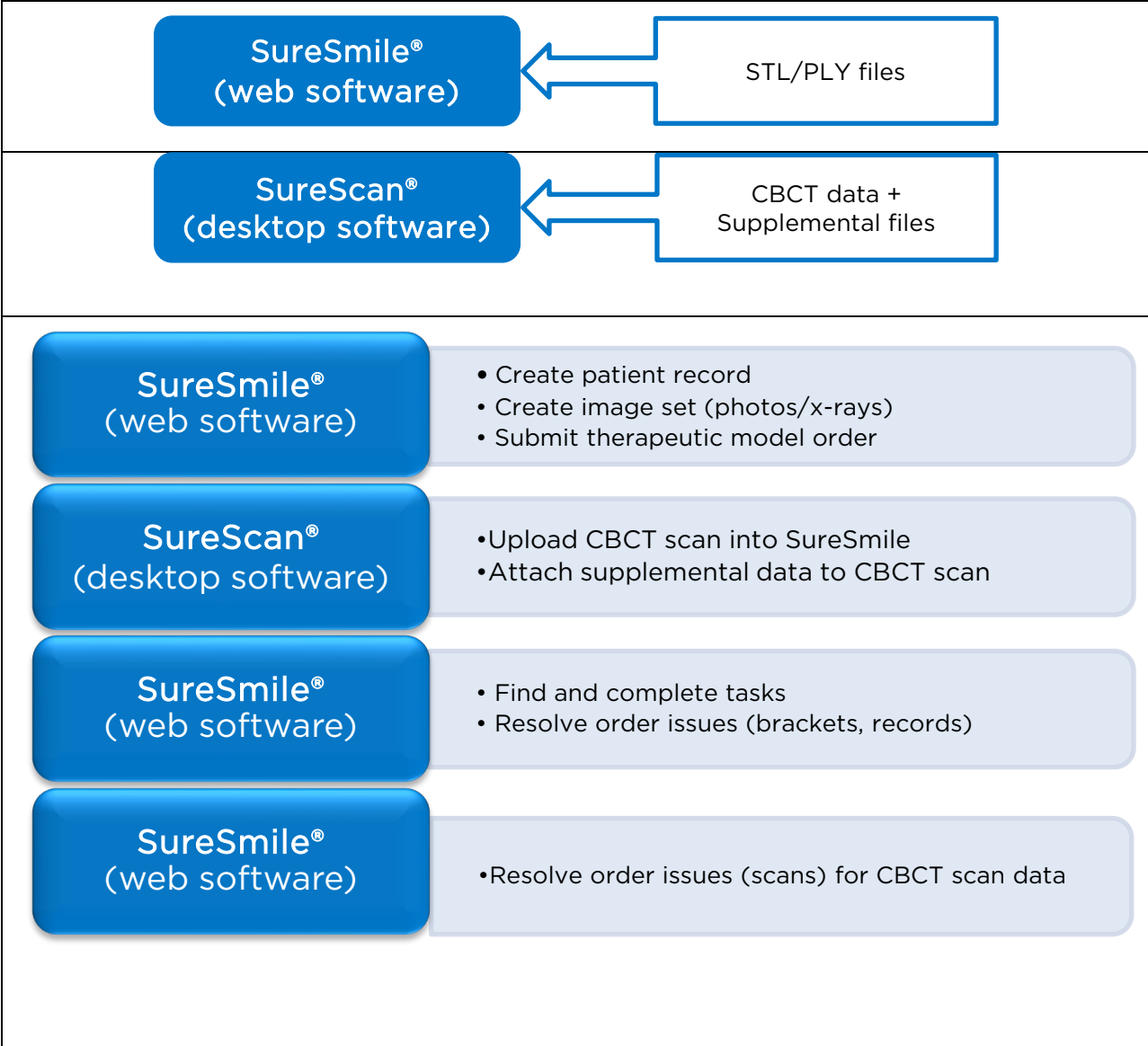
The SureSmile system consists of several components in your office to support efficient and effective treatment:

- **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.





Ordering a Therapeutic Model

Since every SureSmile patient who will receive custom wires requires a therapeutic model, this is the most common order type. You must include all required information for your order to proceed smoothly:

- Standard photos & x-rays (see protocol)
- Teeth information (such as missing, supernumerary)
- Bracket information (exact part numbers)
- Scan data

If ordering a therapeutic model with CBCT or orascan data, these types of data will need to be uploaded via SureScan. Choose the appropriate data source as you start the order.

After you upload the 3D data and submit the order, the Digital Lab produces a model from your scan data within 5 business days.

***WORKFLOW:** The patient's photos and scan will be captured at the same appointment. You can place the order to send the scan to the Digital Lab during the appointment or later in the day as you have time.*

Objectives

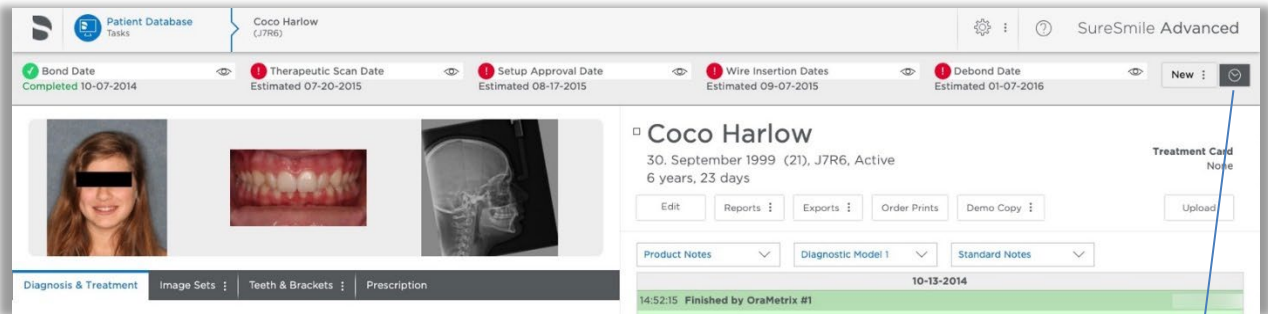
By the end of this section, you will be able to:

- Start SureScan software
- Find a patient record in SureScan
- Start a therapeutic model order
- Enter the dental exam
- Apply a bracket set
- Assign brackets
- Upload data
- View product notes
- Submit an order
- Cancel orders

Patient Overview Page

Once your patient has been created in SureSmile, you will be able to select a new model for them on the Patient Overview Page.

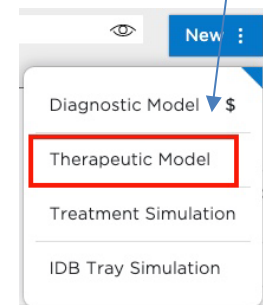
In the top-right corner of the screen, you will see a **New** button. From the drop-down list, choose **Therapeutic Model**.



Order Page

Once you select the **Therapeutic Model** from the list, it will take you to the Order page.

Complete the Dental Exam (if not previously completed), and scroll down to where you see **Upload Scan Data** section:



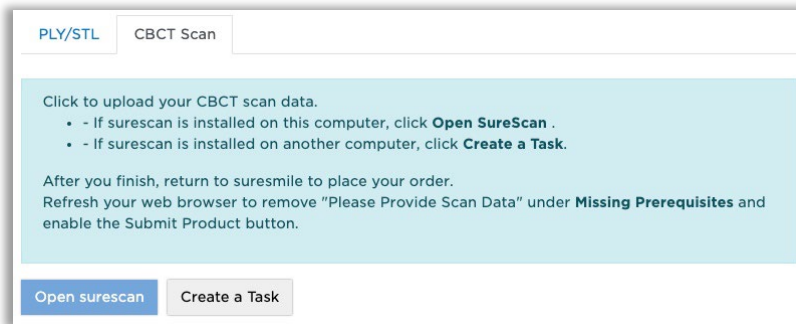
Select your scanner option:

- PLY/STL - intraoral scanners only
- CBCT Scan - CBCT data. Also, choose this option if you have scanned "Supplemental" data or if you are planning on ordering a Premium Model

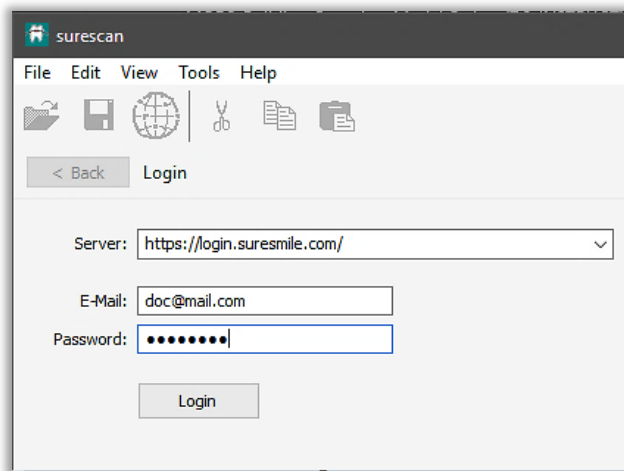
For CBCT data (SureScan):

Start SureScan

The SureScan software is intended primarily for scan acquisition and data transfer.



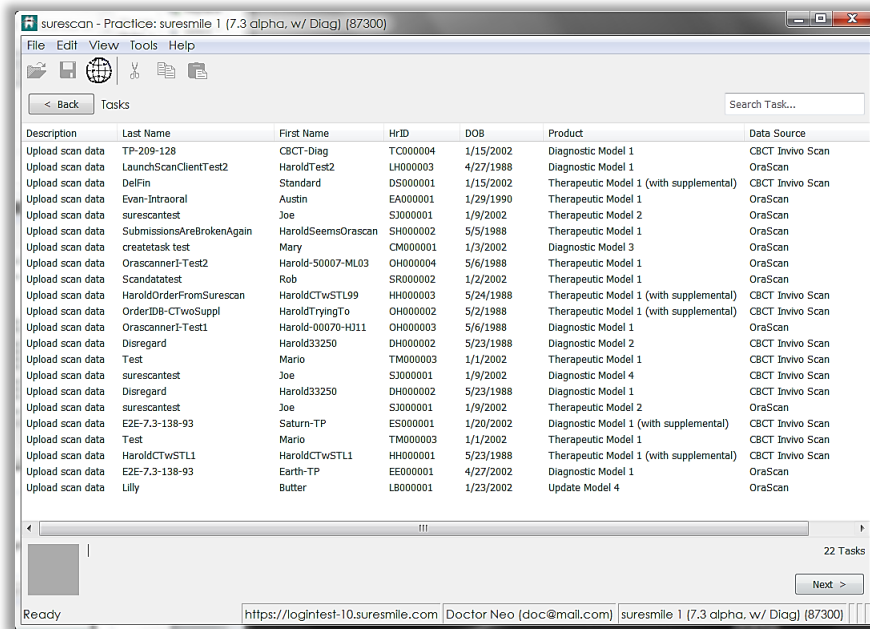
1. Click **Open** SureScan. This will prompt the SureScan application to open (if installed).
2. SureScan software opens to the Login dialog.
3. Enter the same username and password you entered for SureSmile in the browser and click **Login**.



4. The software will open to the patient's chart

Find a Patient Record on SureScan

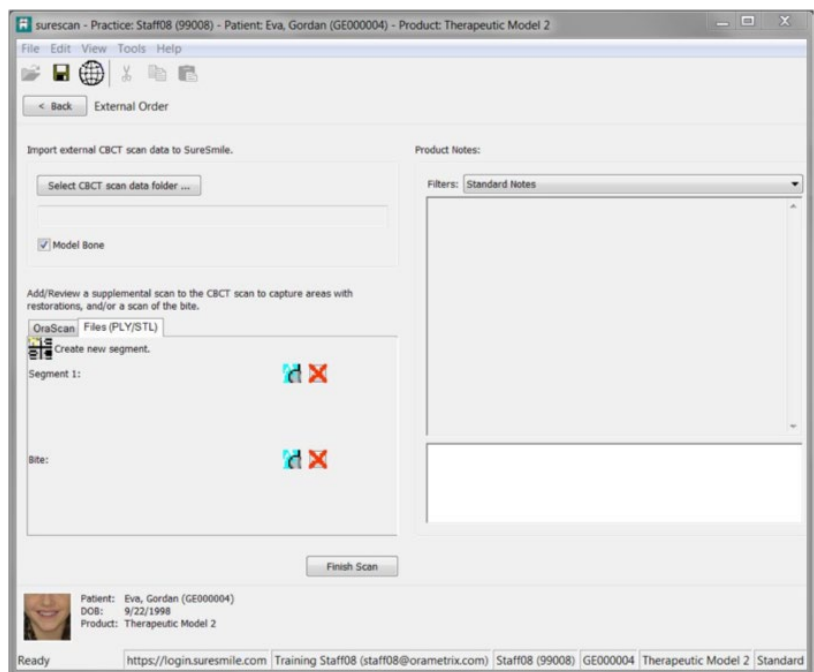
SureScan will open to a Tasks list on the Overview page. Use SureScan only for uploading CBCT scan data into SureSmile or attaching supplemental data to a CBCT scan. Task list can be sorted by clicking on the header of each column. If you still don't see the patient's record, you can then type the patient's



first or last name in the quick search box located in the upper-right corner of the window.

Recognize the Scan Interface

This screen is the interface you will see to upload data. The top-left section is where you will upload your CBCT data. The most recent smile photo is shown to make sure you have the correct patient record open. The windowpanes on the left will hold your upper arch, lower arch and bite segments as you scan the patient. You will learn more about this screen in this guide.



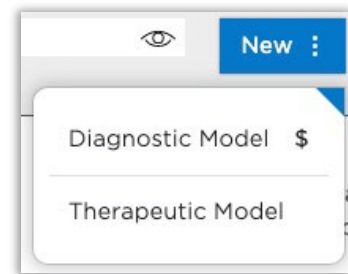
For STL/PLY data (browser):

The patient's first SureSmile model may be a diagnostic model or a therapeutic model. A diagnostic model is optional (at the doctor's discretion and available for an additional fee as indicated by the \$). However, the therapeutic model is required for custom archwires.

If the patient's therapeutic scan (upper and lower arches, with bite registration) is captured using a SureSmile-certified scanner, you may attach the resulting STL files to an order in the SureSmile browser.

NOTE: If your office uses CBCT, you will need to submit optical scan data when patients decline to be CBCT-scanned.

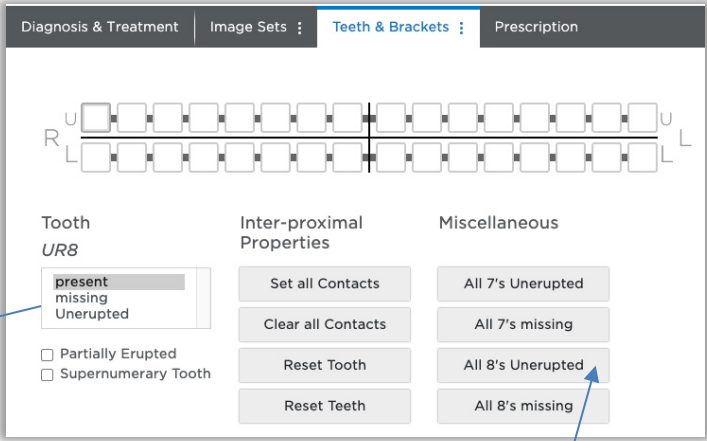
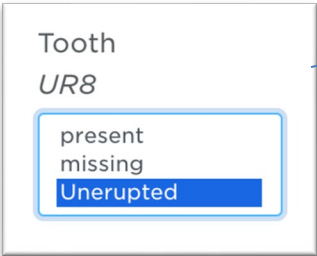
1. Go to the Patient Overview for Hunter Lane in the browser.
2. Click the New drop-down in the timeline. Notice that there are no options for other models such as the Final Model since they are not applicable at this point in the patient's treatment.
3. Select Therapeutic Model. The order page opens. Notice the status is "(PLY/STL, Not Ordered)."
4. Scroll down to notice the order page has three sections:
 - Dental Examination
 - Upload Scan Data
 - Submit Order



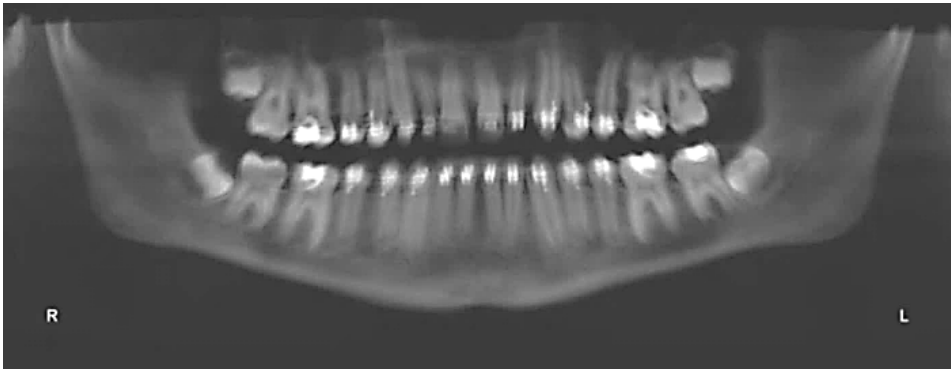
Dental Exam

Teeth Tab

To help the Digital Lab in processing your model order, use the tooth chart to enter tooth properties. Below the chart, several shortcuts are listed for popular choices.



1. Select the UR8, and then select Unerupted.
2. As a shortcut to setting the properties for all of the 8's, click the All 8's Unerupted button.
3. Select the UR7 on the tooth chart.
4. Make sure the tooth is marked as **Present** and then checkmark **Partially Erupted**.
5. Repeat these steps for the UL7 since it is partially erupted also.



Brackets Tab

Apply a Bracket Set

Remember bracket identification is critical to SureSmile treatment. You can assign brackets individually to each tooth or save commonly used bracket trays as a set. Since we will be building your own real sets later, we will select a built-in set for now.

1. Select the **Brackets** tab in the Dental Exam.
2. Click **Apply Bracket Sets**.
3. Select a “built-in” 0.022 set and click **Apply**. All teeth that are present and erupted receive bracket assignments.
4. Click **Close**.

Assign Brackets

If a bracket set is correct except for a couple of teeth, you can override a bracket assignment as needed.

1. Select the LR6 in the chart.
2. Click **Select Bracket**. In this example, we will change to a weldable bracket.
3. Scroll down and select **the .022 molar bracket indicated by your instructor**. Click **Apply & Next**. *(The Apply & Next button keeps the dialog open, the OK button applies and closes the dialog.)*
4. In the target tooth area at the top of the Bracket Set window, select the LR6 button. A tooth chart opens.
5. Select the **LL6** icon.
6. Apply the same part number to the LL6.

TIP: In the scrollable list of brackets, you can also use keyboard keys to move through the list: up/down arrows, Page Up and Page Down.

ALT+A (Chrome) or ALT+SHIFT+A (Firefox or Safari) - equivalent to clicking the “Apply & Next” button in the Bracket Selection dialog.

7. Click **Close**.

Check Assigned Brackets

Ensure that bracket assignments are correct before submitting the order; otherwise, you will be notified through a “customer hold” that the case cannot be processed until you make corrections (do extra work).

1. Select a tooth—notice the bracket prescription is listed.
2. Point at the 3D bracket viewer and drag to look over the bracket.

Mark Not Bonded

Notice three of the 7's do not reflect reality—they have not been bonded yet because they are partially erupted.

1. Select the LL7.
2. Click Mark Not Bonded. The tooth chart updates to indicate the bracket that is part of the set, but not yet bonded.
3. Repeat these steps for the UR7 and UL7.

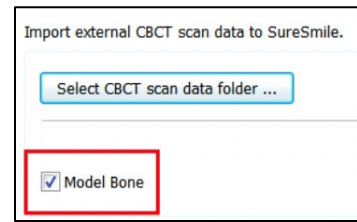
When the teeth are bonded later in treatment, you can send an update scan and simply click the Mark Bonded button to save you steps in assigning each bracket part number.



Uploading 3D data For CBCT data (SureScan):

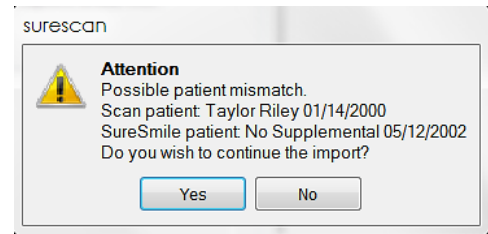
Model Bone

Although most doctors taking CBCT scans prefer to see bone in the Therapeutic Model, there is an option to decline bone modeling. Make sure this option is checked if you want bone included.



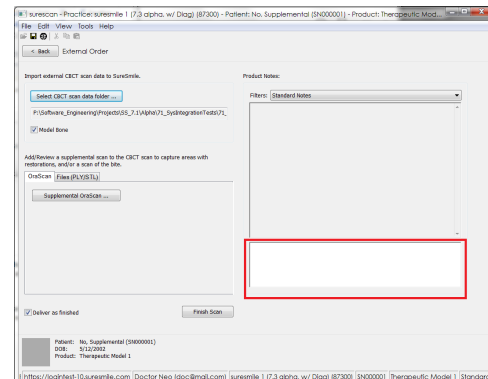
1. In SureScan, click **Select CBCT scan data folder...** and browse to your CBCT data. Select it and click **OK**. (Click **Yes** to confirm.)

NOTE: The software checks the name of the patient against the name encoded into the data and warns you if there is a mismatch. Ignore this message in the training exercise.

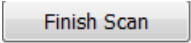


2. You are able to add relevant notes in the white area in the lower right window to the Digital Lab such as “7’s will be added to treatment later.” However, you may also do this on the order page in the browser.

Your order is now attached. (It contains records, teeth/brackets information and scan data).



3. Switch back to the **browser** and click the **Refresh** icon on the top of the page so that the software can recognize that the new scan data has been attached.
4. Make sure that the “Deliver with Brackets” option is checked. It is selected by default, which is correct since the patient is bonded. *(For wire therapy, however, it must be checked to avoid a customer hold!)*

5. Click **Finish Scan**. . Task for this patient will be removed from list on Overview page.

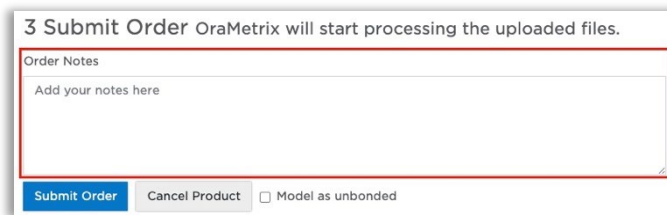
Since the SureScan software is not cloud software, it does not continuously update your patient database every time you commit an action in surescan. However, it does update the patient record on the cloud whenever an order is saved, cancelled or submitted.

For STL/PLY data (browser):

You should already have exported the upper and lower arch files and saved them in a shared folder where they can be accessed for SureSmile orders. Most SureSmile-certified third-party scanners do not export a separate bite file since the upper/lower relationship is stored within the arch files (but some other systems need the bite option).

1. For Upper Jaw, click the **Choose File** button, select the patient's upper scan file and click **Open**.
2. For the Lower Jaw, click the **Choose File** button, select the patient's lower scan file and click **Open**.
3. At this point, the files are simply assigned but not yet uploaded. The "Submit Product" button will not become available until you upload files.
4. Click Upload Files and wait a minute for the files to be copied to the cloud. A confirmation appears in the "Already uploaded" area.
5. In Order Notes section, type any relevant notes to the Digital Lab technician, such as "7's added to treatment later."

Already uploaded:
• Upper_Arch.STL
• Lower_Arch.STL



3 Submit Order OraMetrix will start processing the uploaded files.

Order Notes

Add your notes here

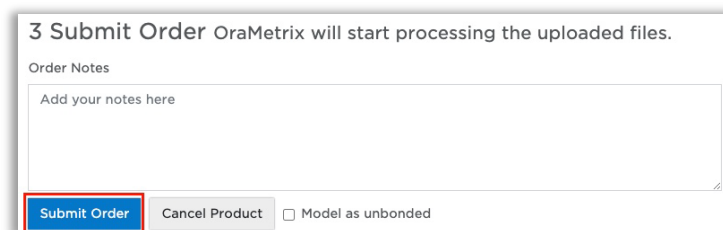
Submit Order Cancel Product Model as unbonded

6. Make sure that the "**Model as unbonded**" option is NOT checked. It is not selected by default, which is correct since the patient is bonded.

Model as unbonded

(You may check this option and use the model for aligner therapy. For wire therapy, however, it must be unchecked to avoid a customer hold!)

7. **Submit Product** button is available (active).



3 Submit Order OraMetrix will start processing the uploaded files.

Order Notes

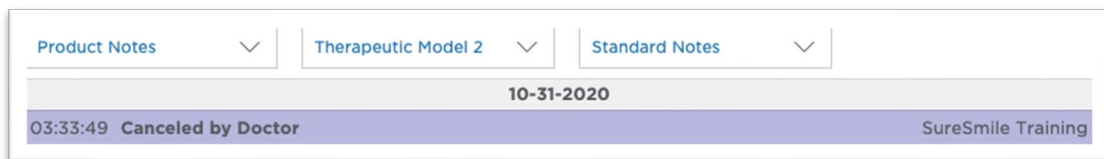
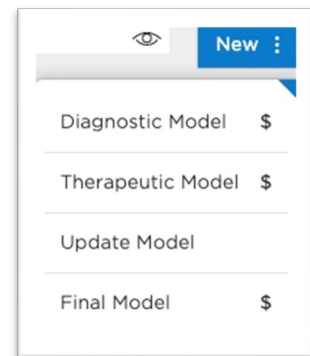
Add your notes here

Submit Order Cancel Product Model as unbonded

Re-Open/Cancel an Order



In addition to placing orders, you will also need to know how to re-open or cancel orders. If it is possible that a team member has started the order at another computer, refresh before you accidentally start another order!

1. Return to the **Patient Overview**. Notice the timeline lists your model order and its status.
2. Click Therapeutic Model 1 on the timeline. This link opens your order until the model is delivered; then, the link will open the model in the treatment planning workspace. Notice your notes and the Dental Exam are visible, but the buttons are now hidden.
NOTE: The tooth/bracket information from a processed order remains visible in the Teeth/Brackets area on the Patient Overview.
3. Find the **New** drop-down menu and start a new **Therapeutic Model** order. (Notice more options are available—Update and Final. The \$ sign indicates a fee applies.)
4. Return to the Patient Overview and drop down the full timeline. Notice both models are listed.
5. Select **Therapeutic Model 2** (not ordered) to open it.
6. In the product notes, type a note to explain the cancellation such as “duplicate order.”
7. Click **Cancel Product**. Notice Therapeutic Model 1 is back in the timeline and the canceled order has been removed from the full timeline.

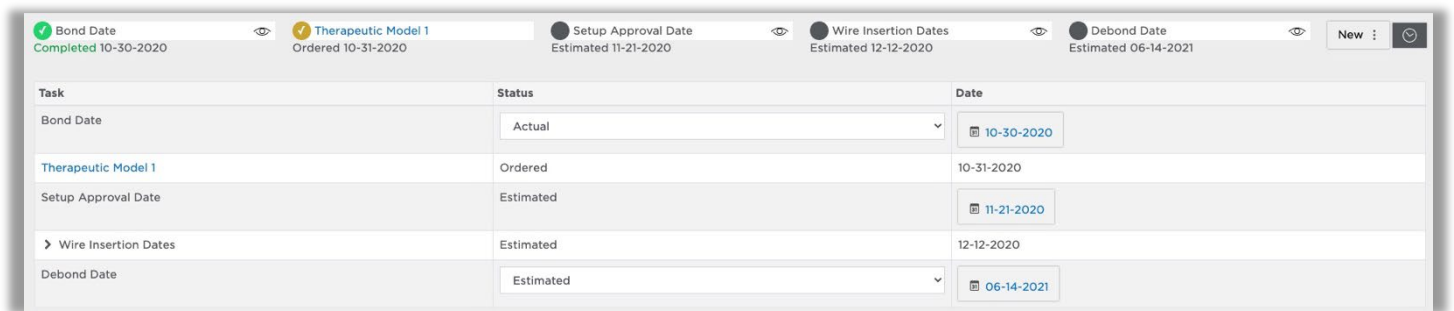


Refresh Browser to See Latest Updates

If you want to see the latest updates to the record via the browser, you may need to refresh.

1. Switch to the browser.
2. Return to the **Patient Overview** and take a look at the timeline. If you do not see the Therapeutic Model listed, you will need to refresh the browser.
3. **Press <F5> to refresh or click the  reload icon** to refresh the browser screen.
Notice the submitted order appears.
4. Click the  **Full Treatment Timeline** clock to see the full timeline.

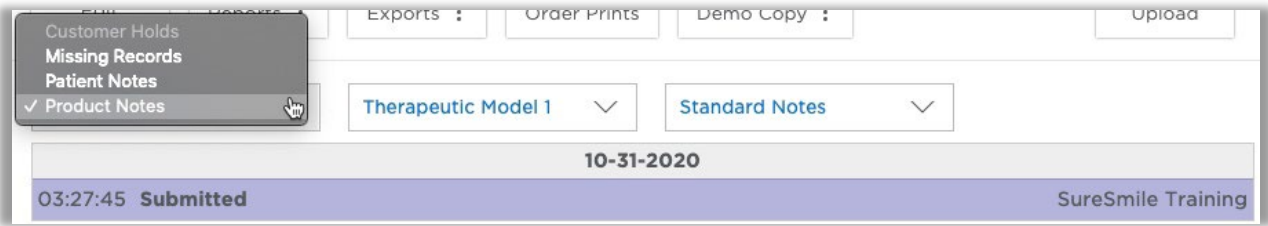
NOTE: Canceled orders are not displayed in the timeline history.



Task	Status	Date
Bond Date	Actual	10-30-2020
Therapeutic Model 1	Ordered	10-31-2020
Setup Approval Date	Estimated	11-21-2020
Wire Insertion Dates	Estimated	12-12-2020
Debond Date	Estimated	06-14-2021

View Product Notes

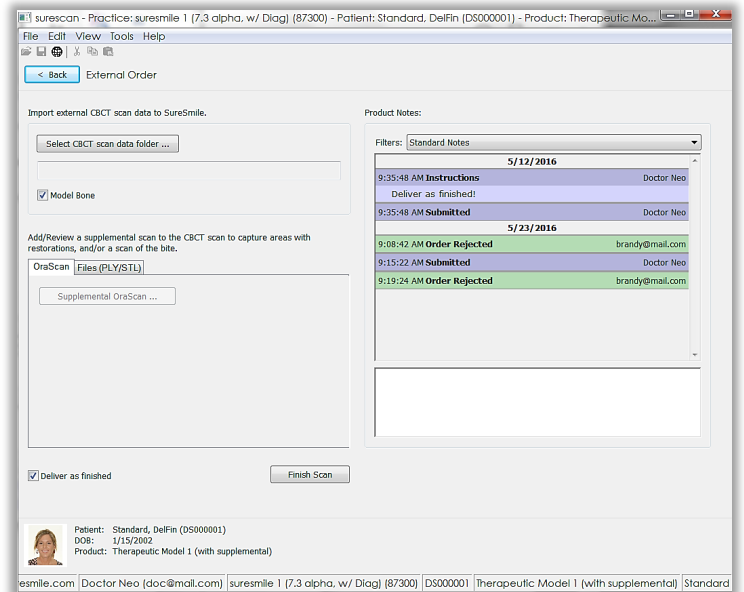
In Browser:



1. Select the Product Notes option in the drop-down, if needed. A second drop-down list appears.
2. Click Therapeutic Model 2 to display a list of products, and then select Therapeutic Model 1 to view product information.
3. Notice the note you typed for each model order (purple rows); there are no notes from the Digital Lab yet.
4. Return to the Clinic Overview.

In SureScan:

The SureScan software also lists Product Notes information.



Recognize Cases with Diagnostic Models

1. Find the patient card for *Opal Smith*.
2. Notice you can see in the timeline and on the card that a diagnostic model was ordered and approved for this patient.
3. Open the record and notice you can see the same information in the full timeline.
4. Import progress photos and x-rays.
5. Submit a complete therapeutic model order for this patient. (Assign any built-in bracket set.)

Test Your Knowledge

Where is the SureScan software available in your office?

What is the main purpose of SureScan?

How do you refresh the browser?

Why do you need to indicate which teeth are missing in the dental exam?

Why is it critical to enter the correct bracket information?

Apply Your Knowledge

Please work independently to complete the case studies:

Case Study 1 - CBCT

1. Open Opal Smith.
2. Notice a Diagnostic Model was ordered earlier.
3. Using the browser, import progress photos and x-rays. Notice her second molars have erupted.
4. Submit a complete CBCT Therapeutic Model order for this patient. Don't forget to update her dental exam. Assign any built-in bracket set.

Case Study 2 - *No CBCT scanner*

1. In the browser, create a new patient record:
Name: Melissa Sparks
DOB: 9/18/1990
Accept all other defaults.
2. Use a default bracket set.
3. Import progress photos and x-rays.
4. Submit a complete therapeutic model order for this patient.

Case Study 3 - *No CBCT scanner*

1. In the browser, create a new patient record:
Name: Nolie McIntyre
DOB: 10/31/1975
Accept all other defaults.
2. In preparation for working with tasks, skip required items:
 - a. Do NOT import records yet.
 - b. Start a therapeutic model order for this patient. Do NOT click the Submit button.
 - c. Do NOT assign brackets yet.

Ordering a Therapeutic Model (CBCT/Supplemental)

When scheduling the patient, take into account the procedures the patient will need:

- CBCT scan to capture tooth anatomy, tooth roots and bracket positions
- Supplemental scan to capture teeth that are not clear in a CBCT scan due to restorations

If the patient requires a supplemental scan, you will attach both the CBCT data and the STL/PLY data to the SureSmile order to completely capture the patient's malocclusion.

Objectives

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

- Refresh SureScan to see latest updates
- Recognize the supplemental scan area
- Add supplemental data
- Add/remove segments
- Switch to the browser from SureScan

Refresh SureScan to See Latest Updates

To avoid creating duplicate patient records, refresh the software to make sure you are seeing the latest patient list. When you refresh, you are asking the software to deliver the current version of the database records on the cloud to your computer.

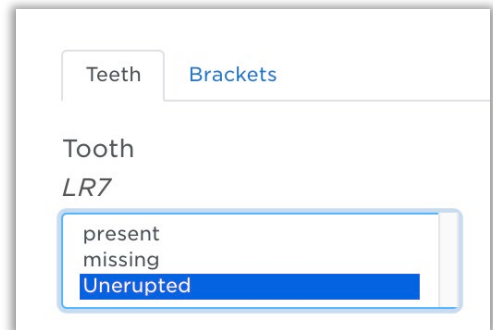
1. In the browser, create a new patient record:
 - Name: Melissa Sparks
 - DOB: 9/18/1990
 - Accept all other defaults.
2. Create an image set and import her photos/x-rays.
3. Switch to SureScan. Notice her record is not visible since the patient listing has not had the opportunity to refresh.
4. Click the Refresh button or (F5) to update the listing.
5. Open the same patient's record.
6. Start a CBCT therapeutic model order.

Model Unerupted Teeth

The patient's 7's are not fully erupted, so they will be entered into treatment later. Even though they are not visible in the mouth, they are completely visible in the CBCT scan. You could add them later using the Update Scan; however, intraoral scans will not capture tooth roots.

If you want the unerupted teeth included in the Therapeutic Model now, you must request that they be modeled using a checkbox.

NOTE: Model Unerupted Teeth option is only available for orders with CBCT scan



The screenshot shows a software interface with two tabs: 'Teeth' and 'Brackets'. The 'Brackets' tab is active. Below the tabs, the text 'Tooth LR7' is displayed. A dropdown menu is open, showing three options: 'present', 'missing', and 'Unerupted'. The 'Unerupted' option is highlighted in blue.

To activate this function for a CBCT scan model order:

1. Scroll down to Select your 3D scan data files section
2. Select CBCT Scan
3. Click Create a Task button.

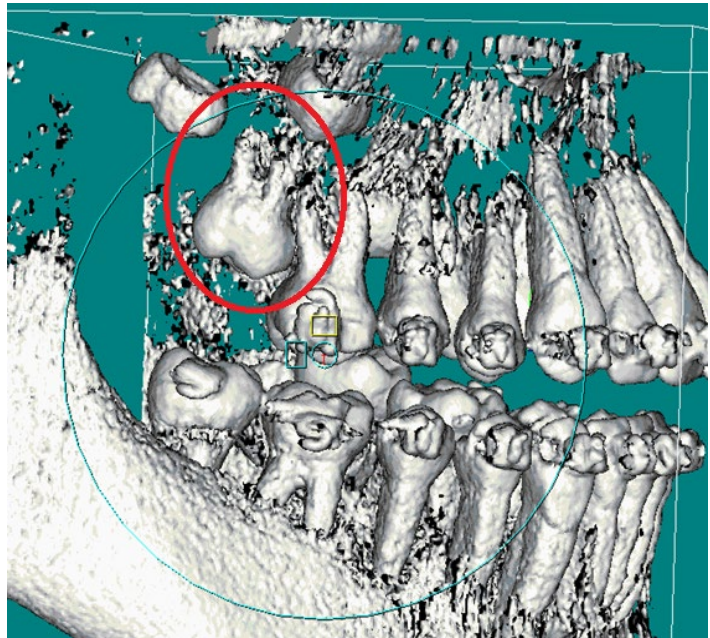
Create a Task

This will create a task in SureScan to upload CBCT data for this patient.

4. To visually indicate your selection, the diagonal line is removed.

NOTE: If the doctor does not want to see an unerupted tooth in the therapeutic model, do not choose this option for that tooth. A diagonal line marks the teeth you do not elect to model.



5. Enter the rest of her dental exam.
6. Apply a bracket set.

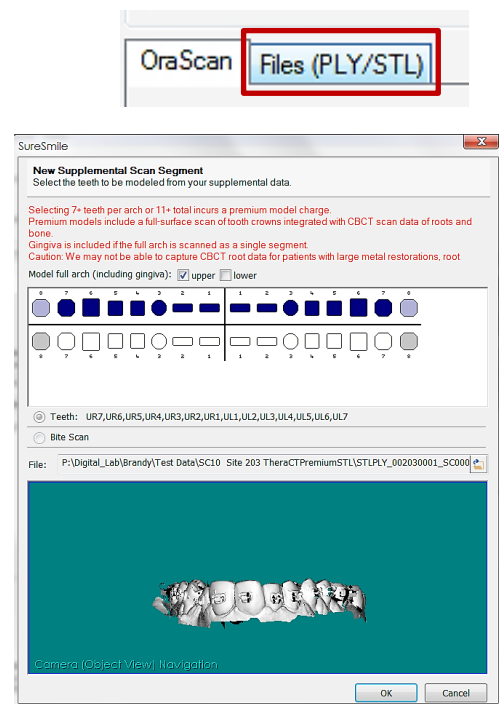


Including the Supplemental Scan Data with CBCT Order For STL/PLY data (SureScan):

As you already noticed, the patient required a supplemental scan of the upper 6's. The scanning technician captured the entire upper arch to encompass both sides. However, you can capture a partial arch if fillings/restorations are only on one side.

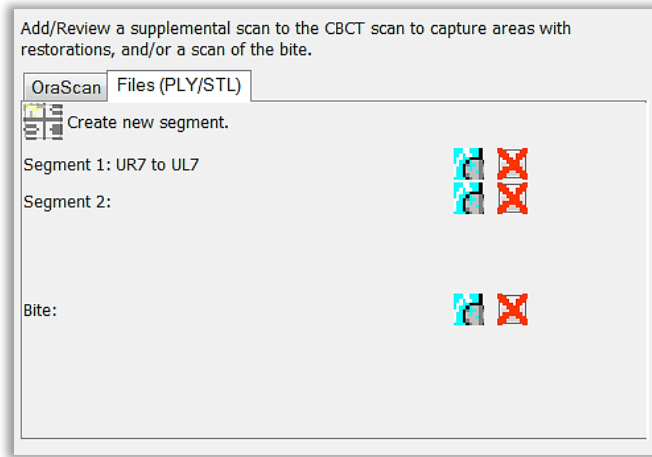
NOTE: When scanning a partial arch, the scanning technician must capture adjacent teeth for a minimum of three teeth to enable the segment to be easily merged with the CBCT data.



1. Import her CBCT data in SureScan.
2. Select the tab Files PLY/STL.
3. For segment 1, click the **Create/Preview/Edit Segment**  icon and click Yes. The “New Supplemental Scan Segment” dialog opens.
4. Select the UR6 and the UL6 in the tooth chart to indicate the reason for the supplemental data.
5. Click the  folder icon and browse to the “new” upper arch data. Select it and click Open.
6. Click OK. The segment name updates.



Add/Remove Segments

If the scanning technician had captured fillings/restorations in the lower arch, you would need to add a segment. Follow the steps below to see how this works.



1. Click the  **Create new segment.** button to add Segment 2.
2. For segment 2, click the **Create/Preview/Edit Segment**  icon.
3. Notice the upper 6's are grayed to help you remember they have already been marked. Also, you may only attach data for one arch per segment.
4. If this patient had lower arch data, you would upload it now. Click Cancel. You will also need to know how to remove a segment in case you create one accidentally.
For Segment 2, click the red X to remove it.
5. Click Finish Scan.
6. Cancel the extra segment.

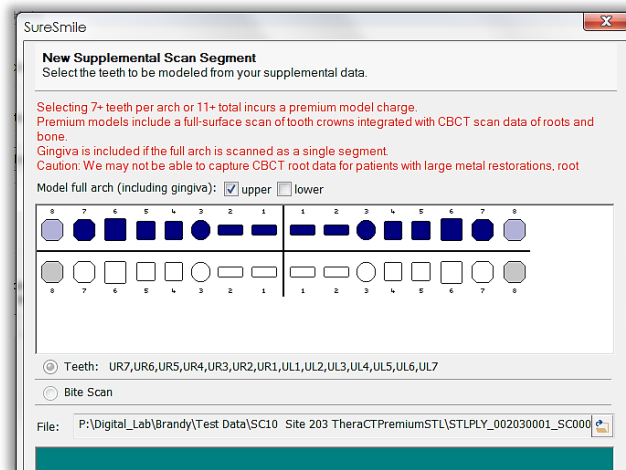
Recognize Premium Modeling Service Limit

SureSmile offers a premium modeling service primarily intended to allow doctors to combine a CBCT scan that captures tooth roots and bone with an optical scan of the teeth crowns to produce a model with enough accuracy to plan a surgical splint.

To avoid the premium modeling service fee, do not CBCT scan patients who require a supplemental scan for 7 teeth or more in an arch or a total of 11 teeth or more in both arches. Instead, perform an optical scan of the patient using your SureSmile-certified third-party scanner.

A warning message appears when you have crossed this threshold.

1. Start another segment and select at least 7 teeth in the lower arch so that you can see the premium modeling service warning.
2. Notice that checking the lower option selects all teeth in the arch automatically, with the added benefit that you will receive gingiva as long as you attach full arch data.



TIP: For the best value, go ahead and request full arch modeling (for both upper and lower) whenever you see that the premium fee will be incurred anyway!

Return to the Browser after a SureScan Order

1. Switch to the browser.
2. For the same patient record, check the full timeline (on the Patient Overview) to see how it updates per your order.
3. If the record has not updated yet, refresh it.

TIP: The name of the product indicates a supplemental scan is included.

Apply Your Knowledge

Please work independently to complete case studies:

Case Study 1

1. In the browser, create a new patient record:

Name: Nolie McIntyre

DOB: 10/31/1975

Accept all other defaults.

2. Start a CBCT therapeutic model.

For CBCT only

1. Import the CBCT data.
2. In preparation for working with tasks, skip required items:
 - Do NOT import photos/x-rays yet.
 - Do NOT assign brackets yet.
 - Do NOT click the Submit button.
3. **Finish Scan** in SureScan.

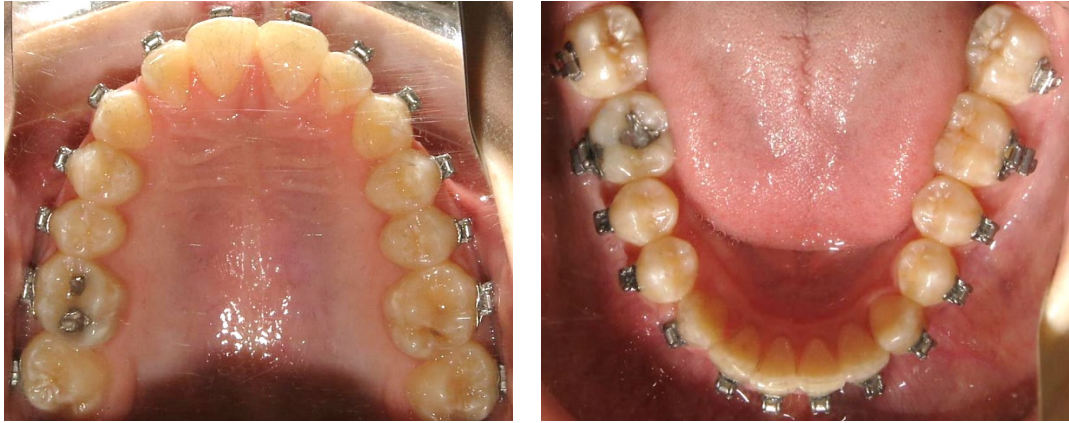
For STL/PLY

1. Import the CBCT data and attach the STL supplemental data.
2. In preparation for working with tasks, skip required items:
 - Do NOT import photos/x-rays yet.
 - Do NOT assign brackets yet.
 - Do NOT click the Submit button.
3. **Finish Scan** in SureScan.



Test Your Knowledge

Does this patient require a supplemental scan?



What is SureSmile's premium modeling service?

Would the patient pictured above incur a premium modeling service fee if you choose to take a CBCT scan?

Would the patient pictured below incur a premium modeling service fee if you choose to take a CBCT scan?



How can you avoid the premium modeling service fee?

Finding & Completing Tasks in the Browser

The Tasks page lists the actions needed by the practice to continue moving these patients through SureSmile treatment. There are three general categories of tasks:

- Orders that are incomplete, have processing issues or are ready for review
- Timeline milestones that are due or late
- Activities that are due or late

Objectives

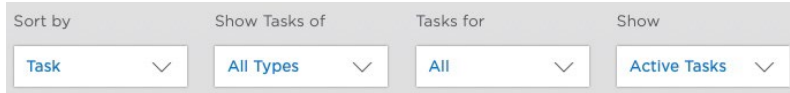
By the end of this section, you will be able to:

- Open tasks in a separate tab
- Sort and filter tasks
- Filter for unsubmitted orders
- Filter for orders that require information
- Filter for order to be created
- Provide information to release holds

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Wire Insertion Date	Status	Deferred To
<input type="checkbox"/>		Kelley	Paul	S8K4	Jennifer Lopez	Therapeutic Model 1	Provide information	12-14-2009		01-25-2010	05-03-2010	Active	
<input checked="" type="checkbox"/>		Ames	Amber	Y3R3	Marcus Welby	Plan 1	Provide information	04-16-2010		07-09-2010	05-04-2010	Active	
<input checked="" type="checkbox"/>		Wagner	Cary	C7Y5	Jennifer Lopez	Therapeutic Model 1	Resolve hold	03-23-2010		02-05-2010	02-26-2010	Active	
<input type="checkbox"/>		Tao	Aiden	M5G6	Jennifer Lopez	Therapeutic Model 1	Resolve hold	04-19-2010		05-11-2010	06-24-2010	Active	
<input type="checkbox"/>		Hilton	Chad	V5E7	Marcus Welby	Therapeutic Model 1	Upload scan data	08-27-2012		09-05-2012	10-13-2012	Active	
<input type="checkbox"/>		Granger	Bill	F7V8	Marcus Welby	Therapeutic Model 1	Upload scan data	08-27-2012		08-30-2012	09-20-2012	Active	
<input type="checkbox"/>		Black	Eddy	I5L6	Marcus Welby	Plan 1	Review order	04-19-2010		04-26-2010	06-20-2010	Active	
<input type="checkbox"/>		Adams	Casey	I8J2	Marcus Welby	Plan 1	Review order	04-19-2010		04-20-2010	05-04-2010	Active	
<input type="checkbox"/>		Small	Lance	N6Y2	Marcus Welby	Plan 2 (Pre-Surgery)	Review order	02-17-2011		01-29-2011	03-03-2011	Active	
<input type="checkbox"/>		Bono	Cher	T6O8	Marcus Welby	Plan 1	Review order	08-16-2012		08-16-2012	08-30-2012	Active	
<input type="checkbox"/>		Salvador	Harry	S4I5	Marcus Welby	Therapeutic Model 1	Review order	06-13-2013		06-14-2010	07-05-2010	Active	
<input type="checkbox"/>		Hunsucker	Ella	D6H9	Marcus Welby	Plan 1	Review order	08-14-2014		08-19-2014	09-03-2014	Active	
<input type="checkbox"/>		Benson	Cindy	K4T4	Marcus Welby	Plan 1	Review order	08-14-2014		08-14-2014	09-04-2014	Active	
<input type="checkbox"/>		Hession	Jule	H6M5	Marcus Welby	Plan 1	Review order	09-09-2014		09-12-2014	10-03-2014	Active	

View & Sort Tasks

The Tasks tab lists the tasks to be completed for each patient. By default, all active tasks are displayed for your username.



The number next to Tasks at the top of the screen is a counter of the number tasks for the practice.

Tasks (21)


1. In the browser, select Tasks on the Clinic Overview.
2. Click the Sort by... drop-down and select Sort by Task if it is not already selected.

By default, the tasks are sorted by task type/urgency.

Notice the blue items in the rows are links to open the patient record. Some additional information is listed:

- Item - the product order that requires action
- Key dates for the patient
- Status of the task

There are two icons located next to the task, if applicable:

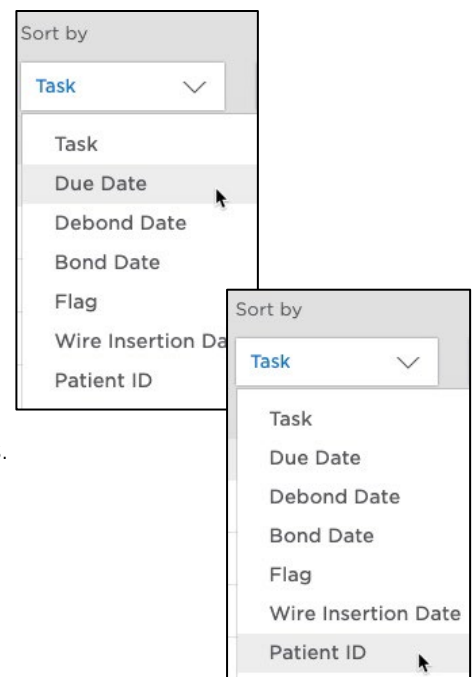
- Clock - allows you to defer (“snooze”) a task 
- Checkbox - allows you to mark a task as complete, which removes it from the list

3. Click the Sort by... drop-down and select Due Date.

Items that are overdue are shaded in red.

Alternatively, you can click a blue column header to sort; then click again to reverse sort.

4. Click the Due Date column header to see that you can sort by oldest date first; and, then click again to sort by most recent date first.
5. Click the Sort by... drop-down and select Patient ID. Records are sorted alphabetically by the letters of the patient ID. Notice that some patients have multiple tasks.



Filter by Username

By system default, certain tasks are shown to staff users or doctor users. When you have more experience using the SureSmile system, we can customize these rules. For now, the important settings to know are:

- Setups & Wires – doctor sees all tasks to create, submit and review orders for setups and wires
- Therapeutic or Update Model orders – staff sees tasks to create or submit the order, but the doctor sees the task when the therapeutic model is ready for review
- Therapeutic order issues - staff sees tasks for incomplete information

Before submission, missing information is referred to as missing records (i.e. photos, x-rays) and results in a Provide Records task.

After order submission, missing information results in a “Resolve Hold” task.

1. Click the Tasks for... filter and select All Staff. Now you can see Jennifer’s staff tasks as well. (See the Owner column.)
2. Click the Tasks for... filter and select All Doctors. When the clinic is running smoothly, the doctor will have mostly review tasks.
3. Click the Tasks for... filter and select All.
This is a useful filter if you are assisting the doctor or another team member with their tasks. This filter is also helpful if you do not assign a specific staff member routinely—in this situation all patient records will be defaulted to the first staff user entered for your practice.
4. Click the Tasks for... filter and select your username to return to the default.

Filter Tasks

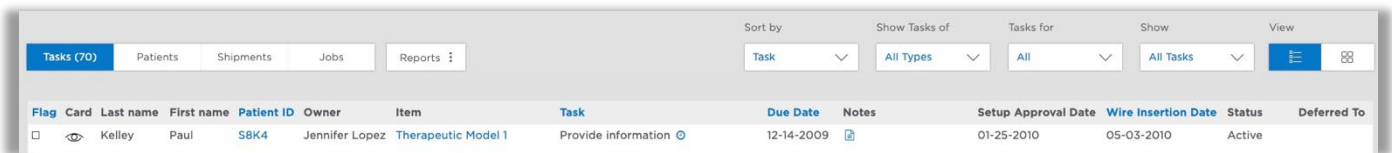
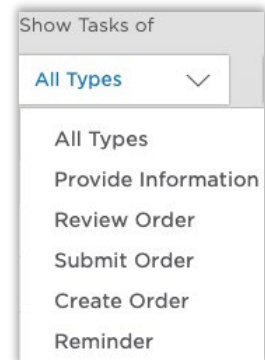
A list of filters allows you to view tasks by type to help you prioritize your work. Task types are listed in the order of their urgency. The first type, “Provide Information,” contains the most critical tasks. The **Submit Order** type lists the patients with incomplete orders.

Today, we will focus on these two types.

Filter for “Submit Orders”

1. Click the **Show...Tasks** filter and select **Submit Order**.
2. Notice your patients with unsubmitted orders are listed.

NOTE FOR CBCT: This is a helpful reminder if the office did not schedule the patient for a Supplemental Scan and she will have to come back (within 2 weeks) for this appointment. Or, alternatively, you captured the Supplemental Scan but still need to import the CBCT data to finish the order.

A screenshot of a software interface showing a task list. The interface includes a top navigation bar with tabs for "Tasks (70)", "Patients", "Shipments", "Jobs", and "Reports". Below the navigation bar, there are several filters: "Sort by" (Task), "Show Tasks of" (All Types), "Tasks for" (All), "Show" (All Tasks), and "View". The main table has columns for "Flag", "Card", "Last name", "First name", "Patient ID", "Owner", "Item", "Task", "Due Date", "Notes", "Setup Approval Date", "Wire Insertion Date", "Status", and "Deferred To". A single row is visible with the following data: Flag (checkbox), Card (eye icon), Last name (Kelley), First name (Paul), Patient ID (SBK4), Owner (Jennifer Lopez), Item (Therapeutic Model 1), Task (Provide Information), Due Date (12-14-2009), Notes (document icon), Setup Approval Date (01-25-2010), Wire Insertion Date (05-03-2010), Status (Active), and Deferred To (empty).

Before we handle your patient's Submit Order issue, let's see what else we have to do.

Filter for “Provide Information”

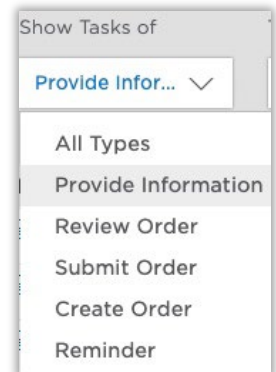
The **Provide Information** filter lists orders that are incomplete whether they have been submitted or not.

- The software allows an order to be submitted without required records to avoid disrupting your workflow.
- Scan data, however, must be attached for the Submit order button to become available.

The **Provide Information** filter also lists orders where work has stopped in the Digital Lab due to an issue with the scan data.

These situations are indicated on the task list as follows:

- **Resolve Hold** – required information is missing such as photos, x-rays or brackets AND the Digital Lab has started and halted processing of the therapeutic model.
- **Provide Information** – the data is rejected during processing in the Digital Lab due to substandard quality, protocol errors, or missing data any of which prevents the scan from being processed.



1. Click the Show...Tasks filter and select Provide Information.
2. If your last patient is not listed here, then remove the filter and allow all tasks to list, or when you look under the Submit order category, or if you filter for her patient ID (see next section).

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Wire Insertion Date	Status	Deferred To
<input type="checkbox"/>		Kelley	Paul	S8K4	Jennifer Lopez	Therapeutic Model 1	Provide information	12-14-2009		01-25-2010	05-03-2010	Active	
<input checked="" type="checkbox"/>		Ames	Amber	Y3R3	Marcus Welby	Plan 1	Provide information	04-16-2010		07-09-2010	05-04-2010	Active	
<input checked="" type="checkbox"/>		Wagner	Cary	C7Y5	Jennifer Lopez	Therapeutic Model 1	Resolve hold	03-23-2010		02-05-2010	02-26-2010	Active	
<input type="checkbox"/>		Tao	Aiden	M5G6	Jennifer Lopez	Therapeutic Model 1	Resolve hold	04-19-2010		05-11-2010	06-24-2010	Active	

Filter by Patient ID

If you are looking for a specific patient, the system assumes that you want to see this patient's tasks regardless of the staff member assigned or task type. Therefore, by user request, entering the patient ID in the search box will override the "Tasks for..." and "Show Tasks" filters.

NOTE: The system does not make this assumption for doctor users. For example, if Dr. A enters a patient ID for a record assigned to Dr. B and Dr. A is filtering on his username, the record will not be found. Instead, Dr. A should change the filter to "Tasks for All Doctors" or filter for Dr. B's username to find the other doctor's patient.

There are three ways to search for patients:

1. ID number (4 digits)
2. First OR Last name. Or at least 3 sequential letters of the patient's name.


Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Wire Insertion Date	Status	Deferred To
<input type="checkbox"/>		Kelley	Paul	S8K4	Jennifer Lopez	Therapeutic Model 1	Provide information	12-14-2009		01-25-2010	05-03-2010	Active	
<input type="checkbox"/>		Kelley	Paul	S8K4	Jennifer Lopez	Wire 2 17x25 Cu Niit Mx ...	Insert wire	05-03-2010		01-25-2010	05-03-2010	Active	

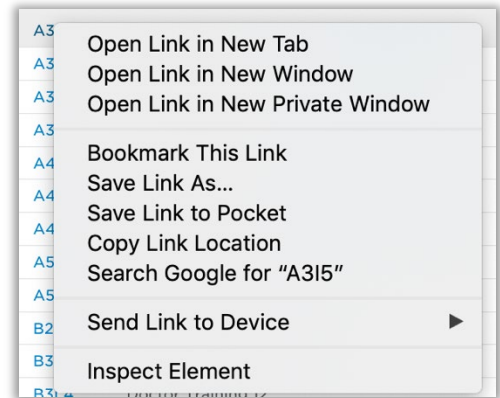
3. Patient notes. Any notes that are saved under the icon are specific to that patient and will also display under a search.

NOTE: Only the most recent note will display. Any previous notes can still be seen, but will not show up in a search.

Open Tasks in Separate Tab

To save time in working with tasks, keep the task list open in the first browser tab and the patient record open in a new tab.

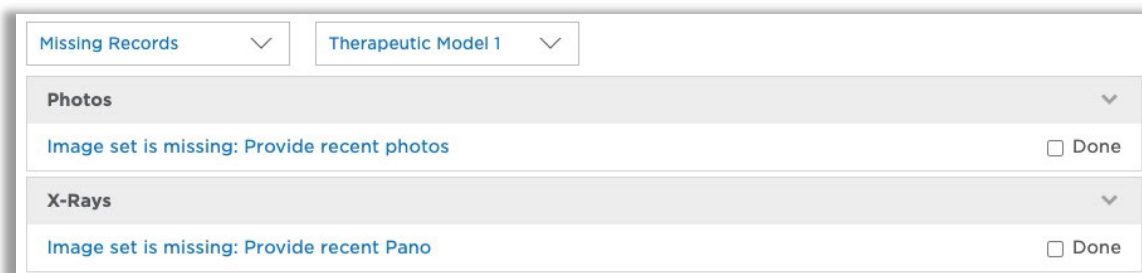
1. Click the  notes icon on the task.
In addition to submitting the order, you also need to upload missing records.
The notes list the missing records and offers helpful links.
2. In the browser, right-click the Patient ID link and choose **Open Link in New Tab**. The tabs are labelled:
 - **SureSmile overview** - the clinic overview with tasks or patient cards
 - **(HRID) overview** - the patient overview
3. Toggle back and forth between the first and second tabs to see how to easily switch between the tasks view and open patients.
4. Switch to her open case (open in the second tab).



Completing Tasks

Add Missing Records

Notice the notes area of the Patient Overview also conveniently lists the records that are missing.



Provide Information to Release Holds for Missing Photos

1. Click the link for the first “to do” **Image set is missing: Provide recent photos**. The **Image Sets** page opens.
2. Create the image set.
3. Check the patient’s photos and notice which teeth are unerupted or partially erupted.

TIP: The patient's records import directly into the correct image slots because they use standard filenames recognized by SureSmile. If you do not use standard names, the images will import into the Untyped image set and you will drag and drop them into place.

4. Go to the order and complete the information:
 - Update the dental exam and apply a built-in bracket set
 - Import the data
 - Submit the order
5. Switch to the clinic overview (open in the first tab).
6. Refresh the screen to reflect your changes to the record. The task disappears.

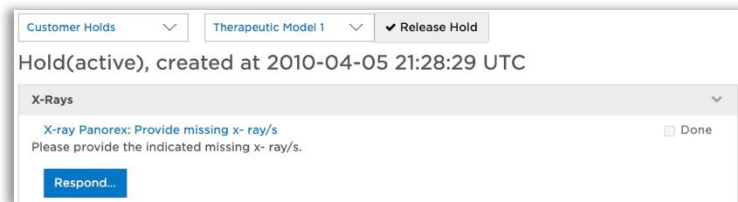
Provide Information to Release Holds for Missing X-rays

We will look at these task categories further after you have more experience using SureSmile. Returning to the Action Needed category, let's see how to resolve holds.

1. Click the **Show...Tasks** filter and select **Action Needed**. Several patients are listed with a **Resolve Hold** task.
2. For the patient *Stacy Pierce*, right-click **Therapeutic Model 1** to open the patient's record in another tab. A "Customer Hold" banner is displayed along the top of the Patient Overview and the notes area is automatically toggled to the Customer Hold section for this product. The patient's panorex and ceph are missing. Notice there are clickable links in the hold details.

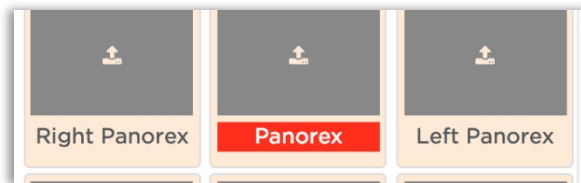
3. Click the link: **X-ray Panorex: Provide missing x-rays**.

The Image Sets page opens to the appropriate x-rays tab.

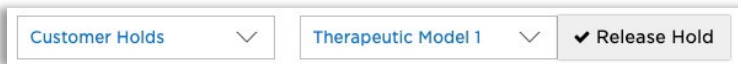


4. The Panorex label is highlighted in red to get your attention

For the **Panorex** image slot, click the + sign and add the missing record.



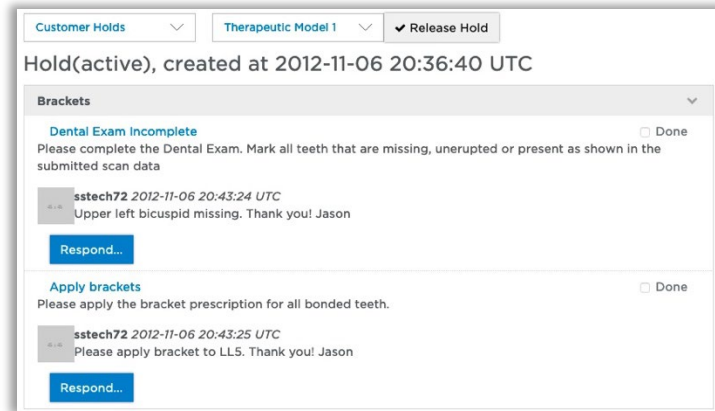
5. Return to the Patient Overview. The item is now check marked "Done."



6. Click the **Release Hold** button.
7. Close Stacy's tab and switch to the browser tab with your Tasks list.
8. Refresh the Tasks page to see the task has cleared.

Release Hold for Missing Brackets

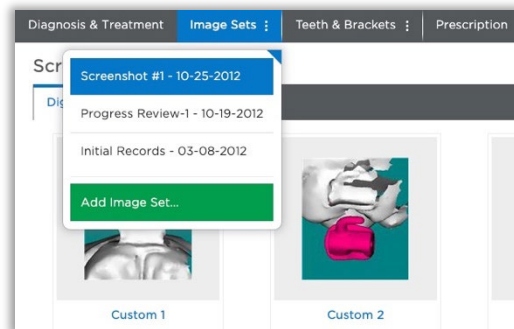
1. Open the record for *Lucy Ishmael* in a separate tab.
2. Right-click the new tab and choose **Duplicate** so that you will retain her Patient Overview as you follow links.
3. Read the notes from the DL technician: UL bicuspid is missing and LL5 needs a bracket.
4. Click the link: **Dental Exam Incomplete**.
5. Update the UL4 to indicate that it is missing.
6. Apply this bracket to the LL5: **Ortho Technology Lotus MBT (300-22-4530)**.
7. Close the duplicate tab and view the Patient Overview.
8. Release the hold.



Check DL Image for Bracket Hold

If a practice releases a hold without providing the correct bracket (that will register during Digital Lab processing), the Digital Lab will provide a screenshot of our software to illustrate that the bracket geometry is incorrect.

1. Open the record for *Rita McCoy*.
2. Read the notes from the Digital Lab indicating they attached a screenshot.
3. Click the Image Sets drop-down and select **Screenshot #1**. The image set opens within the page. Notice the bracket does not match the scan data.
4. Apply the correct bracket and release the hold: **Ormco Molar (340-5212)**. Notice the icon is bordered in red while the bracket is on hold, then in orange when it is corrected.



Cancel a CBCT Order from SureSmile

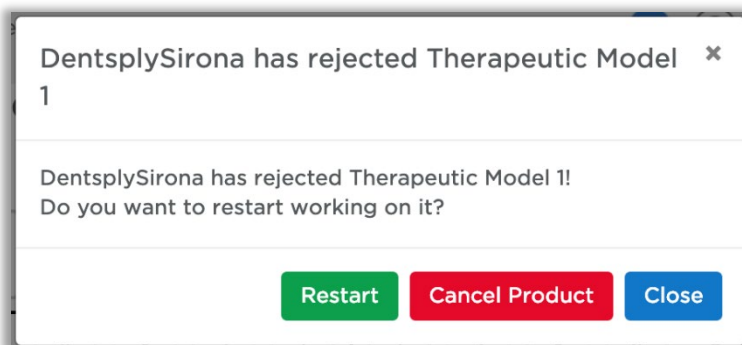
Although you use SureScan to submit a CBCT order, you are more likely to see a problem with the order when viewing tasks on the SureSmile web software. For this reason, SureSmile allows you to cancel a rejected CBCT order whether you are in SureScan or SureSmile.

There are several situations for canceling a rejected CBCT order:

- The doctor's clinical protocol limits patients to one cone-beam scan during treatment. Therefore, if the first scan is rejected, the second scan must now be captured with an intraoral scanner.
- The patient declined to be rescanned with CBCT.

The patient quit and is no longer a SureSmile patient. If you cancel a rejected Therapeutic order, you may be eligible for a refund.

1. In the Action Needed tasks, Find [Sam Bernard](#).
2. Read the notes to see the reason for the rejection.
3. Open the order (item link). A popup appears to prompt you to cancel the order.



4. Click Cancel Product.
Alternatively, if you are able to schedule the patient for another CBCT scan, you would NOT cancel the order. Instead you would open the order in SureScan at the time of the appointment, attach new data and resubmit.
5. Notice the product is removed from the timeline, but information on the order is still available in the Product Notes area.
6. Return to the Tasks page to see the Action Needed task for this patient has been removed.
7. In your clinic, at this point you would schedule the patient for an intraoral scan.

Apply Your Knowledge

Please work independently to complete these case studies:

Case Studies

1. Filter for Tasks for **Jennifer Lopez** (or **All**).
2. Release the holds for: *Aiden*, *Paul*, and *Cary*.




Ordering an Update Scan

Recognize When an Update Scan is Necessary

The therapeutic model must reflect the patient's current tooth anatomy and brackets. If there is a change, take an update scan to produce an updated therapeutic model

You may need an update scan at any point after the therapeutic model has been ordered. If a setup has already been produced and custom archwires ordered, you will need to replace one or both of these items.

Common situations include:

	Reason for Update Scan	Requires
	Brackets were rebonded due to broken brackets or repositioning	new wire order or new wire simulation
	A tooth has erupted that the doctor is bonding and entering into treatment	new setup prescription & new wires
	Tooth anatomy has changed that will affect the setup (such as a restoration)	new setup prescription & new wires

Objectives

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

- Identify minimum update scan requirements
- Find a recently modified case
- Start an update model order
- Communicate modeling requests
- Submit an update model order

Identify Minimum Data Requirements

Scan the changed areas according to these requirements:

- Follow coverage/quality requirements for therapeutic scans
- Capture the changed tooth AND the adjacent teeth for a minimum of **three** teeth that meet quality standards

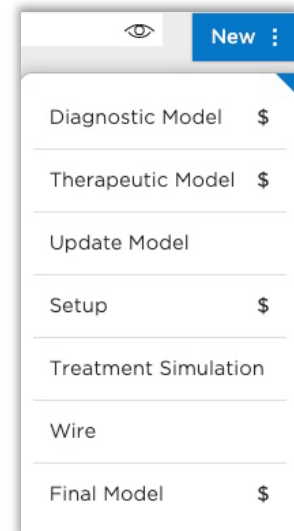
Start an Update Model Order

For STL/PLY (browser)

Find a Recently Modified Case

Since you already ordered a therapeutic model for *Hunter Lane*, we can use his case to represent the situation when a patient breaks brackets.

- From the Clinic Overview and Patients tab, choose **Sort by Modification Date**. Your record is sorted to the top of the list since it has the most recent changes.
- Notice the middle of the card is blank since the patient does not have a completed product.
- Open *Hunter Lane*
 1. In the New menu, choose **Update Model** to start the order. The order page opens.
 2. Notice the numbering of the model increments from the last therapeutic model order.
(Remember the canceled therapeutic was #2 so the update model will be #3.)



Mark Bonded

The remaining 7's are now erupted.

1. Select the LL7.
2. Under the Brackets tab, click **Mark Bonded**. The tooth chart updates to indicate the bracket that was previously assigned is now bonded.
3. Repeat these steps for the UR7 and UL7.

Communicate Modeling Requests to the Digital Lab

The Digital Lab uses your new data to update bracket positioning and tooth models/bracket positions according to your coverage selections in the order.

For the purpose of this exercise, assume that:

- The LR4-5 brackets were rebonded with the same part numbers which means the bracket assignments are still correct.
- The upper centrals' tooth anatomy has changed significantly due to polishing.

1. For Segment 1, click the **Choose File** button, browse to and select the partial scan file and click **Open**.

NOTE: There is room for four segments, which should be more than sufficient. If there are extensive changes to the patient's teeth and brackets, we recommend ordering a new therapeutic model (full scan of both arches and bite)

2. Click the **Coverage** drop-down adjacent to Segment 1. A dialog appears with a tooth chart.

2 Upload Scan Data We support PLY/STL and CBCT (DICOM) files.

PLY/STL

Segment 1 Choose File No file chosen Coverage ...

Segment 2 Choose File No file chosen Coverage ...

Segment 3 Choose File No file chosen Coverage ...

Segment 4 Choose File No file chosen Coverage ...

Upload Files

3. Click the **LR4** once and the **LR5** once. The bracket icons highlight in dark blue.

Click **Close**.

4. Notice the Coverage button label updates to indicate the selected teeth
5. For segment 2, upload the partial scan file.

TIP: You can preview the files you uploaded, if needed.

6. For segment 2 coverage, click the **UL1** and the **UR1** twice. Both the bracket icon and the tooth icon highlight in dark blue.
7. Click **Close**.

New Partial Scan Segment

Select the segment of brackets to be added.

NOTE: When you click the tooth icon once, the bracket portion highlights to indicate a bracket was rebonded.

When you click the tooth icon twice, both the bracket and tooth portions of the icon are highlighted to indicate a tooth is to be remodeled (along with its bracket).

If you click the tooth icon a third time, both the bracket and tooth icons return to being unselected.

New Partial Scan Segment (2)

Select the segment of brackets to be updated or the teeth to be added.

A tooth was selected! This will require a new Setup (additional costs)!

Close

Submit an Update Model Order

1. Click **Upload Files**.
2. Type a note for the DL.
3. Click **Submit Product**.

NOTE: There is no option to turn on/off a “Deliver with Brackets” option in an update model order since this scan type only applies to bonded patients.

4. Click **OK** to confirm the same part numbers were used to rebond brackets.
Return to the **Patient Overview** and notice the updated therapeutic model has taken the place of the original therapeutic model in the timeline at the top of the page.

Apply Your Knowledge – STL/PLY

Please work independently to complete these case studies:

Case Study 1

1. Find and open the patient Melissa Sparks.
2. For the purpose of this exercise, assume that the patient’s 7’s erupted and were added to treatment.
3. Submit the update model order and notice the name of the item on the Patient Overview.

Case Study 2

1. Find and open John Lovelace (who has a therapeutic model order finished).
2. For the purpose of this exercise, assume that the patient’s upper left lateral was added to treatment, the UR5 was rebonded and this information was already captured in an upper arch scan.
3. Submit the update model order complete with new bracket information.

Test Your Knowledge

What is an update scan for?

What product is a prerequisite for starting an update scan order?

Capturing Supplemental Scans

Although the supplemental scan feature can be used to capture a bite scan or data for the premium modeling service, it is required for the patient who has teeth that cannot be modeled from a CBCT scan due to restorations.

Recognize Patients Who Require a Supplemental Scan

Restorations that cause too much noise in the CBCT Scan:

- Metal crowns or bridges with metal:
- PVC (porcelain veneer crowns)
- PFM (porcelain fused to metal)
- Cantilever bridges
- Gold inlays, onlays, $\frac{3}{4}$ crowns
- Fillings 3mm or larger



Restorations that are not captured adequately by a CBCT Scan:

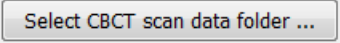
- Porcelain jacket crowns
- Composite fillings on critical anatomy, especially incisal edges and occlusal surface

Recognize minimum Data Requirements

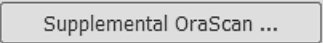
If there are multiple restorations to both the left and right sides of an arch, you may choose to scan the entire arch just as you would for a therapeutic scan. Otherwise scan the areas you identified for the supplemental scan according to these requirements:

- Capture the identified tooth AND the adjacent teeth for a minimum of three teeth
- Follow coverage/quality requirements for therapeutic scans

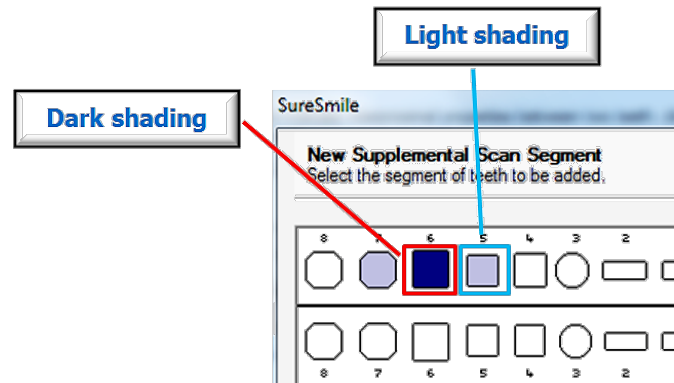
Import CBCT Data

1. Start a therapeutic CBCT invivo scan. If your volunteer is not a candidate for a supplemental scan, check the photos and x-rays in this patient record—notice which teeth require a supplemental scan.
2. Click  and browse to the appropriate folder to attach the data for this patient.

Add Supplemental Scan

1. Click  and click **Yes** to confirm that you want to start a scan. The **New Supplemental Scan Segment** dialog box opens.
2. Decide which arch or quadrant you want to work on first.
3. In the tooth diagram, click the teeth in that area that cannot be modeled from the CBCT data.

- Dark shading indicates the teeth that must be modeled from the supplemental scan.
- Light shading indicates the teeth that must be captured in your scan segment.



NOTE: A minimum of three teeth are required per scan segment to accurately register the segment to the CBCT data.

4. Click OK and capture the corresponding area.

Add a New Segment

1. Click  to open the **New Supplemental Scan Segment** dialog box again.
2. Repeat steps 2-4 from the previous section to capture the next area.

NOTE: Do NOT select the teeth you plan to scan. Instead, click the teeth that require modeling from the supplemental scan. SureSmile will provide helpful shading to indicate the area to capture.

Add a Bite Scan

Since CBCT users must separate the teeth for the therapeutic CBCT scan, the Digital Lab manually sets the bite according to the photos. For a more accurate representation of the patient's bite in the model, add a supplemental scan of the bite.

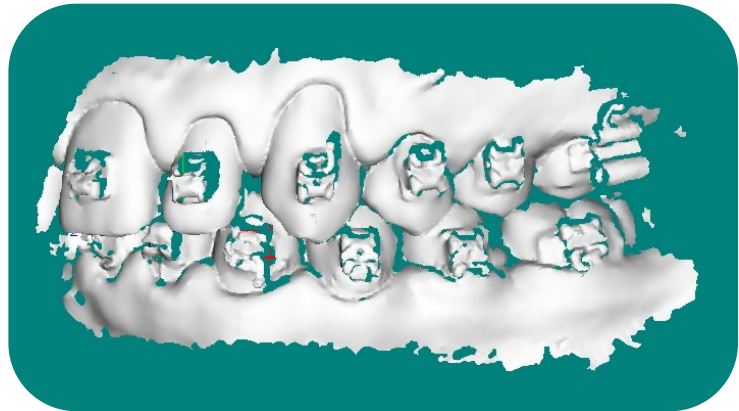
1. After you complete your supplemental segments, prepare the patient for a bite scan. You may need to apply SureWhite or an opaquer depending on where you have already scanned, but you do not need to re-coat an area.

2. Click  to open the **New Supplemental Scan Segment** dialog box again.

3. Click  to select the **Bite scan** option, and then click **OK**. A windowpane appears for this segment.

NOTE: Only one bite scan can be included per order. However, you can delete a bite scan and replace it.

4. Scan the bite following the proper technique:
 - Have the patient bite down in a natural position.
 - Scan across the bite in one motion, capturing at least five teeth on the upper and five teeth on the lower in occlusion.



5. **Finish Scan**

Apply Your Knowledge

Case Study 1

Practice adding a bite scan only and placing the order.

Please work independently to complete this case study:

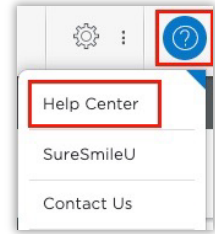
Case Study 2


1. Open a patient that contains a CBCT scan rejected for an incomplete supplemental scan.
2. The patient has been scheduled for the supplemental scan. (Please note that the prior supplemental scan cannot be reused and must be deleted.)
3. Resolve the rejection and place the order for a therapeutic model.

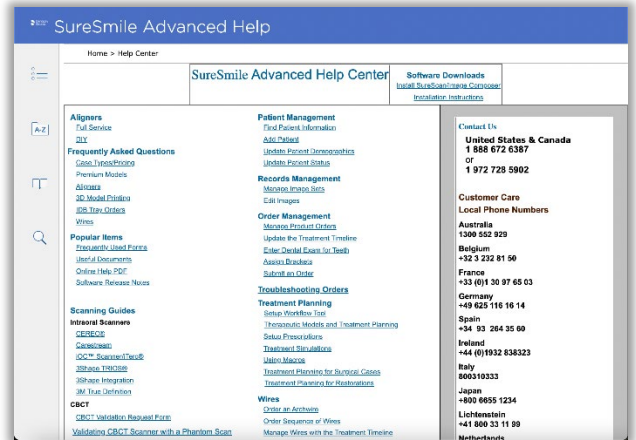
Learning Resources

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

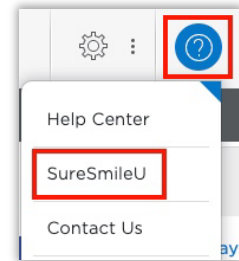



To open the Help Center, click the question mark  button and select **Help Center**.



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**.

