

Enhancements in SureSmile® October 2022 Release

User Enhancements in SureSmile® October Release

Important Note: After every SureSmile® Advanced & Ortho software update, we recommend clearing your browser cache to remove any remnants of the old version to optimize software performance. The steps to follow depend on the browser you are using, and are linked here for your convenience:

[🔗 Steps for Google Chrome](#)

[🔗 Steps for Mozilla Firefox](#)



[🔗 Steps for Apple Safari](#)



User Enhancements in SureSmile® October Release

- ✚ **SureSmile® Terminology:** Updates to various SureSmile® terms (*SureSmile® Ortho & SureSmile® Advanced*)
- ✚ **New Patient Creation:** Improvements to date of birth entry (*SureSmile® Ortho*)
- ✚ **Tasks Tab:** Improvements to clickable links (*SureSmile® Ortho & SureSmile® Advanced*)
- ✚ **Customer Holds:** Process to release customer holds streamlined (*SureSmile® Ortho & SureSmile® Advanced*)
- ✚ **Aligner Staging:** Improvements to scanned attachments (*SureSmile® Ortho & SureSmile® Advanced*)
- ✚ **Aligner Staging:** Automatic application of slits & buttons (*SureSmile® Ortho & SureSmile® Advanced*)
- ✚ **Shipments Tab:** Sort by Order Date by default (*SureSmile® Ortho & SureSmile® Advanced*)

SureSmile® Terminology: Updates to various SureSmile® terms

Previous Term	New Term
CBCT Premium option (\$) (<i>SureSmile® Ortho</i>)	Include CBCT data (\$) (<i>SureSmile® Ortho</i>)
Provide Information	Action Needed
Fixed	Do not move
Displacements	Tooth Movements
Gap/Intersection	Spacing/Intersection
Event Info	IPR/Attachments
Order Prints	Order 3D Prints
Patient Notes	Practice Internal Notes
MACROS (in Product Notes)	Prescription
Shipped Setup & Staging (<i>in Product Notes</i>)	Removed
Aligner Processing: Ship setup/ aligner. Opened the browser. (<i>in Product Notes</i>)	Removed
Aligner Processing: Finished scan and created setup. (<i>in Product Notes</i>)	Removed
Created setup stages Plan 1. (<i>in Product Notes</i>)	Removed
Eyeball Icon 	Clock Icon 

[See Appendix for additional information and screenshots](#)

Impacted: SureSmile® Ortho & Advanced

New Patient Creation: Improvements to date of birth entry

Impacted: SureSmile® Ortho

Start a new patient

PATIENT INFORMATION

New

Patient

1982-08-25

YYYY-MM-DD



Site

First Site

Doctor

Test Doctor

Staff

Case Selection Criteria

You can now type in the patient's date of birth when creating a new patient

You can still click on the calendar icon to display the calendar

Tasks Tab: Improvements to clickable links

Impacted: SureSmile® Ortho & Advanced

Tasks (13) Patients Shipments Jobs Reports ?

Sort by: Task Show Tasks of: All Types Tasks for: All Show: Active Tasks View

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>	<input checked="" type="radio"/>			Q5H7		Initial Model	Provide information	09-07-2021	Rejected Scan Data	09-27-2021	Active	
<input type="checkbox"/>	<input checked="" type="radio"/>			V5V7		Initial Model	Provide information	09-07-2021			Active	
<input type="checkbox"/>	<input checked="" type="radio"/>			A6R4		Initial Model	Resolve hold	08-30-2021			Active	
<input type="checkbox"/>	<input checked="" type="radio"/>			B4Z8		Initial Model	Resolve hold	08-30-2021			Active	
<input type="checkbox"/>	<input checked="" type="radio"/>			M8J2		Initial Model	Resolve hold	08-30-2021			Active	
<input type="checkbox"/>	<input checked="" type="radio"/>			O5U2		Initial Model	Resolve hold	08-30-2021			Active	
<input type="checkbox"/>	<input checked="" type="radio"/>			U3L7		Initial Model	Resolve hold	08-30-2021			Active	
<input type="checkbox"/>	<input checked="" type="radio"/>			U6E7		Initial Model	Upload scan data	06-13-2022		07-04-2022	Active	
<input type="checkbox"/>	<input checked="" type="radio"/>			B6T8		Refinement Model	Upload scan data	07-06-2022	Refinement	08-30-2021	Active	

Customer Holds: Process to release customer holds streamlined

Impacted: SureSmile® Ortho & Advanced

Initial Model
On hold 08-30-2021

Setup Approval Date
Estimated 09-27-2021

Treatment Start
Completed 08-30-2021

Treatment Completion
Estimated 02-06-2022

Customer Hold! See particular items.

Julie Turner
17. June 1959 (63), U3L7, Active
1 year, 23 days

Edit Reports Exports Order Prints Demo Copy

Customer Holds Initial Model

Please resolve the following holds (3):
2021-09-07 17:47:31 UTC

Image set is missing or too old: Provide recent photos
Please provide a recent set of photographs.
Please provide additional information...
Resolve Release Item

Image set is missing or too old: Provide recent Pano
Please provide a recent Panoramic x-ray
Please provide additional information...
Resolve

Dental Exam Incomplete
Please complete the Dental Exam. Mark all teeth that are missing, unerupted or present as shown.
Please provide additional information...
Resolve

Dental Examination & Prescription

Dental Examination

- To be Extracted:
- Do not move:
- Missing:
- Arches to Treat Both
- Attachments Don't allow
- IPR Allow
- Elastics Allow
- Ideal Treatment
- Midline: Independent
- Class correction: Molar right Class I
- Class correction: Molar left Class I
- Class correction: Canine right Class I
- Class correction: Canine left Class I

Hold links have been removed; click the Resolve button to resolve the hold item

'Edit' button renamed to 'Resolve'

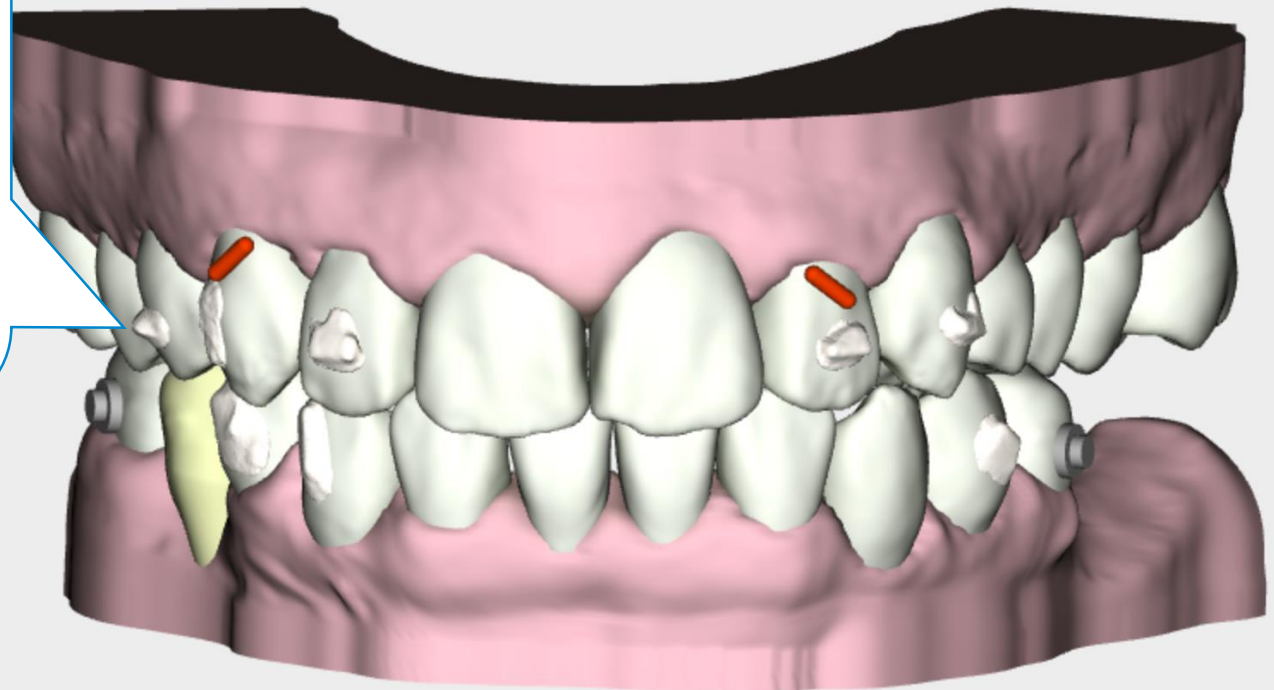
For image holds, you will be taken to the Upload Images page you see when submitting a case instead of the Image Sets page

'Resolve Item' button renamed to 'Release Item' when multiple holds are present or 'Release Hold' if only one item or last item to be resolved.

Aligner Staging: Improvements to scanned attachments

Impacted: SureSmile® Ortho & Advanced

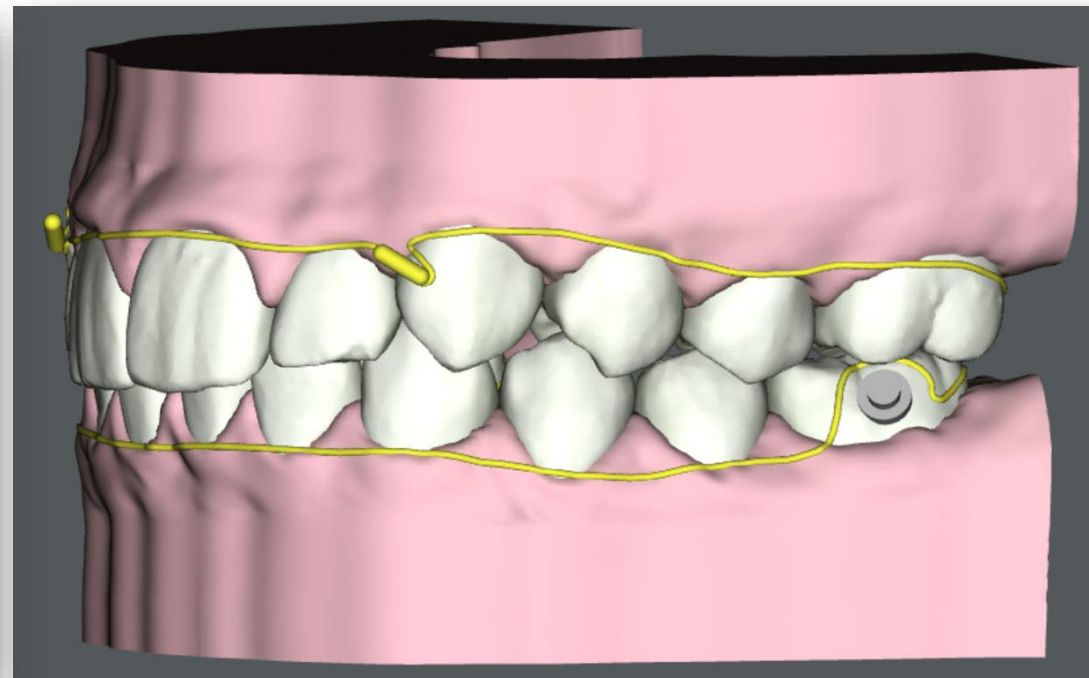
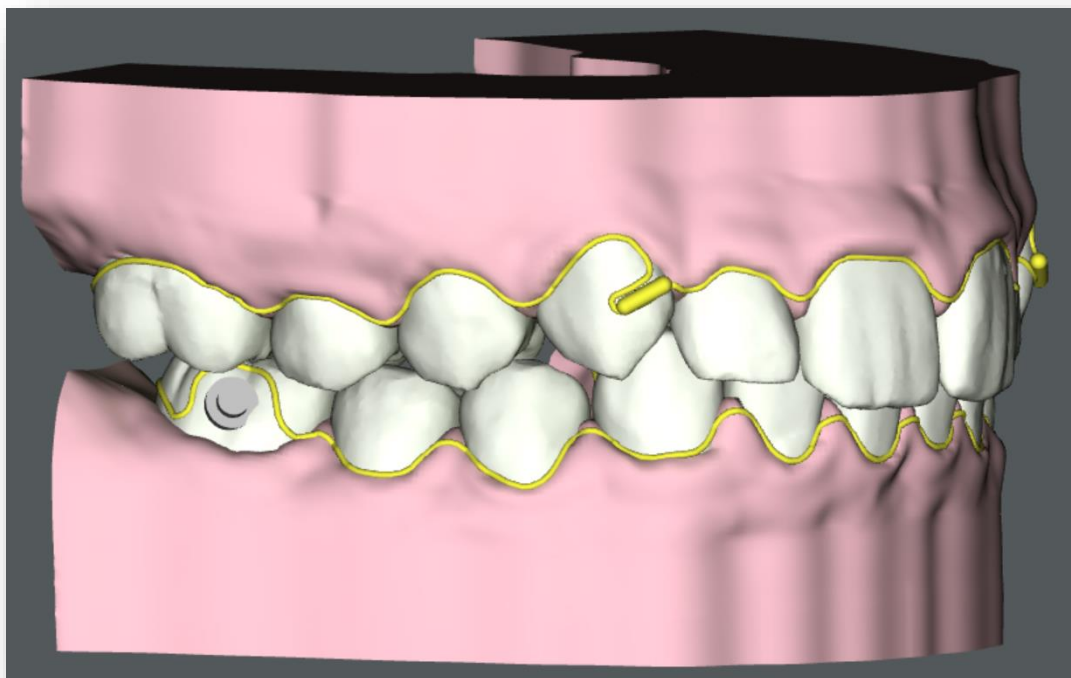
When scanned attachments on the model are processed in the Digital Lab, the system recognizes the flash as part of the attachment, highlighting it red when it gets too close to the gingiva. With this enhancement, the scanned attachments will no longer turn red, and flash recognition has been improved so that less flash will be present on the model.



Aligner Staging: Automatic application of slits & buttons

Impacted: SureSmile® Ortho & Advanced

Slits and buttons are now placed automatically in cases where Class elastics were applied. This includes Full-service and DIY Aligner cases. For other elastics, the slits and buttons will still need to be manually applied.



Shipments Tab: Sort by Order Date by default

Impacted: SureSmile® Ortho & Advanced

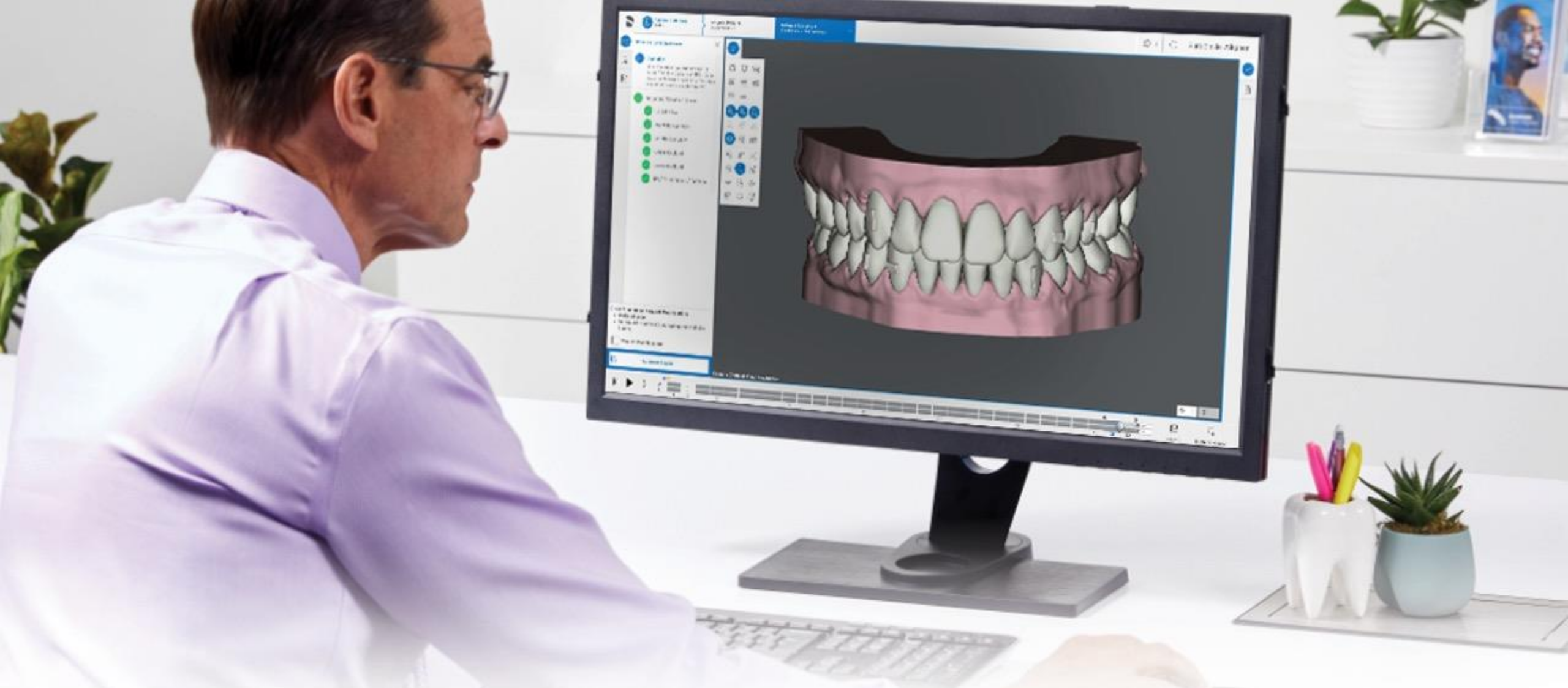
Tasks Patients **Shipments** Jobs DS CEREC Orders Reports

Show All Shipment... Of All Types For All

Ortho(1) Enter tracking # or product ID to receive... Receive

Last Name	First Name	Patient ID	Product ID	Product Name	Order Date	Shipped Date	Receive Date	Receive By	Site
		C4H5	05956467	Aligners for [Staged Models 1] 1	08-09-2022	08-11-2022			
		X3R8	05956480	Aligners for [Staged Models 1] 1	08-09-2022	08-11-2022			
		S7U6	05901965	Aligners for [Staged Models 1] 1	07-25-2022	07-26-2022			
		V7X5	05868363	Aligners for [Staged Models 2] 1	07-15-2022	07-18-2022			
		M5A6	05793070	Aligners for [Staged Models 1] 1	06-24-2022	06-25-2022			
		E4X2	05782824	Aligners for [Staged Models 1] 1	06-22-2022	06-23-2022			
		U3D3	05670460	Aligners for [Staged Models 1] 4	05-23-2022	05-24-2022	08-23-2022	Automatic	Ortho(1)

The Shipments tab is now sorted by default with the most recent Order date on top



Appendix: SureSmile[®] Terminology Updates

Provide Information

Existing Term: Provide Information
New Term: Action Needed

Description: Case status
Platform(s) affected: Aligner, Ortho, Advanced

Tasks page overview

Flag	Card name	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>		Moss	Cindy	G7W6		Therapeutic Model 1 (wit...	Provide Information	09-07-2021	Rejected Scan Data	09-27-2021	Completed	

Preferences > Appearance

Tasks sorting dropdown “Show Tasks of”

Sort by	Show Tasks of	Tasks for	Show
Task	Provide Infor...	All	All Tasks

- All Types
- Provide Information
- Review Order
- Submit Order
- Create Order
- Reminder

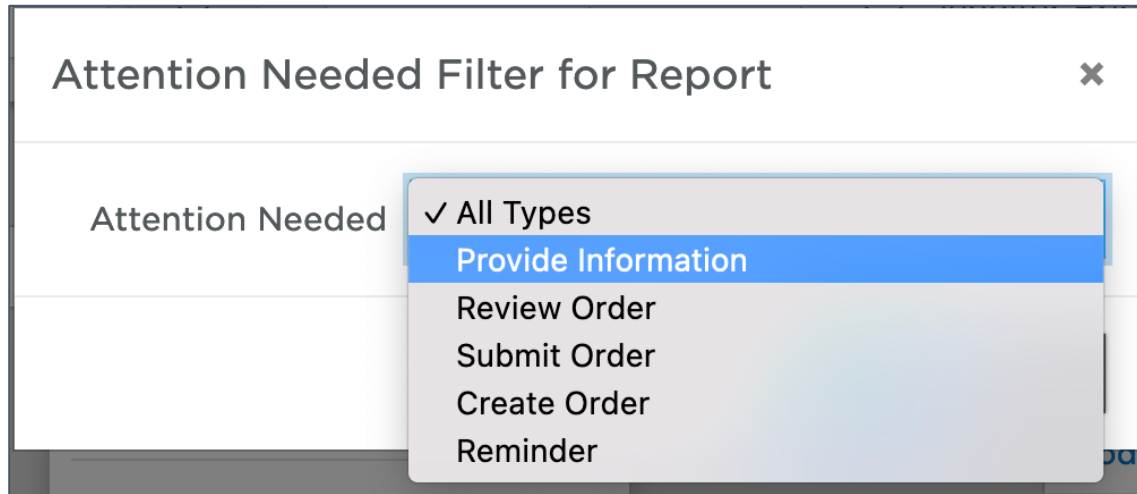
Setting	Value
Default Tasks Sorting	Task
Default Task User Filter	
Default Task Type Filter	<ul style="list-style-type: none"> ✓ All Types Provide Information Review Order Submit Order Create Order Reminder
Default Task Status Filter	
Display Patients as	

Provide Information Continued

Existing Term: Provide Information
New Term: Action Needed

Description: Case status
Platform(s) affected: Aligner, Ortho, Advanced

🔗 Reports



Attention Needed Report suresmile®

September 12, 2022 6:31 PM

provide_info Items needing attention - 6

Patient ID	Patient Name	Items	State	Item Date
B5I7		Provide information	OrderRejected	05-05-2022
C3Q8		Provide information	OrderRejected	05-05-2022
N3D4		Provide information	OrderRejected	04-15-2022
P7E7		Provide information	OrderRejected	09-15-2021
T2Z8		Provide information	OrderRejected	05-05-2022
U3L7		Resolve hold	InProduction	08-30-2021

CBCT Premium Option

Existing Term: CBCT Premium Option (\$)
New Term: Include CBCT data (\$)

Description: Upload Scan Data page in case order
Platform(s) affected: Aligner, Ortho

🔗 Upload Scan Data page

Upload Scan Data

Choose files to upload
or drag and drop them here.

CBCT premium option (\$)

Upper Arch
Upper_Arch.STL

Lower Arch
Lower_Arch.STL

🔗 Payment page

Patient Info Scan Data Photos / X-rays Dental Exam Prescription **6** Payment

Payment

Select payment method

- Charge this card **visa ending 4242** [use new card](#)

Your order

Ordering this Therapeutic Model 3 (with supplemental) as part of this Full-service Aligner Staging package will incur a one-time charge of [redacted] (including **premium** charge [redacted]). Charges are incurred immediately.

Fixed

Existing Term: Fixed
New Term: Do not move

🔗 Dental Exam page (Aligner only)

Dental Examination
Please indicate which teeth cannot be moved, are missing or will be extracted.

Records

- Upper Occlusal
- Lower Occlusal
- Panorex

Description: Dental Exam in case order
Platform(s) affected: Aligner, Ortho, Advanced

🔗 Patient Overview page (Aligner only)

Therapeutic Model 1
Not ordered 09-12-2022

Setup Approval
Estimated 10-03-2022

Dental Examination & Prescription	Image Sets
Dental Examination <ul style="list-style-type: none">• To be Extracted:• Fixed: UL7• Missing: UR8, UL8, LR8, LL8	Prescription Form <ul style="list-style-type: none">• Treat Arches Both• Arch Range Full Arch• Attachments Allow<ul style="list-style-type: none">- Don't keep placed attachments• IPR Don't allow• Elastics Don't allow

Fixed Continued

Existing Term: Fixed
New Term: Do not move

Description: Dental Exam in case order
Platform(s) affected: Aligner, Ortho, Advanced

Product Overview Prescription (Aligner only)

Prescription

Dental Examination

- To be Extracted:
- Fixed:**
- Missing: UR8, UL8, LR8, LL8

Displacements tab (Aligner, Ortho, Advanced)

Displacements	Elastics	Measurements	IPR Tracking													
	UR8	UR7	UR6	UR5	UR4	UR3	UR2	UR1	UL1	UL2	UL3	UL4	UL5	UL6	UL7	UL8
Stage 22																
mesial (+) / distal (-)	0.4	0.3	0.6	0.4	0.3	0.5	-0.2	-0.4			0.2	-0.2				0.3
buccal (+) / lingual (-)				0.5	0.3	0.8	0.7	0.4	0.1	0.2	0.1		0.3			
occlusal (+) / gingival (-)						0.6		0.4		0.5	0.1	0.1				
Torque facial (+) / lingual (-)		-2		2		9	3	10	11	3	7	5	10	2	-2	
Ang. mesial (+) / distal (-)		5	-3		4	-1	7	6	5	6		9				
Rot. mesial (+) / distal (-)				-6				12	12	-5			-5			
Gap (+) / Intersection (-)																
	Fixed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cumulative: Cumulative Incremental

Displacements

Existing Term: Displacements
 New Term: Tooth Movements

Description: tooth movement table in treatment planning
 Platform(s) affected: Aligner, Ortho, Advanced

☰ Tab in Tooth Movement pop-up in Aligner / tab in treatment planning workspace in Ortho / Advanced

Stage 33	UR8	UR7	UR6	UR5	UR4	UR3	UR2	UR1	UL1	UL2	UL3	UL4	UL5	UL6	UL7	UL8
mesial (+) / distal (-)		-0.6	-0.2	-0.4	-0.4	-0.3		0.1	0.1	0.7	0.8	0.5	0.5	0.6	0.2	
buccal (+) / lingual (-)		-0.1	1.1	1.2	0.6	-0.2	1.8	1.5	1.9	2.0	1.2	0.9	1.4	1.4	0.7	
occlusal (+) / gingival (-)		0.5	0.1						-0.5	0.4	1.1	0.2	0.1	0.2	0.3	
Torque facial (+) / lingual (-)		-13	-3	-1	7		6	-1		-3	-1	-12	-12	-6	-9	
Ang. mesial (+) / distal (-)			-2		-2	-6			3					-2	6	
Rot. mesial (+) / distal (-)			-5	5	7	28	-20	-16	2	6	30	9	9			
Gap (+) / Intersection (-)																
Fixed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cumulative: Cumulative Incremental

☰ Request Modifications Information Pop-up

Edit Mode ✕

Edit Mode allows you to:

- Send notes to the Digital Lab to request modifications
- Manually edit the values in the **Displacements** table (in Tooth Movement)
- Make adjustments to the 3D model by clicking on the tooth to be modified (from R stage only)
- If you leave Edit Mode all modifications made will be removed

Do not show this message again

OK

Gap / Intersection

Existing Term: Gap / Intersection
 New Term: Spacing / Intersection

Description: row in Displacements where spacing and intersections are shown
 Platform(s) affected: Aligner, Ortho, Advanced

☰ Tab in Tooth Movement pop-up in Aligner / tab in treatment planning workspace in Ortho / Advanced

Displacements	Elastics	Measurements															
	Stage 33	UR8	UR7	UR6	UR5	UR4	UR3	UR2	UR1	UL1	UL2	UL3	UL4	UL5	UL6	UL7	UL8
	mesial (+) / distal (-)		-0.6	-0.2	-0.4	-0.4	-0.3		0.1	0.1	0.7	0.8	0.5	0.5	0.6	0.2	
	buccal (+) / lingual (-)		-0.1	1.1	1.2	0.6	-0.2	1.8	1.5	1.9	2.0	1.2	0.9	1.4	1.4	0.7	
	occlusal (+) / gingival (-)		0.5	0.1						-0.5	0.4	1.1	0.2	0.1	0.2	0.3	
	Torque facial (+) / lingual (-)		-13	-3	-1	7		6	-1		-3	-1	-12	-12	-6	-9	
	Ang. mesial (+) / distal (-)			-2		-2	-6			3					-2	6	
	Rot. mesial (+) / distal (-)			-5	5	7	28	-20	-16	2	6	30	9	9			
	Gap (+) / Intersection (-)																
	Fixed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Cumulative: Cumulative Incremental

Event Info

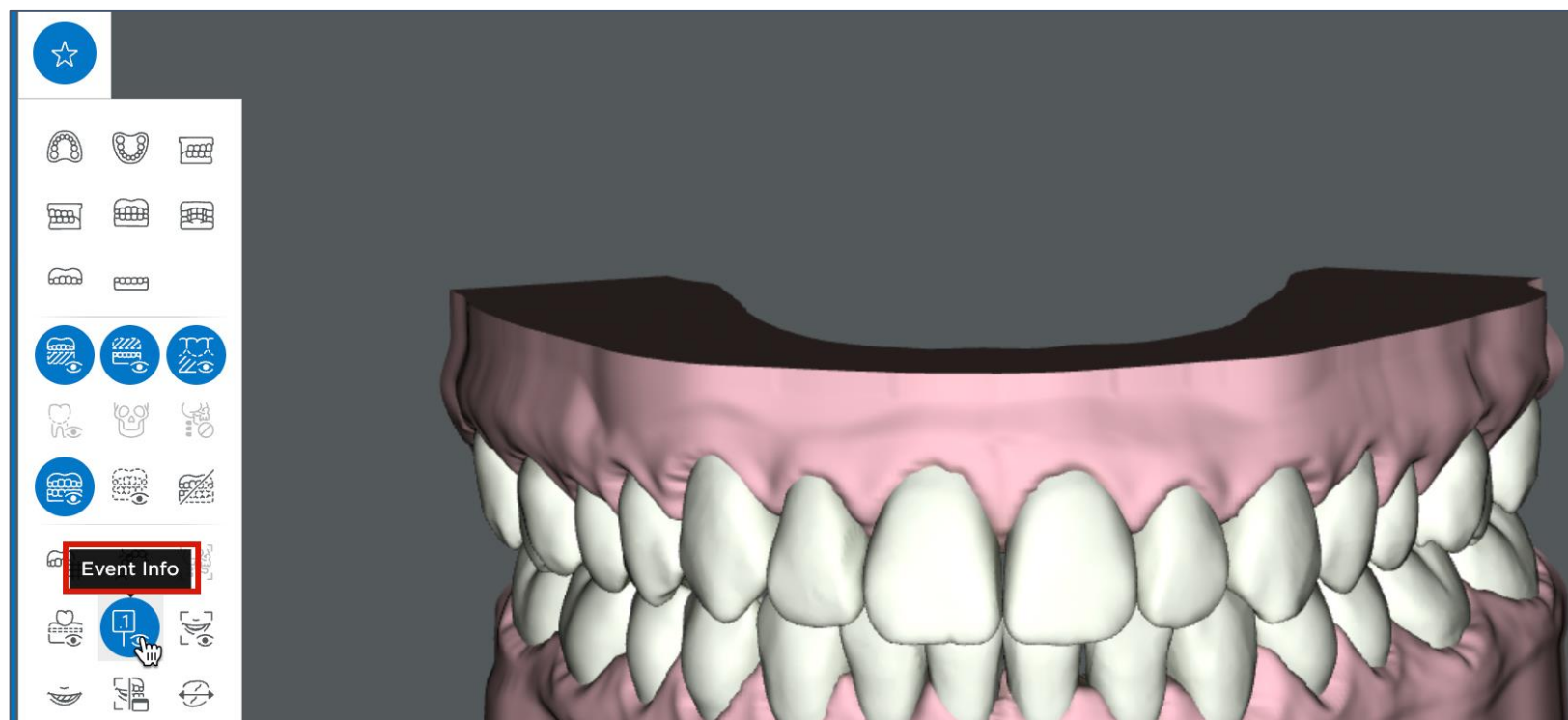
Existing Term: Event Info

New Term: IPR / Attachments

Description: tool to see IPR & Attachment labels

Platform(s) affected: Aligner, Ortho, Advanced

 Favorites palette

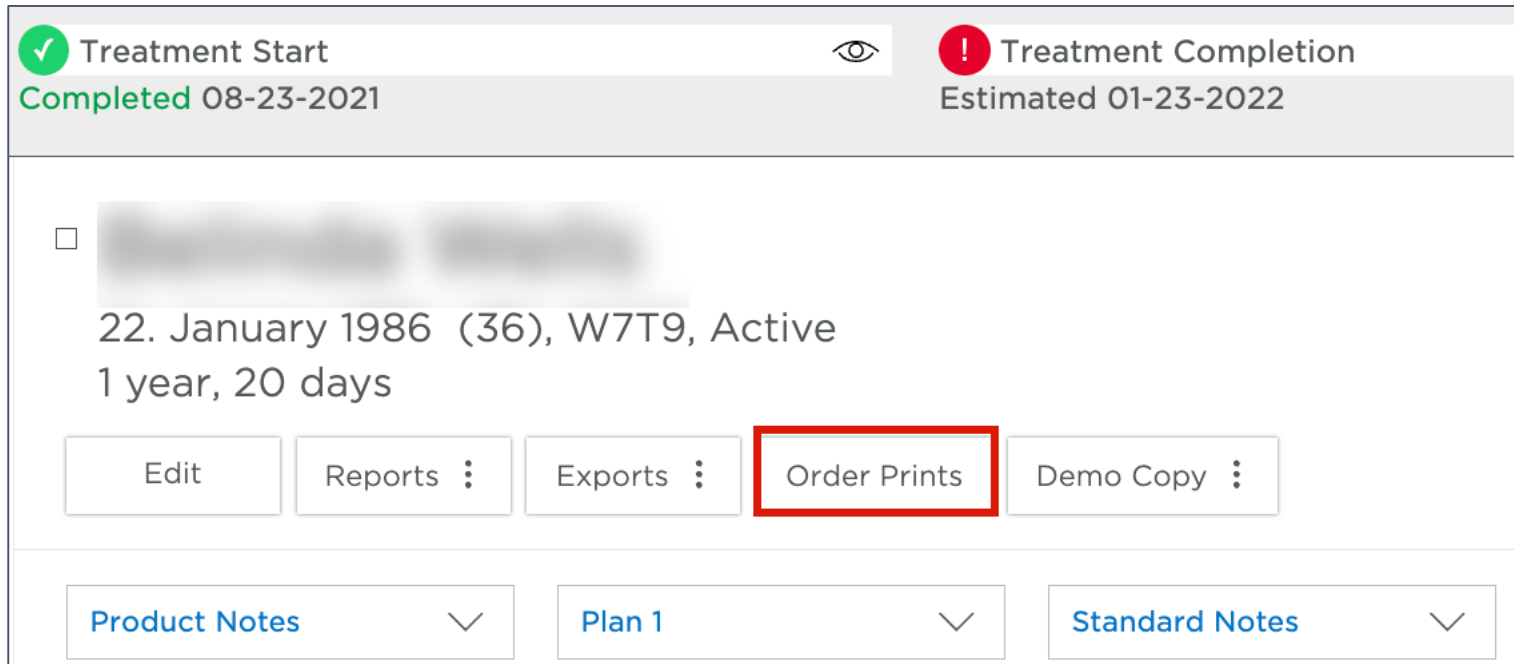


Order Prints

Existing Term: Order Prints
New Term: Order 3D Prints

Description: button on Patient Overview
where 3D printed models are ordered
Platform(s) affected: Aligner, Ortho, Advanced

 Patient Overview page

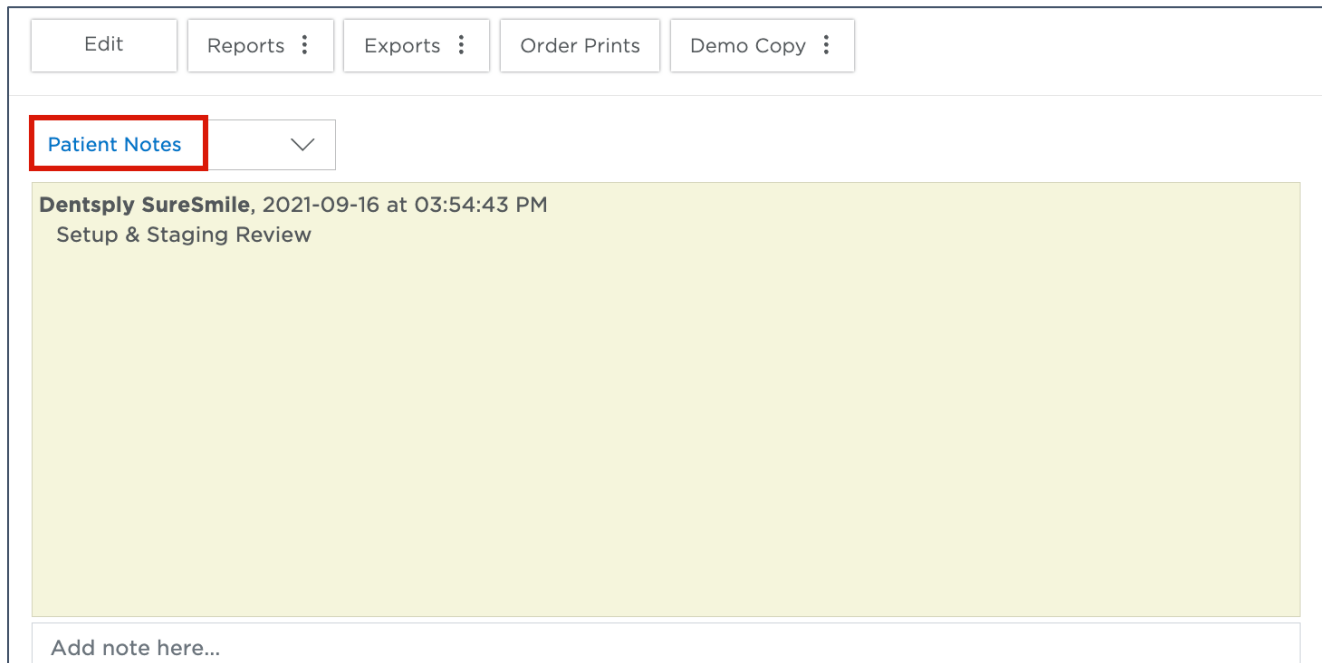


The screenshot displays a patient's treatment overview. At the top, there are two status indicators: a green checkmark for 'Treatment Start' (Completed 08-23-2021) and a red exclamation mark for 'Treatment Completion' (Estimated 01-23-2022). Below this, a patient's name is blurred. The patient's details are listed as '22. January 1986 (36), W7T9, Active' with a duration of '1 year, 20 days'. A row of action buttons is shown: 'Edit', 'Reports' (with a vertical ellipsis), 'Exports' (with a vertical ellipsis), 'Order Prints' (highlighted with a red border), and 'Demo Copy' (with a vertical ellipsis). At the bottom, there are three dropdown menus: 'Product Notes', 'Plan 1', and 'Standard Notes'.

Patient Notes

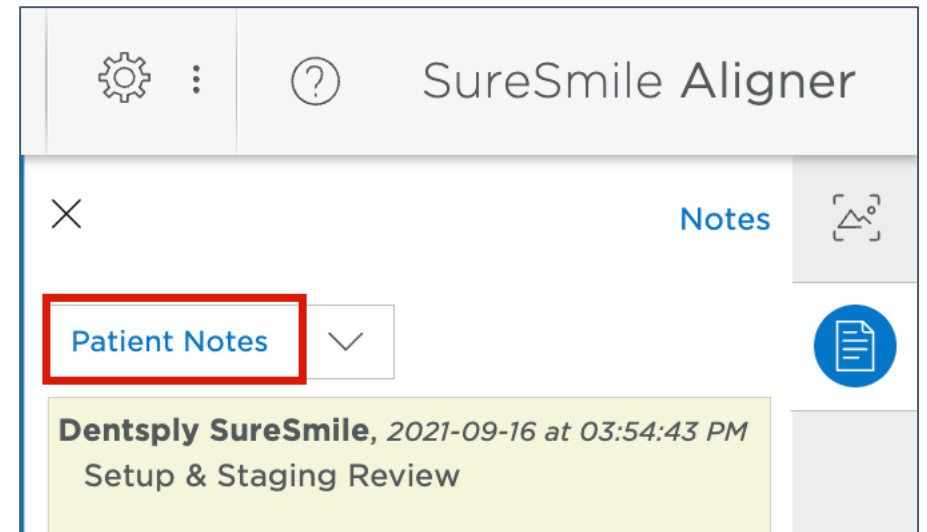
Existing Term: Patient Notes
New Term: Practice Internal Notes

 Patient Overview page



Description: notes section meant for the practice only (not for DL communication)
Platform(s) affected: Aligner, Ortho, Advanced

 Product page (Treatment Planning Workspace)

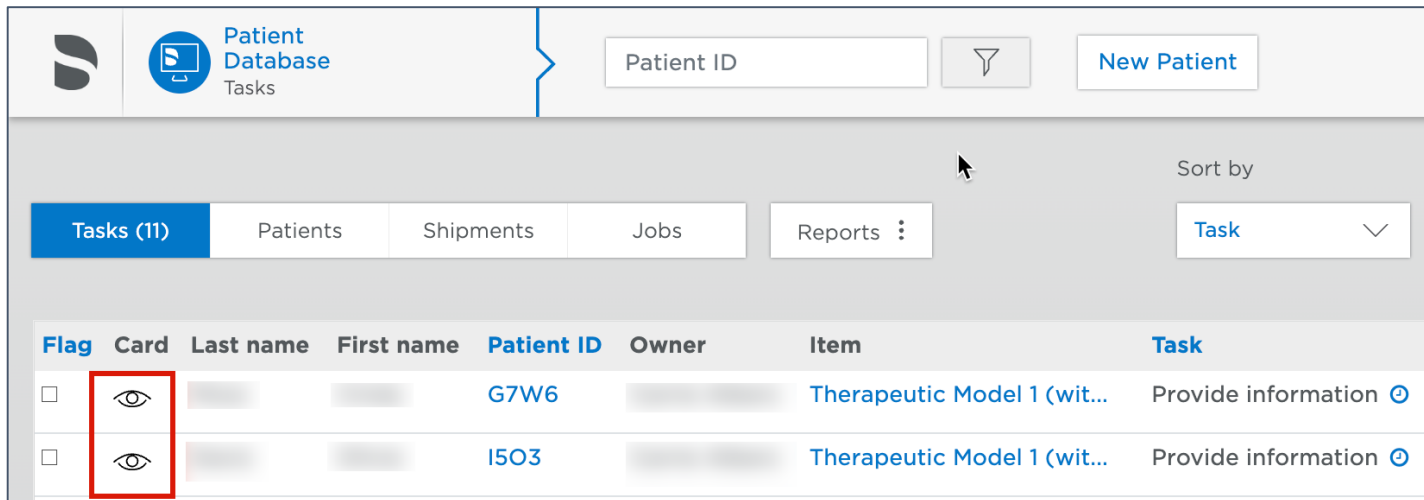


Timeline (Eyeball) Icon





Existing: Eyeball icon 
New: Clock icon 

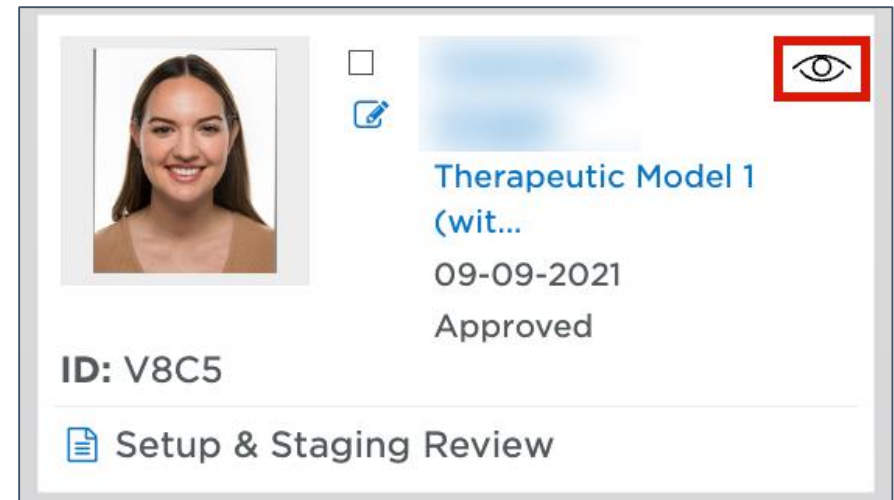
Description: icon to open the timeline from the Tasks/Patients tabs
Platform(s) affected: Aligner, Ortho, Advanced

 Patient Card on Tasks and Patients tabs



The screenshot shows the 'Patient Database Tasks' interface. At the top, there is a search bar for 'Patient ID' and a 'New Patient' button. Below this is a navigation bar with tabs for 'Tasks (11)', 'Patients', 'Shipments', 'Jobs', and 'Reports'. A 'Sort by' dropdown is set to 'Task'. The main table has columns: Flag, Card, Last name, First name, Patient ID, Owner, Item, and Task. Two rows are visible, both with an eyeball icon in the 'Card' column, which is highlighted with a red box.

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task
<input type="checkbox"/>				G7W6		Therapeutic Model 1 (wit...	Provide information 
<input type="checkbox"/>				I5O3		Therapeutic Model 1 (wit...	Provide information 



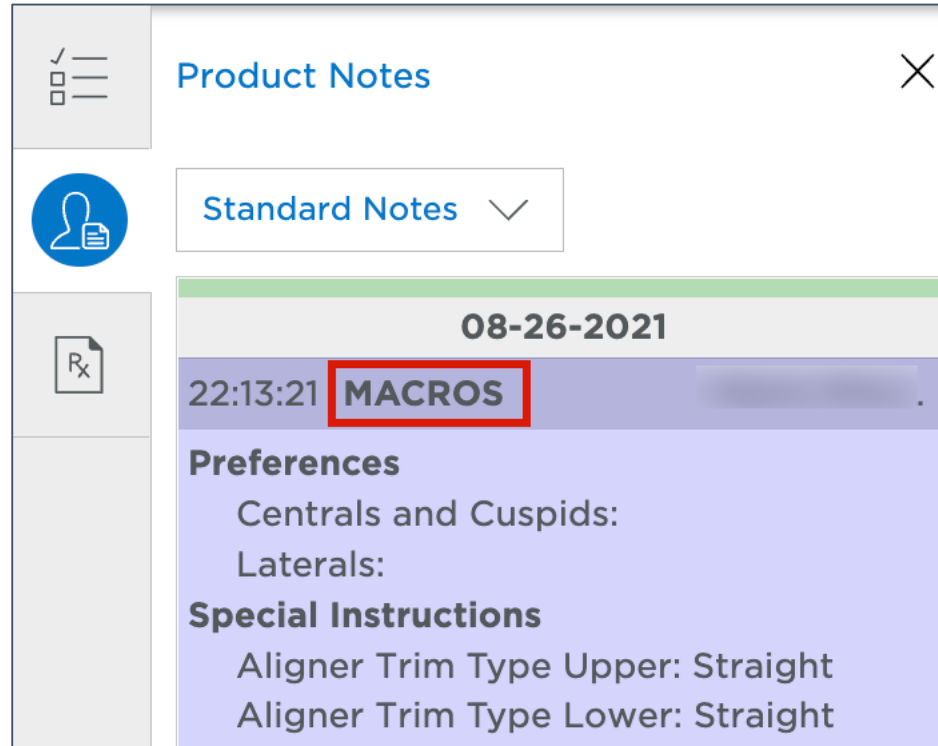
The screenshot shows a 'Patient Card' for a patient. It includes a photo of a woman, a checkbox, a pencil icon, and a blurred area. The text reads: 'Therapeutic Model 1 (wit...', '09-09-2021', 'Approved', 'ID: V8C5', and 'Setup & Staging Review'. An eyeball icon in the top right corner is highlighted with a red box.

MACROS

Existing Term: MACROS
New Term: Prescription

Description: Appears in Product Notes
Platform(s) affected: Aligner, Ortho, Advanced

 Product Notes



The screenshot shows a 'Product Notes' window with a sidebar on the left containing icons for a checklist, a person with a document, and a prescription symbol (Rx). The main area is titled 'Product Notes' and has a close button (X). Below the title is a dropdown menu set to 'Standard Notes'. A date separator '08-26-2021' is displayed above a list of notes. The first note is timestamped '22:13:21' and contains the word 'MACROS', which is highlighted with a red rectangular box. Below the notes, there are sections for 'Preferences' (listing 'Centrals and Cuspids:' and 'Laterals:') and 'Special Instructions' (listing 'Aligner Trim Type Upper: Straight' and 'Aligner Trim Type Lower: Straight').



Shipped Setup & Staging 1



Existing Term: Shipped Setup & Staging 1
New Term: NA – Remove term


Description: Appears in Product Notes
Platform(s) affected: Aligner, Ortho, Advanced

 Product Notes

08-27-2021	
15:37:59	Modification in Work
	Shipped Setup & Staging 1
15:34:42	Delivered
	Dr.,

 **Product Notes** 

 Standard Notes 

 Aligners for [Setup & Staging 1] 1 were ordered

08-27-2021

15:37:59 **Modification in Work**

Shipped Setup & Staging 1

15:34:42 **Delivered**

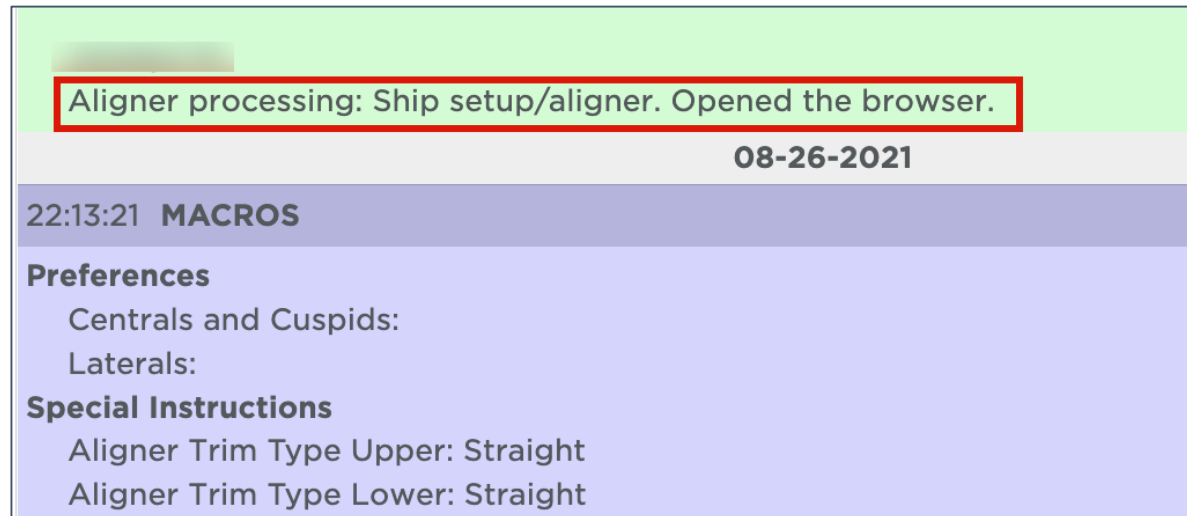
Dr.,

Aligner Processing: Ship setup/aligner. Opened the browser.

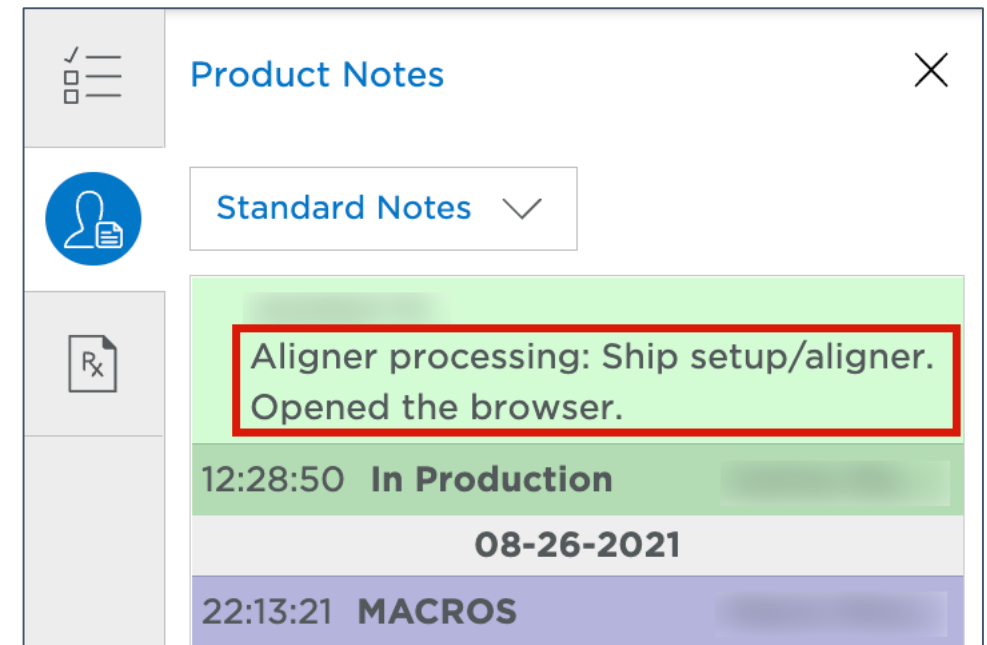
Existing Term: Aligner Processing: Ship setup/aligner. Opened the browser.
New Term: NA – Remove term

Description: Appears in Product Notes
Platform(s) affected: Aligner, Ortho, Advanced

 Product Notes



A screenshot of the Product Notes interface. At the top, there is a green header bar with a blurred name. Below it, a text entry "Aligner processing: Ship setup/aligner. Opened the browser." is highlighted with a red rectangular box. Underneath the text is a grey bar containing the date "08-26-2021". Below the date is a purple bar with the time "22:13:21" and the label "MACROS". The main content area is light blue and contains sections for "Preferences" (Centrals and Cuspids, Laterals) and "Special Instructions" (Aligner Trim Type Upper: Straight, Aligner Trim Type Lower: Straight).



A screenshot of the Product Notes interface showing navigation options. On the left, there is a vertical sidebar with icons for a checklist, a person with a document, and a document with "Rx". The main area has a title "Product Notes" with a close button (X) in the top right. Below the title is a dropdown menu set to "Standard Notes". The main content area shows a green header bar with a blurred name, followed by a text entry "Aligner processing: Ship setup/aligner. Opened the browser." highlighted with a red rectangular box. Below the text is a grey bar with the date "08-26-2021". At the bottom, there is a purple bar with the time "22:13:21" and the label "MACROS".

Aligner Processing: Finished scan and created setup

Existing Term: Aligner Processing: Finished scan and created setup.

New Term: NA – Remove term

Description: Appears in Product Notes
Platform(s) affected: Aligner, Ortho, Advanced


 Product Notes


22:13:21 **Trim Line Settings**

Upper Aligner Trim Type: Straight, 1.0mm
Lower Aligner Trim Type: Straight, 1.0mm
Upper Attachment Template Trim Type: Straight, 1.0mm
Lower Attachment Template Trim Type: Straight, 1.0mm


22:13:19 **Submitted**

Aligner processing: Finished scan and created setup.

 Product Notes ✕

 Standard Notes

Lower: Yes

 22:13:21 **Trim Line Settings**

Upper Aligner Trim Type: Straight, 1.0mm
Lower Aligner Trim Type: Straight, 1.0mm
Upper Attachment Template Trim Type: Straight, 1.0mm
Lower Attachment Template Trim Type: Straight, 1.0mm

22:13:19 **Submitted**

Aligner processing: Finished scan and created setup.

Created setup stages Plan 1 [1.1 DL]

Existing Term: Created setup stages Plan 1 [1.1 DL]

New Term: NA – Remove term

Description: Appears in Product Notes

Platform(s) affected: Aligner, Ortho, Advanced

 Product Notes

08-25-2021	
16:20:24	Changes in DL #1
Review Data Applied	
	Created setup stages Plan 1 [1.1 DL]
15:50:52	In Production #1
15:50:52	Trim Line Settings

Product Notes	
Standard Notes	
16:20:24	Changes in DL #1
Review Data Applied	
	Created setup stages Plan 1 [1.1 DL]
16:20:21	In Production #1
15:50:52	In Production #1
15:50:52	Trim Line Settings

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