



**CLEAR BLUE SMILES™**

**Suresmile® Aligner**

**#2 CONSULTATION PROCESS**

# Appointment #1

## OVERVIEW

Review diagnosis and treatment plan.

Adjust the digital setup as needed for effective and efficient treatment.

Submit digital setup to the lab to embed the changes.

## PREPARATION

Review handout:  
#1 Ordering Case Type

Review handout:  
#2 Consultation Process

## APPOINTMENT

Appointment time commitment: 30-45 minutes

Will schedule call #2 at the end of this appointment.

# Appointment #1

## STEP 1

Review diagnosis.

## STEP 2

Review treatment plan.

**Digital Setup Evaluation:**

1. Smile Design
2. Occlusal Plane
3. Tooth Adjustments
4. Finalize Occlusion

## STEP 3

Review orthodontic and restorative callouts.

## STEP 4

Review “Rule of 3’s” Calculation:

**Estimation of:**

1. Treatment time
2. Treatment cost
3. Dispensing protocol

# Patient Consult

*A clear, concise 4-step consultation process will provide all the pertinent information needed to provide the Patient with an effective and efficient consultation. This instills confidence in the Doctor translating to a clear pathway for greater case acceptance leading to practice growth.*

*Step 1: Review Tx time*

*Step 2: Review IPR, attachments, SHO, and THO using Staged Models*

*Step 3: Review Orthodontic and Restorative Callouts.*

*Step 4: Review Tx costs and Sign Paperwork*

- Clear Aligner Contract
- Orthodontic Informed Consent
- Clear Aligner Patient Partnership Agreement



**CLEAR BLUE SMILES™**

# **Step 1: Review Diagnosis**

# Step 1: Review Diagnosis

Discussion of the orthodontic diagnosis including crowding, spacing, overjet, overbite and occlusion. Utilize the therapeutic model checklist to aid in diagnostic review.



**CLEAR BLUE SMILES™**

# **Review Therapeutic Model Checklist**

# 1. Login into SureSmile®

Dentsply Sirona

SureSmile®

Log in with your account details

Email address

Password

Login

[Forgot your password?](#)

[Looking to add a new user to your account?](#)

New to SureSmile®?  
Click here to create an account

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# 2. Select Review setup and staged models

AuraSmile Dental

Patient ID

Dr. Brian Gaudreault  
AuraSmile Dental

SureSmile Aligner

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

View:  List  Grid

Tasks (4) | Patients | Shipments | Jobs | DS CEREC Orders | Reports | Active Tasks

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>		Walker	Shekeda	O3P3	Douglas W. Voiers, DDS		Order Retainers	2022-07-04		2022-06-16	Active	
<input checked="" type="checkbox"/>		Dillon	Sanders	H5Y4	Douglas W. Voiers, DDS		Review setup & staged models	2022-06-30		2022-07-27	Active	
<input type="checkbox"/>		Wayne	Renee	V9T8	Douglas W. Voiers, DDS		Review setup & staged models	2022-06-30		2022-07-20	Active	
<input type="checkbox"/>		Miller	Jeff	G6M8	Douglas W. Voiers, DDS		Review setup & staged models	2022-07-01		2022-07-21	Active	

# Setup and Staging Opens

The screenshot displays the SureSmile Aligner software interface. At the top, the patient information includes 'Patient Database Tasks', 'Evelyn Fey (K3E8)', and 'Setup & Staging 1 (Approved / Approved)'. The main area shows a 3D model of a patient's teeth in a patient view. The interface includes a navigation bar on the left with icons for home, patient, and prescriptions. The bottom bar features camera navigation controls, a timeline with markers at 1, 15, 20, 25, and 28, and buttons for 'Legend', 'Treatment Details', and 'Get report'.

# 3. Toggle to Initial Model

The screenshot displays the SureSmile Aligner software interface. At the top, the patient information is shown: "Patient Database Tasks", "Evelyn Fey (K3E8)", and "Setup & Staging 1 (Approved / Approved)". A dropdown menu is open, showing "Initial Model (Approved)" and "Setup & Staging 1 (Approved / Approved)". A red arrow points from the "Initial Model" option to the 3D dental model. The model shows a patient's teeth with a pink aligner tray. A blue circle highlights the central incisors, and a red arrow points to the "Initial Model" option in the dropdown menu. The interface includes a navigation bar at the bottom with icons for back, play, forward, and a timeline from 1 to 28. The text "Camera (Patient View) Navigation" is visible in the bottom left corner. The bottom right corner contains "Legend", "Treatment Details", and "Get report" buttons.

# Initial Model Opens

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name 'Evelyn Fey (K3E8)' is shown, along with the 'Initial Model (Files (PLY/STL), Approved)' status. The main workspace features a 3D model of the patient's teeth in a patient view. To the left, a 'Checklist and Overview' sidebar lists various tasks such as 'Overview', 'Ceph Review', 'Facial Smile', '2D/3D Alignment', and 'Upper Anatomy'. To the right, an 'Image Assets' panel shows two photographs of the patient: a frontal view and a profile view. The interface includes navigation icons and a 'Camera (Patient View) Navigation' label at the bottom of the 3D model area.

# 4. Select Overview

The screenshot displays the 'Checklist and Overview' window of the Clear Blue Smiles software. On the left, a vertical menu lists various checklist items, with 'Overview' highlighted and a red arrow pointing to it. The central area features a 3D model of a patient's teeth. On the right, the 'Image Assets' window shows two photographs of the patient: a frontal smile and a profile view.

**Checklist and Overview**

- Overview (Read the Notes from the Digital Lab.)
- Ceph Review
- Facial Smile
- 2D/3D Alignment
- Bite - Right Buccal
- Upper, Lower - Midline
- Bite - Left Buccal
- Upper Anatomy
- Upper - Feature Points
- Lower Anatomy
- Lower - Feature Points
- Summary

**Image Assets**

Camera (Patient View) Navigation

# Review Digital Lab Notes

The screenshot displays a digital lab interface with three main sections:

- Product Notes (Left Panel):** A sidebar containing a list of notes. A red arrow points to the "All Notes" dropdown menu. The notes are organized by date:
  - 2022-08-31:**
    - 05:54:00 **Finished by** Lisette Hitt
    - OraMetrix #1**
  - 2022-08-30:**
    - 18:29:17 **In Production** Elluany Po...
    - 17:27:18 **Submitted** Dr. Brian G...
    - 17:27:18 **Instructions** Dr. Brian G...Below the notes, there is a text instruction: "Keep already placed attachments: No No more than 1mm of cuspid expansion".
- 3D Dental Model (Center):** A 3D rendering of a dental arch with a single tooth highlighted in green.
- Image Assets (Right Panel):** A section titled "Image Assets" containing two photographs of a patient: a frontal view and a profile view.

At the bottom of the interface, the text "Camera (Patient View) Navigation" is visible.

# 5. Ceph Review

The screenshot displays a dental software interface with a central 3D cephalometric scan of a patient's skull and teeth. The scan is viewed from a lateral perspective, with a large cyan circle highlighting the dental arches. A green dot on the left side of the skull is connected to a blue dot on the upper arch by a line, with a '20°' label indicating an angle. Several colored boxes (yellow, blue, red) are overlaid on the scan, likely representing specific anatomical or dental features.

On the left side, there is a 'Checklist and Overview' panel. The 'Ceph Review' item is highlighted with a red arrow. Below it, a note reads: 'Confirm occlusal plane accuracy by displaying/hiding the upper arch. Note: The occlusal plane may not match when comparing a therapeutic model with an initial ceph'. Other items in the checklist include 'Facial Smile', '2D/3D Alignment', 'Bite - Right Buccal', 'Upper, Lower - Midline', 'Bite - Left Buccal', 'Upper Anatomy', 'Upper - Feature Points', and 'Lower Anatomy'.

On the right side, there is an 'Image Assets' panel. It contains two images: a profile photograph of a woman with long blonde hair and a 2D cephalometric X-ray image of the same patient's skull.

# 6. Facial Smile

The screenshot displays a software interface for dental analysis. On the left, a 'Checklist and Overview' sidebar lists several items: 'Overview' (checked), 'Ceph Review' (checked), 'Facial Smile' (highlighted with a red arrow), '2D/3D Alignment', 'Bite - Right Buccal', 'Upper, Lower - Midline', 'Bite - Left Buccal', 'Upper Anatomy', 'Upper - Feature Points', and 'Lower Anatomy'. The 'Facial Smile' item includes a play button icon and a description: 'Refer to the Facial Smile photo head orientation and facial features. Confirm orientation of the Facial Smile photo. Apply adjustment as needed.' The main area shows a close-up of a patient's smile with a blue horizontal line across the eyes and a vertical line down the center of the face. On the right, an 'Image Assets' panel shows a smaller version of the smile photo and a close-up of the teeth.




# 7. 2D/3D Alignment

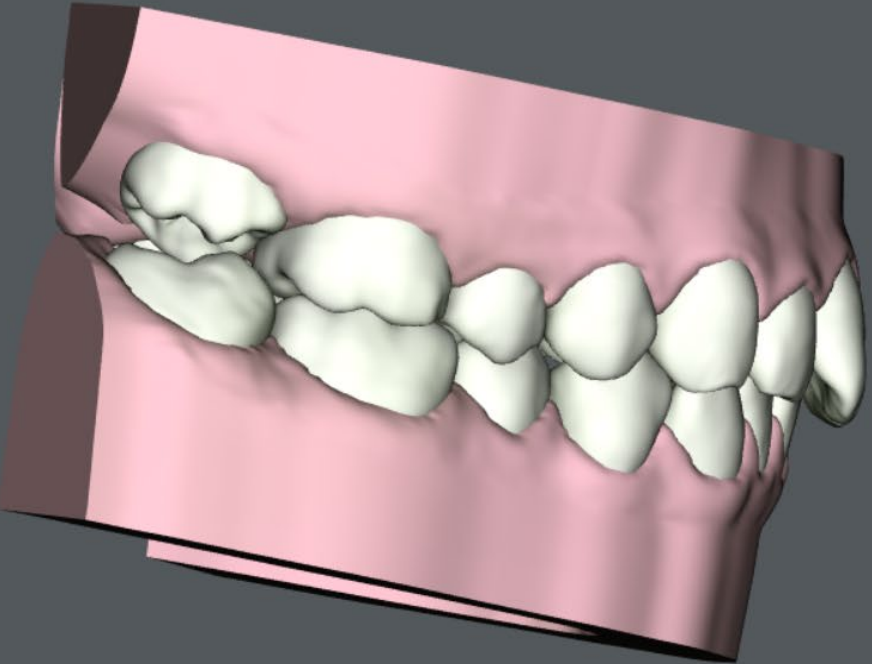
The screenshot displays a dental software interface with three main panels:

- Checklist and Overview:** A sidebar on the left containing a checklist. The '2D/3D Alignment' item is highlighted with a red arrow. The checklist includes:
  - Overview (checked)
  - Ceph Review (checked)
  - Facial Smile (checked)
  - 2D/3D Alignment** (highlighted with a red arrow)
    - Enlarge Facial Smile photo as needed.
    - Confirm the superimposition of the model onto the photo. Apply 2D/3D Cant Alignment adjustment as needed.
    - Consider using the lip tracing tool in the upper right window to evaluate the smile line.
  - Bite - Right Buccal
  - Upper, Lower - Midline
  - Bite - Left Buccal
  - Upper Anatomy
  - Upper - Feature Points
- Main View:** A large central window showing a 3D digital model of a patient's upper teeth superimposed onto a photograph of the patient's face. A vertical blue line is visible in the center of the face, likely representing the midline.
- Image Assets:** A window on the right showing a gallery of images. The top image is a full-face photograph of the patient smiling. The bottom image is a close-up photograph of the patient's teeth.



# 8. Bite-Right Buccal

### Checklist and Overview

- ✓ Overview
- ✓ Ceph Review
- ✓ Facial Smile
- ✓ 2D/3D Alignment
- ▶ **Bite - Right Buccal**   
Refer to the 3D model and Right Buccal photo. Confirm right-side bite adjustment.
- ⋮ Upper, Lower - Midline
- ⋮ Bite - Left Buccal
- ⋮ Upper Anatomy
- ⋮ Upper - Feature Points
- ⋮ Lower Anatomy
- ⋮ Lower - Feature Points



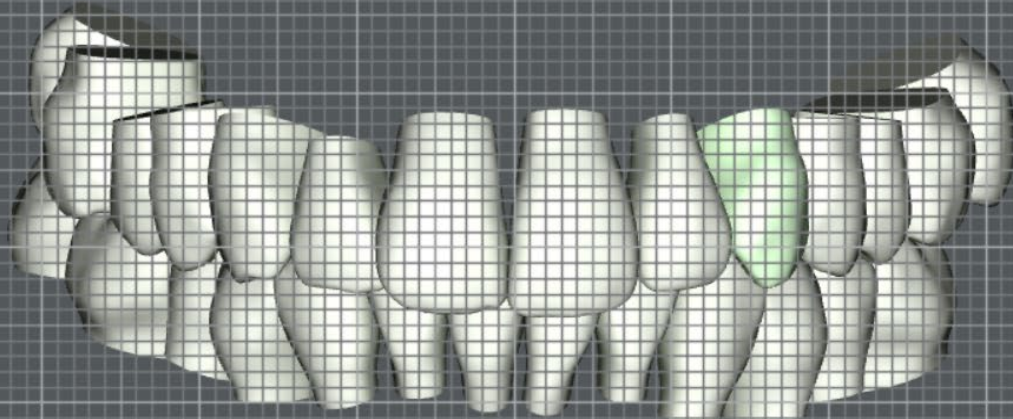
### Image Assets



# 9. Upper/Lower Midline



### Checklist and Overview

- ✓ Overview
- ✓ Ceph Review
- ✓ Facial Smile
- ✓ 2D/3D Alignment
- ✓ Bite - Right Buccal
- ▶ **Upper, Lower - Midline** ←
- Bite - Left Buccal
- Upper Anatomy
- Upper - Feature Points
- Lower Anatomy
- Lower - Feature Points




Distance of Grid Lines: 1 mm  
Camera (Patient View) Navigation

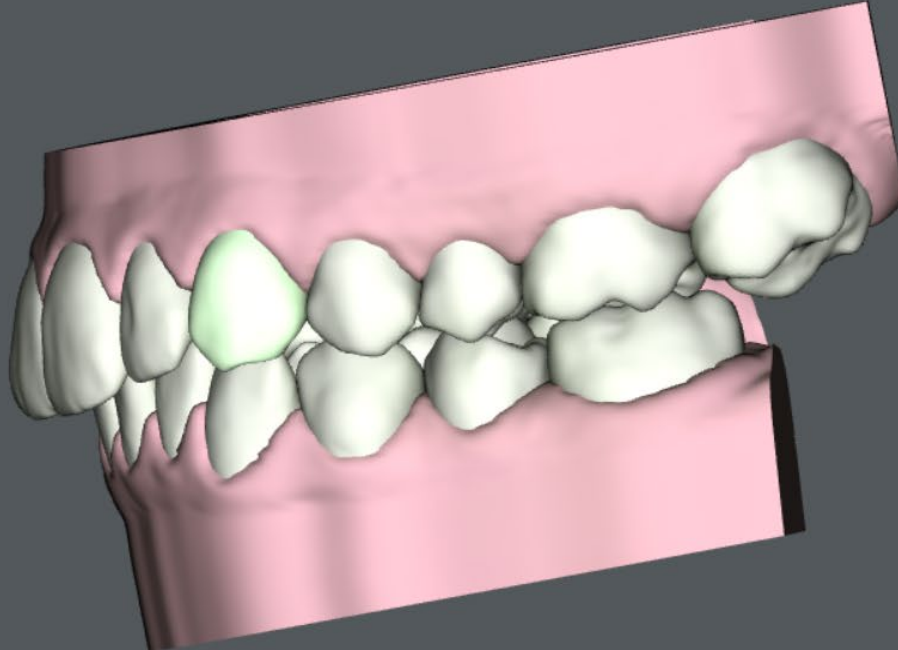
### Image Assets





# 10. Bite-Left Buccal

### Checklist and Overview

- ✓ Overview
- ✓ Ceph Review
- ✓ Facial Smile
- ✓ 2D/3D Alignment
- ✓ Bite - Right Buccal
- ✓ Upper, Lower - Midline
- ▶ Bite - Left Buccal**   
Refer to the 3D model and Left Buccal photo. Confirm left-side bite adjustment.
- ⋮ Upper Anatomy
- ⋮ Upper - Feature Points
- ⋮ Lower Anatomy
- ⋮ Lower - Feature Points




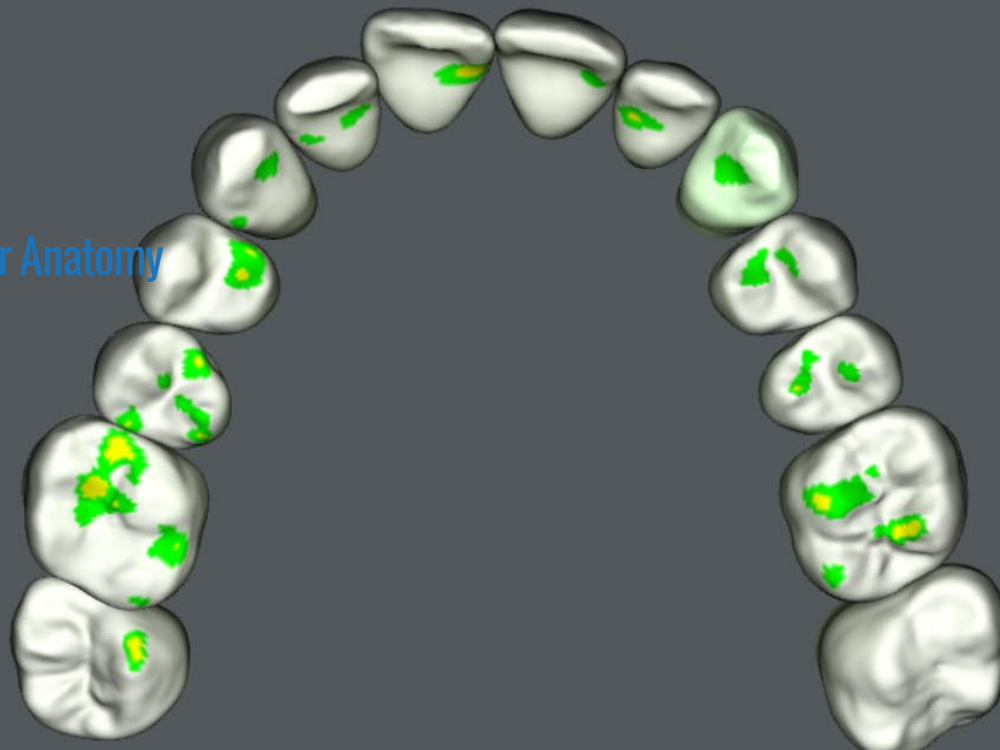
### Image Assets



# 11. Upper Anatomy

### Checklist and Overview



- Bite - Right Buccal
- Upper, Lower - Midline
- Bite - Left Buccal
- Upper Anatomy** 
- Upper - Feature Points
- Lower Anatomy
- Lower - Feature Points
- Summary



11 Upper Anatomy


Camera (Patient View) Navigation

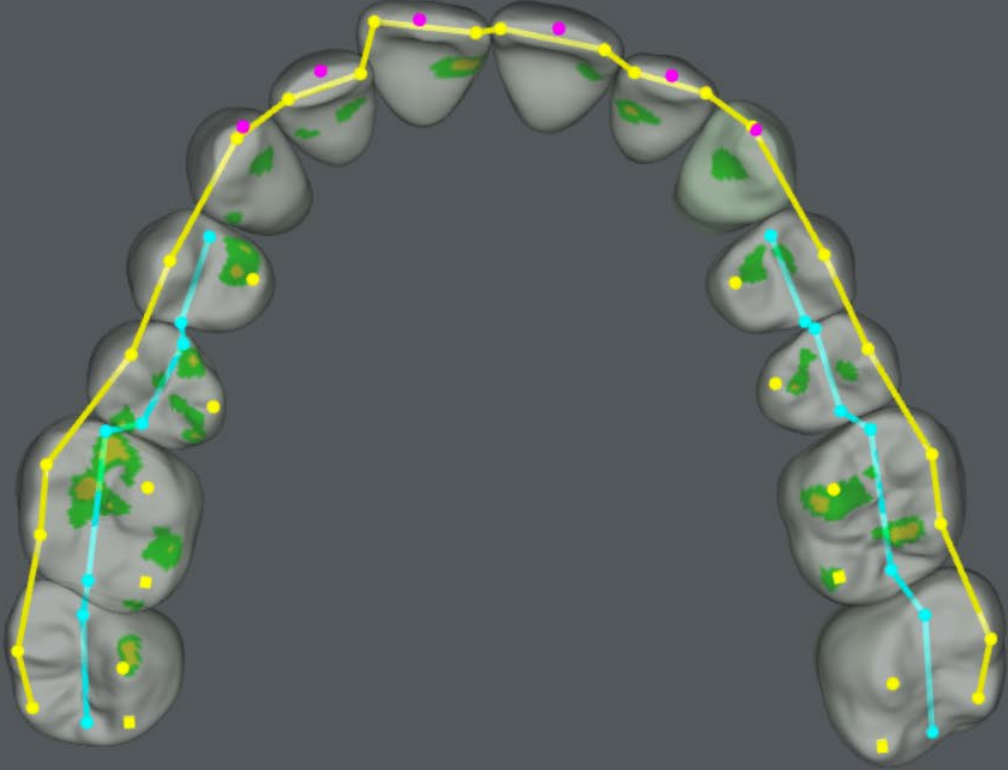
### Image Assets




# 12. Upper-Feature Points

### Checklist and Overview

- ✓ Ceph Review
- ✓ Facial Smile
- ✓ 2D/3D Alignment
- ✓ Bite - Right Buccal
- ✓ Upper, Lower - Midline
- ✓ Bite - Left Buccal
- ✓ Upper Anatomy
- ▶ Upper - Feature Points**   
Refer to the 3D model and the tooth features. Confirm the placement of the tooth features.
- ⋮ Lower Anatomy
- ⋮ Lower - Feature Points
- ⋮ Summary



### Image Assets

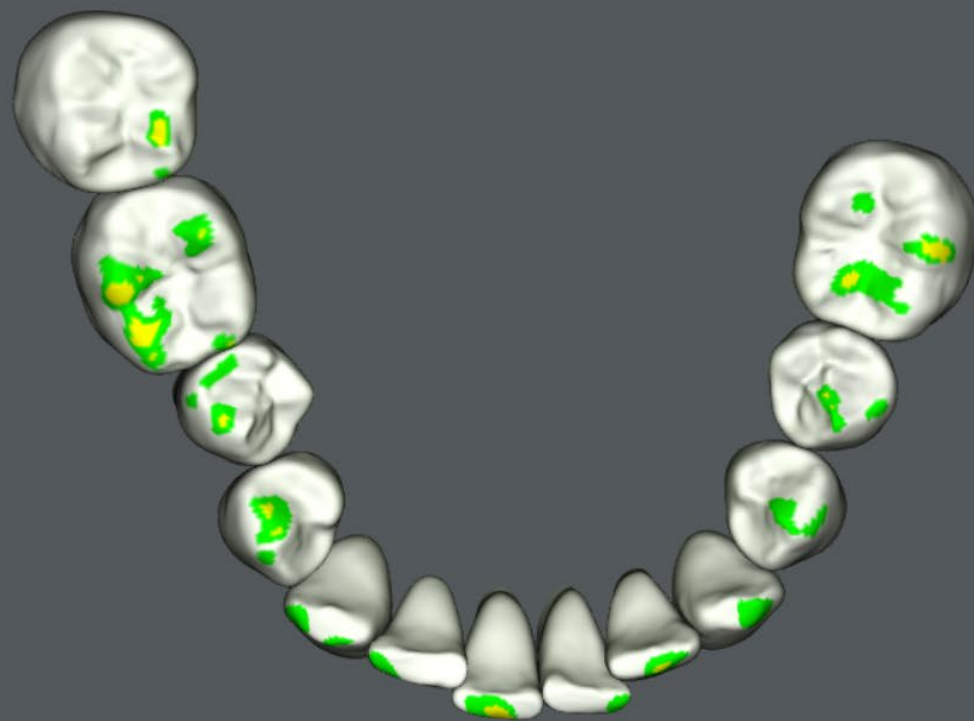


# 13. Lower Anatomy

### Checklist and Overview



- ✓ Ceph Review
- ✓ Facial Smile
- ✓ 2D/3D Alignment
- ✓ Bite - Right Buccal
- ✓ Upper, Lower - Midline
- ✓ Bite - Left Buccal
- ✓ Upper Anatomy
- ✓ Upper - Feature Points
- ▶ Lower Anatomy** ←

Refer to the occlusal paper marks (if present) and the virtual occlusal marks. Confirm occlusal mark consistency.  
(OraScan) Display Scan vs. Template Data. Refer to the source of the scan data and the 3D model. Confirm modeling accuracy.  
(CBCT) Refer to the photographs and



Camera (Patient View) Navigation

### Image Assets



# 14. Lower-Feature Points

The screenshot displays a dental software interface with three main components:

- Checklist and Overview:** A sidebar on the left containing a list of tasks. The task "Lower - Feature Points" is highlighted with a red arrow. Below it, a description reads: "Refer to the 3D model and the tooth features. Confirm the placement of the tooth features."
- 3D Model:** A central 3D rendering of a lower dental arch. The teeth are grey, and feature points are marked with yellow and cyan dots connected by lines. A red arrow points from the checklist to this model.
- Image Assets:** A panel on the right showing two clinical photographs of the lower teeth, one above the other, used for comparison with the 3D model.



# 15. Summary

**Checklist and Overview**

- ✓ Ceph Review
- ✓ Facial Smile
- ✓ 2D/3D Alignment
- ✓ Bite - Right Buccal
- ✓ Upper, Lower - Midline
- ✓ Bite - Left Buccal
- ✓ Upper Anatomy
- ✓ Upper - Feature Points
- ✓ Lower Anatomy
- ✓ Lower - Feature Points
- ▶ Summary** ← Review the Discrepancy Index score to assess severity of malocclusion.

**Quality Discrepancy Index**

Select Feature Points:  System  Digital Lab  Practice

Labels  Ref. Arch  Exclude

Overjet [Standard] (2)

8	7	6	5	4	3	2	1	1	2	3	4	5	6	7	8
□	□	□	□	□	○	□	□	□	□	○	□	□	□	□	□
8	7	6	5	4	3	2	1	1	2	3	4	5	6	7	8

Current Sum: 2 Standard: 12 SureSmile: 5 Total: 17

Camera (Patient View) Navigation



**CLEAR BLUE SMILES™**

## **Step 2: Review Treatment Plan**

# Step 2: Review Treatment Plan

Evaluate the digital lab setup to confirm it addresses the Patient's Chief Complaint and Orthodontic diagnosis. Utilize the Setup and Staging review checklist to aid in the digital setup review. Adjust the digital setup and submit to apply the changes.

## Adjustments include:

- Smile Design
- Occlusal Plane development
- Tooth Adjustments (Overall alignment with restorative considerations)
- Finalize Occlusion (Overjet, overbite, Curve of Spee, and arch coordination considering protrusive and lateral excursions)



**CLEAR BLUE SMILES™**

# **Review Setup and Staging Checklist**

# 1. Login into SureSmile

Dentsply Sirona

SureSmile®

Log in with your account details

Email address

Password

Login

[Forgot your password?](#)

[Looking to add a new user to your account?](#)

New to SureSmile®?  
Click here to create an account

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# 2. Select Review setup and staged models

AuraSmile Dental

Patient ID

Dr. Brian Gaudreault  
AuraSmile Dental

SureSmile Aligner

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

View: [List View] [Grid View]

Tasks (4) | Patients | Shipments | Jobs | DS CEREC Orders | Reports | Active Tasks

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>		Walker	Shekeda	O3P3	Douglas W. Voiers, DDS		Order Retainers	2022-07-04		2022-06-16	Active	
<input checked="" type="checkbox"/>		Dillon	Sanders	H5Y4	Douglas W. Voiers, DDS		Review setup & staged models	2022-06-30		2022-07-27	Active	
<input type="checkbox"/>		Wayne	Renee	V9T8	Douglas W. Voiers, DDS		Review setup & staged models	2022-06-30		2022-07-20	Active	
<input type="checkbox"/>		Miller	Jeff	G6M8	Douglas W. Voiers, DDS		Review setup & staged models	2022-07-01		2022-07-21	Active	

# Setup and Staging Review Opens

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is "Jean Frost (R2N6)" and the current step is "Setup & Staging 1 (Ready for Review)". The main window shows a 3D model of a patient's teeth in a patient view. On the left, a "Checklist and Overview" panel is open, listing several review items, all of which are marked with green checkmarks:

- Setup and Staging Review
- Labial View
- Right Buccal View
- Left Buccal View
- Upper Occlusal
- Lower Occlusal
- IPR / Attachment / Trimline

Below the checklist, there is a "Request Modifications" toggle switch which is currently turned off. At the bottom of the checklist panel, there is a button labeled "Approve & Order Aligners". The bottom of the interface features a navigation bar with playback controls (back, play, forward), a timeline with markers at 1, 5, 10, 15, 20, and 21, and icons for "Legend" and "Treatment Details".

# 3. Select Overview

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Jean Frost (R2N6) and the current step is Setup & Staging 1 (Ready for Review). The main window shows a 3D model of a patient's teeth in a patient view. On the left, a 'Checklist and Overview' panel is open, with the 'Overview' tab selected and highlighted by a red arrow. The checklist includes:

- Overview (selected, with a red arrow pointing to it)
- Click the Notes Tab and review the notes from the Digital Lab (DL). Go to next step to begin reviewing the setup in different views, and review IPR
- Setup and Staging Review (checked)
- Labial View (checked)
- Right Buccal View (checked)
- Left Buccal View (checked)
- Upper Occlusal (checked)
- Lower Occlusal (checked)
- IPR / Attachment / Trimline (checked)

Below the checklist is a 'Request Modifications' toggle switch. At the bottom of the interface, there is a 'Camera (Patient View) Navigation' bar with playback controls and a timeline from 1 to 21. The bottom right corner contains 'Legend' and 'Treatment Details' buttons.



# 4. Select Notes Tab



### Product Notes

All Notes

**2022-08-31**

05:54:00 **Finished by** Lisette Hitt  
**OraMetrix #1**

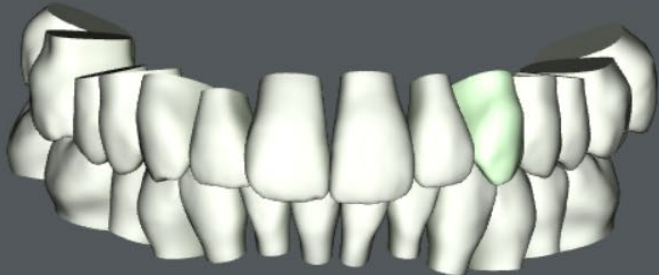
**2022-08-30**

18:29:17 **In Production** Elluany Po...

17:27:18 **Submitted** Dr. Brian G...



17:27:18 **Instructions** Dr. Brian G...

Keep already placed attachments: No  
No more than 1mm of cuspid expansion



Camera (Patient View) Navigation

### Image Assets



# Review Digital Lab Notes

The screenshot displays a digital lab interface with three main sections:

- Product Notes:** A sidebar on the left containing a list of notes. A red arrow points to the entry: "05:54:00 Finished by OraMetrix #1 Lisette Hitt". Below this, notes for "2022-08-30" include "18:29:17 In Production Elluany Po...", "17:27:18 Submitted Dr. Brian G...", and "17:27:18 Instructions Dr. Brian G...". A note at the bottom states: "Keep already placed attachments: No No more than 1mm of cuspid expansion".
- 3D Model:** A central view showing a 3D digital model of a dental arch. The upper right premolar is highlighted in green.
- Image Assets:** A panel on the right showing two images: a patient's smile and a clinical photograph of the teeth.

At the bottom of the interface, the text "Camera (Patient View) Navigation" is visible.

# 5. Select Labial View

The screenshot displays the SureSmile Aligner software interface. At the top, the patient's name is "Jean Frost (R2N6)" and the current stage is "Setup & Staging 1 (Ready for Review)". The main window shows a 3D model of the upper dental arch with a labial view selected, indicated by a red arrow in the checklist on the left. The checklist includes: Overview, Setup and Staging Review, Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, Lower Occlusal, and IPR / Attachment / Trimline. To the right, there are image assets including a patient's portrait and a clinical photograph of the teeth. The bottom of the interface features a navigation bar with a timeline from 1 to 21, a legend, and treatment details.

# 6. Select Right Buccal View

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Jean Frost (R2N6) and the current stage is Setup & Staging 1 (Ready for Review). The interface is divided into several sections:

- Checklist and Overview:** A sidebar on the left contains a checklist with the following items:
  - Overview (checked)
  - Setup and Staging Review (checked)
    - Labial View (checked)
    - Right Buccal View** (selected, indicated by a red arrow)
    - Left Buccal View (checked)
  - Upper Occlusal (checked)
  - Lower Occlusal (checked)
  - IPR / Attachment / Trimline (checked)
- 3D Model:** The central area shows a 3D model of the patient's teeth and aligner in a right buccal view. The aligner is shown in pink, and the teeth are in white. The camera is labeled "Camera (Patient View) Navigation".
- Image Assets:** On the right, there are two clinical photographs of the patient's teeth, showing the right buccal view.
- Bottom Bar:** Includes a "Request Modifications" toggle, an "Approve & Order Aligners" button, a timeline with markers at 1, 5, 10, 15, 20, and 21, and icons for "Legend" and "Treatment Details".

# 7. Select Left Buccal View

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is "Jean Frost (R2N6)" and the current stage is "Setup & Staging 1 (Ready for Review)". The main window shows a 3D dental model of the upper and lower teeth in a pinkish-red color, viewed from the left buccal perspective. A red arrow points to the "Left Buccal View" option in the "Checklist and Overview" panel on the left. The checklist includes: Overview, Setup and Staging Review, Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, Lower Occlusal, and IPR / Attachment / Trimline. Below the checklist is a "Request Modifications" toggle and an "Approve & Order Aligners" button. On the right, the "Image Assets" panel shows two clinical photographs of the patient's teeth. At the bottom, there is a navigation bar with a timeline from 1 to 21, a legend, and a treatment details icon.

# 8. Select Upper Occlusal View

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is 'Jean Frost (R2N6)' and the current stage is 'Setup & Staging 1 (Ready for Review)'. On the left, a 'Checklist and Overview' panel lists several items, with 'Upper Occlusal' highlighted by a red arrow. The central 3D model shows the upper dental arch with green and yellow highlights on the occlusal surfaces. On the right, an 'Image Assets' panel shows two clinical photographs of the patient's teeth. The bottom of the interface features a navigation bar with a timeline and control icons.

Second Site | Jean Frost (R2N6) | Setup & Staging 1 (Ready for Review) | SureSmile Aligner

Checklist and Overview

- ✓ Overview
- ✓ Setup and Staging Review
  - ✓ Labial View
  - ✓ Right Buccal View
  - ✓ Left Buccal View
  - ▶ Upper Occlusal
  - ✓ Lower Occlusal
  - ✓ IPR / Attachment / Trimline

Request Modifications

Approve & Order Aligners

Image Assets

Camera (Patient View) Navigation

Legend | Treatment Details

# 9. Select Lower Occlusal View

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is 'Jean Frost (R2N6)' and the current stage is 'Setup & Staging 1 (Ready for Review)'. The main central area shows a 3D model of the lower dental arch with green and yellow highlights on the teeth. To the left, a 'Checklist and Overview' panel lists several views: Overview, Setup and Staging Review, Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, Lower Occlusal (highlighted with a red arrow), and IPR / Attachment / Trimline. To the right, an 'Image Assets' panel shows two clinical photographs of the patient's lower teeth. At the bottom, there is a navigation bar with playback controls and a timeline from 1 to 21. The text 'Camera (Patient View) Navigation' is visible below the 3D model.

# 10. Review IPR/Attachments/Trimline

The screenshot displays the SureSmile Aligner software interface. At the top, the patient's name is "Jean Frost (R2N6)" and the current stage is "Setup & Staging 1 (Ready for Review)". The main central area shows a 3D dental model of the upper and lower arches with a yellow trimline and white attachments. A red arrow points to the "IPR / Attachment / Trimline" item in the left-hand "Checklist and Overview" panel, which lists several other review items that are already completed. To the right, the "Image Assets" panel shows two photographs: a full-face portrait of the patient and a close-up of her teeth. At the bottom, there is a navigation timeline with a play button, a legend, and treatment details.

Second Site | Jean Frost (R2N6) | Setup & Staging 1 (Ready for Review) | SureSmile Aligner

Checklist and Overview

- Overview
- Setup and Staging Review
  - Labial View
  - Right Buccal View
  - Left Buccal View
  - Upper Occlusal
  - Lower Occlusal
  - IPR / Attachment / Trimline

Request Modifications

Approve & Order Aligners

Image Assets

Camera (Patient View) Navigation

Legend | Treatment Details



# 11. Review Treatment Details

The screenshot displays the SureSmile Aligner software interface. At the top, the patient's name is "Jean Frost (R2N6)" and the current stage is "Setup & Staging 1 (Ready for Review)". The main window shows a 3D model of the upper dental arch with a yellow wire and brackets. To the left is a "Checklist and Overview" panel with the following items:

- Overview (checked)
- Setup and Staging Review (checked)
  - Labial View (checked)
  - Right Buccal View (checked)
  - Left Buccal View (checked)
  - Upper Occlusal (checked)
  - Lower Occlusal (checked)
  - IPR / Attachment / Trimeline (play button icon)

Below the checklist is a "Request Modifications" toggle (off) and an "Approve & Order Aligners" button. On the right, the "Image Assets" panel shows two photos: a patient's smile and a clinical view of the teeth. At the bottom, there is a navigation timeline with markers for 1, 5, 10, 15, 20, and 21. A red arrow points to the "Treatment Details" icon in the bottom right corner.

# Tooth Movements

Tooth Movements	Elastics	Measurements	IPR Tracking													
Stage 29	UR8	UR7	UR6	UR5	UR4	UR3	UR2	UR1	UL1	UL2	UL3	UL4	UL5	UL6	UL7	UL8
mesial (+) / distal (-)		-0.3	-0.1	0.1			-0.1	0.3	-0.3	-0.1	-0.3	-0.2	-0.1	-0.3	-0.3	
buccal (+) / lingual (-)		1.1	-0.3	0.7	0.3	0.5	0.8	-0.3	0.2	0.6	0.2	1.1	0.5			
occlusal (+) / gingival (-)		1.1		-0.1	0.3	0.3	0.4	0.2		0.5	0.2	0.2				
Torque facial (+) / lingual (-)		-16	-4				2		4		-2					
Ang. mesial (+) / distal (-)		6						-4	3	4						
Rot. mesial (+) / distal (-)				-5	5		-7	-18	3	-9	7		-7			
Spacing (+) / Intersection (-)									-0.2							
Do not move	<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



# Tooth Movements

Stage 29	UR8	UR7	UR6	UR5	UR4	UR3	UR2	UR1	UL1	UL2	UL3	UL4	UL5	UL6	UL7	UL8
mesial (+) / distal (-)																
buccal (+) / lingual (-)																
occlusal (+) / gingival (-)																
Torque facial (+) / lingual (-)																
Ang. mesial (+) / distal (-)																
Rot. mesial (+) / distal (-)																
Spacing (+) / Intersection (-)									-0.2							
Do not move	<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

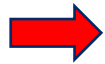


# Elastics

Tooth Movements	Elastics	Measurements	IPR Tracking
Class Correction [mm]		Midline Correction [mm]	
0.0 mm		0.0 mm	




# Measurements



Tooth Movements	Elastics	Measurements	IPR Tracking	
<input checked="" type="radio"/> malocclusion <input type="radio"/> setup				
	Bolton Ratio	Maxilla Sum	Mandible Sum	Lower
All (6..6)	98.1	91.3 mm	89.6 mm	Surplus (6..6): 6.2 mm
Anteriors (3..3)	79.2	44.1 mm	34.9 mm	Surplus (3..3): 0.9 mm
Arch Length Discrepancy			Measured Overjet	
	Left	Right	0.0 mm	
Upper	1.0 mm	0.5 mm		
Lower	-1.3 mm	-0.3 mm		

# Measurements

Tooth Movements	Elastics	Measurements	IPR Tracking	
<input type="radio"/> malocclusion <input checked="" type="radio"/> setup 				
	Bolton Ratio	Maxilla Sum	Mandible Sum	Lower
All (6..6)	98.1	91.3 mm	89.6 mm	Surplus (6..6): 6.2 mm
Anteriors (3..3)	79.2	44.1 mm	34.9 mm	Surplus (3..3): 0.9 mm

Arch Length Discrepancy		
	Left	Right
Upper	1.4 mm	1.4 mm
Lower	0.4 mm	0.4 mm

Measured Overjet
0.3 mm

# IPR Tracking

Tooth Movements	Elastics		Measurements			IPR Tracking										✕
	UR8	UR7	UR6	UR5	UR4	UR3	UR2	UR1	UL1	UL2	UL3	UL4	UL5	UL6	UL7	UL8
Planned								-0.2								
Applied																
Completed	<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"/>
Completed	<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"/>
Applied																
Planned				-0.3	-0.3	-0.3	-0.3	-0.3	-0.3							
	LR8	LR7	LR6	LR5	LR4	LR3	LR2	LR1	LL1	LL2	LL3	LL4	LL5	LL6	LL7	LL8

Edit Selection:  ▲ ▼ =

# Clear Treatment Details Tab

Tooth Movements	Elastics	Measurements	IPR Tracking														
Stage 29		UR8	UR7	UR6	UR5	UR4	UR3	UR2	UR1	UL1	UL2	UL3	UL4	UL5	UL6	UL7	UL8
mesial (+) / distal (-)			-0.3	-0.1	0.1			-0.1	0.3	-0.3	-0.1	-0.3	-0.2	-0.1	-0.3	-0.3	
buccal (+) / lingual (-)			1.1	-0.3	0.7	0.3	0.5	0.8	-0.3	0.2	0.6	0.2	1.1	0.5			
occlusal (+) / gingival (-)			1.1		-0.1	0.3	0.3	0.4	0.2		0.5	0.2	0.2				
Torque facial (+) / lingual (-)			-16	-4				2		4		-2					
Ang. mesial (+) / distal (-)			6						-4	3	4						
Rot. mesial (+) / distal (-)					-5	5		-7	-18	3	-9	7		-7			
Spacing (+) / Intersection (-)										-0.2							
Do not move		<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"/>
<b>Cumulative:</b>		<input checked="" type="radio"/> Cumulative	<input type="radio"/> Incremental														





# Setup and Staging Review Opens

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is "Jean Frost (R2N6)" and the current step is "Setup & Staging 1 (Ready for Review)". The main window shows a 3D model of a patient's teeth in a patient view. On the left, a "Checklist and Overview" panel is open, listing several review items, all of which are marked with green checkmarks:

- Setup and Staging Review
- Labial View
- Right Buccal View
- Left Buccal View
- Upper Occlusal
- Lower Occlusal
- IPR / Attachment / Trimline

Below the checklist, there is a "Request Modifications" toggle switch which is currently turned off. At the bottom of the checklist panel, there is a button labeled "Approve & Order Aligners". The bottom of the interface features a navigation bar with playback controls (back, play, forward), a timeline with markers at 1, 5, 10, 15, 20, and 21, and icons for "Legend" and "Treatment Details".



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# **Modification Workflow**

# 1. Login into SureSmile®

Dentsply Sirona SureSmile®

Log in with your account details

Email address

Password

Login

[Forgot your password?](#) [Looking to add a new user to your account?](#) [New to SureSmile? Click here to create an account](#)

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## 1. Login into SureSmile

# 2. Select Review setup and staged models

AuraSmile Dental

Patient ID

Dr. Brian Gaudreault  
AuraSmile Dental

SureSmile Aligner

Sort by: Task  
Show Tasks of: All Types  
Tasks for: All  
View: [List View] [Grid View]

Tasks (4) | Patients | Shipments | Jobs | DS CEREC Orders | Reports | Active Tasks

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>		Walker	Shekeda	O3P3	Douglas W. Voiers, DDS		Order Retainers	2022-07-04		2022-06-16	Active	
<input checked="" type="checkbox"/>		Dillon	Sanders	H5Y4	Douglas W. Voiers, DDS		Review setup & staged models	2022-06-30		2022-07-27	Active	
<input type="checkbox"/>		Wayne	Renee	V9T8	Douglas W. Voiers, DDS		Review setup & staged models	2022-06-30		2022-07-20	Active	
<input type="checkbox"/>		Miller	Jeff	G6M8	Douglas W. Voiers, DDS		Review setup & staged models	2022-07-01		2022-07-21	Active	

# Setup and Staging Opens

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Jean Frost (R2N6) and the current step is Setup & Staging 1 (Ready for Review). The main window shows a 3D model of a patient's teeth in a patient view. On the left, a 'Checklist and Overview' panel is open, listing the following items:

- Overview: Click the Notes Tab and review the notes from the Digital Lab (DL). Go to next step to begin reviewing the setup in different views, and review IPR
- Setup and Staging Review
  - Labial View
  - Right Buccal View
  - Left Buccal View
  - Upper Occlusal
  - Lower Occlusal
  - IPR / Attachment / Trimline

Below the checklist, there is a 'Request Modifications' toggle switch and an 'Approve & Order Aligners' button. At the bottom, a navigation bar includes playback controls, a timeline with markers at 1, 5, 10, 15, 20, and 21, and buttons for 'Legend' and 'Treatment Details'.

# 3. Select Request Modifications

The screenshot displays the SureSmile Aligner software interface. At the top, the patient information is shown as "Second Site" and "Jean Frost (R2N6)". The current step is "Setup & Staging 1 (Ready for Review)". The main area features a 3D model of a patient's teeth in a patient view. On the left, a "Checklist and Overview" panel lists the following items, all of which are marked with a green checkmark:

- Overview: Click the Notes Tab and review the notes from the Digital Lab (DL). Go to next step to begin reviewing the setup in different views, and review IPR
- Setup and Staging Review
  - Labial View
  - Right Buccal View
  - Left Buccal View
  - Upper Occlusal
  - Lower Occlusal
  - IPR / Attachment / Trimline

At the bottom of the checklist panel, there is a toggle switch for "Request Modifications" which is currently turned off. A red arrow points to this toggle. Below the checklist is a button labeled "Approve & Order Aligners". The bottom of the interface includes a navigation bar with playback controls (back, play, forward, stop), a timeline with markers at 1, 5, 10, 15, 20, and 21, and icons for "Legend" and "Treatment Details".

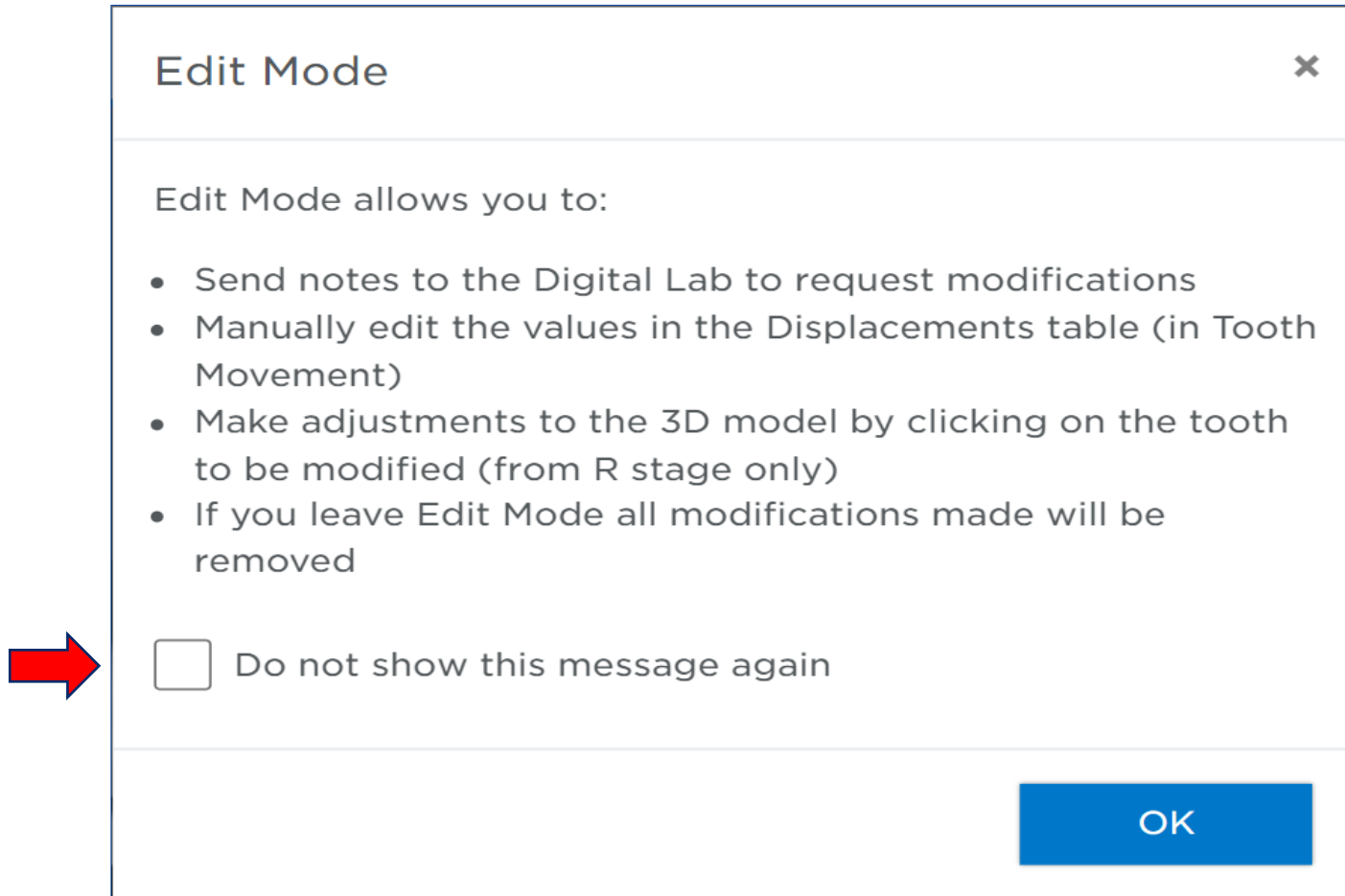
# Request Modifications Active

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Jean Frost (R2N6) and the current stage is Setup & Staging 1 (Ready for Review). The main window shows a 3D model of a patient's teeth in a patient view. On the left, a 'Checklist and Overview' panel lists the following items, all of which are marked as complete with green checkmarks:

- Overview
- Setup and Staging Review
- Labial View
- Right Buccal View
- Left Buccal View
- Upper Occlusal
- Lower Occlusal
- IPR / Attachment / Trimline

Below the checklist, there is a toggle switch for 'Request Modifications' which is currently turned on. A red arrow points to this toggle. Below the toggle, there is a text input field for notes with the placeholder text 'Type something' and a 'Submit' button. At the bottom of the interface, there is a navigation bar with a timeline from 1 to 21, a legend, and a treatment details icon.

# 4. Select “Do not show”





# 4. Select OK

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**



# 6. Clear Treatment Details Tab

Tooth Movements	Elastics	Measurements	IPR Tracking														
Stage 29		UR8	UR7	UR6	UR5	UR4	UR3	UR2	UR1	UL1	UL2	UL3	UL4	UL5	UL6	UL7	UL8
mesial (+) / distal (-)			-0.3	-0.1	0.1			-0.1	0.3	-0.3	-0.1	-0.3	-0.2	-0.1	-0.3	-0.3	
buccal (+) / lingual (-)			1.1	-0.3	0.7	0.3	0.5	0.8	-0.3	0.2	0.6	0.2	1.1	0.5			
occlusal (+) / gingival (-)			1.1		-0.1	0.3	0.3	0.4	0.2		0.5	0.2	0.2				
Torque facial (+) / lingual (-)			-16	-4				2		4		-2					
Ang. mesial (+) / distal (-)			6						-4	3	4						
Rot. mesial (+) / distal (-)					-5	5		-7	-18	3	-9	7		-7			
Spacing (+) / Intersection (-)										-0.2							
Do not move		<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



# 7. Request Modifications-Typing Notes

The screenshot displays a software interface for dental request modifications. On the left, a 'Checklist and Overview' sidebar contains the following sections:

- Overview**: Click the Notes Tab and review the notes from the Digital Lab (DL). Go to next step to begin reviewing the setup in different views, and review IPR.
- Setup and Staging Review**:
  - Labial View
  - Right Buccal View
  - Left Buccal View

Below the sidebar, there is a toggle for 'Request Modifications' (which is turned on), followed by the instruction: 'Type notes and/or modify the Setup then click Submit.' A 'Notes' text box contains the placeholder 'Type something', and a 'Submit' button is located below it.

The main area shows a 3D model of a dental arch with a red arrow pointing to a specific tooth modification area. The text 'Camera (Object View) Navigation' is visible below the model.

At the bottom, a navigation bar includes playback controls, a timeline with markers at 1, 24, 25, 30, 35, and 39, and icons for 'Legend' and 'Tooth movement'.

# Request Modifications- 3D Box

The screenshot displays a software interface for dental 3D modeling. On the left, a sidebar titled "Checklist and Overview" contains a "Submit" button and a "Notes" section with a text input field. The main area shows a 3D model of a dental arch with a red arrow pointing to a specific tooth. A bottom toolbar includes navigation controls, a timeline, and a "Tooth movement" tool.

**Checklist and Overview**

- Overview  
Click the Notes Tab and review the notes from the Digital Lab (DL). Go to next step to begin reviewing the setup in different views, and review IPR
- Setup and Staging Review
  - Labial View
  - Right Buccal View
  - Left Buccal View

Request Modifications

Type notes and/or modify the Setup then click Submit.

**Notes**

Type something

**Submit**

Camera (Object View) Navigation

Legend Tooth movement

# 8. Select Submit

The screenshot displays a dental software interface. On the left, a sidebar titled "Checklist and Overview" contains the following elements:

- Overview**: A play button icon and text: "Click the Notes Tab and review the notes from the Digital Lab (DL). Go to next step to begin reviewing the setup in different views, and review IPR".
- Setup and Staging Review**: A list of view options, each with a menu icon:
  - Labial View
  - Right Buccal View
  - Left Buccal View
- Request Modifications**: A toggle switch that is currently turned on.
- Notes**: A text input field with the placeholder "Type something".
- Submit**: A button with a red arrow pointing to it from the right.

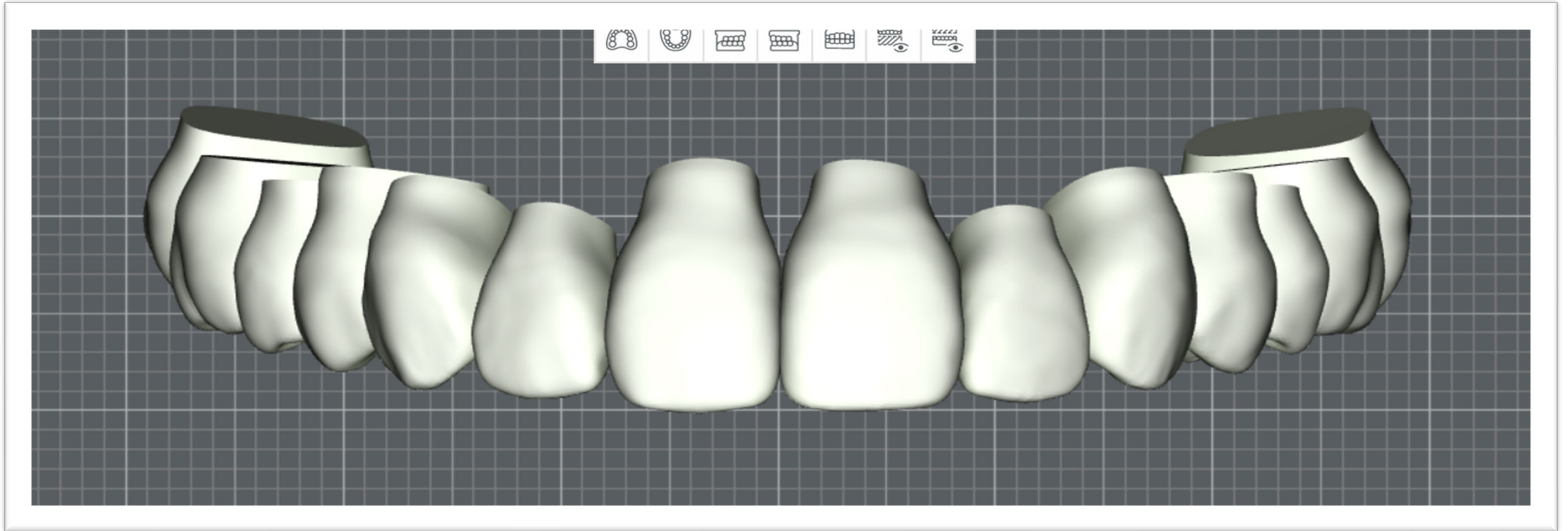
The main area shows a 3D model of a dental arch with a green highlight on a tooth and a grid overlay. Below the model is a "Camera (Object View) Navigation" bar with various icons and a timeline from 1 to 39. At the bottom right, there are icons for "Legend" and "Tooth movement".



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# **Modifications**

# Digital Smile Design



## Width of Anterior Teeth

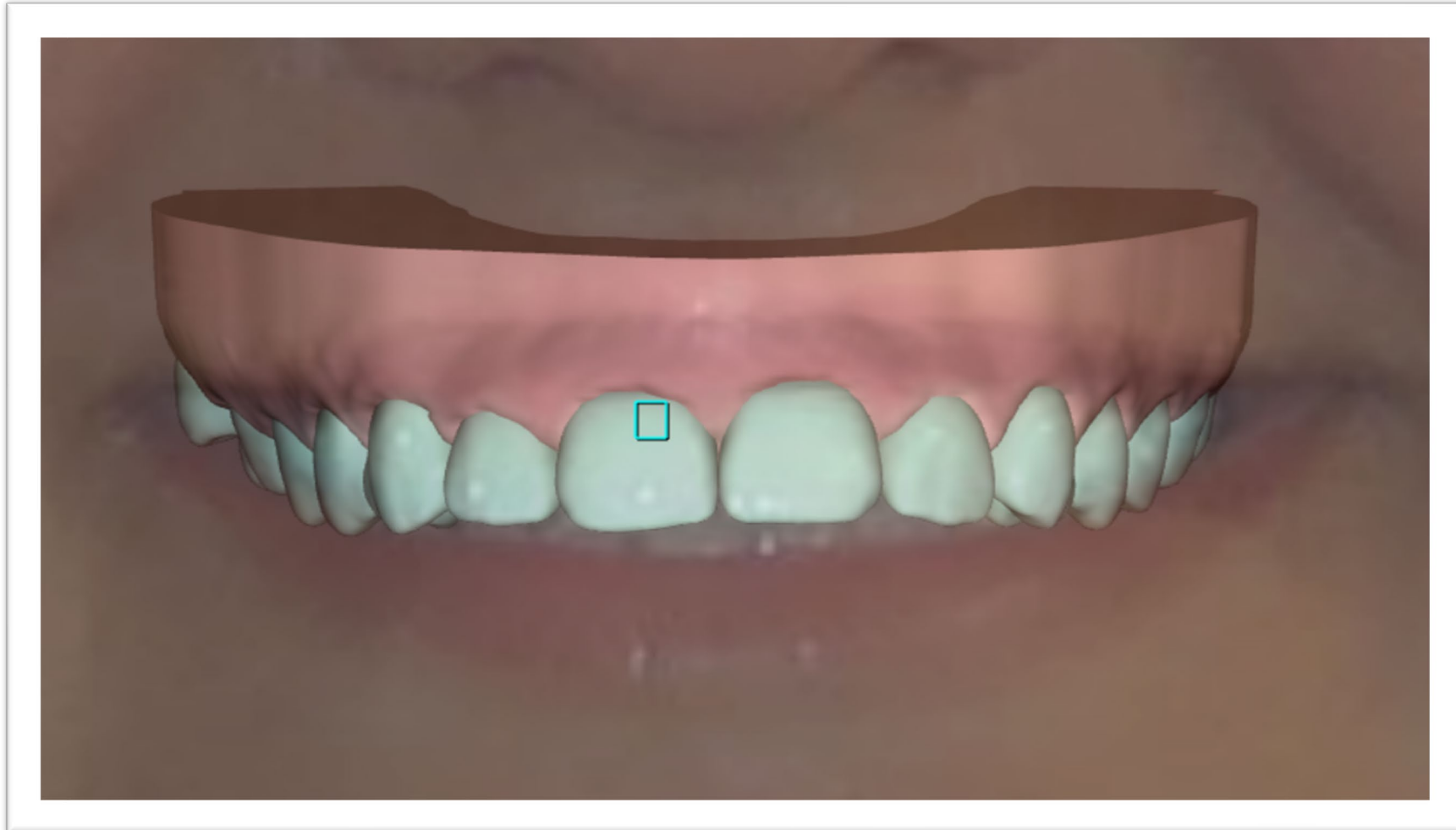
*Central = Y Lateral= Y-2 Canine= Y-1*

**Crown Height = Crown Width / .78**

There is a .5 mm offset starting with the central incisor. Offset determined by angle of occlusal plane.

Steep occlusal plane=1 mm offset.

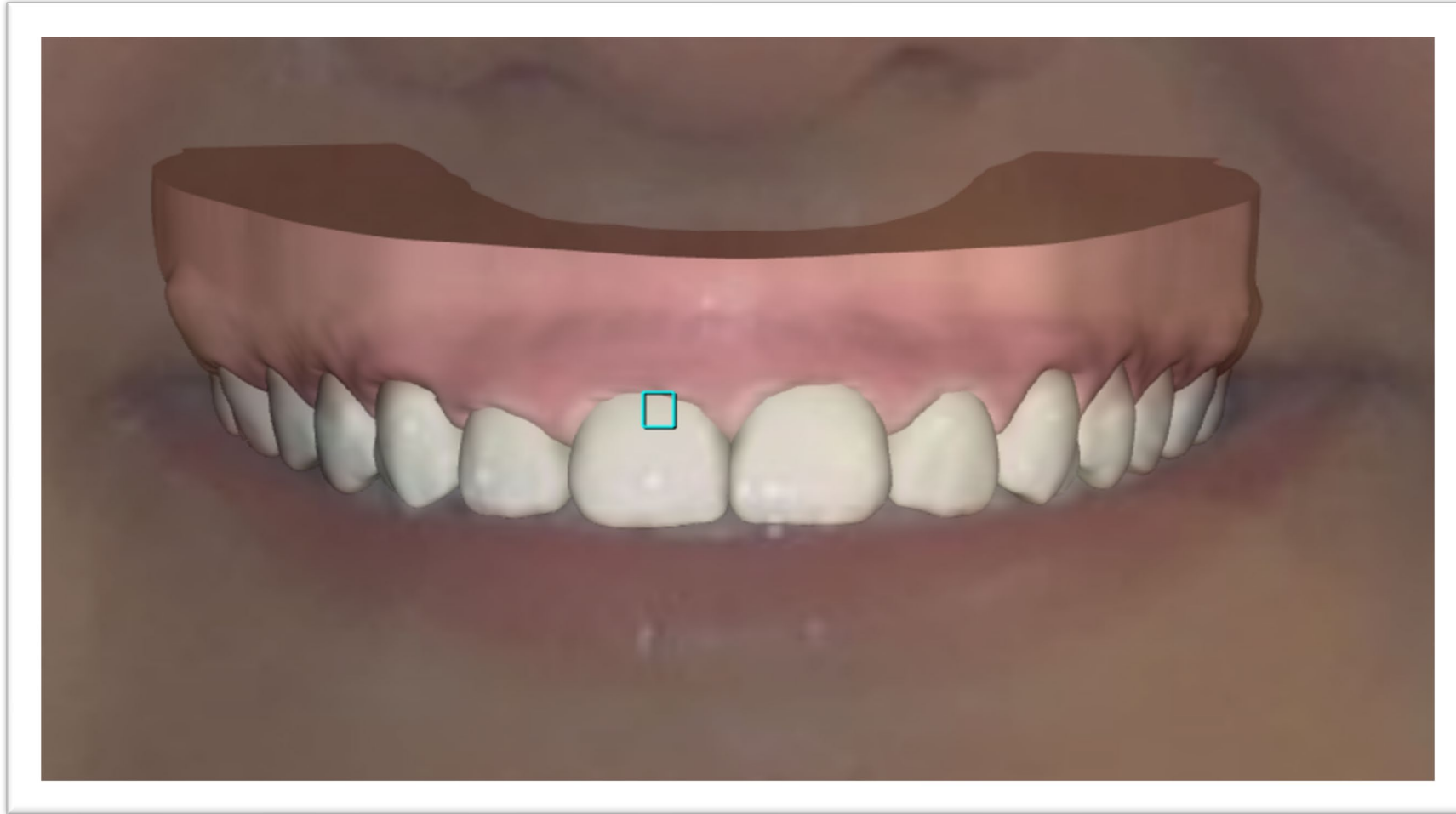
# Digital Smile Design



Use smile photo tool with your patients to show them a before/after effect

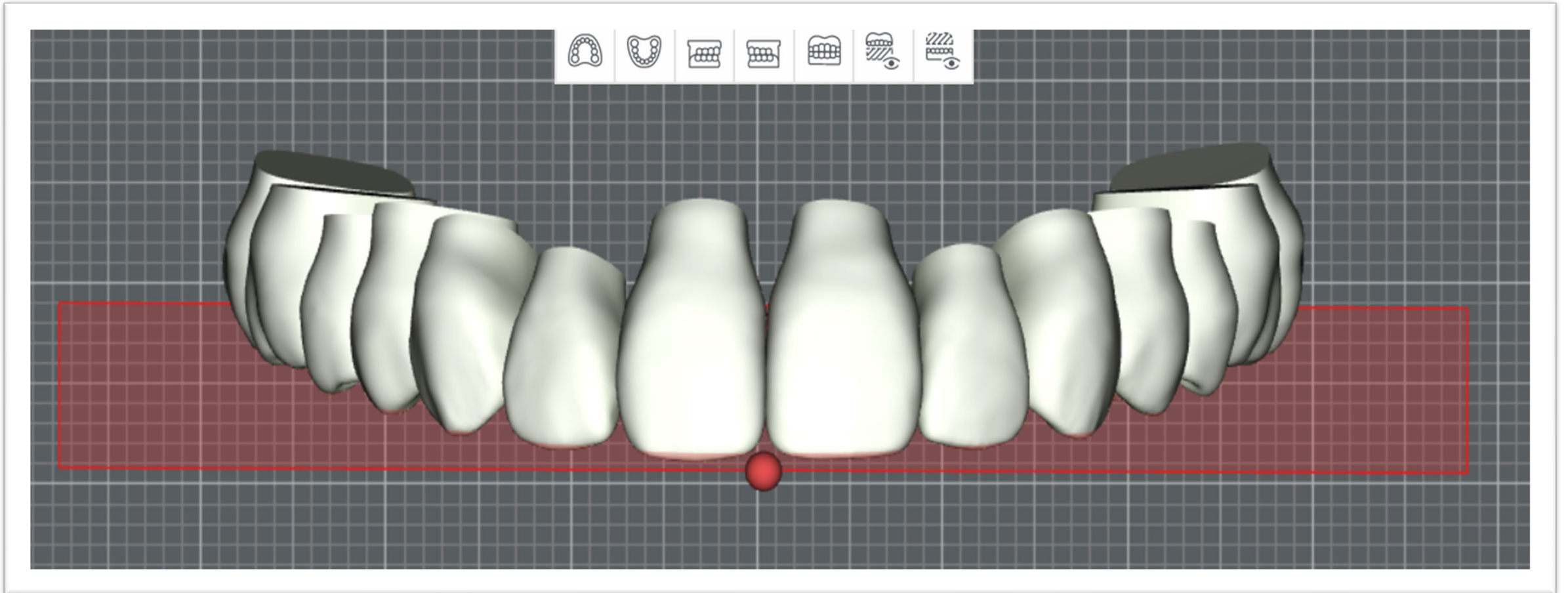


# Digital Smile Design



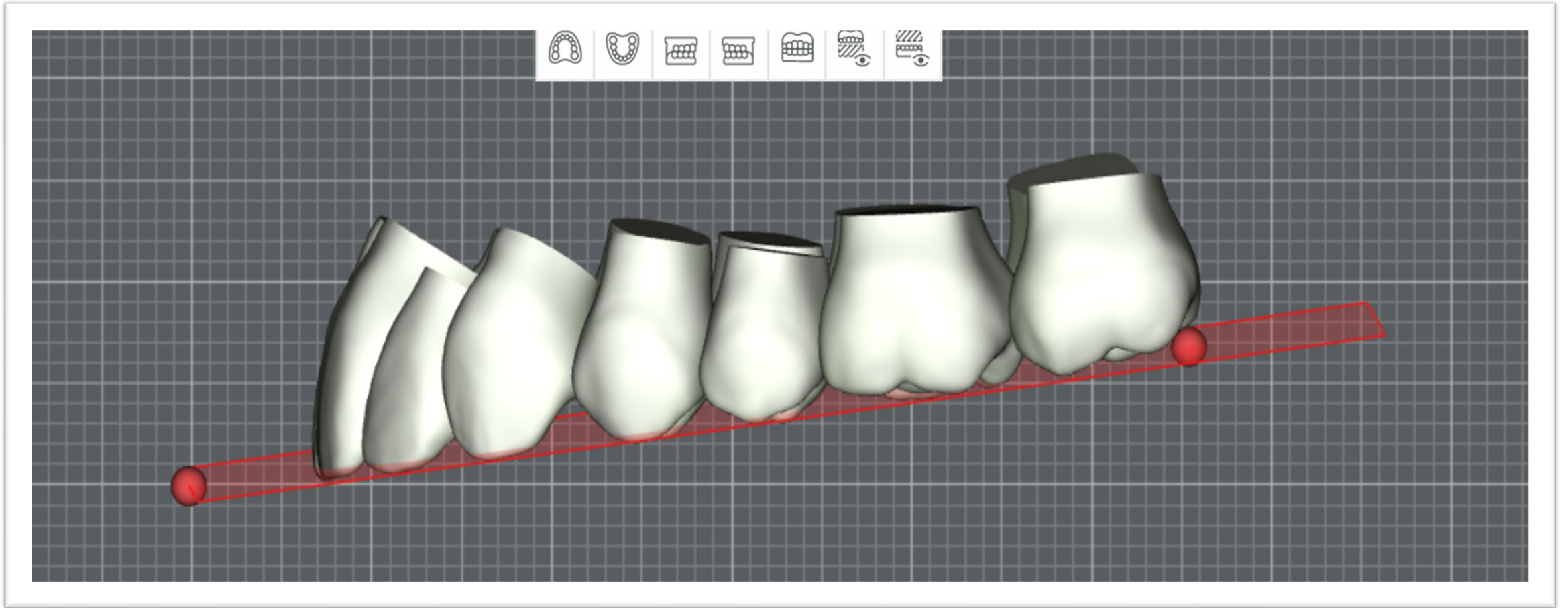
Use smile photo tool with your patients to show them a before/after effect

# Smile Design



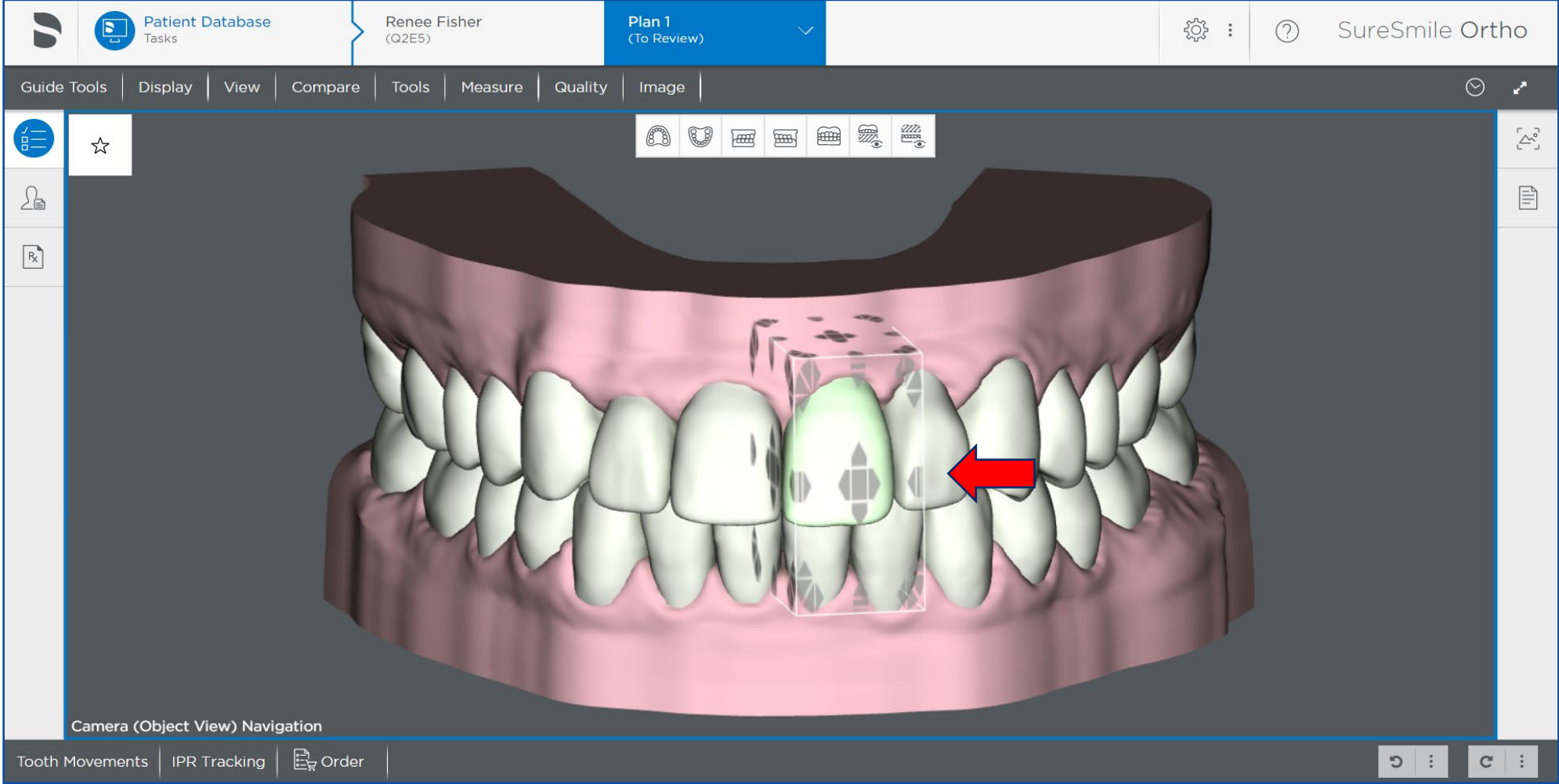
Smile design leads to occlusal plane development

# Occlusal Plane



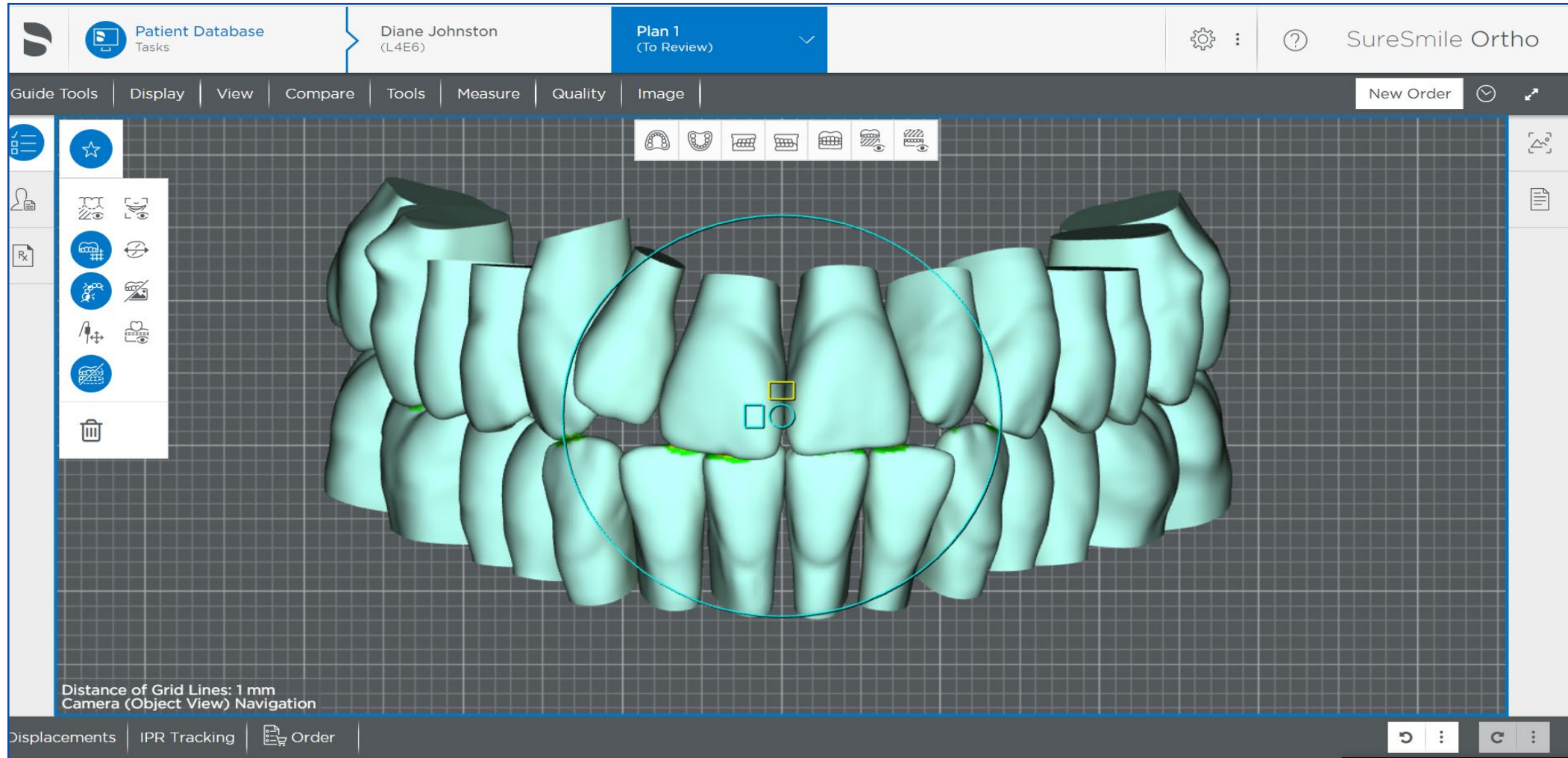
Smile design leads to occlusal plane development

# Tooth Adjustments



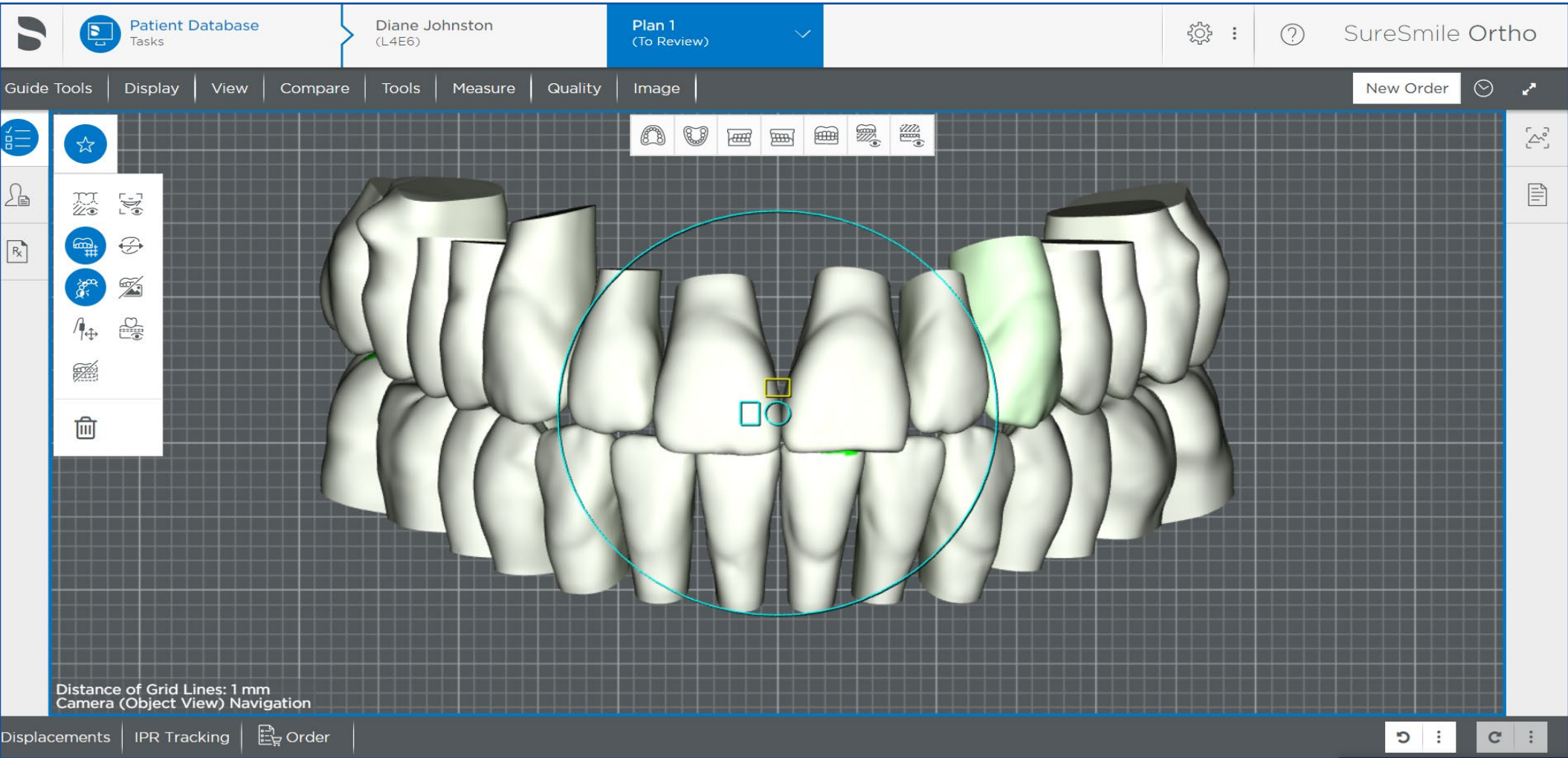
**Tooth Movement Tool= 3D Bounding Box**

# Tooth Adjustments



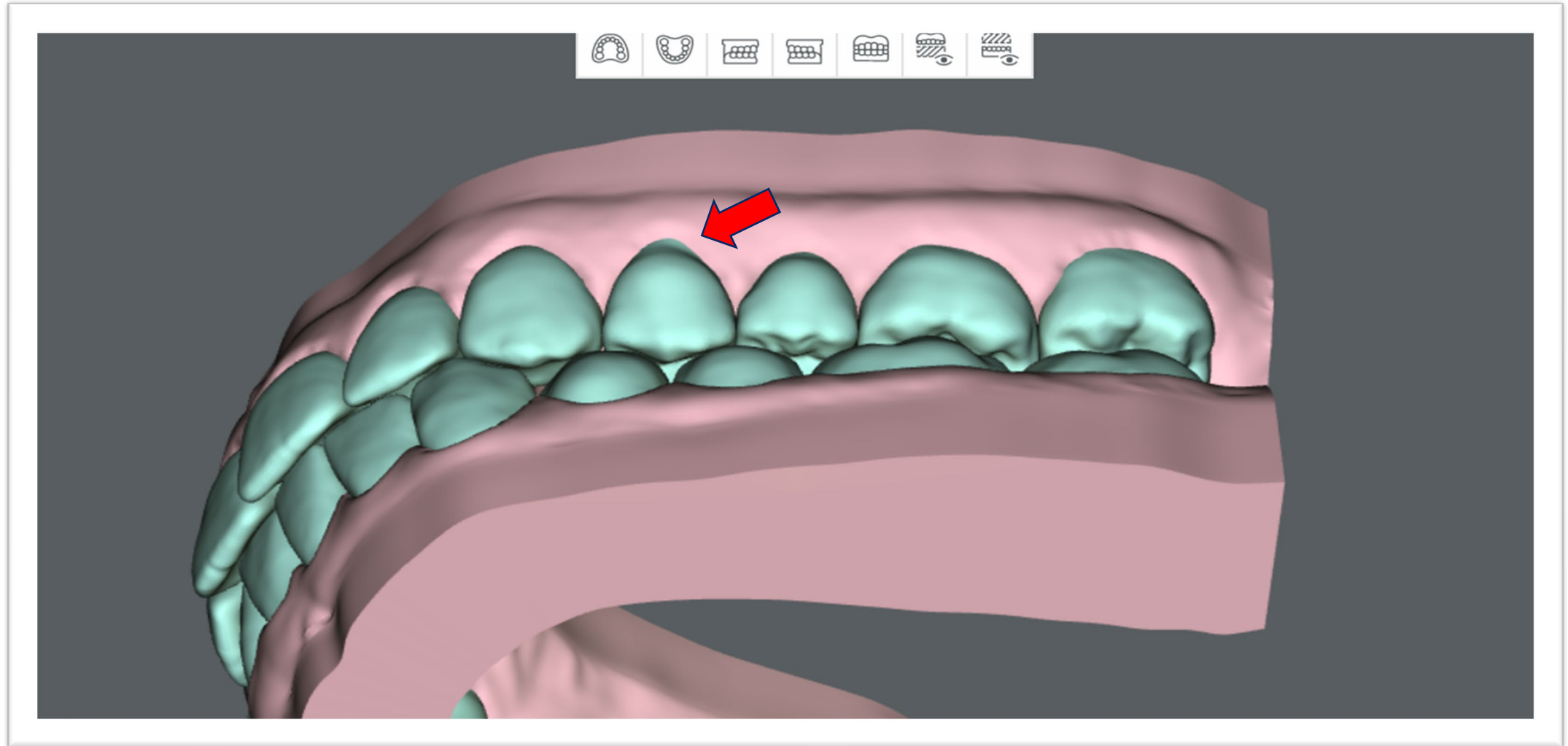
Alignment adjustments for confirming “straightness” of the teeth

# Tooth Adjustments



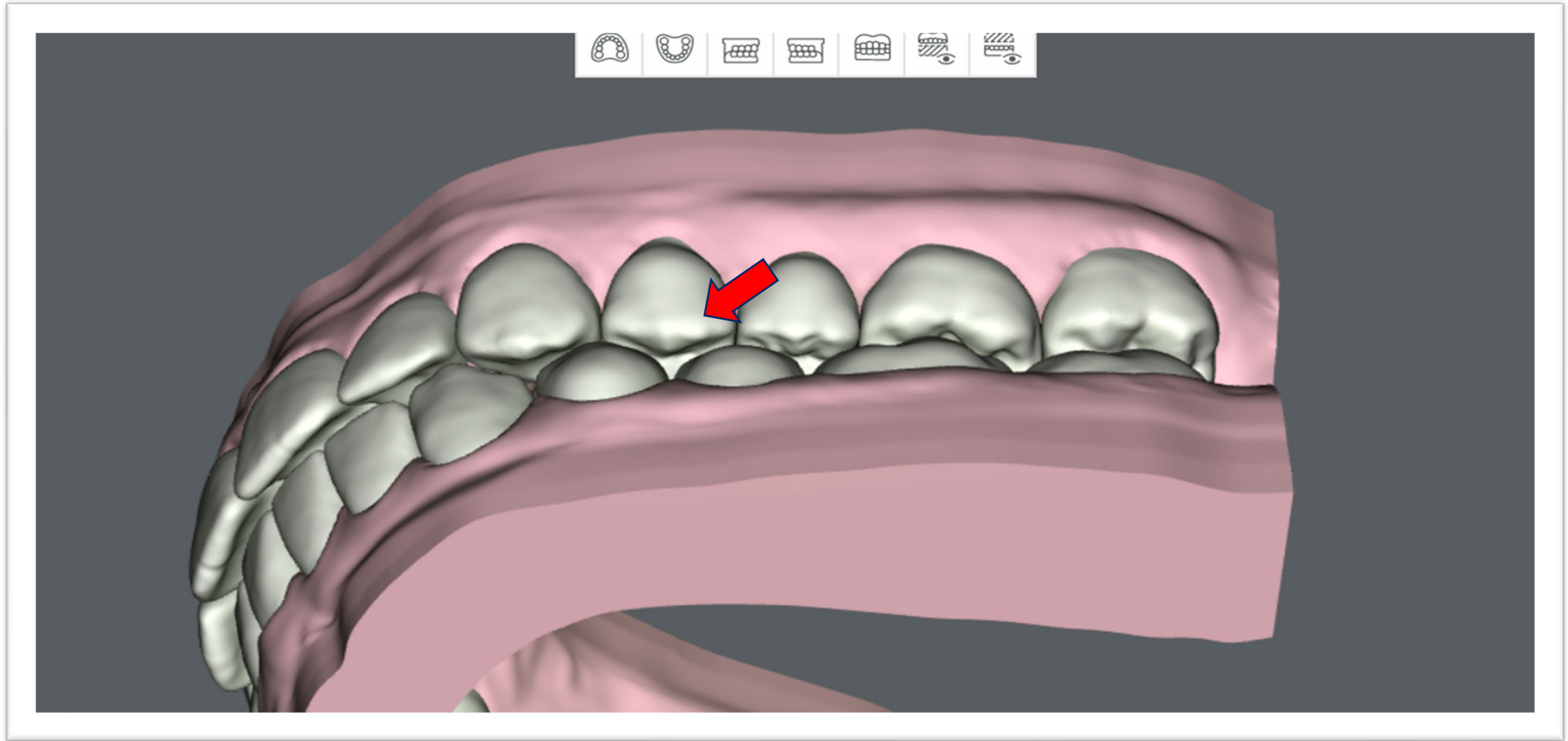
Alignment adjustments for confirming “straightness” of the teeth.

# Arch Coordination



**Loss of inclination and early recession with early abfraction sign.**

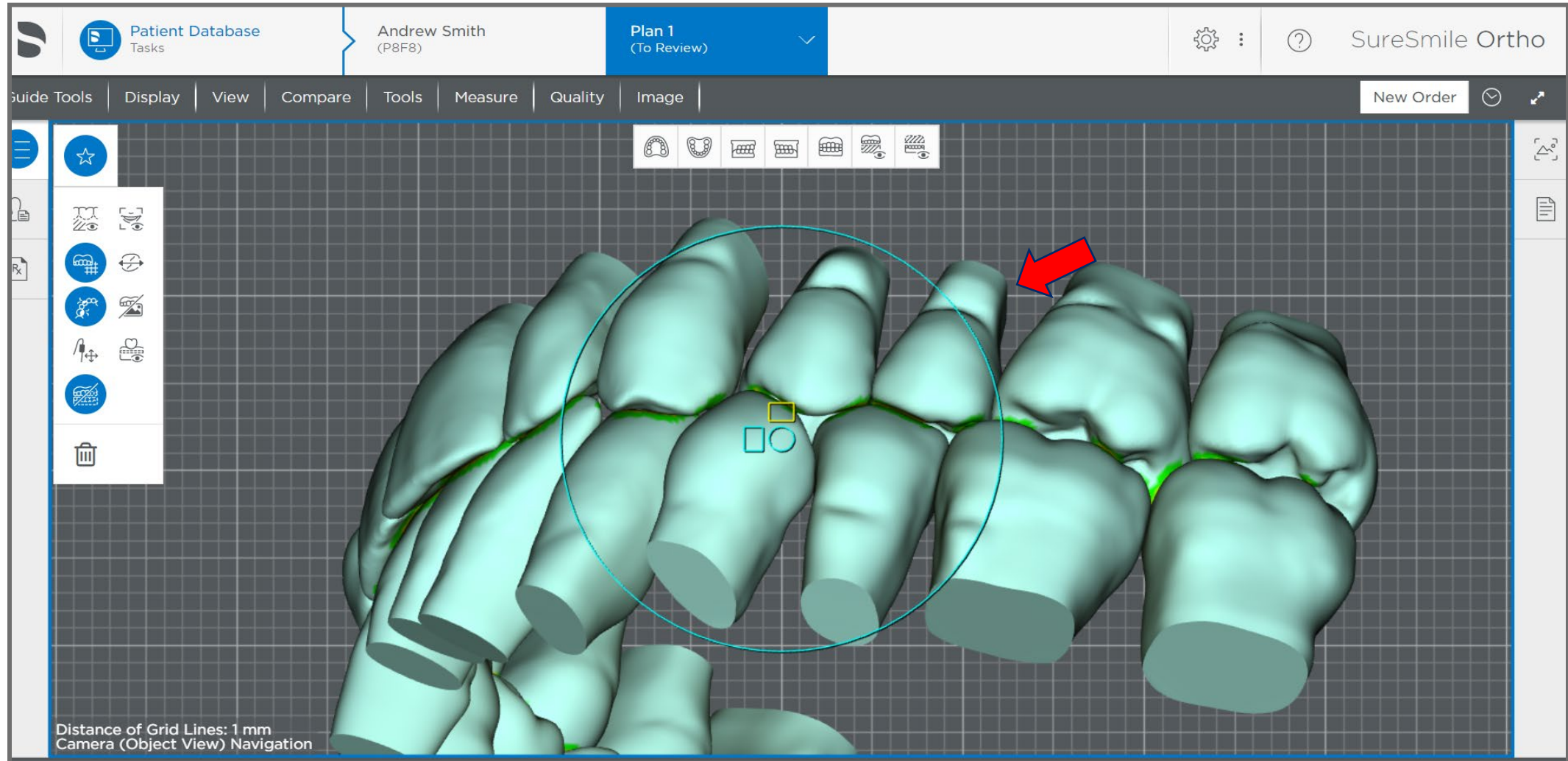
# Arch Coordination



**Adjustment to improve inclination and decrease chance for early recession and abfraction.**

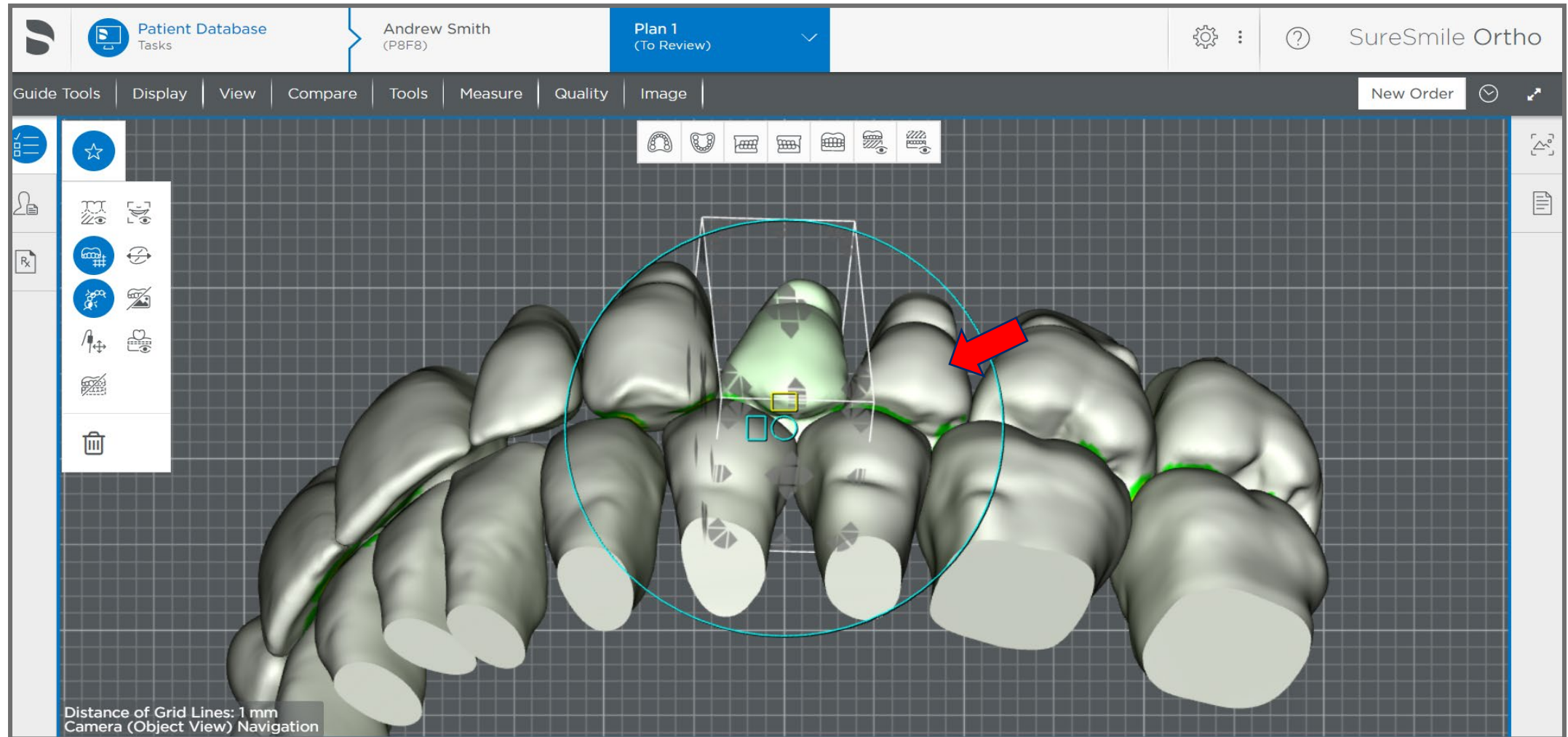


# Arch Coordination



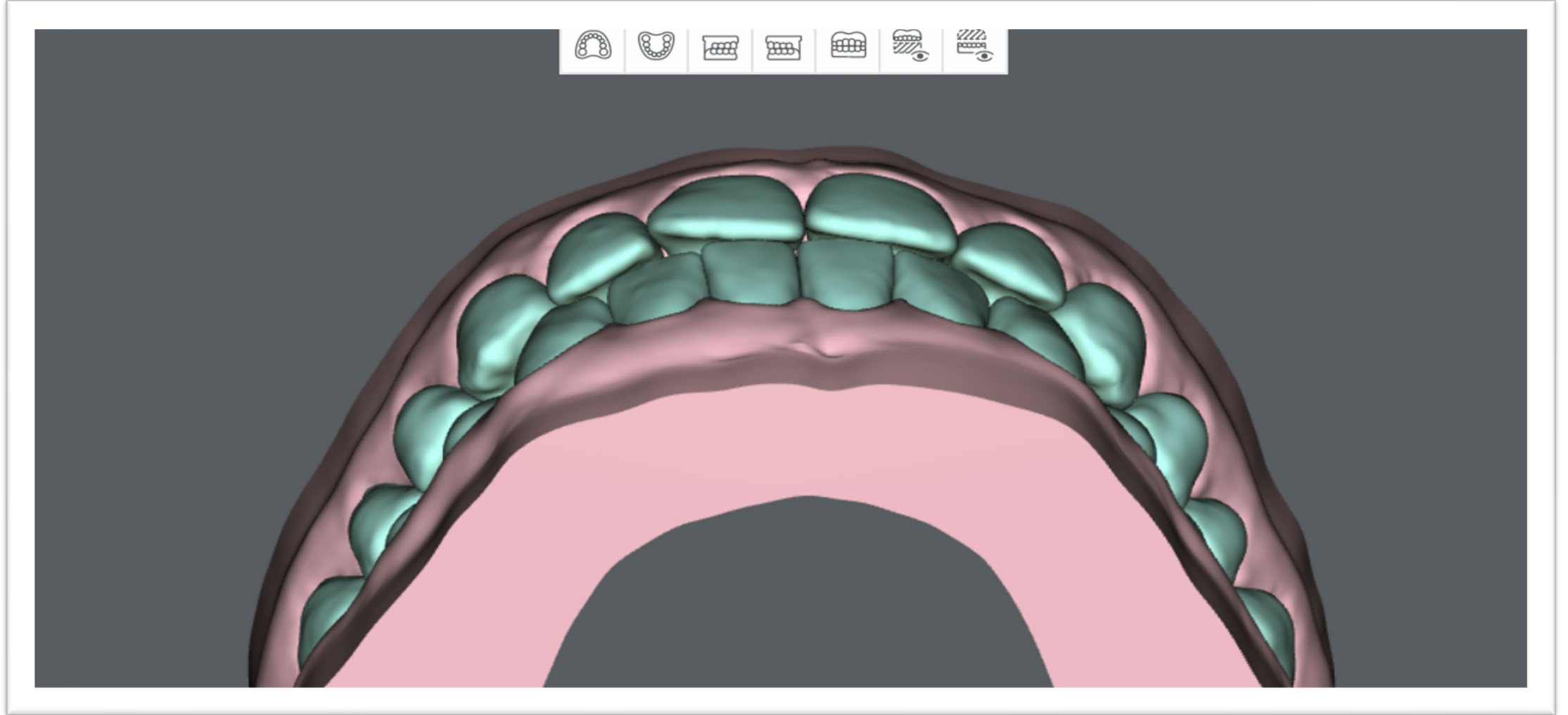
**Severe loss of inclination and severe abfractions**

# Arch Coordination



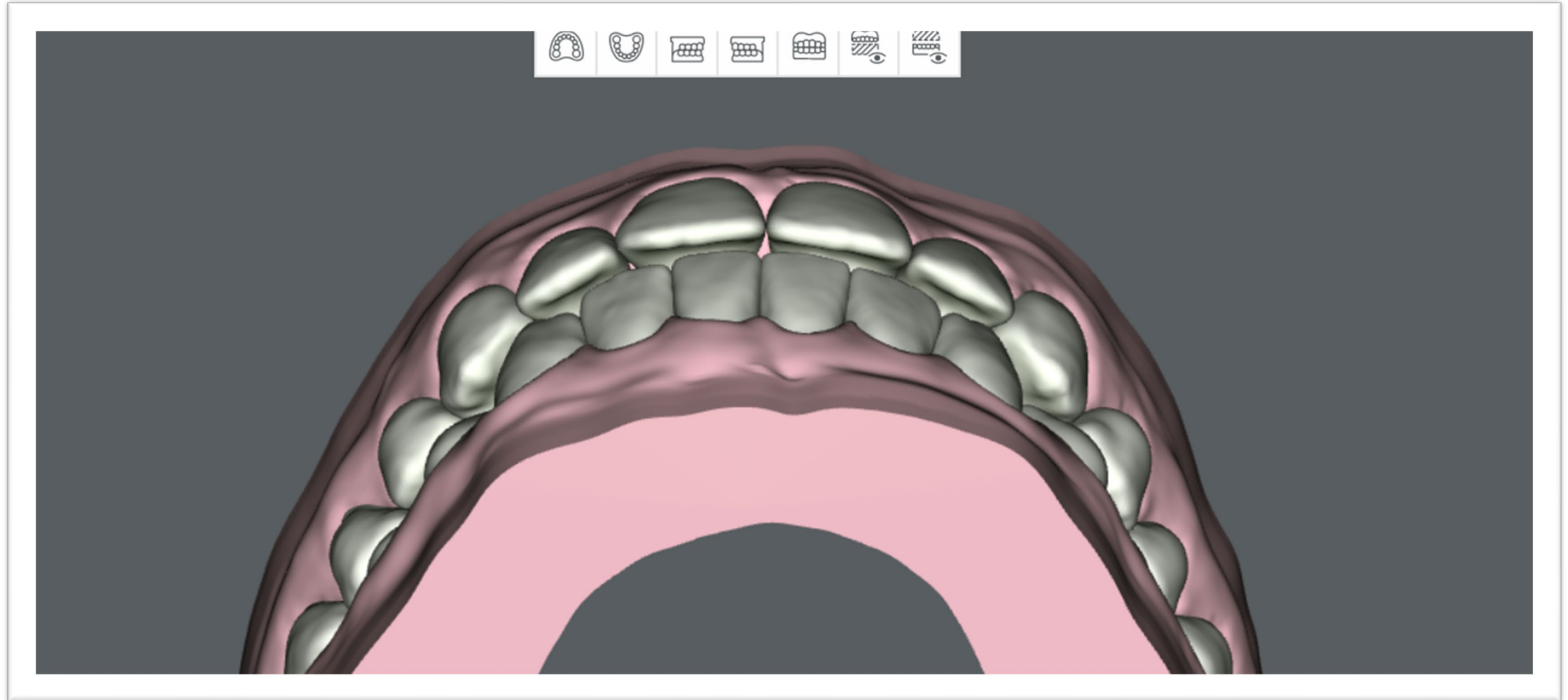
**Adjustments decrease chance for further chance of continued recession and abfraction.**

# Overjet



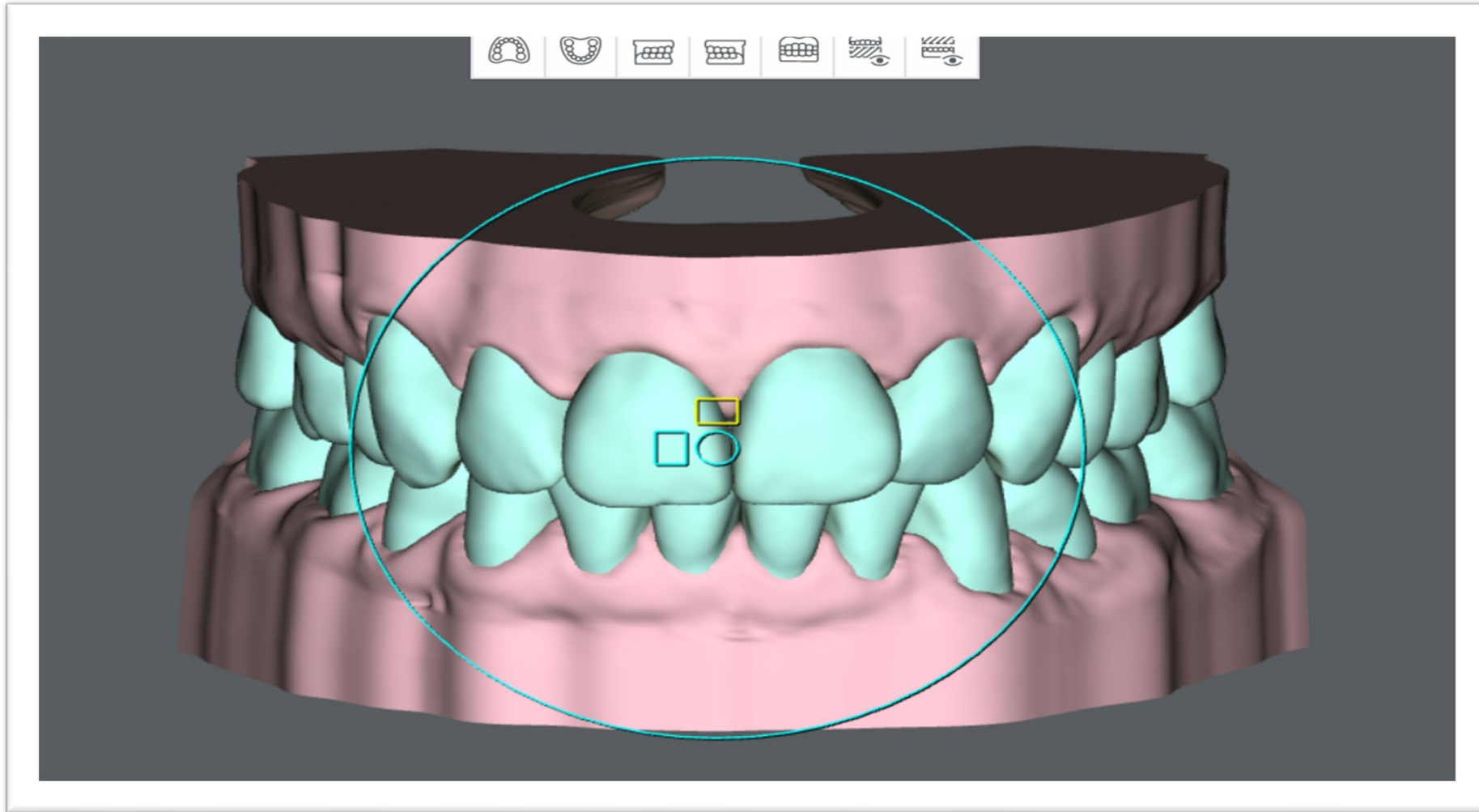
0 mm of overjet

# Overjet



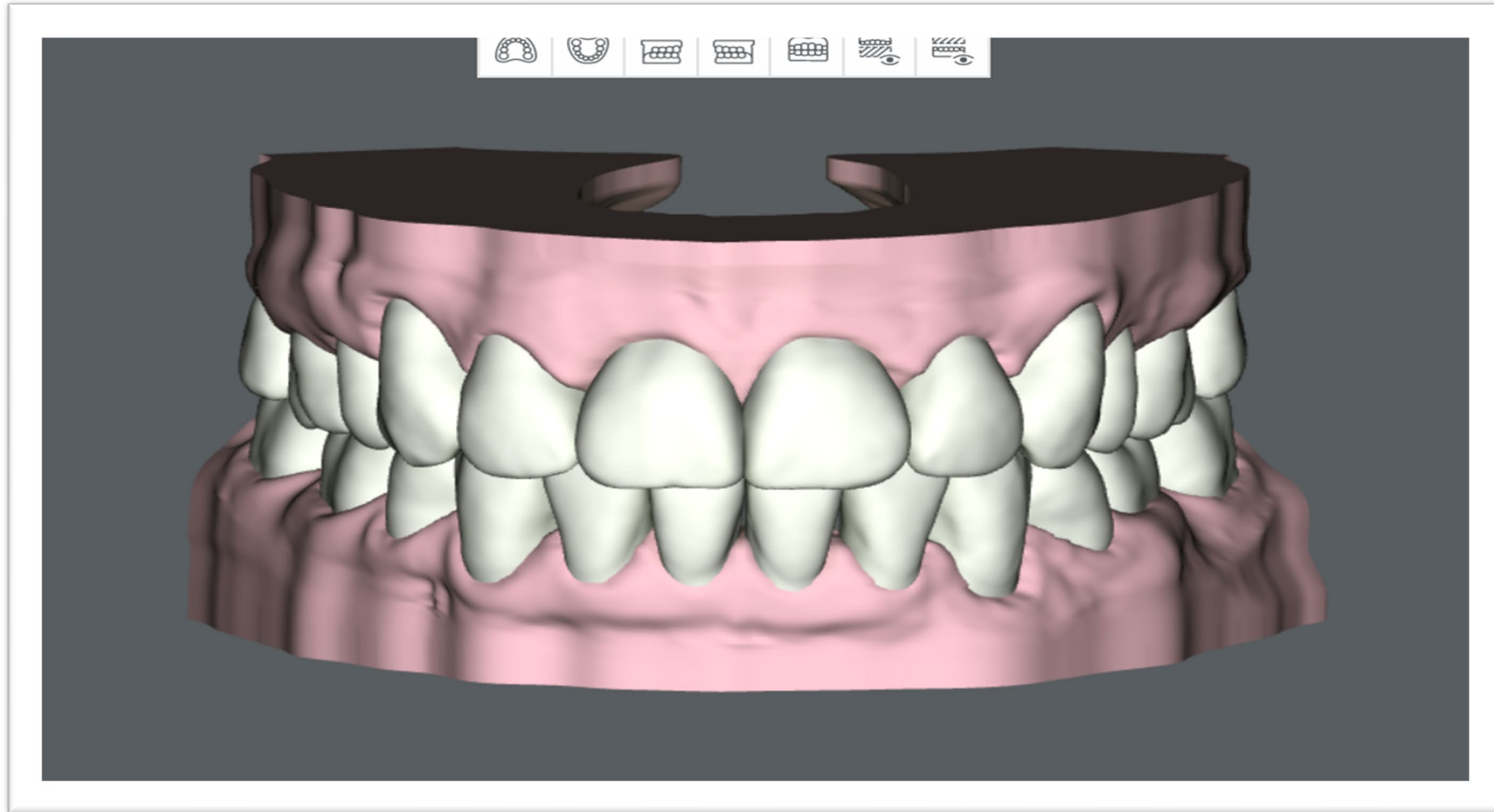
**Tooth adjustments for consideration of protecting anterior teeth during protrusive excursions**

# Overbite



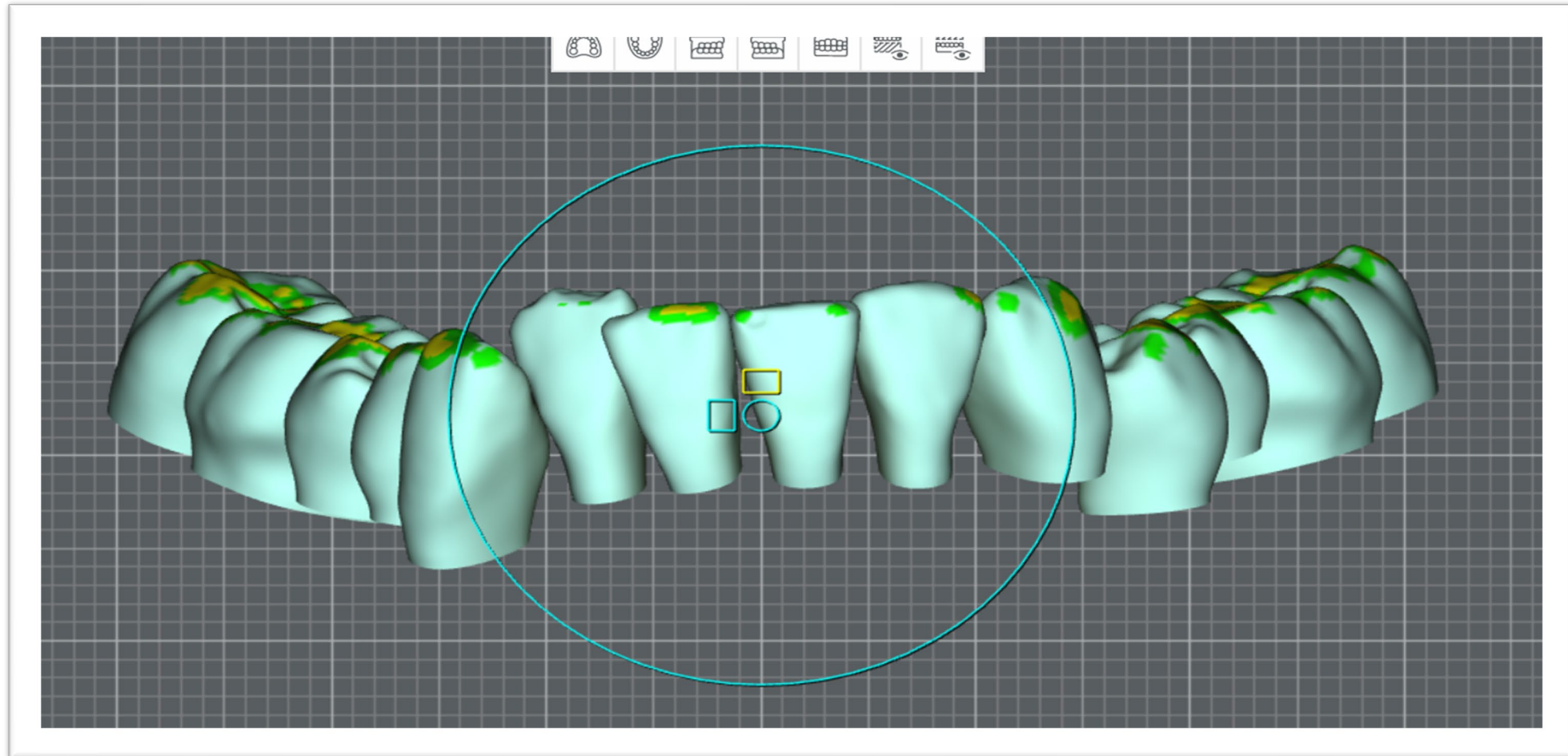
Moderate overbite

# Overbite



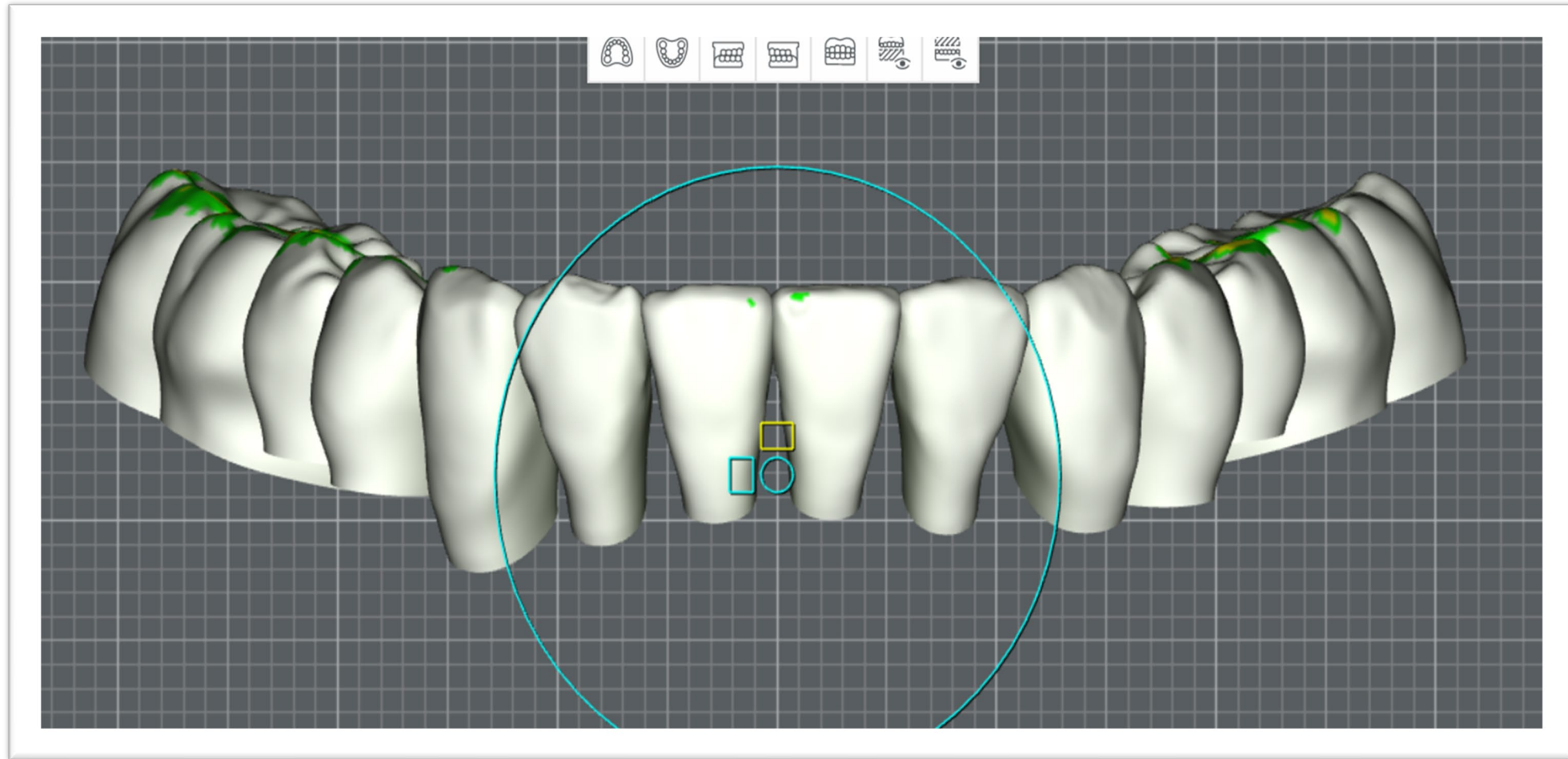
**Tooth adjustments for further leveling of the arch for consideration of protecting anterior teeth during protrusive excursions**

# Curve of Spee



**Tooth adjustments for alignment and bite opening for consideration of protecting anterior teeth during protrusive excursions for continued attrition**

# Curve of Spee



**Tooth adjustments for alignment and bite opening for consideration of protecting anterior teeth during protrusive excursions for continued attrition**





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## **Step 3: Callouts**

# Callouts

Review Orthodontic and Restorative clinical considerations.  
Review SHO and THO.

## Ortho:

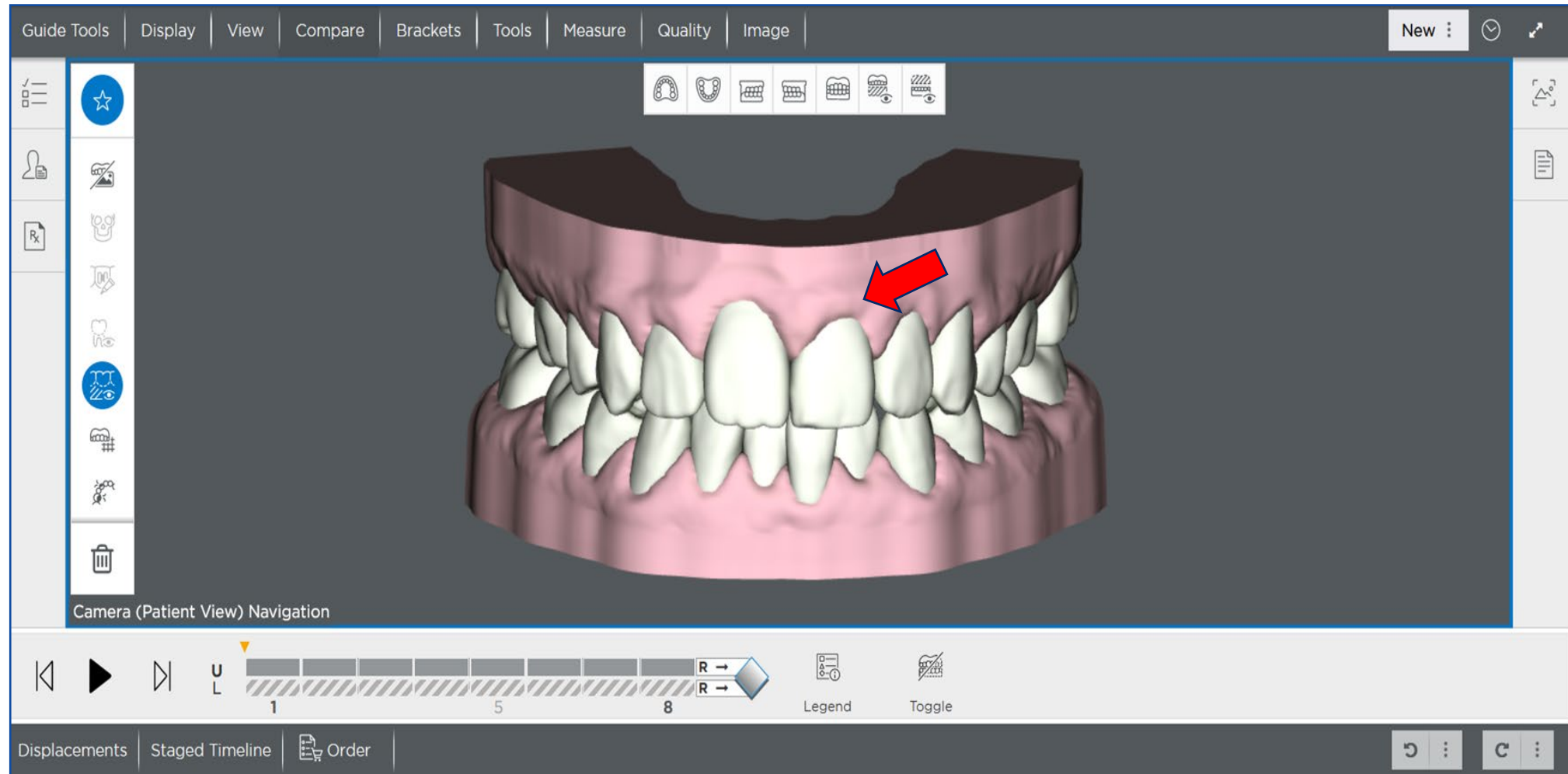
- Black triangles
- Recession/Bone Loss
- Tooth mobility
- Tooth movement limitations affecting outcome

**Restorative:** Need for enameloplasty and restorative opportunities.

## Occlusion:

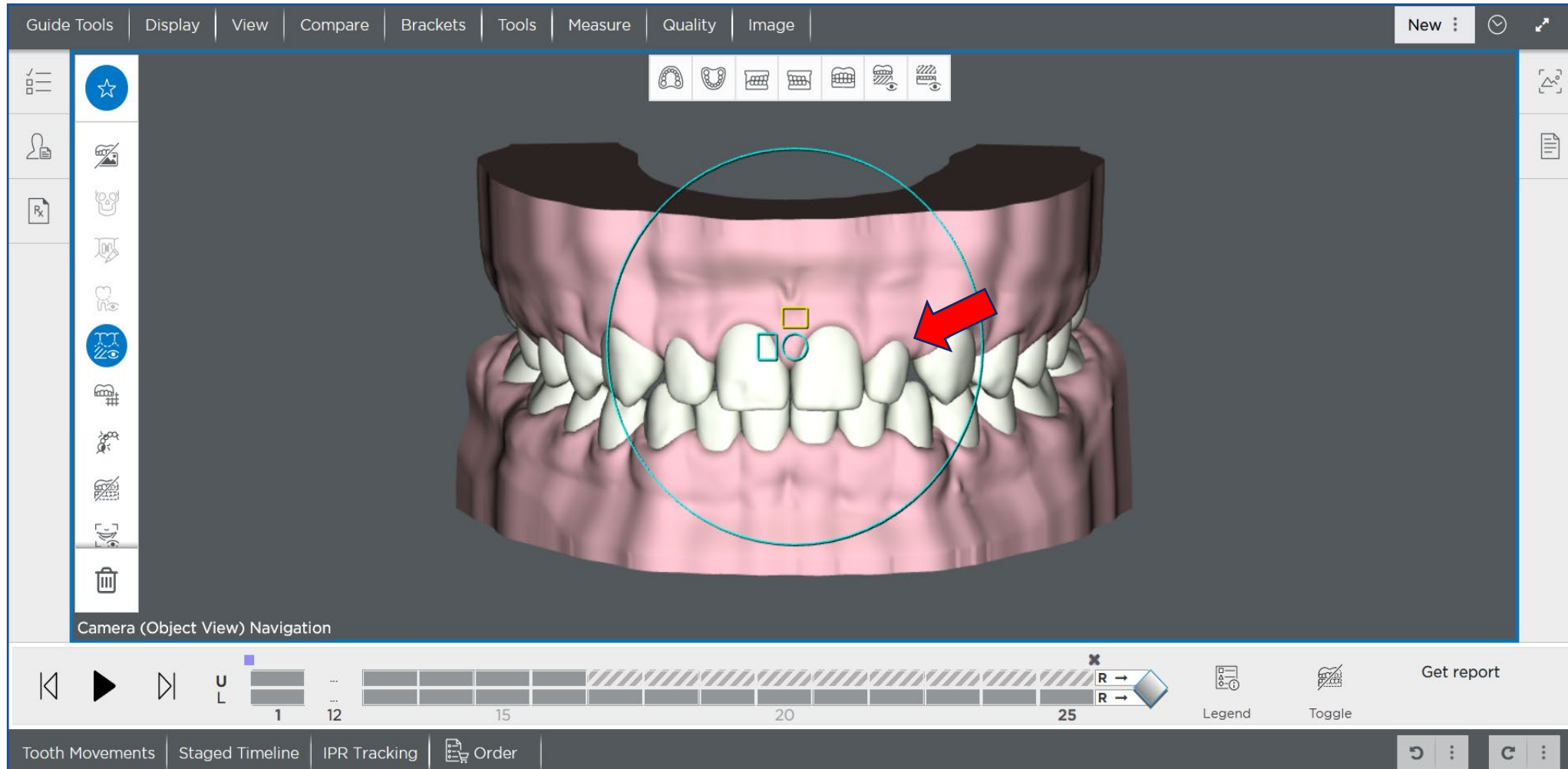
- SHO- for final occlusion
- THO- Tooth transitions during staged models

# Restorative Callout



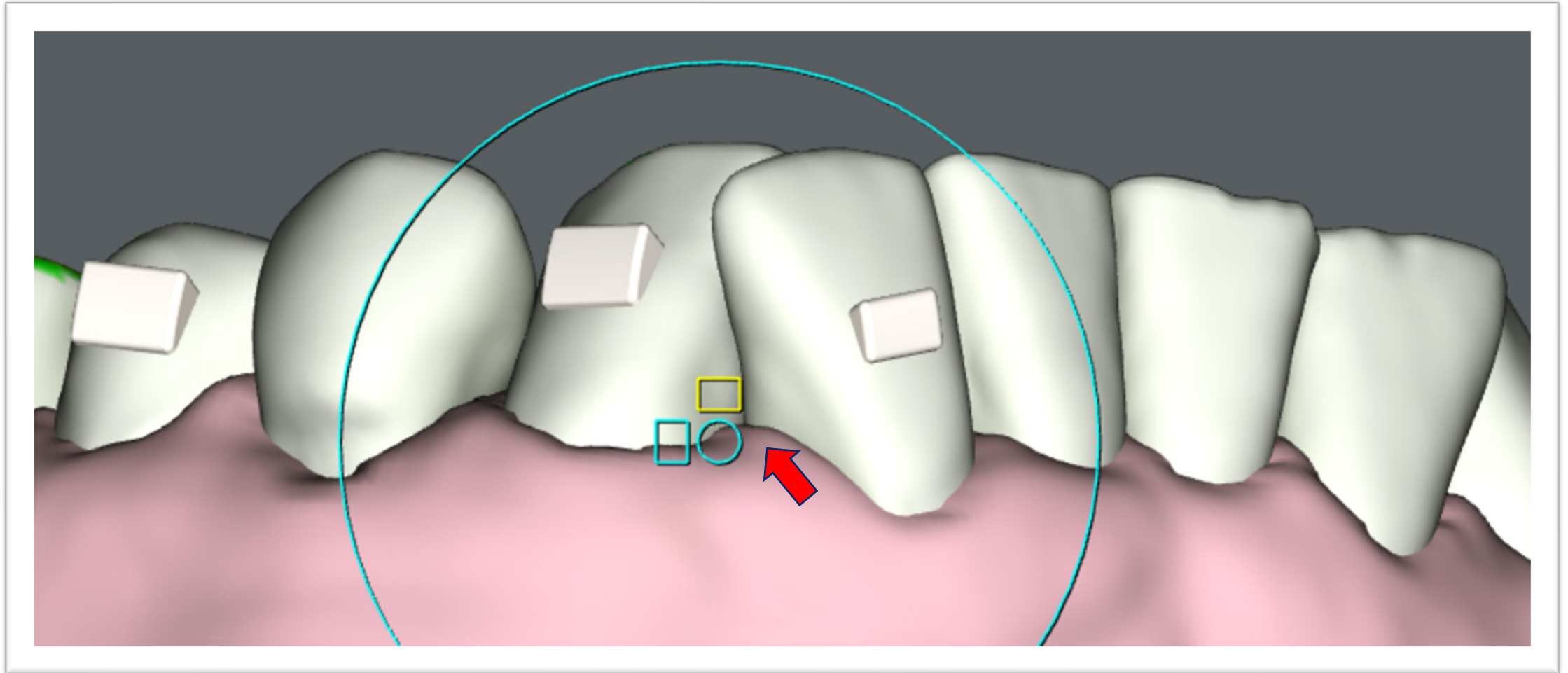
**Are there periodontal considerations on tooth #8 or restorative opportunity on tooth #9?**

# Restorative Callout



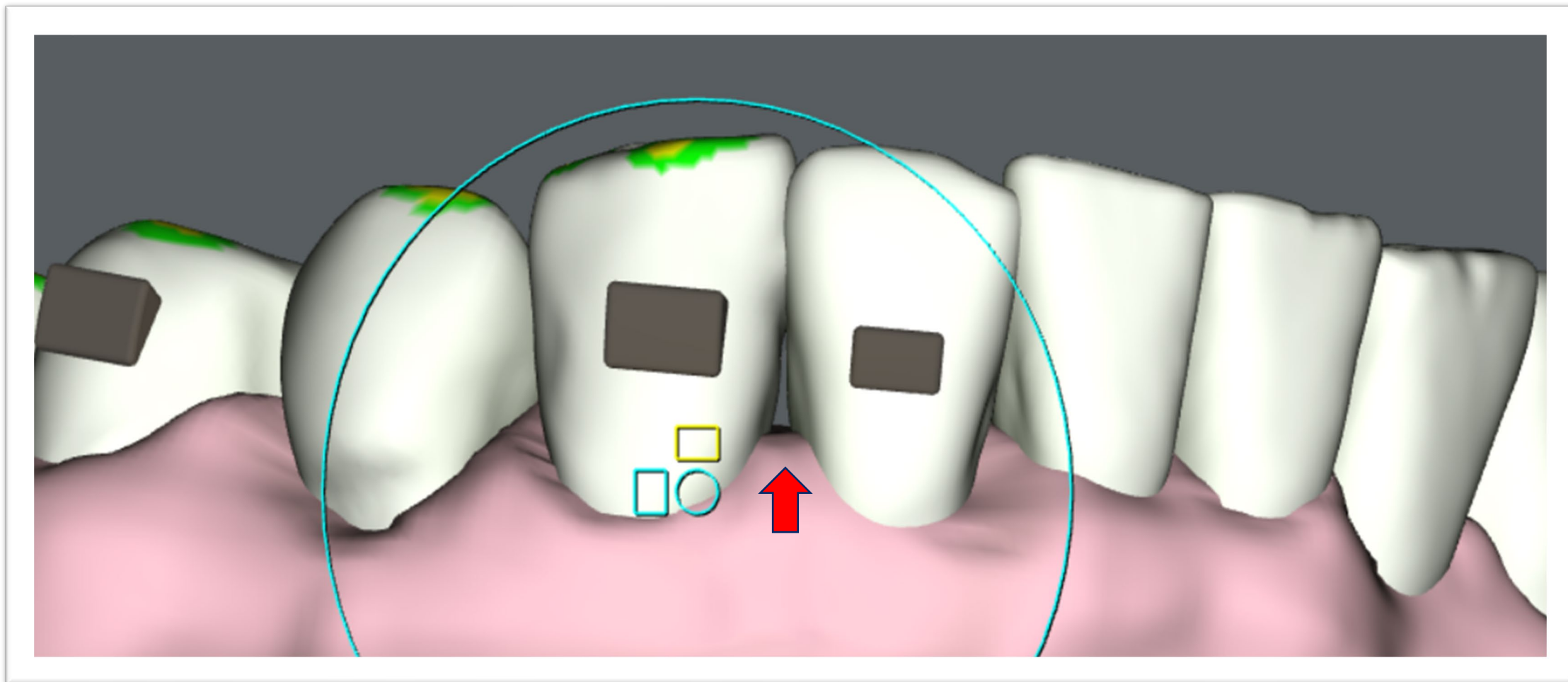
**Bolton Discrepancy: IPR lower, Restore Upper, or Both**

# Orthodontic Callout



**Black triangles risk factors: Rotations out and bone loss (angular > horizontal).  
Rotations in and/or retraction of teeth can decrease black triangle effect**

# Orthodontic Callout



**Black triangles risk factors: Rotations out and bone loss (angular > horizontal).  
Rotations in and/or retraction of teeth can decrease black triangle effect**



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# **Step 4: Treatment Estimations**

# Step 4: Treatment Estimations

*Using the Rule of 3's  
you will be able to calculate:*

- Tx Time
- Tx Costs
- Dispensing Protocol



# Aligner Clinical Protocol

*Rule of 3's- The ALIGNER DISPENSING PROTOCOL is based on the functionality of the software.*

- The first 1/3 of the trays are worn for 2 weeks each
- The second 1/3 of the trays are worn for 10 days each
- The last 1/3 of the trays are worn for 7 days each

*\* Only have 3 options based on the common denominator being the number 3*

# Aligner Clinical Protocol

## ***Example: 15 trays***

- 5 trays are worn for 2 weeks each
- 5 trays are worn for 10 days each
- 5 trays are worn for 7 days each

## ***Example: 16 trays***

- 6 trays are worn for 2 weeks each
- 5 trays are worn for 10 days each
- 5 trays are worn for 7 days each

## ***Example: 17 trays***

- 6 trays are worn for 2 weeks each
- 6 trays are worn for 10 days each
- 5 trays are worn for 7 days each

*\*18 trays will end up as 6 for 2 weeks, 6 for 10 days, and 6 for 7 days*

# Estimated Treatment Time

Calculate estimated Tx time based on the initial number of staged models. The number of staged models equals the number of aligner trays to be worn on average 10 days each. Assume 50% of the initial number of trays for a refinement and worn 10 days on average.

## **Total Estimated Tx Time =**

*# of initial trays X 10 days + # of refinement trays X 10 days*

## **Example:**

*18 initial trays X 10 days + 9 refinement trays X 10 days = 270 days or 9 months*

# Treatment Cost

**Estimated Tx Time = 12 months**

**Actual Tx Time= 9 months**

- *Patient is estimated as a 9-12 month Tx time*
- *Use 9-12 month Tx Fee*



**CLEAR BLUE SMILES™**

**SureSmile® Aligner**

**Patient Consult**

# Patient Consult

**Step 1:** Review Tx time

**Step 2:** Review IPR, attachments, SHO, and THO using Staged Models

**Step 3:** Review Orthodontic and Restorative Callouts.

**Step 4:** Review Tx costs and Sign Paperwork

- Clear Aligner Contract
- Orthodontic Informed Consent
- Clear Aligner Patient Partnership Agreement



**CLEAR BLUE SMILES™**

# **Patient Consult: Accessing Staged Models-Tasks**

# 1. Login into SureSmile

Dentsply Sirona

SureSmile®

Log in with your account details

Email address

Password

Login

[Forgot your password?](#)

[Looking to add a new user to your account?](#)

New to SureSmile?  
Click here to create an account

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# 2. Select Review setup and staged models

AuraSmile Dental

Patient ID  [New Patient](#)

Dr. Brian Gaudreault  
AuraSmile Dental

SureSmile Aligner

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

Tasks (4) Patients Shipments Jobs DS CEREC Orders Reports Active Tasks

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>		Walker	Shekeda	O3P3	Douglas W. Voiers, DDS		Order Retainers <input type="checkbox"/>	2022-07-04		2022-06-16	Active	
<input checked="" type="checkbox"/>		Dillon	Sanders	H5Y4	Douglas W. Voiers, DDS		Review setup & staged models	2022-06-30		2022-07-27	Active	
<input type="checkbox"/>		Wayne	Renee	V9T8	Douglas W. Voiers, DDS		Review setup & staged models	2022-06-30		2022-07-20	Active	
<input type="checkbox"/>		Miller	Jeff	G6M8	Douglas W. Voiers, DDS		Review setup & staged models	2022-07-01		2022-07-21	Active	

# Setup and Staging Opens

The screenshot displays the SureSmile Aligner software interface. At the top, the patient's name is Jackie Haumschild (H4J3), and the current stage is Setup & Staging 1 (To Review / Not ordered). The main window shows a 3D dental model in patient view, with a cyan circle highlighting the central incisors. A yellow square and a blue circle are placed on the upper central incisors, and a blue square is on the lower central incisor. On the left, a 'Checklist and Overview' panel is open, showing an 'Overview' section with instructions to review notes from the Digital Lab (DL) and a 'Setup and Staging Review' section with options for Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, and Lower Occlusal. Below the checklist is a 'Request Modifications' toggle. At the bottom of the interface, there is a navigation bar with a 'Camera (Patient View) Navigation' section, a timeline with markers at 1, 5, 10, and 14, and a 'Legend' section with 'Tooth movement' controls.



**CLEAR BLUE SMILES™**

# **Patient Consult: Accessing Staged Models-Patients**

# 1. Login into SureSmile

Dentsply Sirona

SureSmile®

Log in with your account details

Email address

Password

Login

[Forgot your password?](#)

[Looking to add a new user to your account?](#)


New to SureSmile®?  
Click here to create an account

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# 2. Select Patients


AuraSmile Dental














Patient ID   [New Patient](#)

Dr. Brian Gaudreault  
AuraSmile Dental

SureSmile Aligner

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

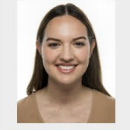
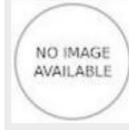
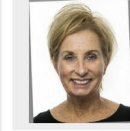
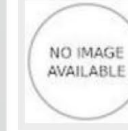
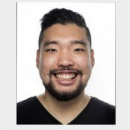
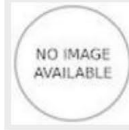
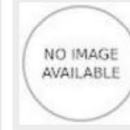
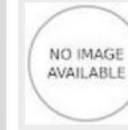

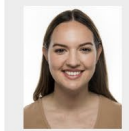
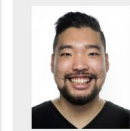

Tasks (4) Patients Shipments Jobs DS CEREC Orders Reports  Active Tasks

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>		Walker	Shekeda	O3P3	Douglas W. Voiers, DDS		Order Retainers  	2022-07-04		2022-06-16	Active	
<input checked="" type="checkbox"/>		Dillon	Sanders	H5Y4	Douglas W. Voiers, DDS		Review setup & staged models 	2022-06-30		2022-07-27	Active	
<input type="checkbox"/>		Wayne	Renee	V9T8	Douglas W. Voiers, DDS		Review setup & staged models 	2022-06-30		2022-07-20	Active	
<input type="checkbox"/>		Miller	Jeff	G6M8	Douglas W. Voiers, DDS		Review setup & staged models 	2022-07-01		2022-07-21	Active	

# 3. Select Setup & Staging

Tasks Patients (57) Shipments Jobs Reports ?

Sort by: Modification ... Patients for: All Show: Active Patien... View: [List Icon] [Grid Icon]

 ID: R3F3	 ID: E8J5	 ID: W4X4	 ID: N4G6
 ID: S6X2	 ID: T2X7	 ID: K4H6	 ID: S7H8
 ID: R3E7	 ID: L6K9	 ID: K8J7	 ID: Y9F9

A red arrow points to the patient card for Lee, Brian.

# Setup and Staging Opens

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Jackie Haumschild (H4J3) and the current stage is Setup & Staging 1 (To Review / Not ordered). The main window shows a 3D dental model of the upper teeth with a cyan circle highlighting the central incisors. A sidebar on the left contains a 'Checklist and Overview' section with an 'Overview' item and a 'Setup and Staging Review' section with options for Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, and Lower Occlusal. Below the sidebar is a button for 'Approve & Order Aligners' and a 'Cancel Full Service Aligner Case' button. The bottom of the interface features a timeline with markers at 1, 5, 10, and 14, and navigation controls for 'Legend' and 'Tooth movement'.