



**CLEAR BLUE SMILES™**

**Suresmile® Aligner**

**#5 Refinement**

# Appointment #3

## OVERVIEW

After the initial set of aligners have been completed, an additional set of aligners can be ordered if needed. This would address a functional concern by the Doctor or an aesthetic concern from the patient.

The previous workflows and protocols will be replicated during the refinement process.

## PREPARATION

Review handout:  
#5 Refinement

## APPOINTMENT

Appointment time  
commitment:  
15 minutes

# Appointment #3

## STEP 1

Data Collection

## STEP 2

Order Case Type:  
Refinement

## STEP 3

Review ordering complete  
aligner protocol.

## STEP 4

Review Clinical Protocols:

**Clear Aligner:**

1. Delivery appointment
2. Dispensing protocol
3. Progress visits



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# **Step 1: Data Collection**

# Step 1: Data Collection

1. New Upper/Lower Intra-oral Scan with Bite Registration
2. New Patient Photos



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## **Step 2: Order Case Type**

# Step 2: Order Case Type

Submit patient records into SureSmile®Aligner. Case Type Order is Refinement.

# 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 DS CEREC Order Tab



Patient Database Tasks




Patient ID  

Dr. Brian Gaudreault SOUTHEAST ORTHO-ALIGNER  SureSmile Aligner


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

Tasks for: Dr. Brian Gau...  Show: Active Tasks

**Tasks (1)** Patients Shipments Jobs **DS CEREC Orders**  Reports 

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>		Becker	Debra	M4V4	Dr. Brian Gaudreault	Initial Model	Submit order  <input type="checkbox"/>	2022-11-15		2022-12-06	Active	

# 3. Select Import

 Patient Database Tasks

Patient ID



Dr. Brian Gaudreault  
SOUTHEAST ORTHO-ALIGNER

SureSmile Aligner

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


Filter by Order Number Enter Order Number


Show wait for proc...


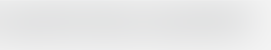

Order	Status	Added on	CEREC Patient	SureSmile Patient	SureSmile Order	Actions
12557873	wait for processing	November 9, 2022	Becker, Debra - December 5, 1959	Becker, Debra - M4V4		 Import  Discard

Displaying 1 item

# 4. Select Search Patient

 **Patient Database**  
Tasks

Patient ID  

   SureSmile Aligner

## Import DS CEREC Order

**DS CEREC Order**

Order

Last Name


First Name

Date of Birth

Status

Additional Instructions

**Use existing SureSmile Patient**



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# 5. Select Patient

**Patient Selection**  
Select a Patient

Name

U 15: XTC-21535	Jen	2008-06-22	A7F4
Initial WK Test 2	Jen	2007-12-03	C7D7
U13 HF1 Sanity - COMP	Jen	2008-02-28	E9M3
Dentoform 2	JEN B - CDOCS	2006-09-01	G3F8
WK - XTC-20474	Jen	2007-12-06	G4M3
U13 HF 1 Sanity - SEL	Jen	2008-02-28	H4F9
QC AX Test Order-6	Jen S -	2007-09-24	H6K4
Initial CBCT WK Test 2	Jen	2007-11-22	I6Q7

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# 6. Select Apply

Patient Database Tasks Patient ID SureSmile Aligner

## Import DS CEREC Order

DS CEREC Order

Order: 2120093

Last Name:

First Name:

Date of Birth:

Status: wait for processing

Additional Instructions:

Use existing

### Patient Selection

Select a Patient

Name:

U 15: XTC-21535	Jen	2008-06-22	A7F4
Initial WK Test 2	Jen	2007-12-03	C7D7
U13 HF1 Sanity - COMP	Jen	2008-02-28	E9M3
Dentoform 2	JEN B - CDOCS	2006-09-01	G3F8
WK - XTC-20474	Jen	2007-12-06	G4M3
U13 HF 1 Sanity - SEL	Jen	2008-02-28	H4F9
QC AX Test Order-6	Jen S -	2007-09-24	H6K4
Initial CBCT WK Test 2	Jen	2007-11-22	I6Q7

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# 7. Select Aligner Refinement

Patient Database Tasks

Patient ID

Settings

Help SureSmile Aligner

## Import DS CEREC Order

### DS CEREC Order

Order:

Last Name:

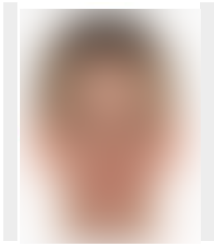
First Name:

Date of Birth:

Status:

Additional Instructions:

### Use existing SureSmile Patient




Last Name:

First Name:

Date of Birth:

ID:

[Import Options](#)



# 8. Select Assign to Order

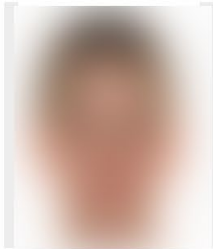
Patient Database Tasks h3c3 1 SureSmile Aligner

## Import DS CEREC Order

### DS CEREC Order

Order	2119353
Last Name	CBCTCheckmark
First Name	Test
Date of Birth	November 15, 2011
Status	wait for processing
Additional Instructions	CBCT Checkmark

### Related SureSmile Patient

	Last Name: U12 20372
	First Name: Kelly
	Date of Birth: December 13, 2007
	ID: H3C3


[Import Options](#)

**Assign to Order: Full-service Aligner Staging** ←

# 9. Auto Upload Scan Data

Progress bar showing steps: 1. Patient Info (checked), 2. Scan Data (active), 3. Photos / X-rays, 4. Dental Exam, 5. Prescription, 6. Confirmation.


### Upload Scan Data



**Choose files to upload**  
or drag and drop them here.

#### Upper Arch

B.L.\_20210604110923\_Upper  
Jaw.stl



#### Lower Arch

B.L.\_20210604110923\_Lower  
Jaw.stl



# 10. Upload Photos/X-rays



## Upload Images

Choose files to upload

or drag and drop them here.


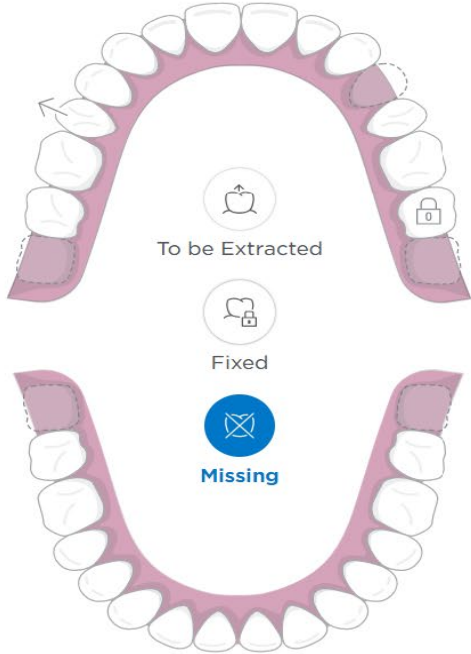
Front 	Profile 	Smile 	Upper Occlusal 	Lower Occlusal 
Right Buccal 	Left Buccal 	Frontal 	Panorex <p>Drop image here or click to upload. - optional -</p>	Lateral Ceph <p>Drop image here or click to upload. - optional -</p>

# 11. Complete Dental Exam


Progress bar: Patient Info (✓), Scan Data (✓), Photos / X-rays (✓), **Dental Exam (4)**, Prescription (5), Confirmation (6)

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


**Records**



Upper Occlusal



Lower Occlusal



Panorex

# 12. Complete Prescription

Progress: Patient Info (✓) → Scan Data (2) → Photos / X-rays (✓) → Dental Exam (✓) → Prescription (5) → Confirmation (6)

### Prescription

**Treat Arches**  
Both

**Arch Range**  
Full Arch

**Attachments**  
 Don't allow  Allow  
Do you want to keep already placed attachments?  
 No  Yes

**IPR**  
 Don't allow  Allow

**Elastics**  
 Don't allow  Allow

More Settings

**Additional Notes**  
Type Something






### Records

Smile

Frontal

Right Buccal

Left Buccal



# Prescription (optional selections)

^ More Settings

---

Midline

Maintain  Correct

---

Archform

Maintain  Expand

Constrict

---

Overjet

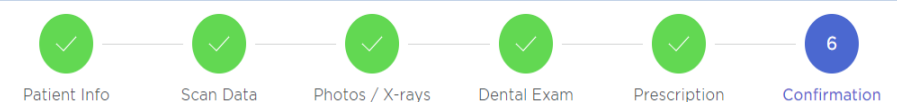
Contact  Gap

---

Overbite

Maintain  Correct

# 13. Place Order



Patient Info   Scan Data   Photos / X-rays   Dental Exam   Prescription   Confirmation

### Order summary

Please review your order summary details before clicking placing your order.

**Attention: No changes were made to Dental Examination - default settings have been applied.**

**Package** Full-service Aligner Staging

---

**Scan Data** Uploaded

---

**Photos / X-rays** Uploaded

---

**CBCT** No

---

**Dental Examination**


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

---

**Prescription Form**

- **Arches to Treat** Both
- **Teeth to Treat** Full Arch
- **Attachments** Allow
  - Don't keep placed attachments
- **IPR** Allow
- **Elastics** Don't allow

---





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## **Step 3: Ordering Complete Aligners Refinement**

# Refinement Workflow

- Confirm lab has applied all refinement requests.
- Utilize the setup and staging checklist to aid in refinement plan review.
- Review Callouts and SHO/THO.
- Make any further modifications if needed.
- Order Refinement Aligners



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**Confirm Modifications Applied**



# 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 information includes "Second Site", "Jean Frost (R2N6)", and the current stage "Setup & Staging 1 (Ready for Review)". The main window shows a 3D model of a patient's teeth in a patient view, with a pink gingival mask. A checklist on the left side of the interface lists the following items, all of which are marked as complete 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 interface, there is a navigation bar with a play button, a timeline from 1 to 21, and icons for "Legend" and "Treatment Details".

# 3. Select Notes Tab



### Product Notes

Standard Notes

2022-11-08

Dr.,

Your modifications have been applied.

New IPR U1s 0.2mm, LR5-LL2 0.3mm per contact

Thank you,

Jarod

Aligner processing: Ship setup/aligner. Opened the browser. Existing staged model: Setup & Staging 1

Request Modifications

Approve & Order Retainers

Approve & Order Aligners

Cancel Full Service Aligner Case

### Image Assets

Camera (Patient View) Navigation

# Confirm Modifications Applied



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

- Product Notes Panel (Left):** Contains a 'Standard Notes' dropdown, a date '2022-11-08', and a text area with the following content:  
Dr.,  
Your modifications have been applied.  
New IPR U1s 0.2mm, LR5-LL2 0.3mm per contact  
Thank you,  
Jarod  
Aligner processing: Ship setup/aligner. Opened the browser.  
Existing staged model: Setup & Staging 1  
Below the notes is a 'Request Modifications' toggle switch (currently off) and three buttons: 'Approve & Order Retainers', 'Approve & Order Aligners', and 'Cancel Full Service Aligner Case'. A red arrow points to this panel from the left.
- 3D Model Panel (Center):** Shows a 3D rendering of a lower dental arch with a green highlight on the upper incisor.
- Image Assets Panel (Right):** Displays two images: a patient's portrait and a clinical intraoral photo of the teeth.

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



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# **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   [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 Review Opens

The screenshot displays the SureSmile Aligner software interface. At the top, the patient information includes "Second Site", "Jean Frost (R2N6)", and the current stage "Setup & Staging 1 (Ready for Review)". The main window shows a 3D model of a patient's teeth in a patient view, with a pink gingival mask. A checklist on the left side of the interface is titled "Checklist and Overview" and contains 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 (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, which is currently turned off. At the bottom of the checklist panel 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's name "Jean Frost (R2N6)" and the current step "Setup & Staging 1 (Ready for Review)" are visible. A "Checklist and Overview" sidebar on the left contains a red arrow pointing to the "Overview" item. Below it, a list of tasks is shown, all with green checkmarks: "Setup and Staging Review", "Labial View", "Right Buccal View", "Left Buccal View", "Upper Occlusal", "Lower Occlusal", and "IPR / Attachment / Trimline". A "Request Modifications" toggle is located below the checklist. At the bottom of the sidebar is a button labeled "Approve & Order Aligners". The main area features a 3D model of a patient's teeth in a pinkish hue, viewed from a patient perspective. The bottom of the interface includes a navigation bar with playback controls, a timeline from 1 to 21, and icons for "Legend" and "Treatment Details".

# 4. Select Notes Tab



### Product Notes

All Notes

**2022-08-31**

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

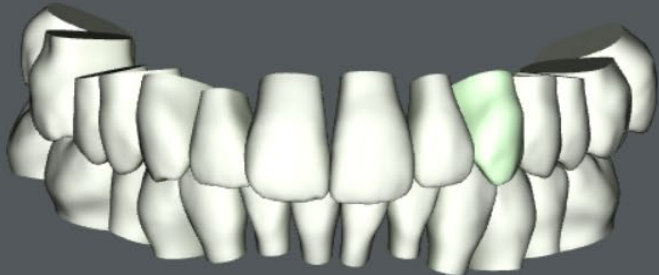
**2022-08-30**

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 right side of the model is highlighted in green, corresponding to the "Finished by" note.
- Image Assets:** A panel on the right showing two images: a patient's smiling face and a clinical photograph of the patient's teeth.

Camera (Patient View) Navigation

# 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: 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.

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



# 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 left sidebar contains a "Checklist and Overview" panel 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)

The main central area shows a 3D model of the teeth in a "Patient View" camera orientation. The right side of the interface features an "Image Assets" panel with 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" section, and a "Treatment Details" button.

# 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 with a pink semi-transparent overlay representing the aligner. 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 playback controls, a timeline from 1 to 21, and icons for "Legend" and "Treatment Details".

# 8. Select Upper Occlusal 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 green and yellow highlights on the teeth. A red arrow points to the 'Upper Occlusal' 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 (highlighted with a red arrow), Lower Occlusal, and IPR / Attachment / Trimline. On the right, there are two 'Image Assets' showing clinical photographs of the patient's teeth. The bottom of the interface features a navigation bar with a timeline from 1 to 21, a legend, and treatment details.



# 9. Select Lower Occlusal 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 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 a timeline from 1 to 21, 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

# 10. Review IPR/Attachments/Trimline

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Jean Frost (R2N6) and the case is in the 'Setup & Staging 1 (Ready for Review)' phase. The main window shows a 3D dental model of the upper and lower arches with yellow lines indicating the trimline and white blocks representing attachments. A red arrow points to the 'IPR / Attachment / Trimline' item in the 'Checklist and Overview' sidebar, which is currently selected. The sidebar also shows other checklist items: Overview, Setup and Staging Review, Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, and Lower Occlusal, all of which are marked with green checkmarks. Below the checklist is a 'Request Modifications' toggle switch. At the bottom of the sidebar is an 'Approve & Order Aligners' button. To the right of the 3D model is an 'Image Assets' panel showing two photographs: a full-face portrait of the patient and a close-up intraoral photo of the teeth. 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 buttons for 'Legend' and 'Treatment Details'.

# 11. Review Treatment Details

The screenshot displays the SureSmile Aligner software interface for a patient named Jean Frost (R2N6). The main window shows a 3D model of the upper dental arch with a yellow wire and brackets. A checklist on the left indicates that the 'Setup and Staging Review' is complete, including Labial, Right Buccal, Left Buccal, Upper Occlusal, and Lower Occlusal views. The 'IPR / Attachment / Trimeline' view is currently selected. A 'Request Modifications' toggle is turned off, and an 'Approve & Order Aligners' button is visible. On the right, the 'Image Assets' panel shows two photos: a patient's smile and a clinical view of the teeth. The bottom of the interface features a timeline with a play button, a slider, and a legend for 'R' (Right) and 'L' (Left) views. A red arrow points to the 'Treatment Details' icon in the bottom right corner.

# Tooth Movements

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"/>
<b>Cumulative:</b>	<input type="radio"/> Cumulative		<input checked="" type="radio"/> Incremental													



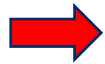
# Elastics

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		
	Left	Right
Upper	1.0 mm	0.5 mm
Lower	-1.3 mm	-0.3 mm

Measured Overjet
0.0 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 information includes "Second Site", "Jean Frost (R2N6)", and the current stage "Setup & Staging 1 (Ready for Review)". The main window shows a 3D model of a patient's teeth in a patient view, with a pink gingival mask. A checklist on the left side of the interface is titled "Checklist and Overview" and contains 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 (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, which is currently turned off. At the bottom of the checklist area 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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# **Review Callouts and SHO/THO**

# Review Callouts and SHO/THO

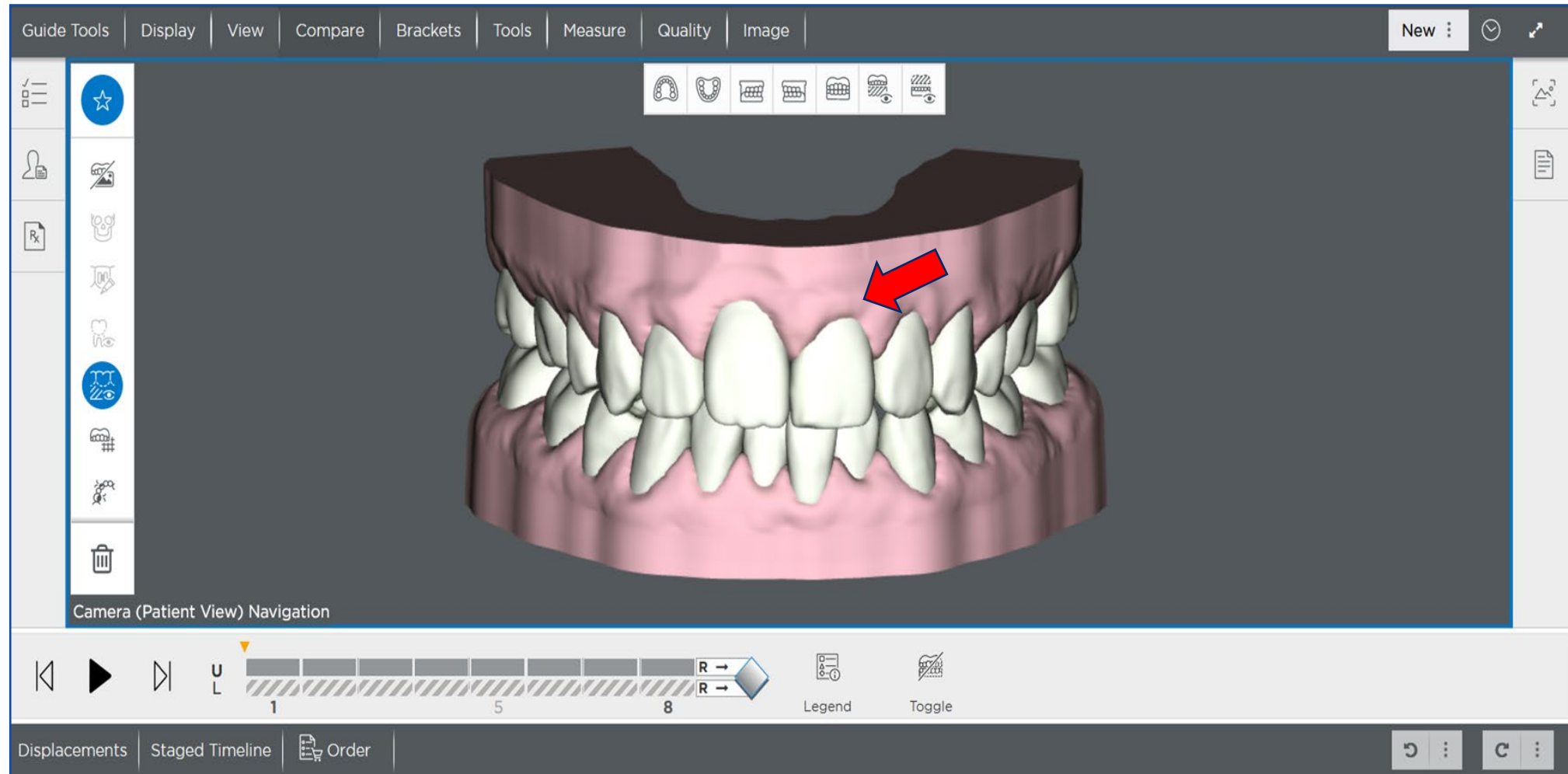
1. Confirm any new Orthodontic and Restorative Callouts.
2. Review SHO and THO in the Staged Models.



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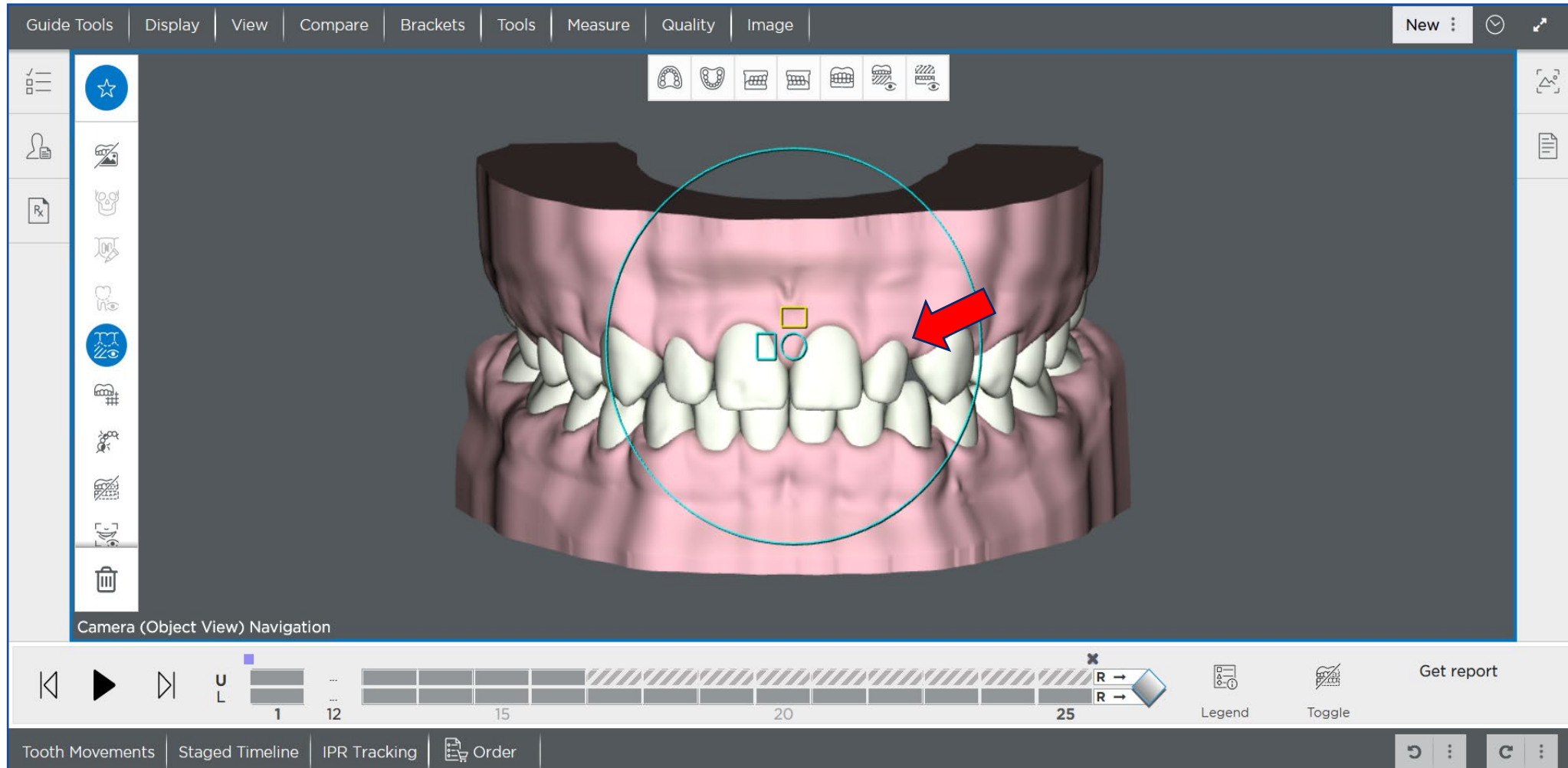
# Callouts

# Restorative Callout



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

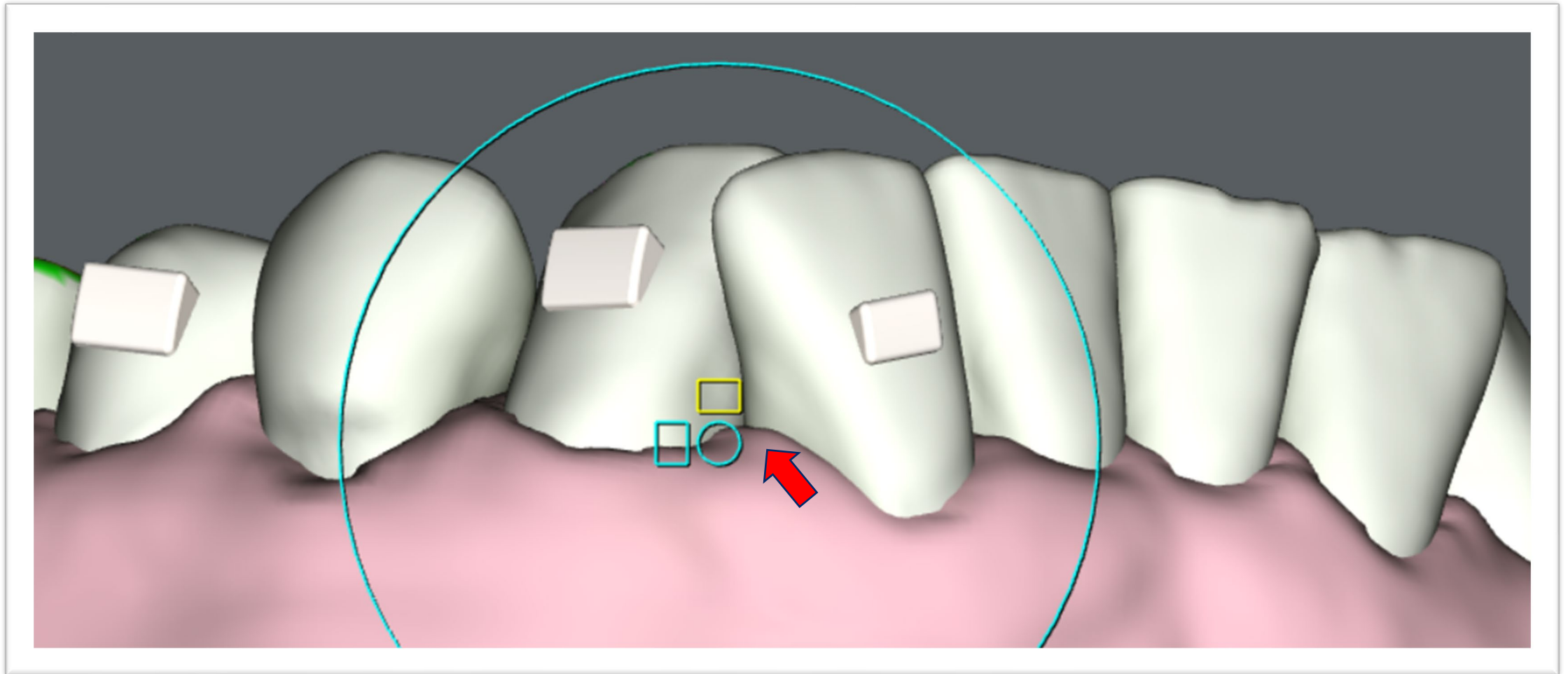
# Restorative Callout



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

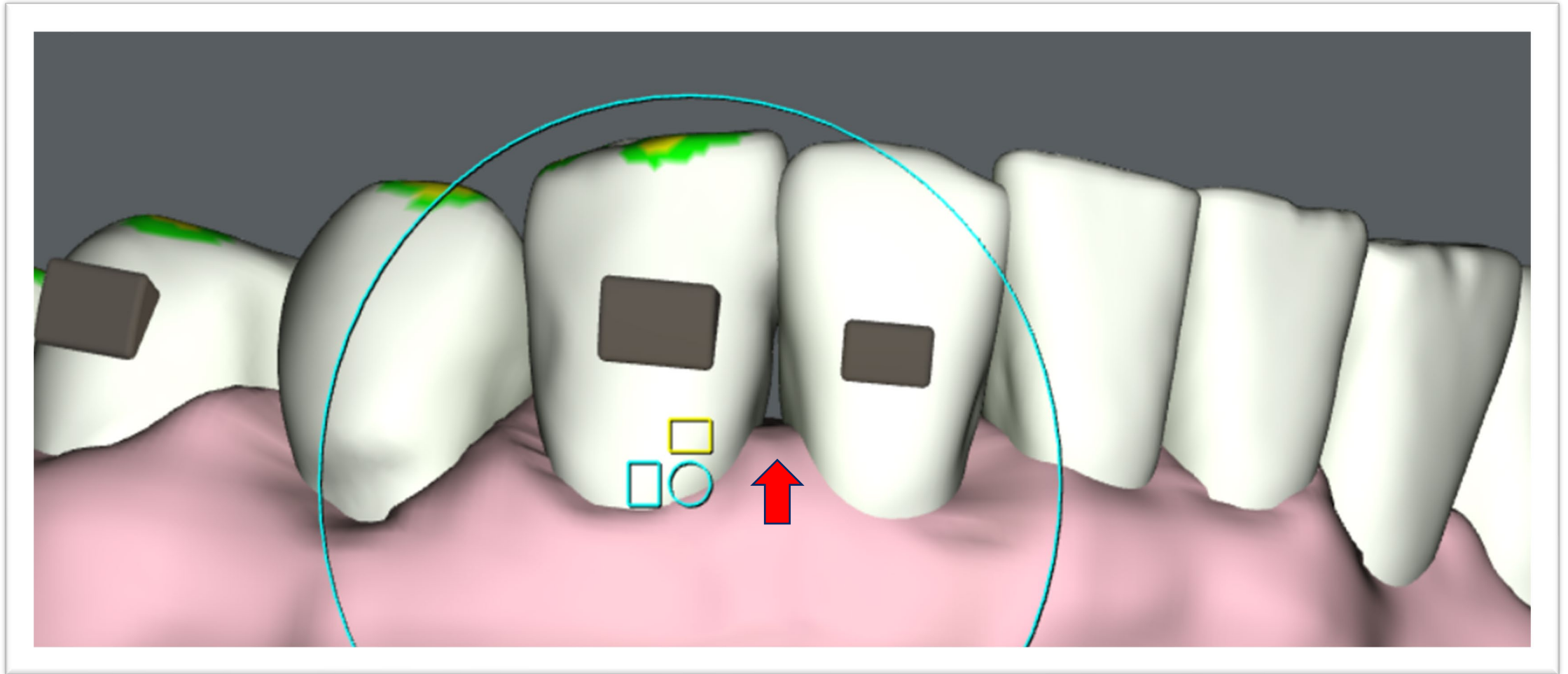


# Orthodontic Callout



**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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**Review SHO**

# Review SHO

Static hyper-occlusion will appear as red occlusal markings on the final staged models or last set of aligners. This is a planned, intentional collision to obtain a better fit of the occlusion during the treatment planning stage. Inform the patient that it will be adjusted at the aligner delivery appointment.

# Select Initial Staged Model

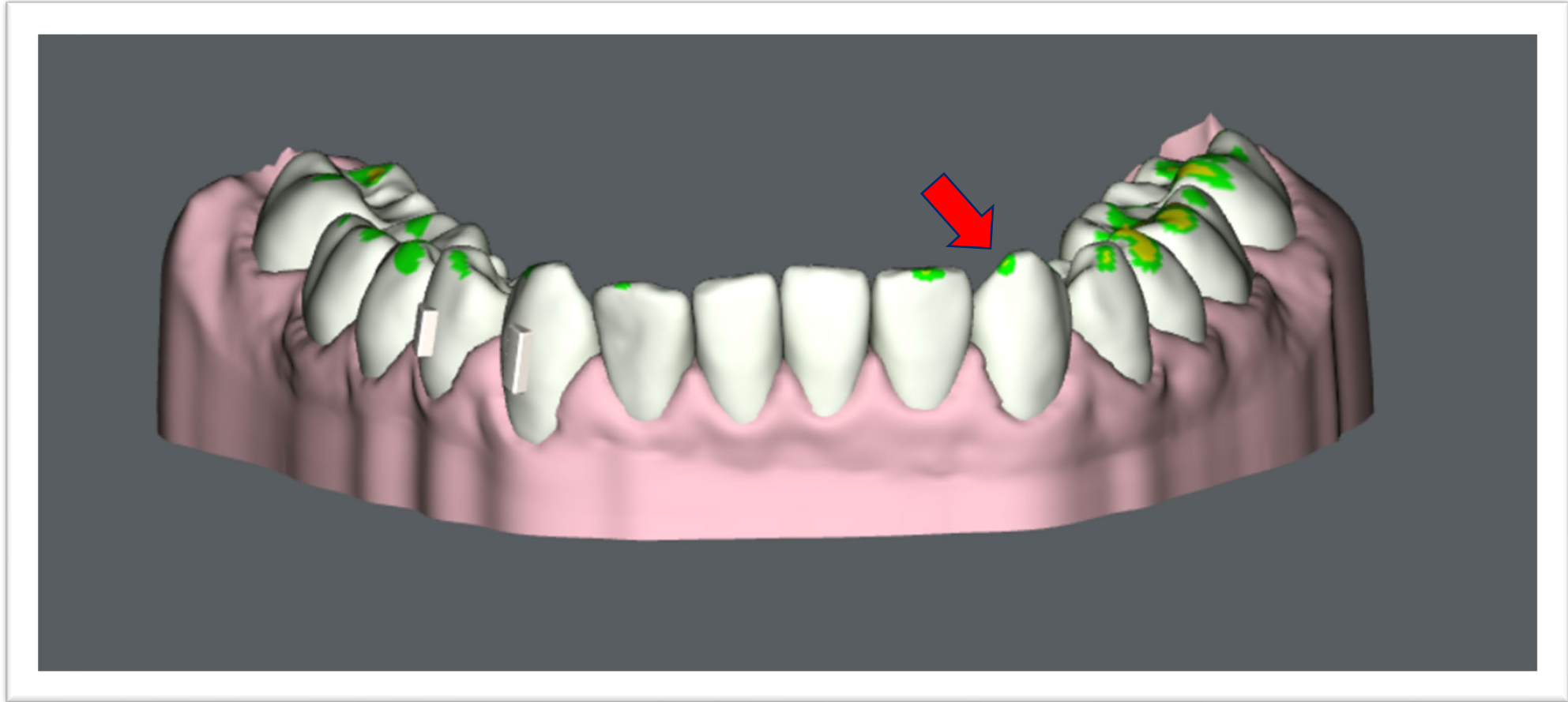
The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is "Jean Frost (R2N6)" and the current stage is "Setup & Staging 1 (Ready for Review)". A "Checklist and Overview" panel on the left lists the following items, all of which are checked with green checkmarks:

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

Below the checklist is a "Request Modifications" toggle switch, which is currently turned off. At the bottom of the checklist panel is a button labeled "Approve & Order Aligners". The main central area shows a 3D model of a patient's teeth in a patient view. At the bottom of the interface is a "Camera (Patient View) Navigation" bar with a timeline from 0 to 21. A red box highlights the number "1" on the timeline, with a red arrow pointing up to it from below the image.

# Review SHO

## *Initial Stage*

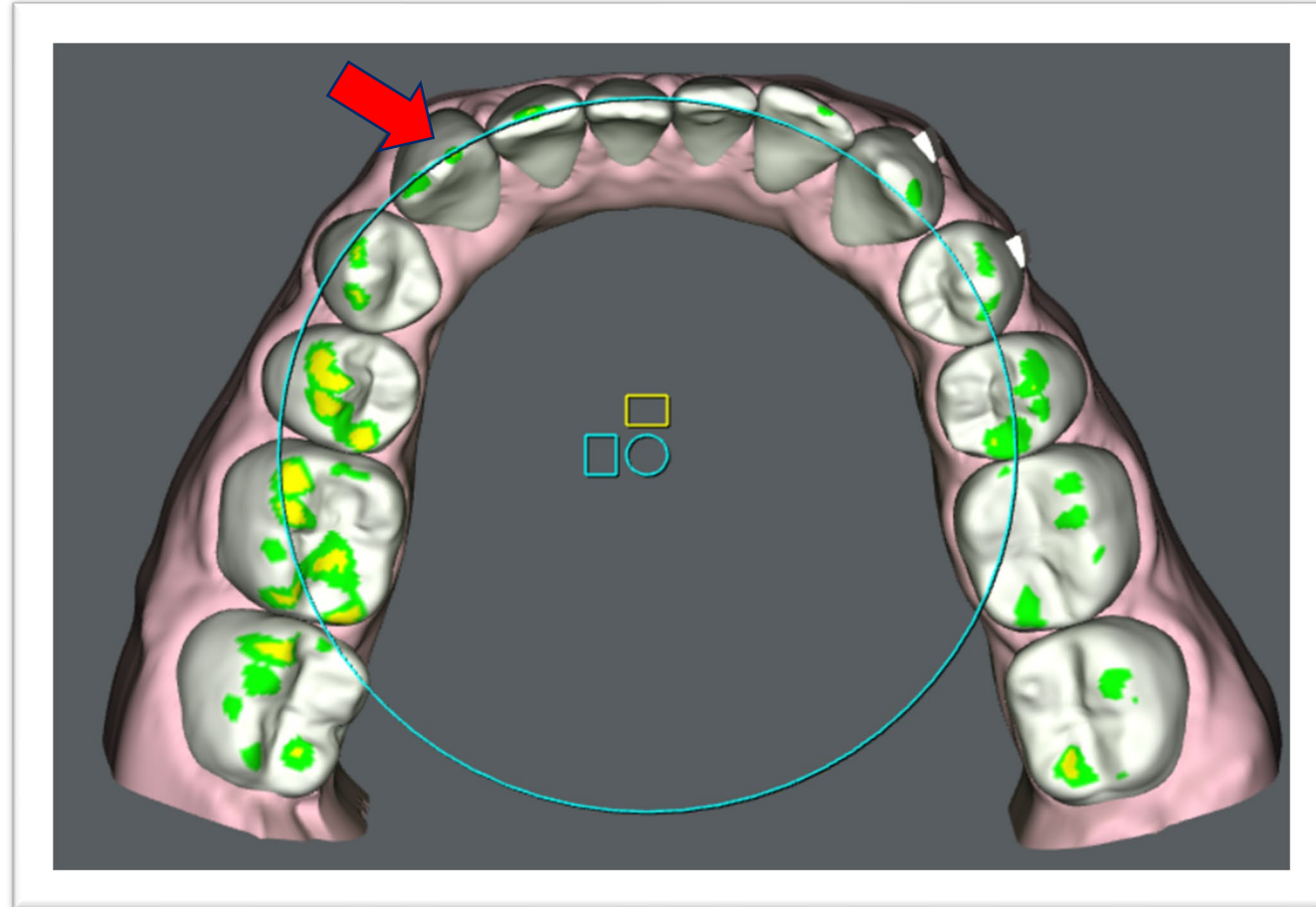


Notice light occlusal marking



# Review SHO

## *Initial Stage*



**Notice light occlusal marking**

# Select Final Staged Model

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)". A "Checklist and Overview" panel on the left lists the following items, all of which are checked with green checkmarks:

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

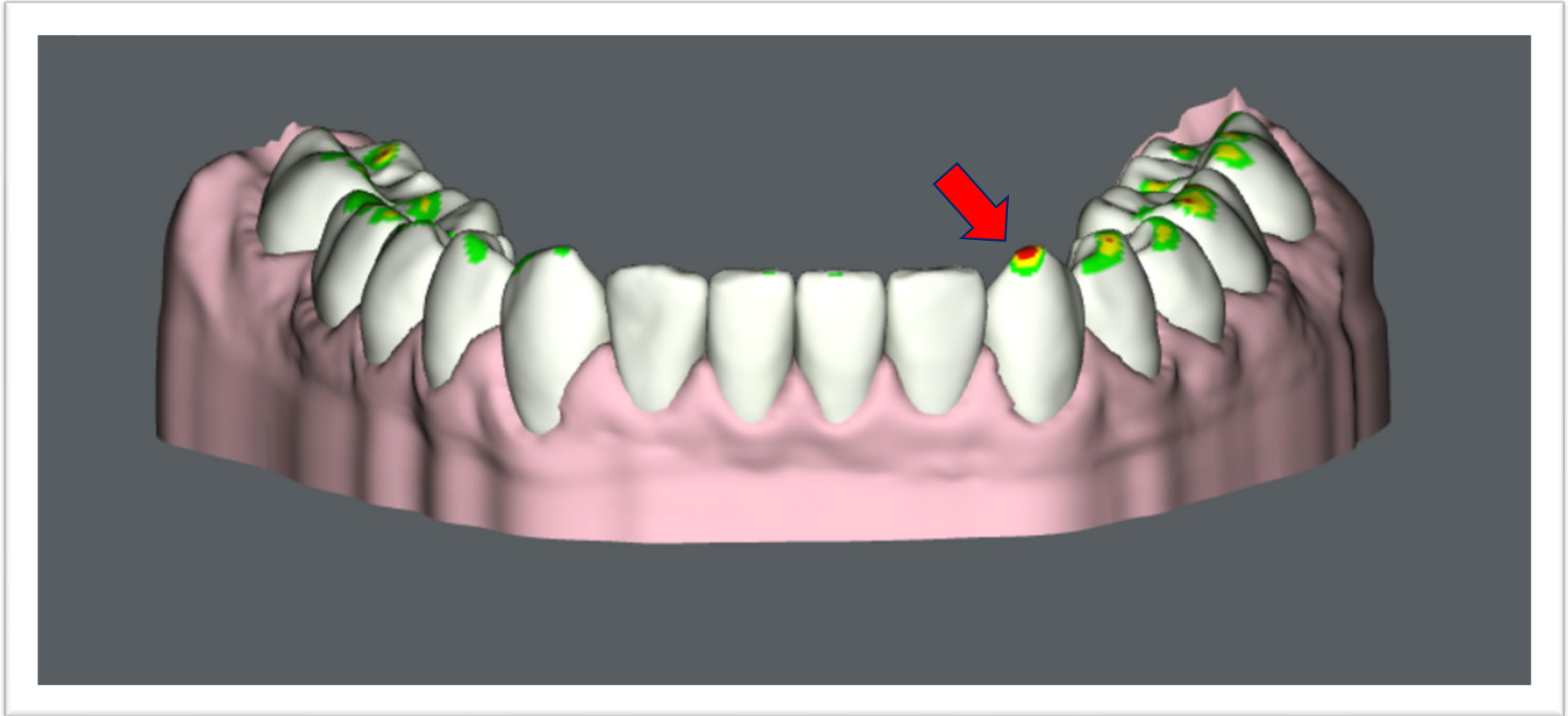
Below the checklist is a "Request Modifications" toggle switch, which is currently turned off. At the bottom of the checklist panel is a button labeled "Approve & Order Aligners". The main central area shows a 3D model of a patient's teeth in a patient view. At the bottom of the interface is a "Camera (Patient View) Navigation" bar with a timeline from 1 to 21. The number 21 is highlighted with a red box, and a red arrow points upwards from below the box. To the right of the timeline are navigation icons for "R" (Right) and "L" (Left) views, a "Legend" icon, and a "Treatment Details" icon.





# Review SHO

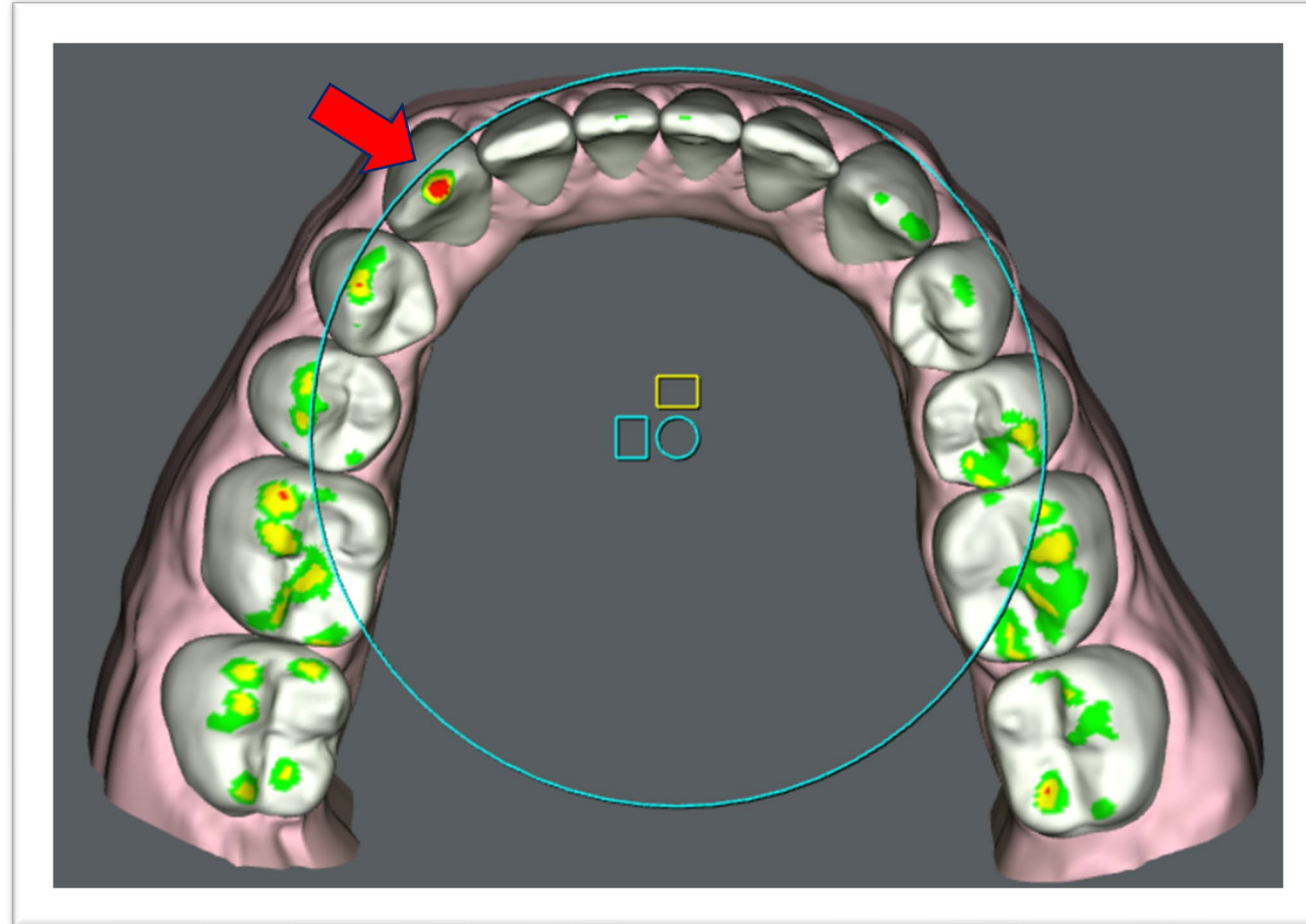
## *Final Stage*



**Notice purposeful over-corrected occlusal marking**

# Review SHO

## *Final Stage*



**Notice purposeful over-corrected occlusal marking**



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**Review THO**

# Review THO

Transitory hyper-occlusion can occur when progressing through aligner treatment and will appear as red markings on the staged models. The patient may not be able to bite all the way down or may have sensitivity from prolonged hyper-occlusion like a high filling. Advise the patient at delivery this may occur and adjust if necessary.

# Select Play Button

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 area shows a 3D model of a patient's teeth in a patient view. On the left, a 'Checklist and Overview' panel is visible, listing several review items, all of which are marked as complete with green checkmarks:

- 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 / Trimeline

Below the checklist is a 'Request Modifications' toggle switch, which is currently turned off. At the bottom of the interface is a 'Camera (Patient View) Navigation' bar. This bar includes a play button icon, a progress bar with markers at 1, 5, 10, 15, 20, and 21, and other navigation controls. A red arrow points to the play button icon.

# Review THO

Patient Database Tasks Denise Dodd (L5Y7) Setup & Staging 1 (To Review / Not ordered) SureSmile Aligner

Checklist and Overview

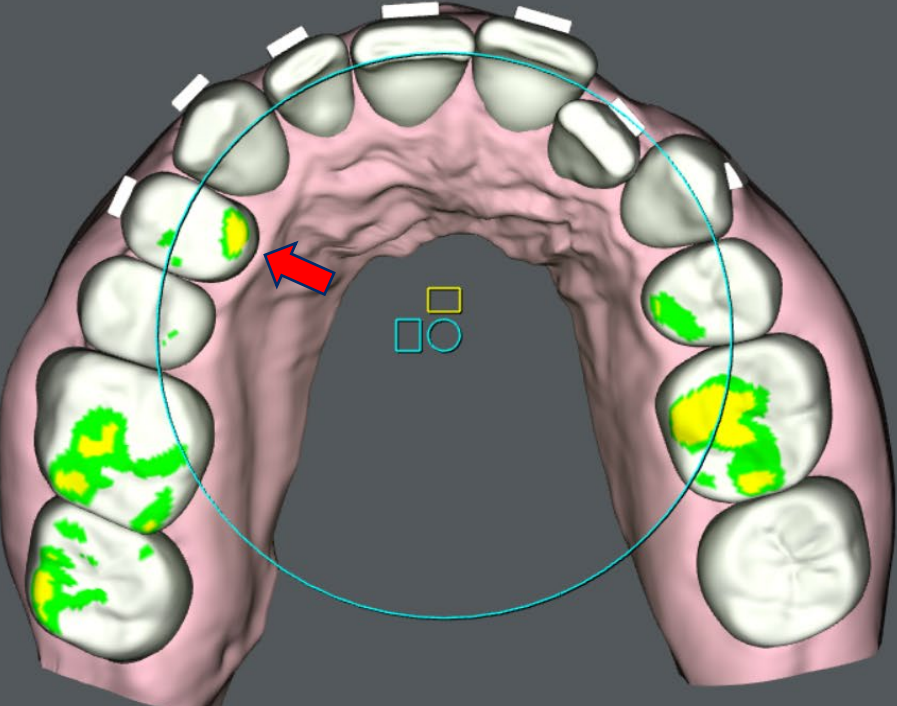
- Overview
- Setup and Staging Review
  - Labial View
  - Right Buccal View
  - Left Buccal View
  - Upper Occlusal
  - Lower Occlusal
  - IPR / Attachment / Trimline

Request Modifications

Approve & Order Aligners

Cancel Full Service Aligner Case

Camera (Object View) Navigation



Legend Tooth movement

1 5 10 15 39





# Review THO

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Denise Dodd (L5Y7) and the case is Setup & Staging 1 (To Review / Not ordered). The main window shows a 3D model of the upper dental arch with occlusal markings in green and yellow. A red arrow points to the start of heavy occlusal marking on the left side. A checklist on the left includes Overview, Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, Lower Occlusal, and IPR / Attachment / Trimline. The bottom of the interface features a timeline with a diamond marker at 8 and a red arrow pointing to it.

Notice start of heavy occlusal marking



# Review THO

Patient Database Tasks Denise Dodd (L5Y7) Setup & Staging 1 (To Review / Not ordered) 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

Cancel Full Service Aligner Case

Camera (Object View) Navigation

1 5 10 12 15 39

Legend Tooth movement



# Review THO

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Denise Dodd (L5Y7) and the case is Setup & Staging 1 (To Review / Not ordered). The main window shows a 3D model of the upper dental arch with occlusal markings in green and yellow. A red arrow points to the end of a heavy marking on the left side. On the left, a checklist shows that Overview, Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, and Lower Occlusal are completed, while IPR / Attachment / Trimline is pending. The bottom timeline shows tooth numbers 1, 14, 15, 18, 20, 25, 27, and 39, with a red arrow pointing to tooth 18. The interface also includes a 'Request Modifications' toggle, an 'Approve & Order Aligners' button, and a 'Camera (Object View) Navigation' bar.

Notice end of heavy occlusal marking



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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 stage is Setup & Staging 1 (Ready for Review). The main window shows a 3D dental model of the upper and lower 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 which is currently turned off. At the bottom of the interface, there is a navigation bar with a timeline showing steps 1, 5, 10, 15, 20, and 21. The current step is 21. Other navigation icons include back, play, and forward, as well as 'Legend' and 'Treatment Details' buttons.

# 3. Select Request Modifications

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 lists several review items, all of which are marked as complete with green checkmarks:

- 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 / Trimeline

At the bottom of the checklist panel, there is a 'Request Modifications' toggle switch, 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 features a navigation bar with playback controls (back, play, forward, stop) and a timeline with markers at 1, 5, 10, 15, 20, and 21. On the right side of the navigation bar, there are icons for 'Legend' and 'Treatment Details'.



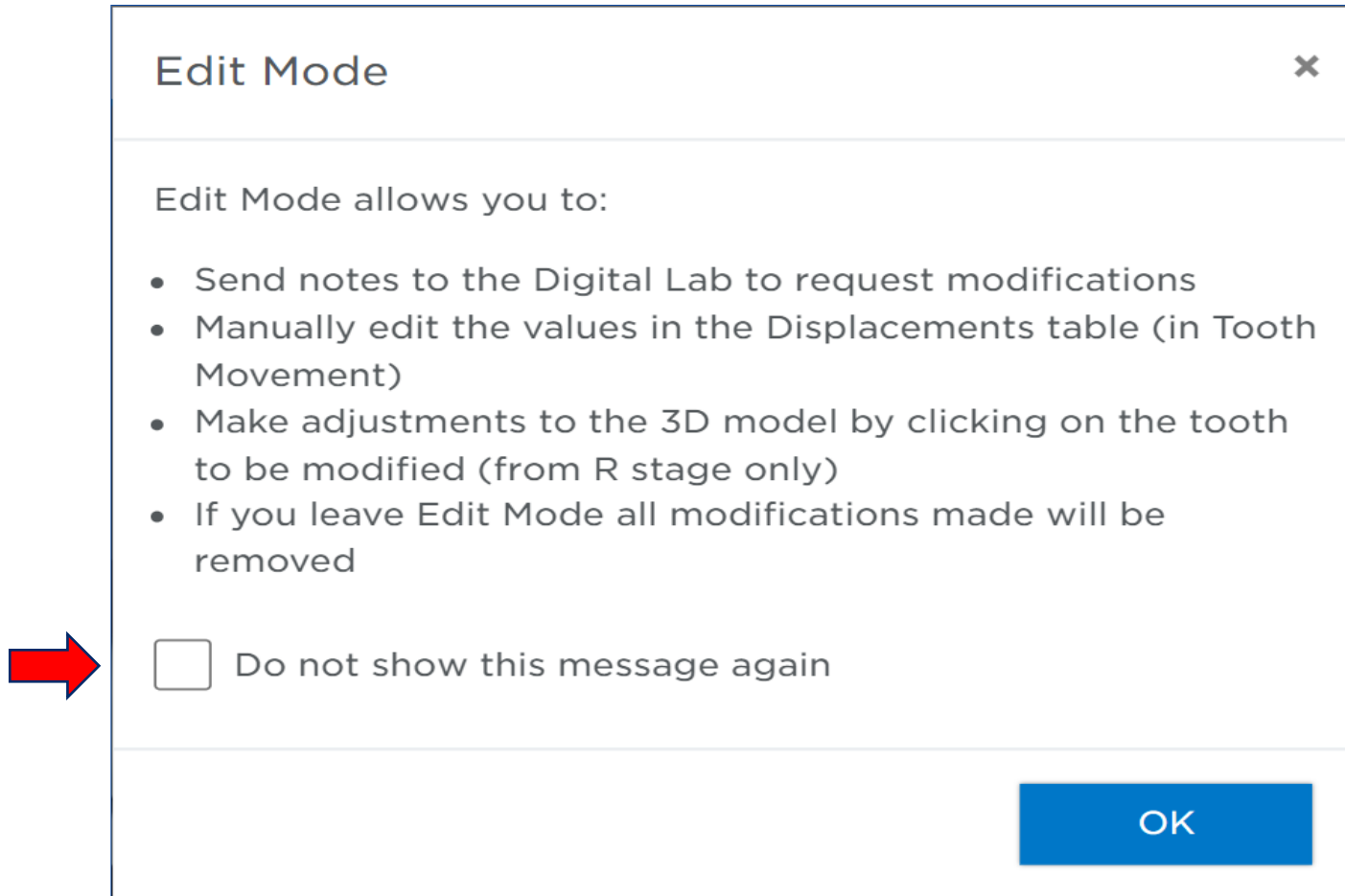
# Request Modifications Active

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 sidebar titled "Checklist and Overview" contains several sections:

- Overview:** Includes instructions: "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:** Lists view options: Labial View, Right Buccal View, and Left Buccal View.
- Request Modifications:** A toggle switch is turned on. Below it, text reads: "Type notes and/or modify the Setup then click Submit." A text input field contains "Type something".
- Submit:** A blue button at the bottom of the sidebar.

The main area shows a 3D model of a dental arch with a red arrow pointing to a specific tooth area. Below the model, the text "Camera (Object View) Navigation" is visible. At the bottom of the interface is a control bar with navigation icons (back, play, forward), 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 several sections: "Overview" with a play button icon and instructions to review notes from the Digital Lab (DL); "Setup and Staging Review" with a list of views: "Labial View", "Right Buccal View", and "Left Buccal View"; and a "Request Modifications" section with a toggle switch that is turned on. Below this, there is a "Notes" section with a text input field containing "Type something" and a "Submit" button. The main area shows a 3D model of a dental arch with a red arrow pointing to a specific tooth. A semi-transparent grid is overlaid on the teeth. At the bottom, there is a "Camera (Object View) Navigation" toolbar with various icons for navigation and a timeline with markers at 1, 24, 25, 30, 35, and 39. The bottom right corner includes a "Legend" and "Tooth movement" section.

# 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 with radio buttons:
  - Labial View
  - Right Buccal View
  - Left Buccal View
- Request Modifications**: A toggle switch that is turned on.
- Notes**: A text input field with the placeholder "Type something".
- Submit**: A blue 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 white 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".





**CLEAR BLUE SMILES™**

**Order Refinement Aligners**

# 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 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 dental model of the upper and lower 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 icons for Legend and Treatment Details.

# 3. Select Approve and Order Aligners

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). A checklist on the left side shows 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

The main view shows a 3D model of the patient's teeth. At the bottom left, there is a button labeled "Approve & Order Aligners" with a red arrow pointing to it. The bottom right corner contains navigation controls, including a timeline with markers at 1, 5, 10, 15, 20, and 21, and buttons for Legend and Treatment Details.

# 4. Select OK

**Trim Types & Heights**  
for aligner order

Aligner Trim Type: U  
 Straight  
 Scalloped  
Straight Trim Height: 0.0 mm

Aligner Trim Type: L  
 Straight  
 Scalloped  
Straight Trim Height: 0.0 mm

Note: Aligner Trim Type can be changed from Scalloped to Straight, but cannot be changed from Straight to Scalloped.

OK Cancel

Camera (Patient View) Navigation

Legend Tooth movement



# 5. Select OK

The screenshot displays the SureSmile Aligner software interface. A central 3D model of a patient's teeth is shown in a patient view. A white dialog box titled "Order Submitted" is overlaid on the model, containing the text: "Order Aligners for [Setup & Staging 2] 1 was successfully created and submitted." Below the text is an "OK" button, which is highlighted by a red arrow. The interface includes a top navigation bar with "Patient Database Tasks" and "SureSmile Aligner". A left sidebar contains a "Checklist and Overview" section with "Overview" and "Setup and Staging Review" (including "Labial View" and "Right Buccal View"). At the bottom, there is a "Camera (Patient View) Navigation" bar with playback controls and a "Get report" button.



# SureSmile® Aligners



**5-7 Business Days**



**CLEAR BLUE SMILES™**

# **Step 4: Clinical Protocols**

# Review Clinical Protocols

- **Clear Aligner Delivery**
- **Clear Aligner Dispensing Protocol**
- **Clear Aligner Adjustments Visits**



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# **Clear Aligner Delivery**

# Step 1: Place Attachments



Flowable Composite



Universal Adhesive



# Attachment Workflow

- 1. Etch and prime teeth receiving attachments**
- 2. Use flowable and slightly over-fill wells in attachment template**
- 3. Place template onto teeth**
- 4. Cure attachments**
- 5. Polish flash around attachments and floss the teeth**

# Attachments: Restorations



**170-5284**



**590-1905**





# Attachment Workflow: Restoration

1. Rough surface of restoration with a diamond bur in the area where attachment will be placed
2. Etch porcelain for 4 mins (with excellent isolation) and rinse and dry extremely well
3. Paint Silane and over etched area and quick dry (not desiccated)
4. Paint Adhesive on affected area
5. Use flowable and slightly over-fill wells in attachment template
6. Place template onto teeth
7. Cure attachments
8. Polish flash around attachments and floss the teeth

# Step 2: Perform IPR



<b>Red Strip</b>	.1 mm	QS-MB
<b>Blue Strip</b>	.2 mm	QS-CG
<b>Green Strip</b>	.3 mm	QS-FR



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# **Clear Aligner Dispensing Protocol**

# Step 1

- Perform occlusal adjustment for SHO/THO*
- Use the rule of “3’s” Dispensing Protocol*
- Seat 1<sup>st</sup> Aligner*
- Patient Instructions*

# Review SHO

Static hyper-occlusion will appear as red occlusal markings on the final staged models or last set of aligners. This is a planned, intentional collision to obtain a better fit of the occlusion during the treatment planning stage. Inform the patient that it will be adjusted at the aligner delivery appointment.

# Select Initial Staged Model

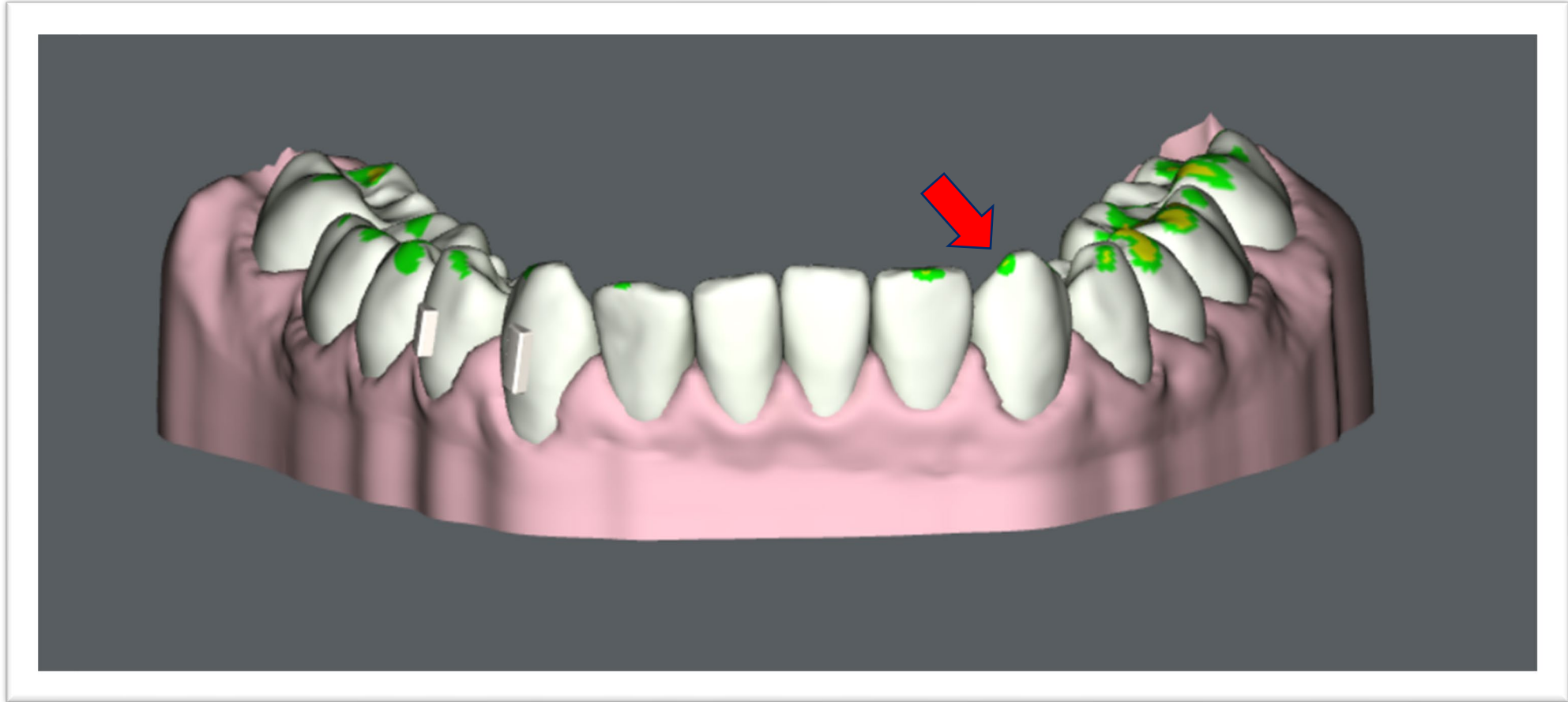
The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is "Jean Frost (R2N6)" and the current stage is "Setup & Staging 1 (Ready for Review)". The main window shows a 3D model of a patient's teeth in a patient view. On the left, a "Checklist and Overview" panel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

- 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 "Request Modifications" toggle switch and a button labeled "Approve & Order Aligners". At the bottom of the interface is a "Camera (Patient View) Navigation" bar with a timeline from 0 to 21. A red box highlights the number "1" on the timeline, with a red arrow pointing to it from below. Other navigation icons include back, play, and zoom controls.

# Review SHO

## *Initial Stage*

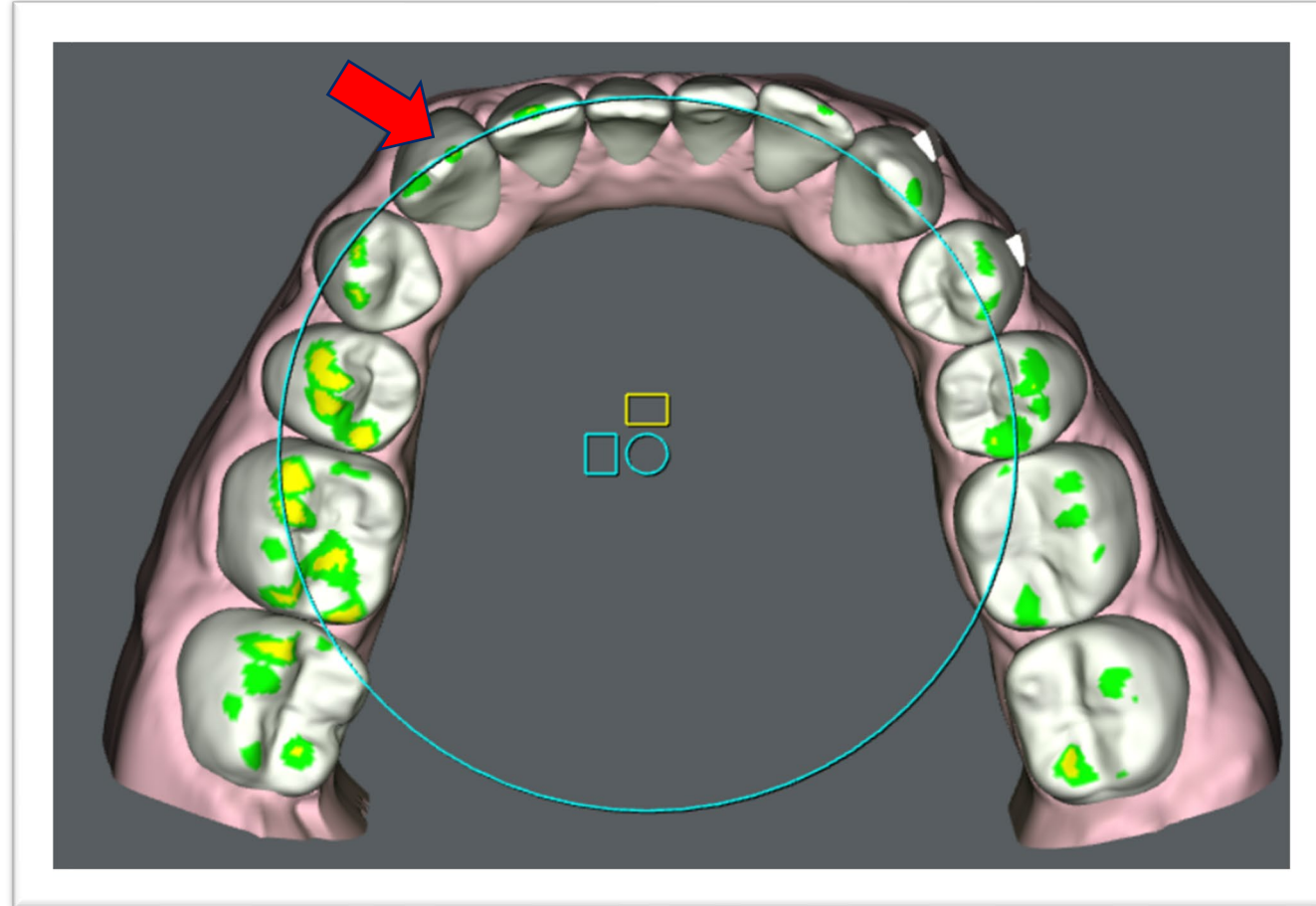


Notice light occlusal marking



# Review SHO

## *Initial Stage*



**Notice light occlusal marking**

# Select Final Staged Model

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)". A "Checklist and Overview" panel on the left lists the following items, all of which are checked with green checkmarks:

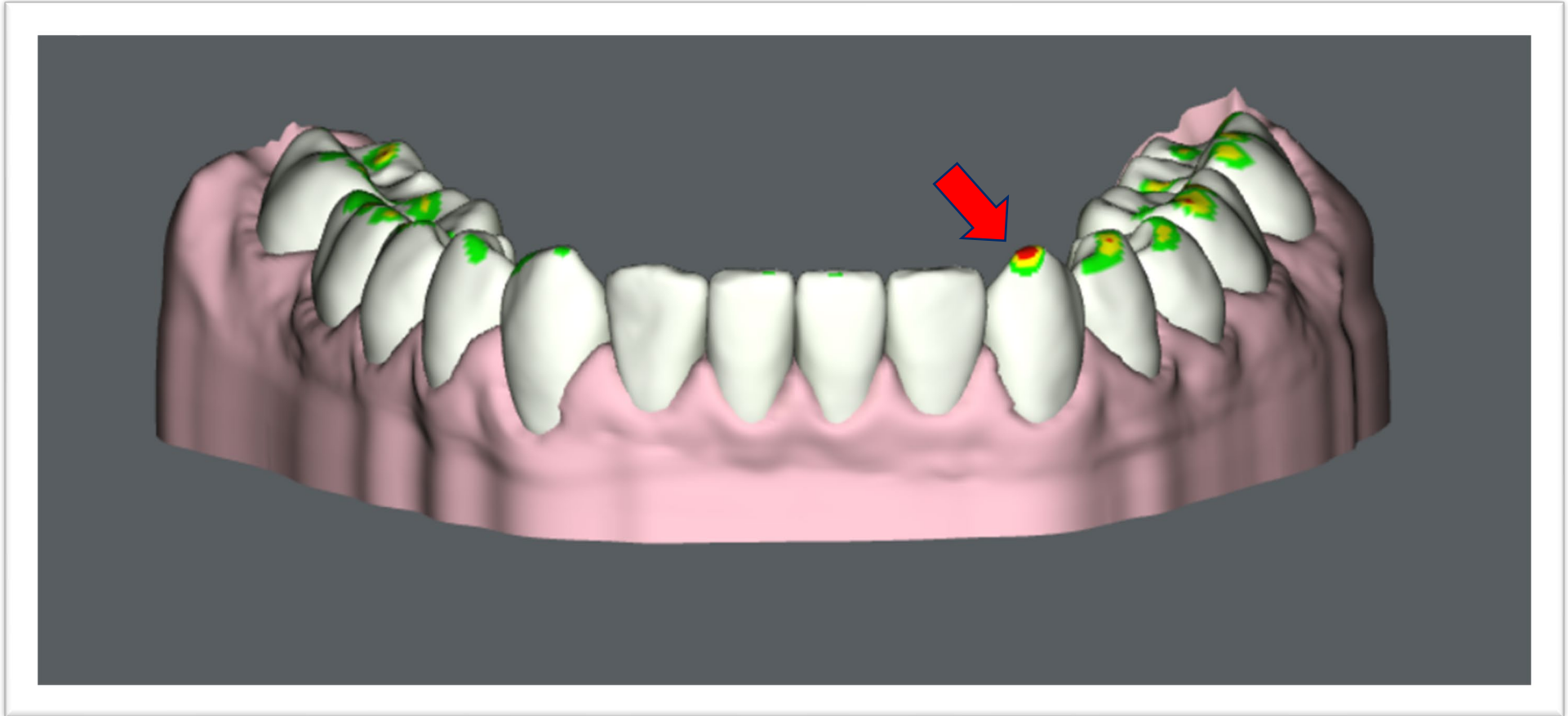
- Overview
- Setup and Staging Review
  - Labial View
  - Right Buccal View
  - Left Buccal View
  - Upper Occlusal
  - Lower Occlusal
  - IPR / Attachment / Trimline

Below the checklist is a "Request Modifications" toggle switch, which is currently turned off. At the bottom of the checklist panel is a button labeled "Approve & Order Aligners". The main central area shows a 3D model of a patient's teeth in a patient view. At the bottom of the interface is a "Camera (Patient View) Navigation" bar with a timeline from 1 to 21. The number 21 is highlighted with a red box, and a red arrow points to it from below. To the right of the timeline are navigation icons for "R" (Right) and "L" (Left), and buttons for "Legend" and "Treatment Details".



# Review SHO

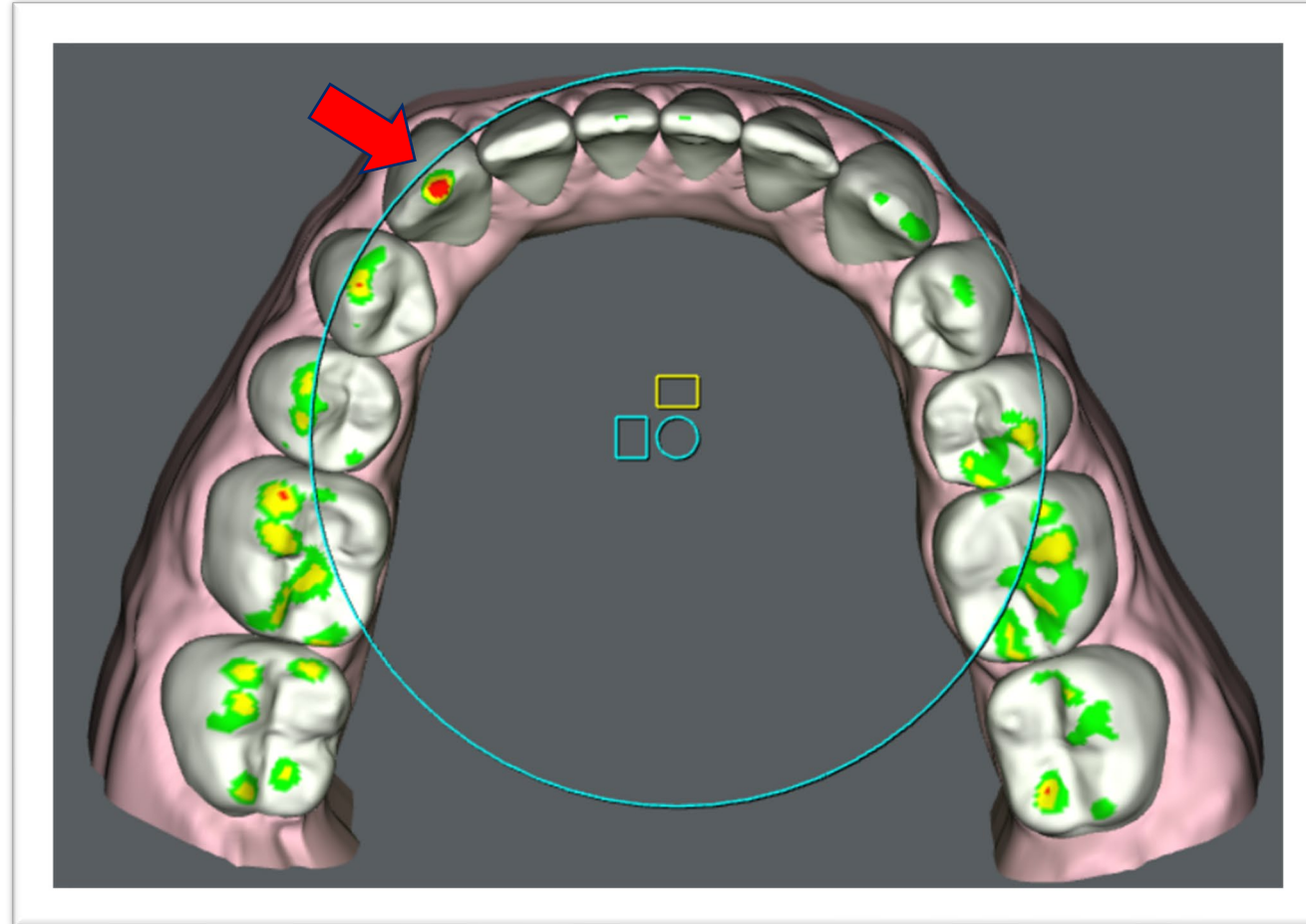
## *Final Stage*



**Notice purposeful over-corrected occlusal marking**

# Review SHO

## *Final Stage*



**Notice purposeful over-corrected occlusal marking**

# Review THO

Transitory hyper-occlusion can occur when progressing through aligner treatment and will appear as red markings on the staged models. The patient may not be able to bite all the way down or may have sensitivity from prolonged hyper-occlusion like a high filling. Advise the patient at delivery this may occur and adjust if necessary.

# Select Play Button

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). A checklist on the left side shows 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 / Trimeline

Below the checklist is a toggle for Request Modifications, which is currently turned off. At the bottom of the interface is a navigation bar with a play button highlighted by a red arrow. The play button is located in the navigation bar, which also includes a back button, a forward button, a search icon, and a timeline with markers at 1, 5, 10, 15, 20, and 21. To the right of the timeline are icons for Legend and Treatment Details.



# Review THO

Patient Database Tasks Denise Dodd (L5Y7) Setup & Staging 1 (To Review / Not ordered) 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

Cancel Full Service Aligner Case

Camera (Object View) Navigation

Legend Tooth movement

1 5 10 15 39





# Review THO

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Denise Dodd (L5Y7) and the case is Setup & Staging 1 (To Review / Not ordered). The main window shows a 3D model of the upper dental arch with occlusal markings in green and yellow. A red arrow points to the start of heavy occlusal marking on the left side. The interface includes a Checklist and Overview panel on the left with items like Overview, Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, Lower Occlusal, and IPR / Attachment / Trimline. A timeline at the bottom shows a sequence of steps, with a red arrow pointing to step 8.

Patient Database Tasks  
Denise Dodd (L5Y7)  
Setup & Staging 1 (To Review / Not ordered)  
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

Cancel Full Service Aligner Case

Camera (Object View) Navigation

Timeline: 1, 5, 8, 10, 15, 39

Legend, Tooth movement



Notice start of heavy occlusal marking

# Review THO

Patient Database Tasks Denise Dodd (L5Y7) Setup & Staging 1 (To Review / Not ordered) 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

Cancel Full Service Aligner Case

Camera (Object View) Navigation

The image shows a 3D digital model of a patient's upper dental arch. The teeth are rendered in a semi-transparent white, revealing the underlying pink gingival tissue. A color-coded occlusal analysis is overlaid on the teeth, with yellow and red areas indicating regions of wear or contact. A red arrow points to a specific contact point on the left side. A blue circular line is drawn around the arch, and several small colored squares (yellow, blue, red) are placed on the teeth. The interface includes a checklist on the left, a navigation bar at the bottom with a timeline from 1 to 39, and various control icons for zooming and moving the model.



# Review THO

The screenshot displays the SureSmile Aligner software interface. At the top, the patient name is Denise Dodd (L5Y7) and the case is Setup & Staging 1 (To Review / Not ordered). The main view shows a 3D model of the upper dental arch with occlusal markings in green and yellow. A red arrow points to the end of a heavy marking on tooth 18. On the left, a checklist shows that Overview, Labial View, Right Buccal View, Left Buccal View, Upper Occlusal, and Lower Occlusal are completed, while IPR / Attachment / Trimline is pending. The bottom timeline shows tooth numbers 1, 14, 15, 18, 20, 25, 27, and 39, with a red arrow pointing to tooth 18. Navigation controls for the timeline are visible at the bottom left.

Notice end of heavy occlusal marking

# Step 2

- Perform occlusal adjustment for SHO/THO*
- Use the rule of “3’s” Dispensing Protocol*
- Seat 1<sup>st</sup> Aligner*
- Patient Instructions*

***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**

# *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***

# Step 3

- Perform occlusal adjustment for SHO/THO*
- Use the rule of “3’s” Dispensing Protocol*
- Seat 1<sup>st</sup> Aligner*
- Patient Instructions*



**Seat the 1<sup>st</sup> set of Aligners to receive bio-feedback on the “tightness” and “feel” of a 2-week tray.**

# Step 4

- Perform occlusal adjustment for SHO/THO*
- Use the rule of “3’s” Dispensing Protocol*
- Seat 1<sup>st</sup> Aligner*
- Patient Instructions*

# Patient Starter Kit



**When aligner are ordered, starter kit will auto-ship to your office.**

# Patient Starter Kit



# Patient Instructions

- Wear 22 hours per day. Only remove to eat or brush your teeth. Water is fine.
- When removed, rinse and brush with cool water. Never use toothpaste or mouth wash.
- Always keep current aligner in white case. Keep last aligner in blue case. Bring both cases with aligners to each appointment.
- Use Chewies 15-20 mins per day for 1<sup>st</sup> three days of each aligner. Left, right and front.
- Use a cleaning tablet once per week.



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# **Clear Aligner Progress Visits**

# Step 1

- Check fit of the current aligner*
- Check contacts with floss*
- Check for hyper-occlusion*
- Place new aligners to test “feel” and “tightness” of aligners*
- Follow “Rule of 3’s” dispensing protocol*



# Step 1

## *Check fit of the current aligner*

If a patient can easily speak, seat and remove the aligners, then compliance is high. If the aligners do not seat on all the teeth, then compliance is low. If the aligners do not seat on 1 or 2 teeth, then IPR or hyper-occlusion may be an issue.

# Step 2

- Check fit of the current aligner*
- Check contacts with floss*
- Check for hyper-occlusion*
- Place new aligners to test “feel” and “tightness” of aligners*
- Follow “Rule of 3’s” dispensing protocol*

# Step 2

## *Check contacts with floss*

Finish any prescribed IPR not completed at the delivery visit. Even if all IPR has been completed as prescribed, floss the contacts, and if the floss is tight, use the red strip to free the contact.

# Step 3

- Check fit of the current aligner*
- Check contacts with floss*
- Check for hyper-occlusion*
- Place new aligners to test “feel” and “tightness” of aligners*
- Follow “Rule of 3’s” dispensing protocol*

# Step 3

## *Check for hyper-occlusion*

Even if SHO/THO has been completed, use occlusal marking paper, and if heavy marks are noted, then perform another occlusal adjustment.

# Step 4

- Check fit of the current aligner*
- Check contacts with floss*
- Check for hyper-occlusion*
- Place new aligners to test “feel” and “tightness” of aligners*
- Follow “Rule of 3’s” dispensing protocol*

# Step 4

*Place new aligners to test “feel” and “tightness” aligners*

Seat the next set of Aligners to receive bio-feedback on the “tightness” of the fit. This will provide the feel of a 10-day and 7-day tray.



# Step 5

- Check fit of the current aligner*
- Check contacts with floss*
- Check for hyper-occlusion*
- Place new aligners to test “feel” and “tightness” aligners*
- Follow “Rule of 3’s” dispensing protocol*

# Step 5

## ***Follow “Rule of 3’s” dispensing 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



**CLEAR BLUE SMILES™**

# **Clinical Pearls**

# What Will Prevent Aligners From Tracking?

- Poor Compliance*
- Intra-arch Collisions (Lack of IPR)*
- Inter-arch Collisions (Hyper-occlusion)*
- Poor Digital Setup*



# Dentsply Sirona

18982

Polishing Brush-Med 12pk



**\*Buy a 12-pack of these polishing wheels. They will trim and polish the aligner or retainer in case of gingival impingement or to smooth the edges.**