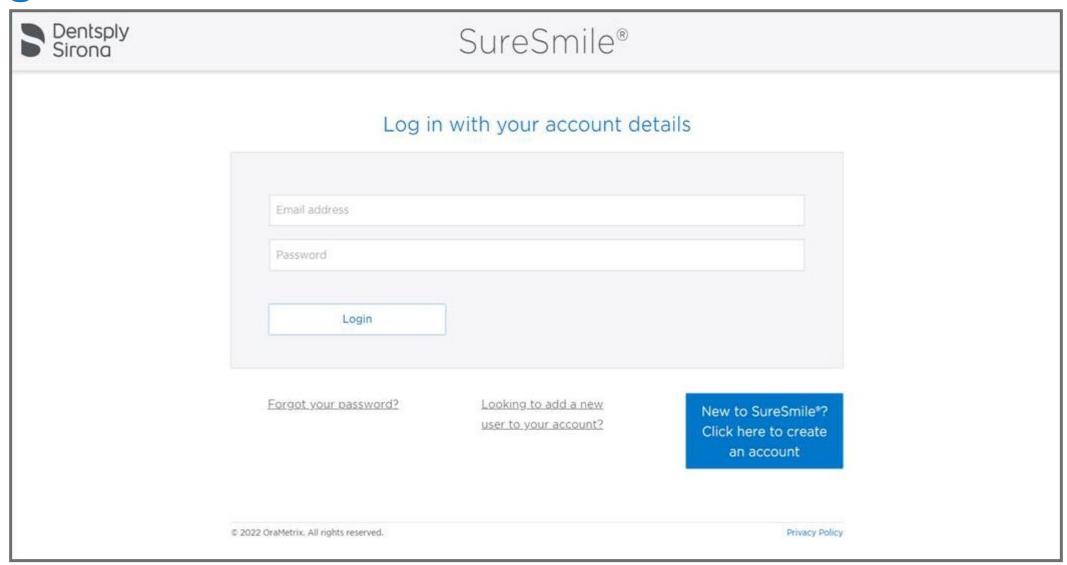


SureSmile Aligner™ Finding and Completing Tasks

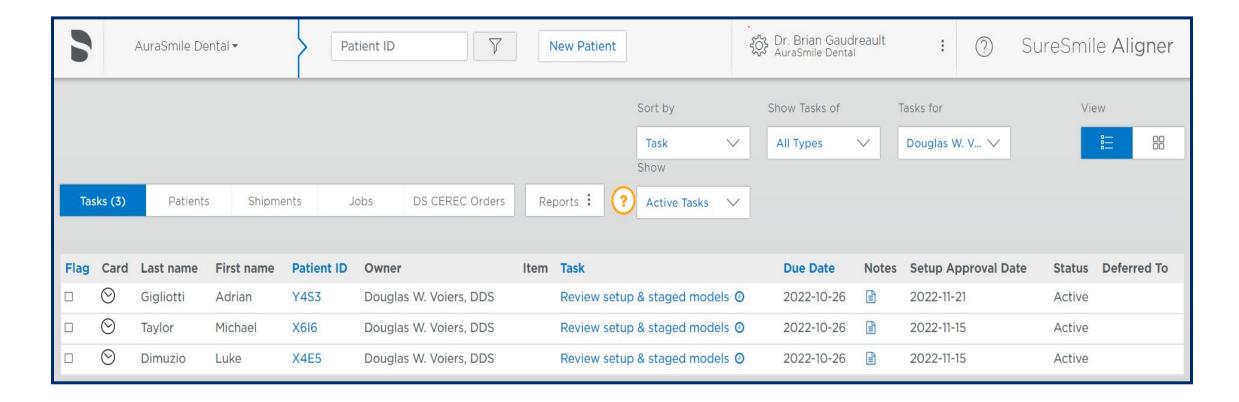
1. Login into SureSmile



Dashboard Page-*Tasks*

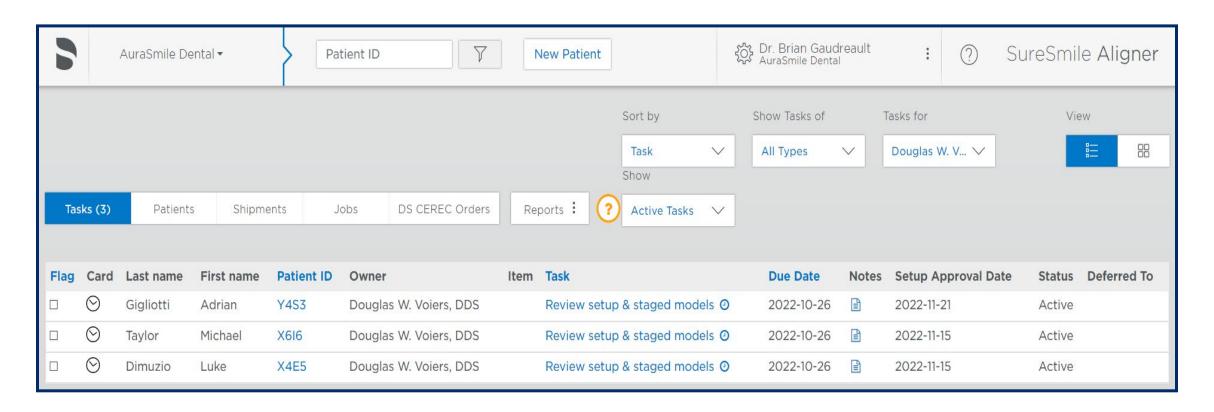
The Tasks page lists the actions you or your team must do to continue moving patients through SureSmile Aligner treatment

To sort and filter tasks: 4 drop-down menus



Dashboard Page-*Tasks*

Tasks- Patients that you need to approve initial or refinement treatments **Patients-** Find charts for Patients in Treatment.

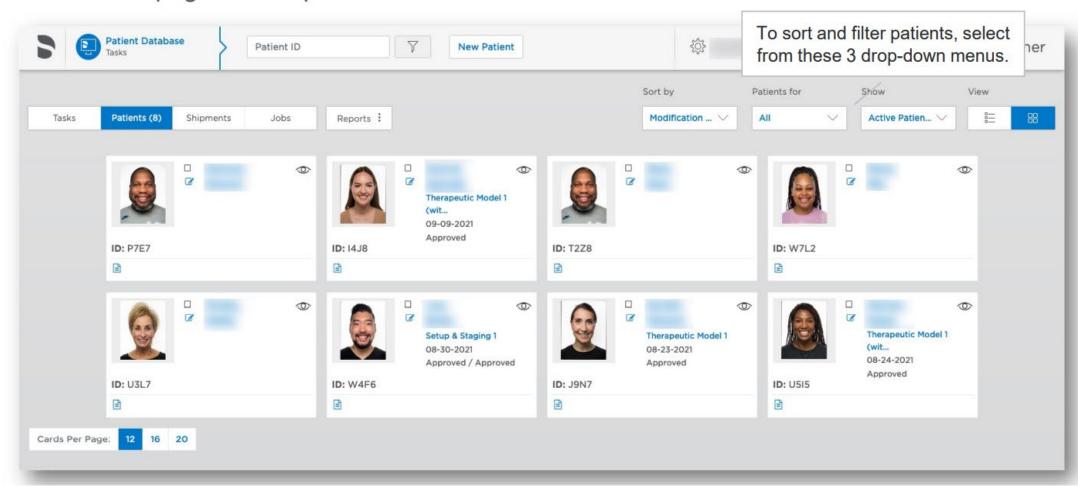


Sorting and Filtering- *Tasks*

Menu	Options
Sort by	Task (default)
	Due Date (Due dates are generated according to the timeline settings which can be managed in Preferences under the Treatment tab.)
	Flag (Flags are an optional method for flagging patient records by color to indicate special attention for that patient.)
	Patient ID (Every patient is given a 4-digit Patient ID by the system in a letter, number, letter, number format)
Show Tasks	All Types shows all tasks. (default)
	Action Needed shows items on hold, rejected, and those needing additional information. The filter shows these tasks: Resolve Hold, Action Needed. (Example: The technician needs more information to process the setup.)
	Review Order shows items needing review. The filter shows these tasks: Review Order and Review Changes. (Example: the setup & staging once the Digital Lab has processed the case.)
	Submit Order shows items to be submitted. This filter shows only Submit Order tasks. (Example: if you start an order but do not complete it, it will show as a Submit Order task.)
	Create Order shows items that are due to be started according to the timeline date. This filter shows tasks such as Scan & Order therapeutic model and Order Setup.
	Reminder shows all patients with past-due actions required by the clinic. The filter shows these tasks: Upload scan data & Upcoming Case Cancellation.
Tasks for	Currently logged in user * (default)
	All Doctors (followed by login name of each doctor)
	All Staff (followed by login name of each staff member)
	All
	* If the currently logged in user has no assigned patients, then all patients are shown.
Show Tasks	Active (default)
	Expired
	Deferred
	Completed
	All

Sorting and Filtering- *Tasks*

The Patients page lists all patients that have been entered into SureSmile



Sorting and Filtering- *Tasks*

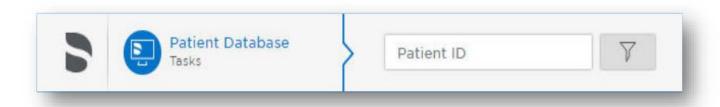
This table lists each menu with its options for sorting and filtering on the Patients page.

Menu	Options
Sort by	Modification Date (default) Patient ID (Every patient is given a 4-digit Patient ID by the system in a letter, number, letter, number format) Flag (Flags are an optional method for flagging patient records by color to indicate special attention for that patient.)
Patients for	Currently logged in user* (default) All Doctors (followed by login name of each doctor) All Staff (followed by login name of each staff member) All *If the currently logged in user has no assigned patients, then all patients are shown.
Show Patients	Active (default) Finished Quit Transferred Cancelled MD (Marked for Deletion) Demo All

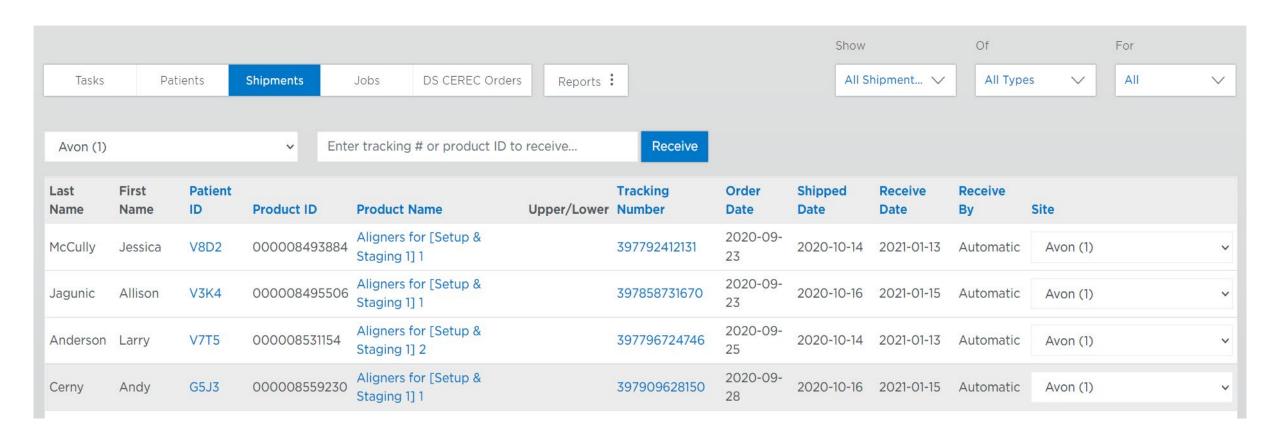
Filter by Patient ID or Name

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

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



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