



Smile Design

Register / Start a New Case

Once your account is active, log in to begin the new case registration.

NEW PATIENT

1. CLICK ON NEW PATIENT TO START A NEW CASE RECORD.

2. ENTER PATIENT INFORMATION.

- Enter patient name, DOB and gender
- Default doctor's office and name should appear automatically in drop down menu.
- Select an associated lab if you have selected one for 3rd party manufacturing.

The screenshot displays the 'PATIENT INFORMATION' section of the registration process. It includes a navigation bar with 'PATIENT INFORMATION', 'PATIENTS IMAGES', 'CREATE ORDER', and 'SUBMIT CASE'. The form contains the following fields:

- Image:** A placeholder for a patient photo with a camera icon.
- Gender:** Radio buttons for 'Male' (selected) and 'Female'.
- First Name *:** Text input with 'John' entered.
- Last Name *:** Text input with 'Smith' entered.
- Birth Date (month/day/year) *:** Text input with '1/1/2000' entered.
- Reference Number:** Text input.
- Office *:** Dropdown menu with 'Test Account' selected.
- Doctor *:** Dropdown menu with 'Test Account' selected.
- Lab:** Dropdown menu.

A 'NEXT' button is located at the bottom right of the form.

NEXT

- Click on **Next** to save patient information

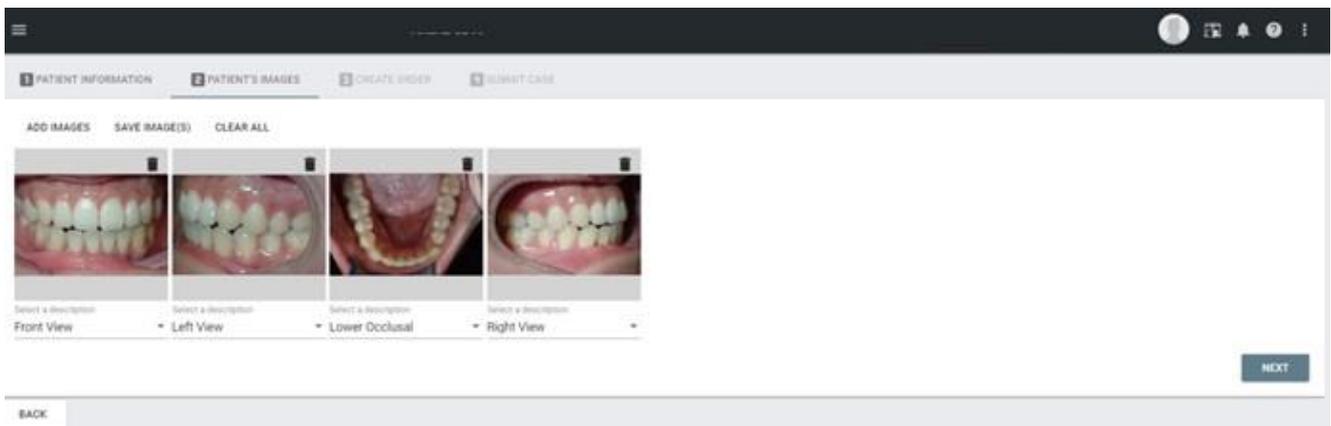
Note: The next, button will navigate to the patient image page.

3. LOAD RECOMMENDED PATIENT IMAGES

ADD IMAGES

- Click **Add Images** button and find image files to upload (recommended images: All intra-oral and a panorex). You can select multiple images at once.

Note: File directory window will open for you to find the image files.



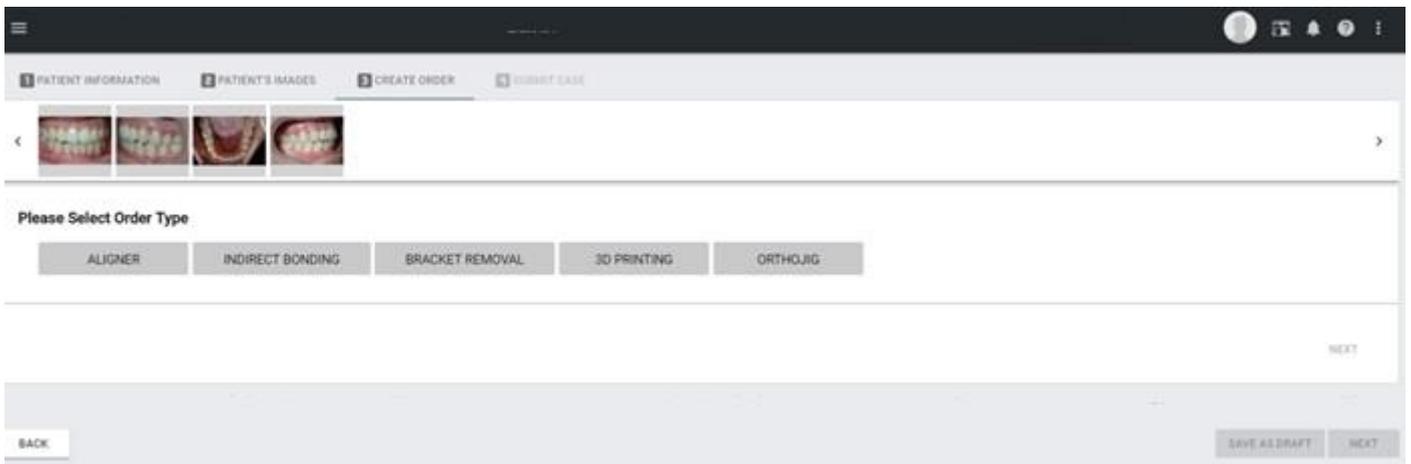
Note: All images loaded on portal will automatically be available to view in Smile Studio software

NEXT

- Click on **Next** button to save to our Cloud Based Portal and navigate to Order Creation tab

4. OPEN ORDER TAB TO CREATE/ADD AN ORDER TO THE PATIENT

- Select **Order Type** from menu options



5. SELECT ORDER TYPE

-Answer a few questions to create the appropriate order type and add-on services.

-Click **NEXT** to save your order type and navigate to the order Rx page.

NEXT

6. CREATE CUSTOM ORDER PRESCRIPTION

- Complete the Order Rx page entering all required fields marked with an *. We highly recommend you provide us with as much end of treatment goals as possible, when requesting In-Align to design the treatment plan.

NEXT

Click next to navigate thru Rx wizard

Aligners

-Select **Treatment Type** from drop down menu (*required field)

Light (light tooth movement)

Moderate (moderate tooth movement)

Unlimited (complex full tooth movement)

Refinement (mid-course correction)

-Select **Arches** to be treated (*required field)

-Fill out prescription details that you would like incorporated into the setup.

- Class relationship (*required field)
- Midline, overbite & overjet
- Spacing
- Arch width
- Crossbite
- Crowding

7. UPLOAD PATIENT IMPRESSIONS

Patient Impression

-Under the impressions field, please select the type of impressions you are sending (Physical or Digital). If digital, you can manually upload them to the order

- Click on **Upper or Lower STL** buttons and find files to upload. (Recommended file types: .STL for any open export scanners)

Impressions

Sending Direct from Scanner

Physical Digital

3D Files:

Note: Allow for each file to reach 100% upload before continuing to submit order.

8. MORE TOOTH SPECIFIC PRESCRIPTION FIELDS

- Indicate IPR instructions

IPR Instructions *

Reduce Teeth as Needed in Lab

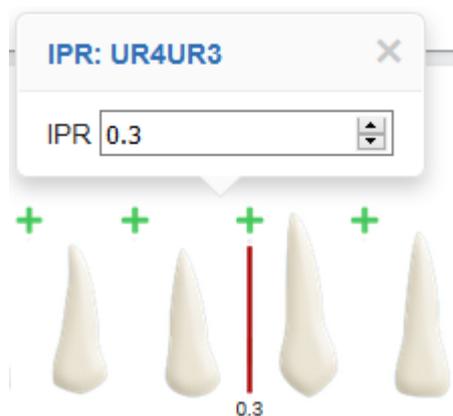
IPR Required (Indicate in the diagram)

No IPR Required

*Required field

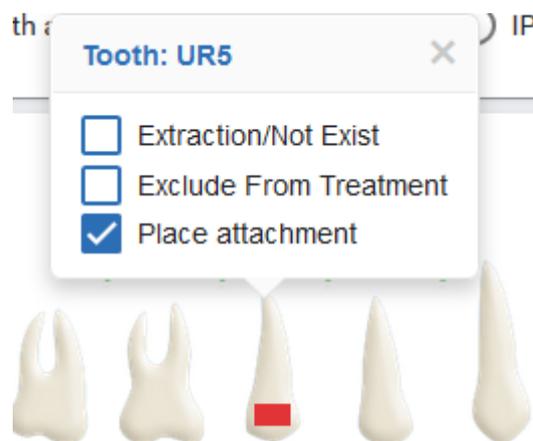
-If **IPR** is required as per your indications, use the diagram to indicate

RX



- Click on the green plus sign in between the teeth you are indicating IPR. The IPR dialog window will open.

- Type the amount of IPR you are indicating



- To provide tooth specific instructions use the same tooth diagram

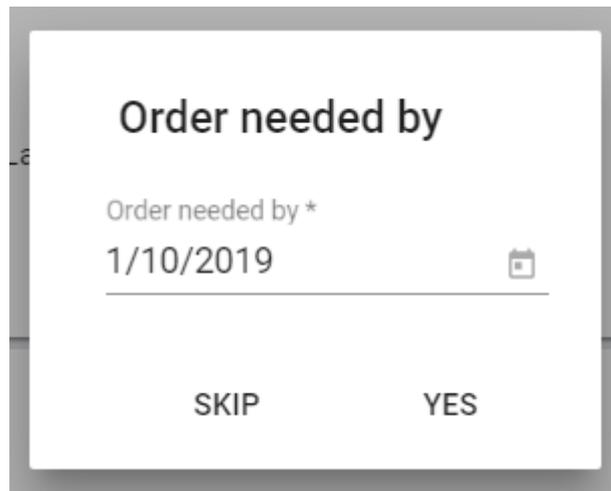
- Click on the **tooth** you are providing instructions for, to open the tooth instructions window

- Select instruction. A marker icon will appear on tooth selected.

-Once the Rx is completed, you can save as a draft to submit at a later time or click next to submit

9. SELECT ORDER DUE DATE

-Click Next to submit and select a date when your order should be delivered.



The image shows a mobile application dialog box with a white background and a grey border. The title "Order needed by" is centered at the top in a bold, black font. Below the title, the text "Order needed by *" is displayed in a smaller font. Underneath, the date "1/10/2019" is shown in a large font, with a small calendar icon to its right. A horizontal line is positioned below the date. At the bottom of the dialog, there are two buttons: "SKIP" on the left and "YES" on the right, both in a bold, black font.

Note: Date selection is block out according to each order type specific turnaround time. Contact us at info@in-align.com for more information on all services turnaround times.

10. SUBMIT ORDER

-Click SUBMIT button to complete order creation and for In-Align to start processing order accordingly.

-Submitting will move the case status to record review and we will begin processing the case

- You should receive an email notification within 2-3 business days to review the setup.

- Once you approve the setup, we will fabricate the trays to your specification and ship them to your office within 7-10 business days from your approval date.

If you selected In-Office printing as additional service the exported STL files will be available for you to download in 1 to 2 business days.