

SureSmile®

iTero® Orthodontic Scanners



IOC



HD2.9



Element™



SureSmile® has its headquarters in Richardson, Texas, with offices in Berlin, Germany and Chatswood, Australia. For general information about SureSmile®, visit the SureSmile® website at [www.SureSmile.com](http://www.SureSmile.com).

## Contact us for support

To contact us, please call one of the phone numbers listed below, or email us at [customercare@SureSmile.com](mailto:customercare@SureSmile.com)

Region	Phone Number
United States & Canada	1 888 672 6387 or 1 972 728 5902
Europe, Australia, New Zealand, Japan & South Korea	+800 6655 1234  <i>Note: We are currently rolling out this number on a country-by-country basis. If not yet available in your country, you can still call us by using our All other countries toll number below.</i>
All other countries	+1 972 728 5902

# Table of Contents

About this Guide .....	4
Getting Started .....	5
What is SureSmile? .....	6
Workflow for iTero® Scanner .....	8
Taking Required 2D Records .....	9
Standards for SureSmile Patients .....	11
Scan Procedure - Element .....	12
Scan Procedure – IOC & HD2.9 .....	18
Review Scan Quality .....	21
Using the iTero® Scanner to Capture Data for SureSmile .....	24
Ordering a Therapeutic Model from STL/PLY Files for SureSmile Advanced .....	29
Ordering a Therapeutic Model from STL/PLY Files for SureSmile Ortho or SureSmile Aligner .....	31
Ordering an Update Model .....	34
Ordering a Therapeutic Model from a CBCT Scan and a Supplemental Scan .....	37
Ordering Diagnostic or Final Models for SureSmile Advanced .....	45
Ordering Diagnostic Models for SureSmile Ortho or SureSmile Aligner .....	48
FAQs .....	49
iTero® Scanning Job Aid for Bonded Patients .....	53

# About this Guide

This guide includes the protocol and procedures for using the iTero® Orthodontic Digital Ecosystem or its precursor, the Element™ Scanner, for SureSmile treatment. Although informative for the doctor, the primary audience is the clinical assistant who will be performing iTero® scans and entering SureSmile orders.



Any practice implementing an iTero® system with SureSmile can use this document as a reference, including:

- New SureSmile practices planning to use the iTero® Element™ scanner for all model types.
- Existing SureSmile practices using the orascanner who have decided to obtain an iTero® Element™ scanner.
- Any SureSmile practice planning to use the iTero® Element™ scanner to capture supplemental and update scans for their SureSmile-certified CBCT system.

Practices using CBCT must also refer to the applicable guide for the SureSmile protocol for CBCT scans. These documents are available in the SureSmile online help.

To access this area,

1. go to SureSmile via your web browser
2. click the ? icon and select Help Center
3. Next, find the “Other Resources” section in the lower-right corner of the window and select “Useful Documents.”
4. When this page opens, find the appropriate CBCT guide under the heading, “Scanning Protocols.”

## Other Resources

[Frequently Used Forms](#)

[Useful Documents](#)

[Online Help PDF](#)

[Software Release Notes](#)

[suresmile's Bracket Library](#)

## Prerequisite Training

Prior to conducting the SureSmile training and launch:

- The practice should be trained in the proper use of the iTero® imaging system by an Align Technology, Inc. clinical trainer.
- Scan technicians should have successfully performed at least 10 scans prior to scanning patients for SureSmile.
- If using CBCT, the practice should be trained in the safe and effective operation of CBCT equipment by a representative of the manufacturer. To begin the process of validating your system for use with SureSmile, visit [sure.u](https://sure.u). You will find instructions here:

SureSmile supports:  
iTero® Orthodontic Digital Ecosystem

**WARNING: SureSmile does NOT support the iTero® Restorative system for dentists.**

# Getting Started

## Obtain a MyAligntech.com Logon

Contact Align Technology, Inc. customer support at 1-800-577-8767 to obtain a username and password for myaligntech.com. This online account portal offers an export option for storage data.

NOTE: Username and password is the same one you would use to log in on the scanner with.

MYALIGNTECH

iTero® OrthoCAD®

Email:

Password:

LOGIN

## Upgrade OrthoCAD®

The export option is available in OrthoCAD® 5.1.1.113 or higher. If this version is not installed, click Support at the bottom of any MyAligntech.com page and choose OrthoCAD® installation instructions.

## Install SureSmile® software and OrthoCAD® on the same computer

Prepare a computer to process orders for SureSmile patients. For your convenience, choose a computer with access to your MyAligntech.com account so you can perform tasks with OrthoCAD® and SureSmile® at the same computer using a patient data folder accessible to both programs.

If you use CBCT, you can also set up a folder for patient CBCT data accessible to this computer.


- Install a SureSmile-supported browser to submit model orders based on STL/PLY data
- Install “SureScan” software to submit model orders based on CBCT data (if applicable)

## Cybersecurity Guidelines

1. Keep your computer’s operating system up to date with patches and fixes.
2. Install and maintain an anti-virus program.
3. Install and maintain a firewall between your LAN and the internet.
4. Avoid installing browser add-ins or plug-ins.
5. Avoid downloading or installing software from unknown sites
6. Create a hard to guess password by using at least 8 characters of mixed case letters, numbers, and symbols.
7. Avoid using common words or phrases.
8. Do not reuse the same password for any accounts.
9. Consider using a password program to manage passwords, such as KeePass or LastPass
10. Do not display your password where others can see it.
11. Change your password periodically, every 60 to 90 days.
12. Logout or lock your workstation when leaving your desk.
13. Avoid clicking on links in email. Instead, go directly to the site and login using your user-id and password.

### Contacts for service or software issues:

For issues with SureSmile orders, software, or CBCT protocols for SureSmile, contact SureSmile Customer Care per the listing on page 2 or in the SureSmile online help.

To access SureSmile online help, go to SureSmile via your web browser, click  the icon and select “Help Center.”

For issues with the iTero imaging systems or exporting your STL files, please contact Align Technology, Inc. customer support.

# What is SureSmile?

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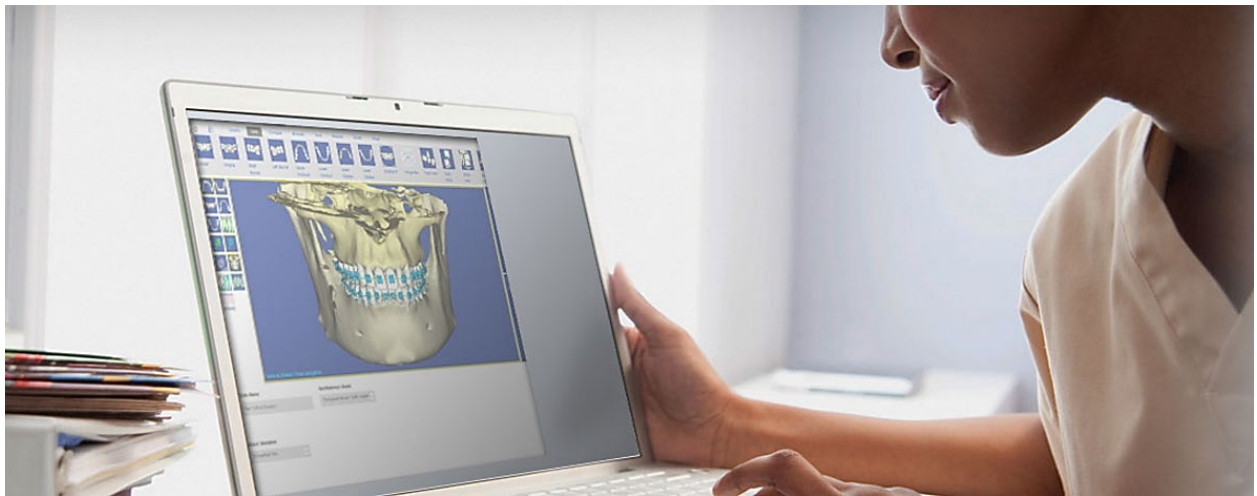
## SureSmile®

The SureSmile system is the first end-to-end solution that allows the orthodontist to apply 3D diagnostic imaging and computer-aided treatment planning to produce custom appliances. This results in greater control and efficiency for orthodontic care.

The SureSmile system is comprised of several technology components:

- Scanning technologies to produce a 3D model of the patient's dentition that may be captured in an optical scan by our orascanner or a certified third party scanner; scans may also be captured by a certified CBCT system.
- SureSmile 3D software, which provides powerful visualization tools for precision diagnosis, treatment simulation and customized appliance design. The doctor can review the digital setup with this software and use it to communicate with patients and with the SureSmile Digital Lab.
- SureScan software primarily used for scan acquisition with the orascanner or CBCT data submission
- The SureSmile Digital Lab provides scan and setup processing to produce precise robotically bent custom archwires; or you may send the models to your lab to fabricate other appliances such as aligners.

IMPORTANT: SureSmile does not determine patient care. SureSmile provides therapeutics as directed by the doctor. The best possible results from the SureSmile process depend on the application of the doctor's diagnostic and clinical judgment.



## Treatment Models

The table below lists the 3D models produced from scans to support SureSmile treatment. An optical scan may be captured by scanning a patient in-vivo (intraorally) or by scanning a plaster model. However, an in-vivo scan is required for wire therapy and strongly recommended when capturing any model used for appliance design.

The Digital Lab also produces a setup, which is a model of the doctor's treatment plan based on the therapeutic model to fabricate custom appliances.

Model	Purpose	Source Data
<b>Diagnostic Model</b>	Models the malocclusion, including individual teeth, to support: full dental examination using 3D diagnostic tools, a simulation of treatment options, and/or a model for appliance design.	<ul style="list-style-type: none"> <li>Optical scan In-vivo or plaster</li> <li>CBCT In-vivo or plaster</li> </ul>
<b>Therapeutic Model</b>	<p>This scan is captured intraorally (or by in-vivo CBCT).</p> <p>For bonded patients, models the patient's current tooth anatomy and bracket positions. Captured any time after bonding in preparation for designing custom archwires or aligners</p> <p>For unbonded patients, models the patient's current tooth anatomy to support: full dental examination using 3D diagnostic tools, a simulation of treatment options, and/or a model for appliance design.</p> <p>CBCT users have an additional scan option that accompanies a therapeutic scan:</p> <ul style="list-style-type: none"> <li>Supplemental scan – an intraoral scan primarily used to capture areas with restorations that cannot be accurately modeled from a CBCT scan. The two scans of the patient are combined to produce a complete model.</li> </ul>	<ul style="list-style-type: none"> <li>Optical scan In-vivo*</li> <li>CBCT In-vivo scan</li> <li>Optical scan In-vivo*</li> </ul>
<b>Update Model</b>  (for bonded patients only)	<p>This scan is taken intraorally by an optical scanner to capture areas that have changed since the last model was produced. Schedule an update scan when you need to order archwires, but bracket positions have changed or new teeth have erupted.</p> <p>Note: If new teeth are captured, you must order a new setup prescription before ordering wires.</p>	<ul style="list-style-type: none"> <li>Optical scan In-vivo*</li> </ul>
<b>Final Model</b>	Models the patient's final tooth positions with individual teeth to support a full Dental Examination using 3D diagnostic and quality grading tools, and/or a model for appliance design.	<ul style="list-style-type: none"> <li>Optical scan In-vivo or plaster</li> <li>CBCT In-vivo or plaster</li> </ul>

# Workflow for iTero® Scanner

While you may use your iTero scanner to scan either intraorally or scan a plaster model, the following scan types must be captured intraorally:

- Therapeutic scans – upper and lower arches (both arches are required even if the patient is receiving single arch treatment since both are needed to plan the occlusion)
- Update scans – arches or partial scans of arches to capture changes to tooth anatomy and/or brackets
- Supplemental scans – arches or partial scans of arches to capture supplemental data for CBCT scans

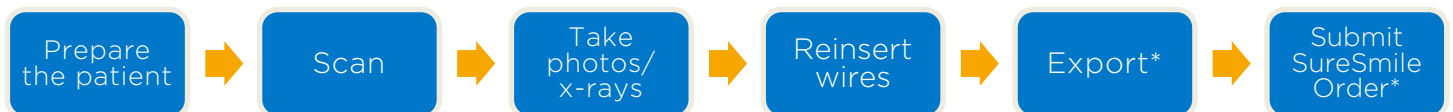
In addition, we strongly recommend capturing diagnostic and final scans intraorally when you plan to use them to design an appliance (aligners or IDB trays, for example).

After capturing the data, export .STL files and submit them to the SureSmile Digital Lab via an order.

The process for the therapeutic scan appointment, which contains the most steps since it must be captured intraorally and requires records, is depicted below.

## Overview of the Therapeutic Scan Appointment

### SureSmile Advanced



### SureSmile Ortho and SureSmile Aligner



\*The steps to export the data from MyAlignntech.com and attach it to a SureSmile order may be completed after the patient appointment. To avoid delays to treatment, make sure you submit orders by the end of the day.



# Taking Required 2D Records

The SureSmile system requires current photos and x-rays any time a scan is taken to optimize 3D modeling accuracy. Each photo is used for a specific purpose in Digital Lab modeling or setup processing. A standard photo set consists of:

- 3 extraoral photos: Extraoral photos indicate the natural jaw position and natural smile line. The Digital Lab uses this information when orienting the 3D model to the head position.
- 5 intraoral photos: The Digital Lab references intraoral photos to confirm tooth anatomy, check bite registration, and confirm bracket placement.

The following table illustrates the records required (or recommended) for each model type.

	Required Photos	Required x-rays	Strongly Recommended
Diagnostic Model	-	-	Five standard intraoral + three facial + full mouth Panorex, ceph
Therapeutic Model	Five standard intraoral + three facial	Panorex + initial or current ceph* <i>(optional for SureSmile Ortho and SureSmile Aligner)</i>	Full Mouth + Overjet
Final Model	-	-	Five standard intraoral + three facial + full mouth Panorex, ceph

For best results, photos should be taken the same day as the scan. To meet minimum modeling requirements, they must be taken within 4 weeks before or 2 weeks after the scan.

\* For the most accurate orientation of the model to the head position, the Digital Lab recommends importing a ceph that includes the Frankfort Plane. If the patient's CBCT scan does not capture this anatomy, you can import the ceph from the initial records.

## Import Records On Time

Import required photos/x-rays into the patient's SureSmile record before the data is sent to SureSmile.

If the 3D data arrives at the Digital Lab without the required records, the order will be placed on "customer hold" and you will have to release the hold before work can begin in the Digital Lab.



## Create a new image set

Create the image set using an integrated imaging system to automatically create the patient record and upload the set, or create the set manually in SureSmile via the web:

1. On the patient overview, click Image Sets and then select Add Image Set...
2. Enter the name for the image set.
3. If you need to change the date, type the date or click the calendar icon and select the date that the records were taken.
4. Click Save.

## Upload multiple images

Next, upload photos and x-rays.

1. Click the Upload Files button for the image set.



2. Select multiple image files from the Open dialog, and click Open.
3. Drag and drop images into their correct position in the montage.

# Standards for SureSmile Patients

NOTE: The following standards may not pertain to all SureSmile platforms. Brackets and wires will apply to SureSmile Advanced.

If the patient is not bonded, you will follow your usual scanning procedure for capturing a model of the patient's teeth. SureSmile requires 100% tooth coverage in scans with 2mm of gingiva.

With using an iTero scanner, you will need to understand how to capture data for SureSmile patients who are bonded. The requirements are:

- 100% tooth coverage and interproximal areas
- 100% of bracket face/wings
- 70% of bracket mesial and distal profiles
- 2mm of gingiva

Because the SureSmile system will fill in holes with artificial data, these standards must be met to produce an accurate representation of the patient. See page 15 for coverage examples.

## Prepare the Patient

1. If the patient is bonded, remove the patient's wires in the arches to be scanned. If they are SureSmile archwires, keep track of their orientation to help you reinsert them correctly at the end of the appointment.



2. Remove calculus and any other material that will misrepresent the true shape of the teeth.

*If the patient has turbos:*

If the turbos are scheduled to be removed at this appointment, remove them before the scan. Otherwise, enter a note in the SureSmile order to describe the location of the turbos.



3. If you are using self-ligating brackets, close bracket doors.

NOTE: The manufacturer recommends using retractors to avoid capturing excessive tissue in scans—especially for anterior teeth (see the Scanner User Guide).



# Scan Procedure - Element

## Scanning Bonded Patients

If the patient is bonded, add the best practices on the following pages to your procedure to adequately capture teeth with brackets. Depending on user preference, you can begin scan on either upper or lower arch and on right or left side.

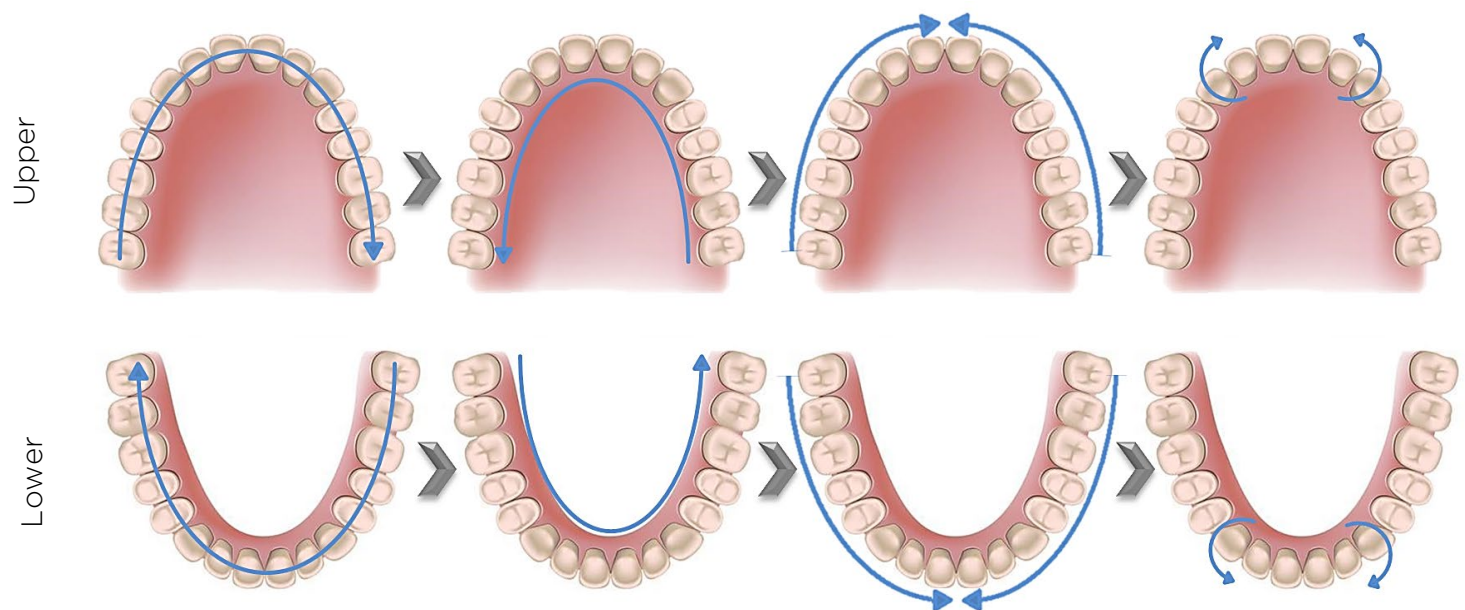
### Keep Areas Dry

Part of capturing a high quality scan, it is important to keep areas being scanned completely dry. Saliva and bubbles can distort the surface captured by the scanner. Be sure to have extra cotton rolls or gauze in addition to having a constant suction at hand.

### Opaque Brackets

Before you begin scanning, you must apply an opaque material to brackets in order to capture with this scanning technology

Use an opaque solution to provide a thin coating for the bracket without obscuring its detail.



## Brackets Present

While completing the case Rx, it is important to be aware of the recipient being scanned. Do the patient's teeth have brackets bonded or not? If so, it is critical that the Brackets Present field is checked. This will allow the scanner to include all attributes of the bracket in the processed scan.



New Scan

Doctor: Dr. Demo, Sample License: \* 123456

First Name: \* Case Type: \* iRecord

Last Name: \* Brackets Present: ☒

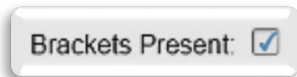
Chart #: Ship To:

Notes

Add Notes

### Brackets Present feature

Bracket scan quality if Brackets Present checked...



Bracket scan quality if Brackets Present is **NOT** checked...



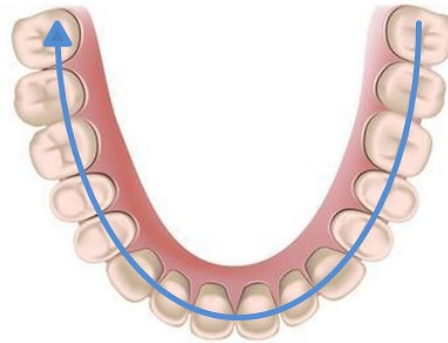
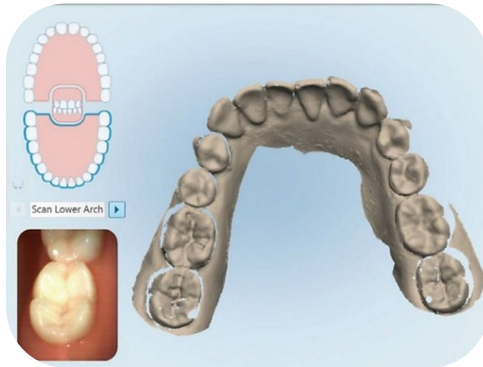
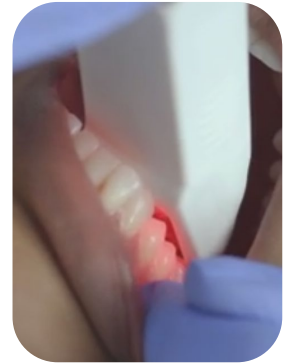
*Notice how the system tries to remove the bracket data from the processed scan*





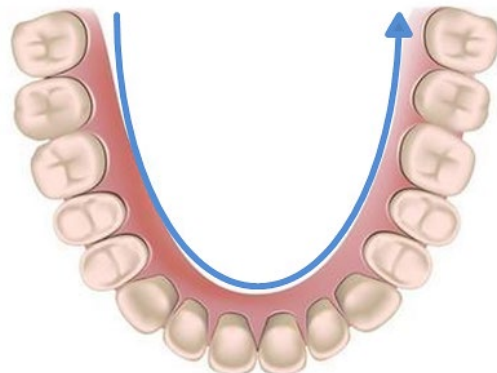
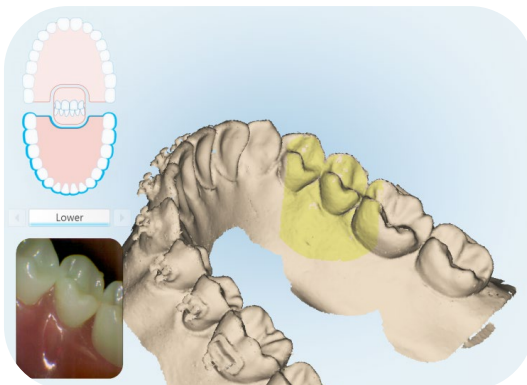
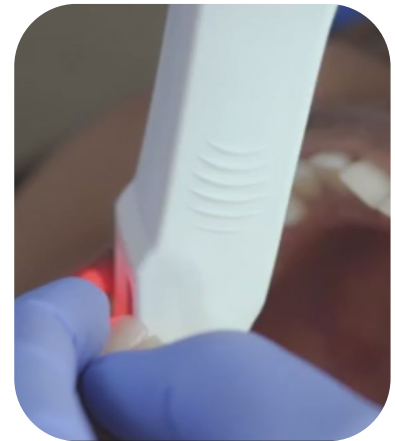
## Capture the Occlusal Segment of an Arch

- To scan the occlusal surface, move in a single continuous motion. Being sure to keep wand flat on the occlusal, steadily bring wand toward anterior.
- When you reach the bicuspid continue by swiping across the anterior, tilting slightly to the lingual at the contralateral bicuspid and then proceed by moving the tip straight back to the contralateral terminal tooth. This will allow for capture of continuous segments of anatomy.



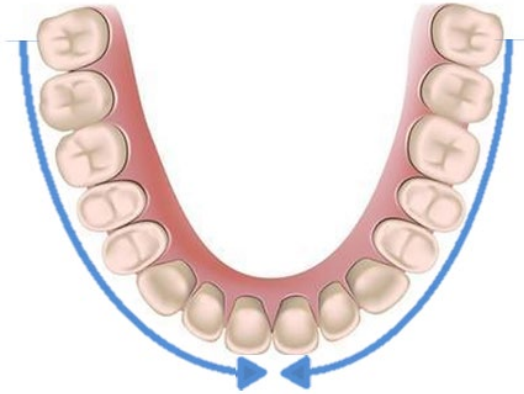
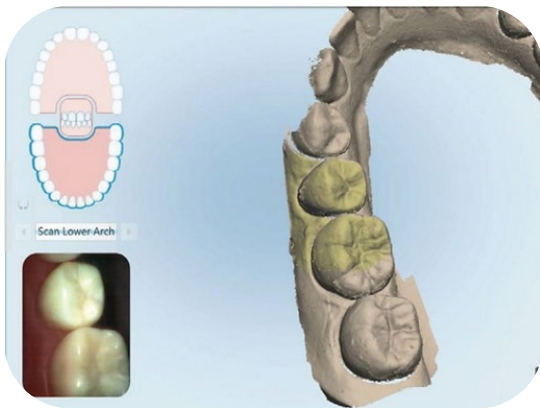
## Capture the Lingual Segment of an Arch

- Once you reach the most terminal molar, rotate to lingual.
- Bring cable end out to side and maintain a 45° angle of wand tip to lingual surface.
- Using twisting motion, continue around entire arch being sure to capture the interproximal anatomy of the entire lingual surface.
- Holding the wand tip against the tooth will help to retract the tongue.



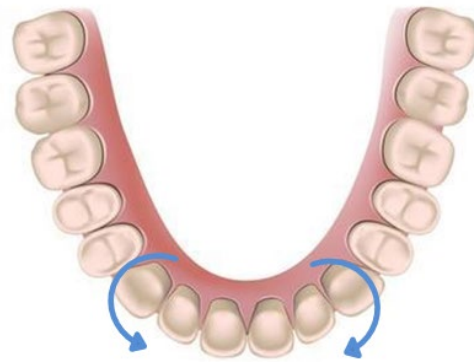
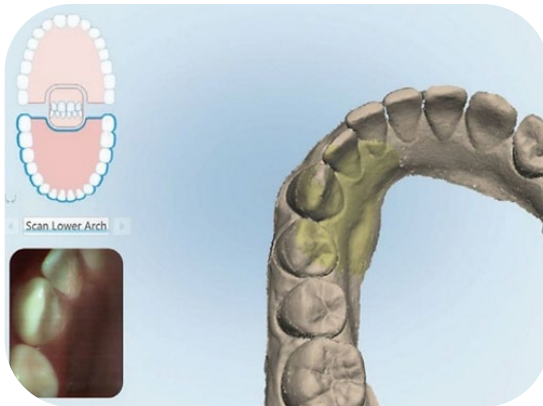
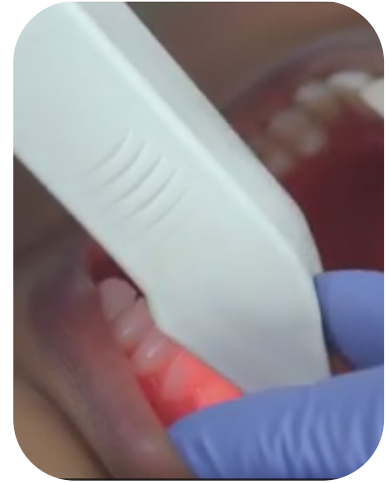
## Capture the Buccal Segment of an Arch

- If the patient is in lingual treatment, remember the side that is bonded is the most critical view for modeling.
- After scanning of lingual is complete, rotate to buccal surface. Tilt wand at larger angle (bringing cable end away from arch) and move towards midline to capture distal of tooth/bracket and interproximal anatomy of the buccal.
- Once you cross the midline, move wand tip to opposite terminal tooth and use same technique to capture distal and interproximal anatomy of buccal moving from posterior to anterior. Moving from posterior to anterior when scanning buccal surface reduces interference from cheek and allows for a smoother scanning experience
- Tilting wand tip (bringing cable end closer to the arch) and at a slight diagonal angle will allow better capture of the mesial surface of tooth/bracket and the underside of bracket area.



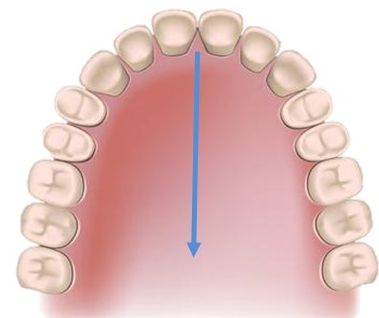
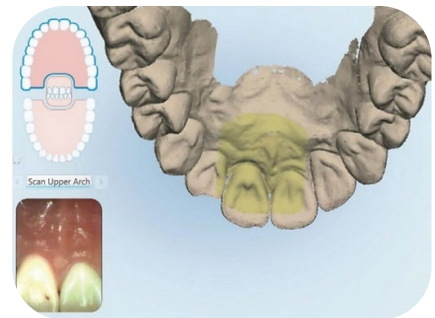
## Capture the Upper/Lower Anterior

- After scanning of buccal is completed, move to anterior to capture incisal surface.
- Place wand so that the lingual of the cuspid and lateral are centered in view finder.
- Roll from lingual surface, over incisal edge to buccal/facial surface.
- Repeat on contralateral side.
- These scan helps to ensure that lingual and buccal segments are joined with the accurate incisal surfaces.



## Capture the Palate

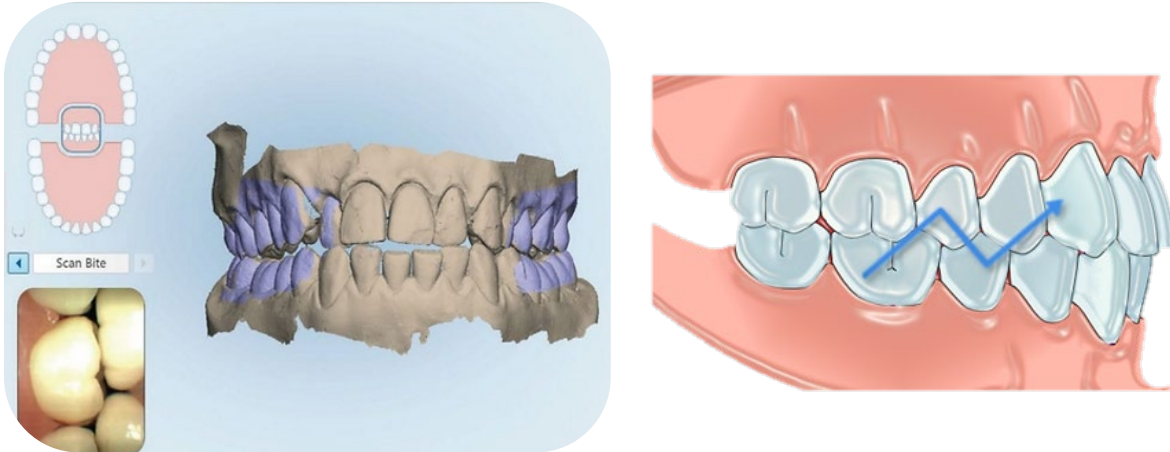
- To scan the palate: Begin at the midline directly behind the central incisors.
- Follow with additional scans until reaching the soft palate.
- Fill remaining palatal surfaces by sliding the wand side to side.





## Capture the Bite

- The final segment is the bite. Prior to scanning confirm the patient's bite.
- Have the patient open, use the wand to retract the cheek and have patient close in centric occlusion. Bring wand tip gently against teeth observing the occlusion in the view finder.
- Start with the first molars. Center the wand between the upper and lower arches and slowly move forward in a small wave-like motion, capture 3-4 teeth and then move to the contralateral side using the same technique.
- Once bite has been captured, the upper and lower arches will occlude according to the bite scan.



Proceed to Review Scan Quality section

# Scan Procedure – IOC & HD2.9

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## Plan Segments

Since the iTero IOC and HD2.9 scanners offers a limited amount of pictures per segment, we recommend the techniques detailed in the following sections to achieve these goals:

- Ensure that completed segments will merge
- Capture accurate and complete modeling data, including bracket features
- Follow the most efficient steps

**WARNING:** Do NOT complete a segment without capturing all required anatomy; including interproximal areas and bracket face/wings, since the iRecord case type causes the system to fill in holes upon completion of a segment. You will typically need all pictures for maximum accuracy with SureSmile.

Remember, the IOC and HD2.9 scanners offers a maximum of 8 segments per upper/lower scan. In other words, there are 4 segments per arch (labial right, lingual right, labial left, lingual left).

## Scanning Bonded Patients

If the patient is bonded, add the best practices on the following pages to your procedure to adequately capture teeth with brackets. Depending on user preference, you can begin scan on either upper or lower arch and on right or left side.

## Keep Areas Dry

Part of capturing a high quality scan, it is important to keep areas being scanned completely dry. Saliva and bubbles can distort the surface captured by the scanner. Be sure to have extra cotton rolls or gauze in addition to having a constant suction at hand.

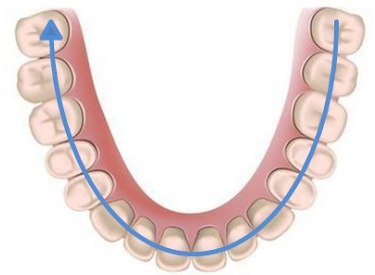
## Opaque Brackets

Before you begin scanning, you must apply an opaque material to brackets that are difficult to capture with this scanning technology

Use an opaque solution to provide a thin coating for the bracket without obscuring its detail.

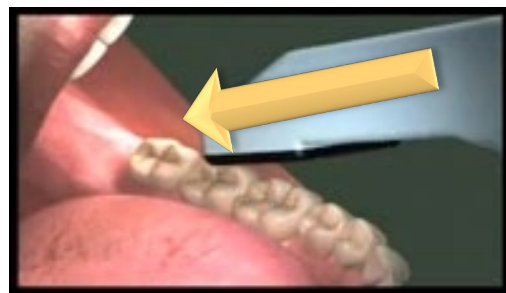
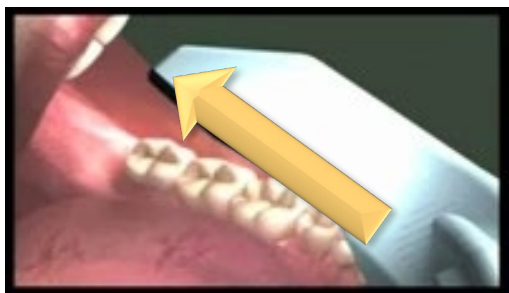
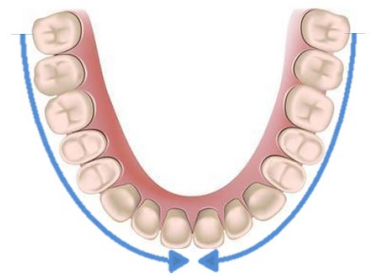
## Capture the Occlusal Segment of an Arch

To scan the occlusal surface, move in a single continuous motion. Being sure to keep wand flat on the occlusal, steadily bring wand toward anterior.

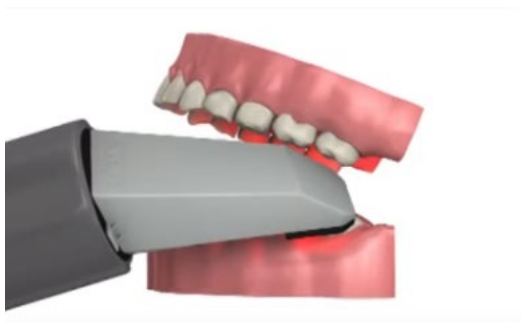


## Capture the Buccal Segment of an Arch

- If the patient is in lingual treatment, remember the side that is bonded is the most critical view for modeling.
- After starting with your occlusal surface of the last molar, hold the wand over the buccal cusps of the molars for an occlusal/buccal view of the posterior teeth. It is necessary to capture some of the occlusal view in the buccal segment to help the system merge with the lingual segment later.
- Continue scanning along the segment working your way mesially until you cross the midline.
- Since the brackets will block your view and leave holes, position the wand perpendicular to the buccal view and take additional pictures to fill in the holes.
- Follow the manufacturer's recommendations for rocking mesially and distally to capture interproximal areas. This method is recommended to help avoid shadowing (which will become holes in the data). See your iTero tutorials for a demonstration.

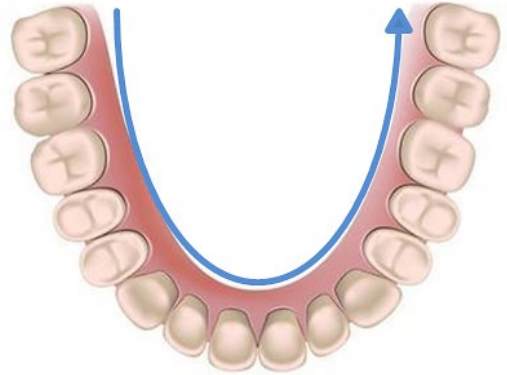


*Rocking pattern recommended by the manufacturer to position the wand to capture interproximal areas.*



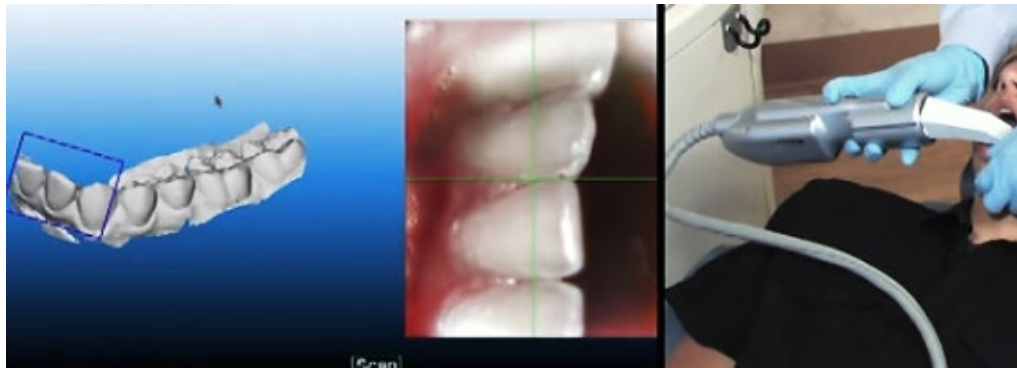
## Capture the Lingual Segment of an Arch

- If you still have holes after you have used up your buccal pictures, you can try to compensate as you scan the lingual view.
- Hold the wand at an angle to capture both lingual and occlusal views. Remember to continue using the rocking pattern, if needed, to capture interproximal areas.



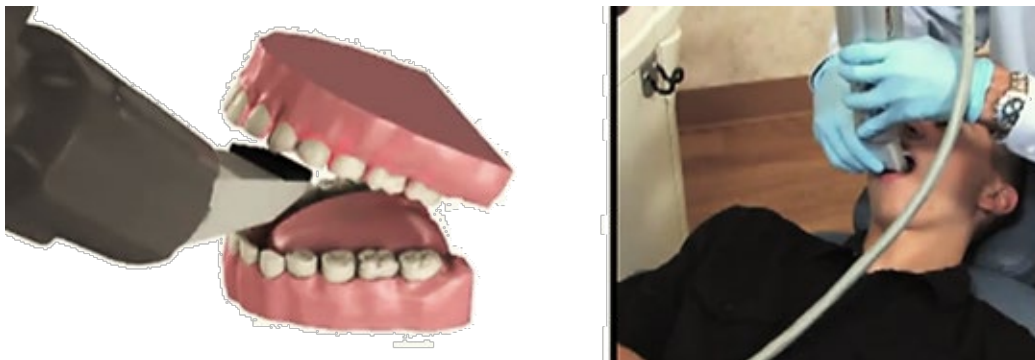
## Capture the Lower Anterior

As recommended in the iTero tutorials, scan across the facial surface of the lower anterior (holding the wand sideways) also capturing incisal edges.



## Capture the Upper Anterior

- As recommended in the iTero tutorials, scan across the facial surface of the upper anterior (holding the wand sideways) also capturing incisal edges.
- However, for the lingual surface of the upper anterior, hold the wand vertically while scanning to include incisal edges with lingual views.

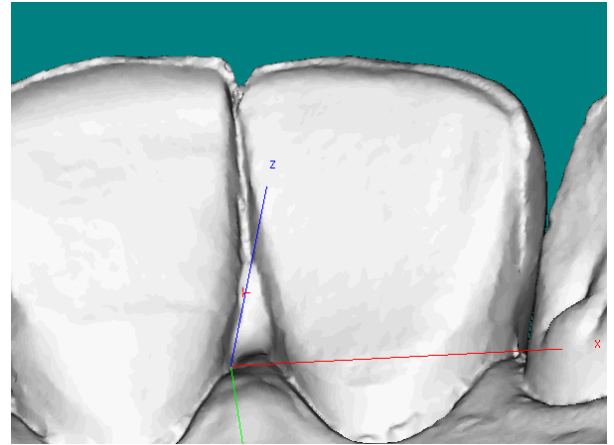


# Review Scan Quality

## Examples of Insufficient Overlap in Anterior

If you see ridges or grooves at the incisal edge that do not reflect actual tooth anatomy, the scan has not accurately registered; and it will ultimately be rejected by the SureSmile Digital Lab. Do not order this scan. Instead, delete the segment and re-scan to capture accurate data.

NOTE: Once the scan is sent to Align Technology, Inc., it cannot be modified. If the scan is rejected by SureSmile, the patient must be recalled and the data re-captured.





## Examples of Coverage

Here are examples of scans with good and bad (insufficient) coverage. SureSmile requires 100% of tooth surfaces.

iTero Scans with Good Coverage



100% of coverage area

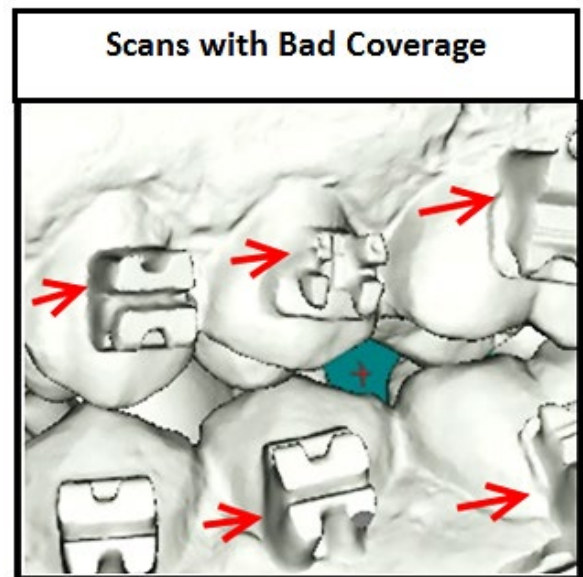
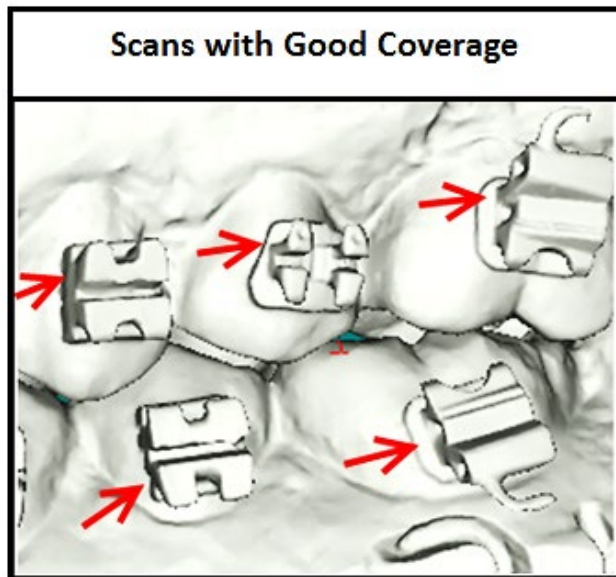
iTero Scans with Bad Coverage



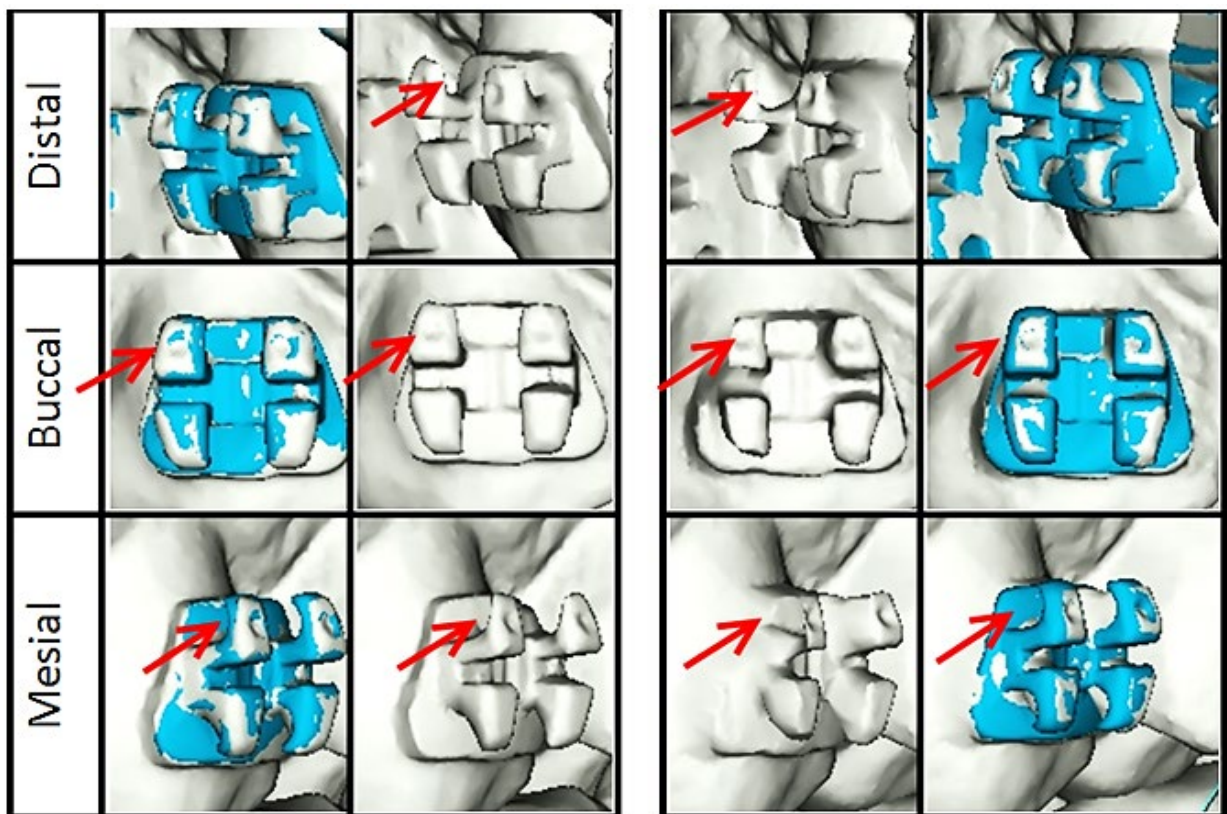
Multiple voids. Insufficient coverage (<100%)

Looking at the left buccal view, you can see the missing coverage causes the brackets' shape to be distorted. The distortion will cause bracket registration to be compromised.





Magnification of the UL5 bracket shows the distortion of the upper mesial wing and pad.



# Using the iTero® Scanner to Capture Data for SureSmile

## Start the Patient's iTero Record

1. Create or open the patient's record on the iTero scanner.
2. For the Case Type, select iRecord.

**WARNING:** The iRecord case type is provided for model storage. You may be charged a storage fee depending on your service terms. To find out more, contact Align Technology, Inc. customer support at 1-800-577-8767.

If you accidentally order your scan using another case type, you may be charged an Invisalign case fee. Contact Align Technology, Inc. customer support immediately to correct the type.

An Invisalign® scan can only be used for an Invisalign case; if you choose the wrong case type, the patient will need to be re-scanned.

MYALIGNTECH iTero • iOC • OrthoCAD Beta			
Orders		Production	
Home > Orders > Orders List > Order Information			
<b>Order Information</b>			
Order ID:	5079476	First Name:	Monica *
Order Code:	5GGM2Z	Last Name:	Schafer *
Case Type:	iRecord	Chart Number:	
Registration Date:	2011/11/16	Acquisition Date:	2011/11/16
State:	Completed		

3. Proceed to the scanning windows and tools.





## Take the Scan/Send Order

1. If you are capturing data for a therapeutic model, capture the upper and lower OR  
If you are capturing data for an update scan or supplemental scan, capture only the arches or areas needed.
2. Fill in any voids to capture:
  - Therapeutic scan: 100% of tooth surfaces for all teeth in a therapeutic scan
  - Update scan: 100% of tooth surfaces for changed teeth plus adjacent teeth for a minimum of 3 teeth (to provide good coverage for integrating new data with the therapeutic model)
  - Supplemental scan: 100% of tooth surfaces for teeth that cannot be modeled from the CBCT scan plus adjacent teeth for a minimum of 3 teeth (to provide good coverage for integrating new data with the therapeutic model)
  - 100% of bracket face/wings
  - 70% of bracket mesial and distal profiles
  - Gingival margins
3. Complete the order to send the data to MyAlignntech.com.

You can take patient photos and x-rays at the time that works best for you during the appointment. Since the file transfer process may take several minutes, you may find this is a good time to take records.

NOTE: The SureSmile Digital Lab recommends marking the bite with articulating paper when preparing to take photos. Also, wires must be removed for SureSmile records.
4. Reinsert the archwires and complete the patient appointment.



## Export your Scan Data from MyAligntech.com

You may export the patient's data during the appointment, or wait until later to process several cases at once.

1. Go to the computer where you can access MyAligntech.com and SureSmile.
2. Logon to your MyAlignTech account.
3. On the individual patient "Order Information" page, click Export.

Click "Export", which requires OrthoCAD 3.5 or higher, to begin the export process.

Order Details ID	Item	Quantity	Ship To	Bill To	Due Date	Shipping Date	Delivery Date	Status
7007404	iCast	1.00	QACompany - Orthodontic Office - iOC		2011/08/18	2011/08/17		Completed

4. Clicking the "Export (OrthoCAD 3.5 or higher)" will launch OrthoCAD.  
If it doesn't open, click on link in this window to download.

**OrthoCAD Export**

Clicking the "Export (OrthoCAD 3.5 or higher)" will launch OrthoCAD in approximately 15 seconds.

If OrthoCAD does not open, click [here](#) to download.

Close

5. "Open File" message window will display indicating that a storage folder was not defined.
  - Choose OK to select the folder and store the downloaded model
  - Choose Cancel to store the downloaded model in a temporary folder.

**Open File**

Models storage folder was not defined!  
Press OK to define the folder and store downloaded model  
Press Cancel to store downloaded model in a temporary folder

OK Cancel

6. Once you select OK, the "Options. Model Folders" window opens allowing user to define the folder for the downloaded model.  
Choose option that works best with your office's workflow.

**Options. Model Folders**

Collision Prevention Case Presentation Print Folders Tool Pref: ▾

Models Repository  
Press 'Browse' to specify models repository folder

Browse... Clear

Additional Search Folders  
Press 'Add' to specify additional folders to be used in Model Search dialog

Add... Delete

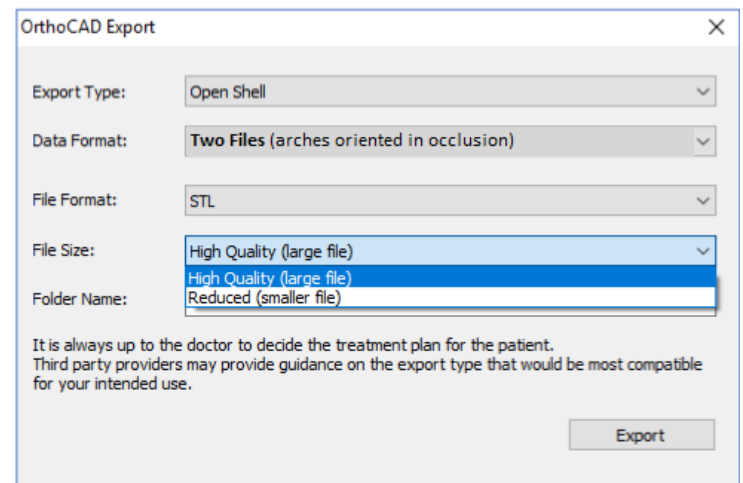
Export Folder  
C:\Cadent\Export\  
Browse... Clear

OK Cancel Defaults

7. Select these settings:

- Export Type: Open Shell
- Data Format: Two Files (arches oriented in occlusion)
- File Format: STL
- File Size: High Quality (large file)
- Folder Name: Enter the folder name you have created for this purpose and save the data with the patient's name.

**WARNING:** Be careful to choose the correct data format of "Two Files (arches oriented in occlusion)." Otherwise, your model may be rejected by the Digital Lab,



- You may repeat these steps for any other patients with data waiting to be exported.
- Close MyAligntech.com and OrthoCAD when you are finished exporting scans.

Next, you will open SureSmile and use a model order to submit your data to the SureSmile Digital Lab as described on the following pages.

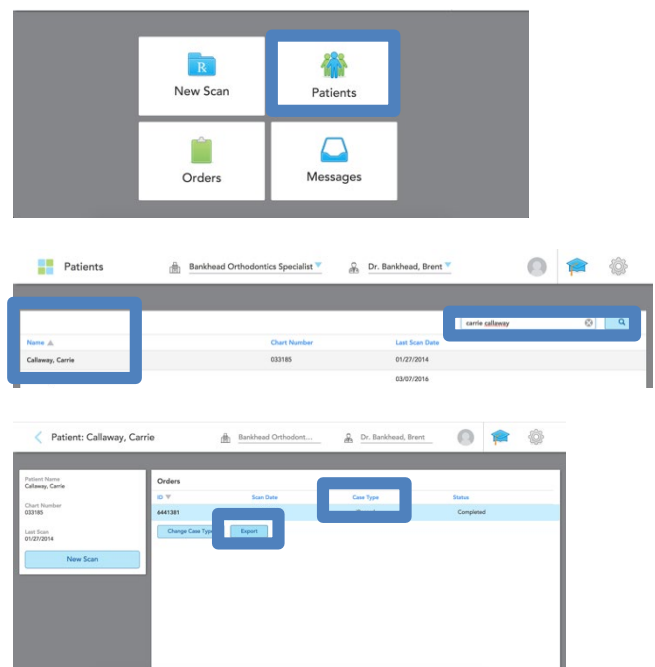
**NOTE:** OrthoCAD will not export a bite segment. The arches are put into occlusion during the scan, so no bite segment is required

## Export your Scan Data from MyiTero.com

*For Mac Users*

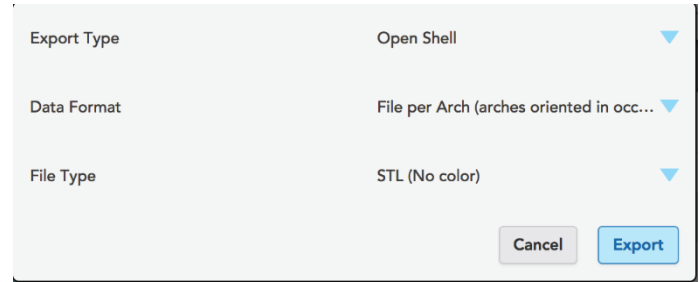
You may export the patient's data during the appointment, or wait until later to process several cases at once.

- Go to any computer where you can access MyiTero.com and suresmile.
- Logon to your MyiTero.com account.
- Click on Patients.
- Search for your patient's name in the search field.
- Click on the patient's name.
- Click Invisalign + iRecord or iRecord depending on the type of scan that was taken. The scan must be a type of iRecord to be able to export .stl files for SureSmile.



7. Click Export
8. Select these settings:
  - Export Type: Open Shell
  - Data Format: File per Arch
  - (Arches oriented in occlusion)
  - File Type: STL (No color)
  - Click Export

**WARNING:** Be careful to choose the correct settings. Otherwise, your model may be rejected by the Digital Lab.



The screenshot shows a dialog box with three rows of settings, each with a label on the left and a dropdown menu on the right. The first row is 'Export Type' with 'Open Shell' selected. The second row is 'Data Format' with 'File per Arch (arches oriented in occ...' selected. The third row is 'File Type' with 'STL (No color)' selected. At the bottom right, there are two buttons: 'Cancel' and 'Export'.

Export Type	Open Shell
Data Format	File per Arch (arches oriented in occ...
File Type	STL (No color)

Cancel Export

9. The files will appear in the downloads folder (OrthoCAD\_Export\_Patient ID's Number)
10. Double click to find your individual .stl files

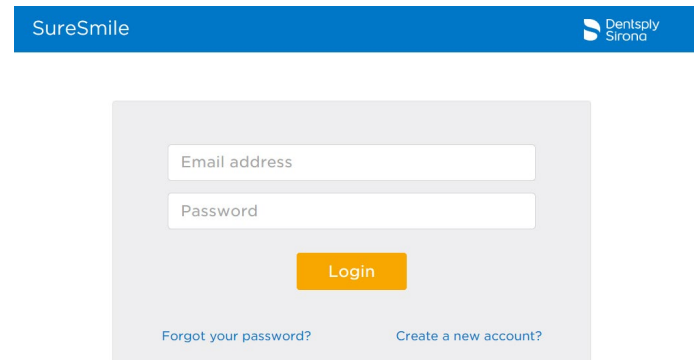
## Open the SureSmile Patient Record

1. Log onto SureSmile, preferably on the computer that can also access the iTero.STL export feature.
2. If the patient record has NOT been created in SureSmile, start a new record. Otherwise, find and open the patient record.

# Ordering a Therapeutic Model from STL/PLY Files for SureSmile Advanced

## Create/Open a Patient Record

1. Login to SureSmile:  
<https://login.SureSmile.com/>
2. Add a new patient record or open a patient record.

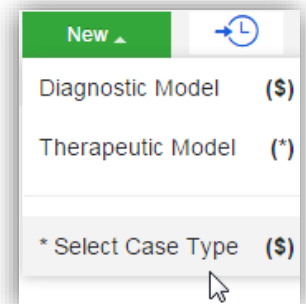
The image shows the SureSmile login interface. At the top, there is a blue header bar with the 'SureSmile' logo on the left and the 'Dentsply Sirona' logo on the right. Below the header, there is a light gray box containing two input fields: 'Email address' and 'Password'. Below these fields is an orange 'Login' button. At the bottom of the gray box, there are two links: 'Forgot your password?' and 'Create a new account?'.

## Select a Case Type

1. On the Patient Overview, click the New button and look at the menu.
2. If the “Select Case Type” option is available, choose it from the menu to go to the Patient Profile page. (If it is not available, continue to the steps below “Start a Therapeutic Model Order.”)
3. In the drop-down menu, select the appropriate case type and click Save Changes. The software returns to the Patient Overview.

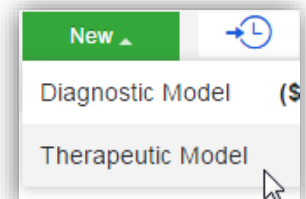
**WARNING:** If your patient will be treated with custom wires now or as a later therapy, do NOT select the Aligner case type.

4. Continue to the steps below “Start a Therapeutic Model Order.”



## Start a Therapeutic Model Order

1. On the Patient Overview, click the New button and choose Therapeutic Model. A new model order opens.
2. Update the Dental Exam for the Teeth tab.
3. If the patient is bonded, select the Brackets tab and update the Dental Exam for the bracket assignments.

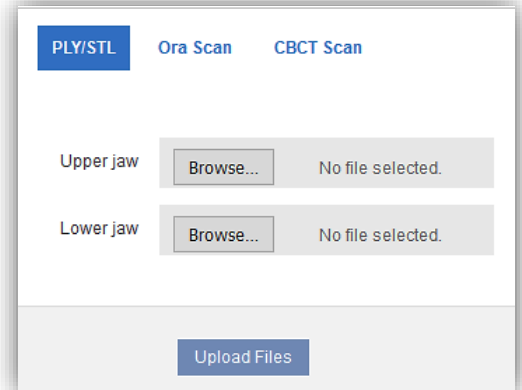


## Upload 3D Scan Data Files

1. For Upper Jaw, click the Choose File button, select the patient's upper scan file and click Open.
2. For the Lower Jaw, click the Choose File button, select the patient's lower scan file and click Open.

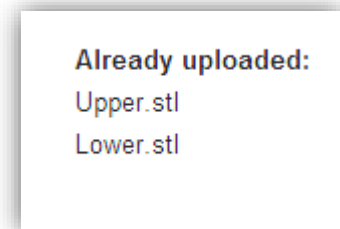
At this point, the files are simply assigned but not yet uploaded. The "Submit Product" button will not become available until you upload files.

NOTE: The bite data is not required since the upper/lower relationship was set at the time the data was captured.



	PLY/STL	Ora Scan	CBCT Scan
Upper jaw	<input type="button" value="Browse..."/>	No file selected.	
Lower jaw	<input type="button" value="Browse..."/>	No file selected.	
<input type="button" value="Upload Files"/>			

3. Click Upload Files and wait a minute for the files to be copied to the cloud. A confirmation appears in the "Already uploaded" area.



**Already uploaded:**  
Upper.stl  
Lower.stl

## Submit the SureSmile Advanced Order for a Therapeutic Scan

The *Submit Product* button becomes available for a therapeutic model order when you have uploaded files for both the upper and lower arches.

### NOTICE

TIP: If you see a red notice instead of the Submit button, you have skipped the steps to select a case type. Follow the link in the notice to make your choice.

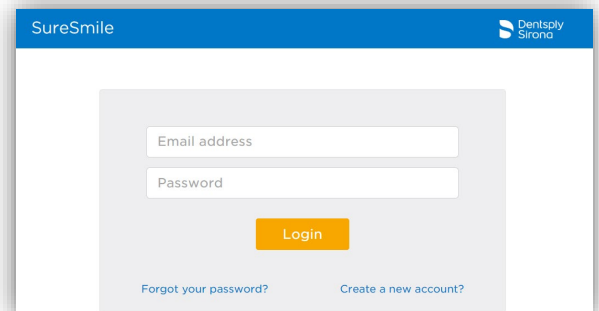
1. Click in the Product Notes area, and type any relevant notes regarding your order.
2. Click the "Deliver with Brackets" checkbox as needed:
  - In a therapeutic model order, the "Deliver with Brackets" checkbox is checked by default. If this is correct (the patient is bonded and will receive custom wires), continue to the next step.
  - OR, if you are scanning a patient that is NOT bonded (or will be debonded at the next appointment) to transition from braces to aligners, uncheck the "Deliver with Brackets" checkbox.
3. Click Submit Product.

Once an order is submitted, the therapeutic model order status is updated to *Ordered*. The order is now restricted to "*Read Only*" in the practice. This means you can review it, but you cannot change it. If you have submitted an order that you would like to cancel or change, please contact SureSmile Customer Care.

# Ordering a Therapeutic Model from STL/PLY Files for SureSmile Ortho or SureSmile Aligner

## Create/Open a Patient Record

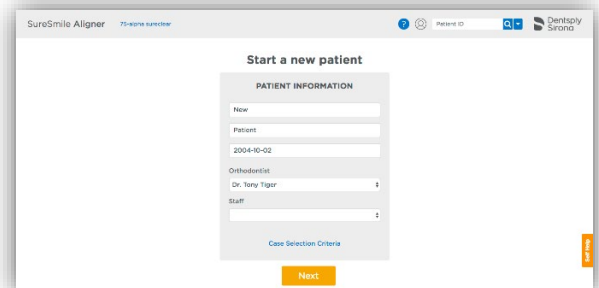
1. Login to SureSmile:  
<https://login.SureSmile.com/>
2. Add a new patient record or open a patient record.



## Enter Patient Information

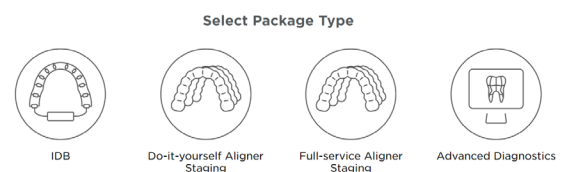
- Enter the patient's first name, last name and DOB. The orthodontist will populate automatically but you have the option to choose a different doctor if needed. Staff is optional.

Click on Case Selection Criteria to review the recommendations.



## Select a Package Type *(This step does not pertain to SureSmile Aligner)*

- Full-service Aligner Staging - Aligner Case (includes Therapeutic model + setup and staging)
  - Lab-created setup & staging
  - Evaluate and accept plan
  - Print or export 3D models
- Advanced Diagnostics - Therapeutic Model + Advanced Toolset
  - Simulate treatment options
  - Surgery, restorative & extractions
  - Optional: 3D models, IDB trays

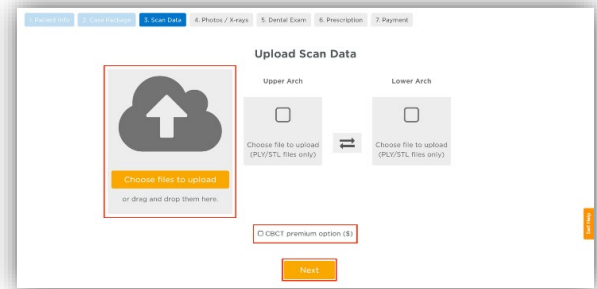


## Upload Surface Scan Data

1. Select Choose files to upload or drag and drop scan data files on the icon.

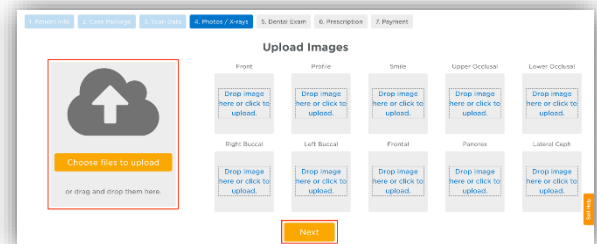
If you plan to include a CBCT scan to order a premium model, check the check box for CBCT premium option (\$). If you select the check box, the system will prompt you to upload the CBCT scan files after the order has been placed.

2. Click Next.



## Upload Images

1. Select Choose files to upload or drag and drop image files on the icon.
2. Click Next.

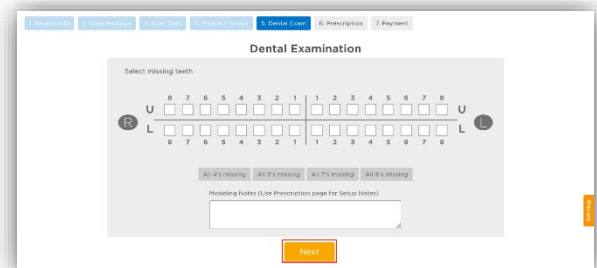


## Dental Examination

1. If any teeth are missing from the scan they need to be marked as missing in the Dental Examination.

Select individual tooth boxes to mark them as missing or use the shortcut buttons below the tooth chart to mark multiple teeth at once. You may also leave notes for the Digital Lab in the Modeling Notes box if needed.

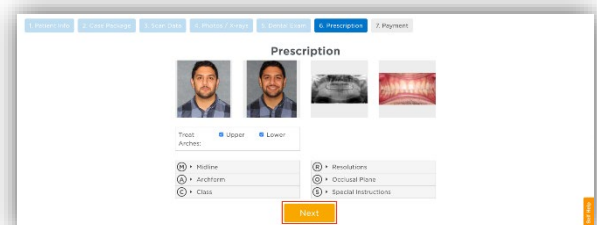
2. Click Next.



## Prescription

Complete each section of the prescription form (MACROS). Click each section to expand it.

All sections except Special Instructions are required





## Payment and Order

Select your payment method then click Place Order. If you are submitting only STL files, you are finished with your order. The Digital Lab will process your order and return it for your review within 6-10 US business days.

If you are submitting a CBCT scan along with your STL files, you will be able to upload the CBCT scan after you click Place Order.

The screenshot shows a web interface for the 'Payment' step of an ordering process. At the top, a horizontal navigation bar contains seven tabs: '1. Patient Info', '2. Case Package', '3. Scan Data', '4. Photos / X-rays', '5. Dental Exam', '6. Prescription', and '7. Payment'. The '7. Payment' tab is highlighted in blue. Below the tabs, the main content area is titled 'Payment' and is divided into two columns. The left column, titled 'Select payment method', contains a radio button labeled 'Charge this card' next to a dropdown menu showing 'Visa ending 4242'. Below this is a link that says 'Or add a new card'. The right column, titled 'Your order', contains text stating: 'Ordering this Aligner as part of this Full-Service Aligner Staging package will incur a one-time charge of 400.00 USD (including premium charge 100.00 USD). Charges are incurred immediately.' At the bottom center of the form is a large orange button with the text 'Place Order'.

# Ordering an Update Model

This section is not applicable for SureSmile Ortho and SureSmile Aligner. For SureSmile Advanced only.

An update scan is used to update the therapeutic model of bonded patients in the event of:

- A newly erupted tooth has been added to treatment.
- One or more brackets were rebonded or repositioned.
- The tooth anatomy has changed to the extent that the setup is affected.

NOTE: The update scan is applicable to bonded patients only, and is not available in an aligner case type

## Capture Scan Pieces

Although the iTero software is designed for full arch scanning, you can capture just a section for a SureSmile update scan. Here are some tips:

- You do not have to start at a terminal tooth. The scanner will allow you to start and end at any tooth. When you stop and view the scan, the software will simply close up the hole at either end.
- Use the iTero menus to choose “Next” or “Previous” to skip to the appropriate area and capture each piece.
- To capture multiple areas in one arch, we recommend performing a full arch scan. The sections to be modeled by the Digital Lab should be captured at the highest possible quality; however ancillary areas can be captured to lower standards.

To help the Digital Lab accurately merge and process the update scan data to update the therapeutic model, follow these requirements:

Requirements	Example
Capture the affected teeth AND the adjacent teeth.	If you rebonded the LL4 and LL5, capture the LL3-LL6
Capture a minimum of three teeth.	If you added the UL7 to treatment, capture the UL5-UL7
For the required area, follow quality criteria described for Therapeutic Scans	If you changed the brackets on the molars, completely capture anatomy and brackets for the molars. The anterior may be captured at a lower quality as long as the arch is connected into one piece.

**WARNING:** Although SureSmile can upload many segments, your iTero or OrthoCAD software may limit you to two segments per patient. Scan full arches as needed.

## Start an Update Scan

1. On the Patient Overview, click the New button and choose Update Model. A new model order opens.

NOTE: If the update model option is not available:

- If you selected the Standard or Extended case type, make sure that you have submitted a therapeutic model order.
- If you selected the Aligner case type, you cannot use the update model feature. To capture changes to tooth anatomy for this case type, order another therapeutic model (additional fees may apply).

2. Update the dental exam and bracket assignments, if changed.

Upload your 3D Scan Data files Files will be uploaded but not yet processed. Supported types are PLY and STL.

Segment	File Selection	Coverage	Action
Segment 1	<input type="button" value="Choose File"/> No file chosen	Coverage: ...	<input type="button" value="Remove"/>
Segment 2	<input type="button" value="Choose File"/> No file chosen	Coverage: ...	<input type="button" value="Remove"/>
Segment 3	<input type="button" value="Choose File"/> No file chosen	Coverage: ...	<input type="button" value="Remove"/>
Segment 4	<input type="button" value="Choose File"/> No file chosen	Coverage: ...	<input type="button" value="Remove"/>

Already uploaded: none

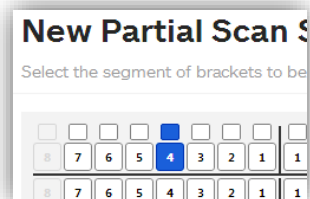
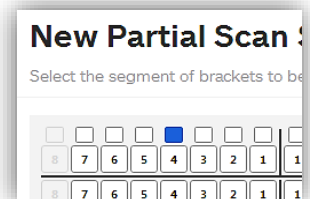
## Upload 3D Scan Data Files

1. For Segment 1, click the Choose File button, and browse to the patient folder you created for this purpose.
2. Select the STL file you saved for the patient's arch (or partial arch) and click Open.
3. Click the Coverage drop-down adjacent to Segment 1. A dialog appears with a tooth chart.
4. In the tooth chart, indicate your modeling request:

If you are capturing a bracket rebond, click the corresponding tooth symbol **ONCE**. The bracket symbol is shaded in dark blue.

OR

If you are capturing a new tooth, click the corresponding tooth symbol **TWICE**. Both the tooth and bracket symbols are shaded in dark blue.



5. Click Close to close the tooth chart.
6. Repeat these steps for each segment you captured for this patient. You may attach up to four segments.

OR

To remove a data segment, click the Remove button adjacent to the segment information.

NOTE: There is room for four segments, which should be more than sufficient. If there are extensive changes to the patient's teeth and brackets, we recommend ordering a new therapeutic model (full scan of both arches).

7. Click Upload Files button and wait a minute for the files to be copied to the cloud. A confirmation appears in the "Already uploaded" area.

## Submit the SureSmile Order for an Update Model



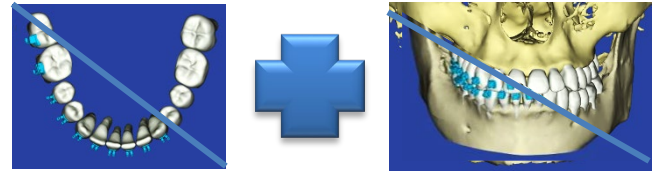
The *Submit Product* button becomes available for an update model order when you have attached data.

1. Click in the Product Notes, and type any relevant notes regarding your order.
2. Click Submit Product.
3. Click OK to confirm you have updated bracket assignments, if changed.

Once an order is submitted, the update model order status is updated to *Ordered*. The order is now restricted to “Read Only” in the practice. This means you can review it, but you cannot change it. If you have submitted an order that you would like to cancel or change, please contact SureSmile Customer Care.

# Ordering a Therapeutic Model from a CBCT Scan and a Supplemental Scan

A supplemental scan is used to add data from an optical scan (iTero) to the data from a CBCT scan to form a complete representation of the patient.



This scan is required if the patient has a certain number of teeth with restorations that cannot be accurately modeled from a CBCT Scan. Optionally, it can be used to add a bite segment as well as order a premium modeling service where all or most crowns are modeled from the optical data (additional fee applies).

**NOTE:** SureSmile Ortho and SureSmile Aligner will need to capture full upper and full lower arches.

Refer to the appropriate CBCT protocol to determine if a supplemental scan (or premium) is needed.

## Capture Scan Pieces

Although the iTero software is designed for full arch scanning, you can capture just a section for patients with minimal restorations requiring a supplemental scan. Here are some tips:

- You do not have to start at a terminal tooth. The scanner will allow you to start and end at any tooth. When you stop and view the scan, the software will simply close up the hole at either end.
- Use the iTero menus to choose “Next” or “Previous” to skip to the appropriate area and capture each piece.
- To capture multiple areas in one arch, we recommend performing a full arch scan. The sections to be modeled by the Digital Lab should be captured at the highest possible quality; however ancillary areas can be captured to lower standards.

To help the Digital Lab accurately merge and process the supplemental scan data into the therapeutic model, follow these requirements:

Requirements	Example
Capture the affected teeth AND the adjacent teeth.	If the upper laterals have been built up, capture the UL3-UR3
Capture a minimum of three teeth.	If the UL7 contains a large filling, capture the UL5-UL7
For the required area, follow quality criteria described for Therapeutic Scans	If both sides of an arch have been restored in the posterior, completely capture anatomy and brackets for the restored teeth and adjacent teeth. The anterior may be captured at a lower quality as long as the arch is connected into one piece.

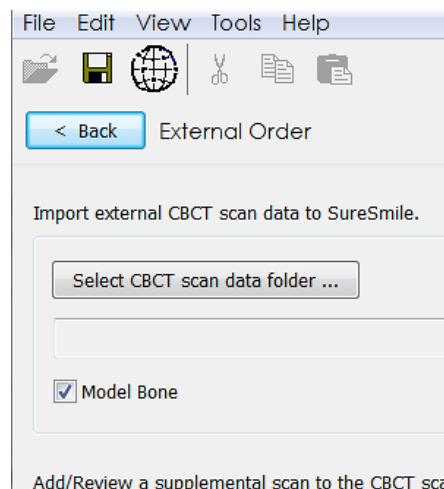
**WARNING:** Although SureSmile can upload many segments, your iTero or OrthoCAD software may limit you to two segments per patient. Scan full arches as needed.

## Start a Therapeutic Model Order (for CBCT Scans)


# SureSmile Advanced

1. In the browser, create an order for a Therapeutic CBCT scan following the instructions in the SureSmile protocol for your CBCT Scanner.
2. Complete the dental exam.
3. Refer to SureScan to import the CBCT data.

NOTE: You must attach CBCT data using the "Select CBCT scan data folder" button before the Finish Scan button becomes available in SureScan and the Submit button available in SureSmile browser.



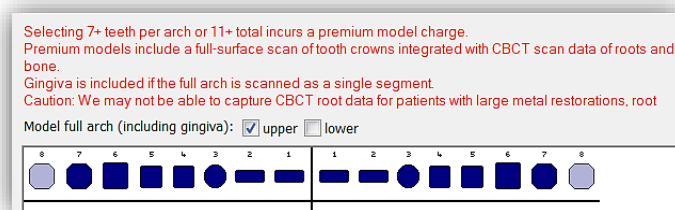
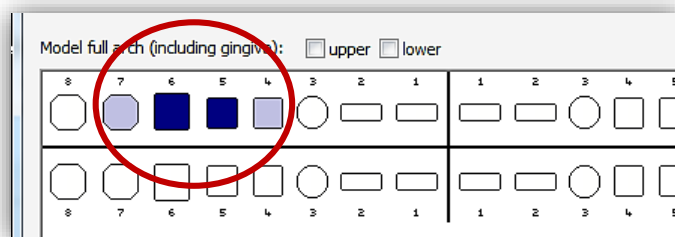
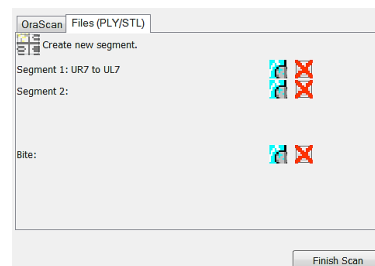
## Import STL Files for Supplemental Scans

1. Select the Files (PLY/STL) tab.
2. Under the tab, click the  Create/Preview/Edit icon adjacent to the segment name (such as Segment 1).
3. In the tooth chart, select each tooth in one arch to be modeled from the supplemental scan due to limitations of CBCT processing.

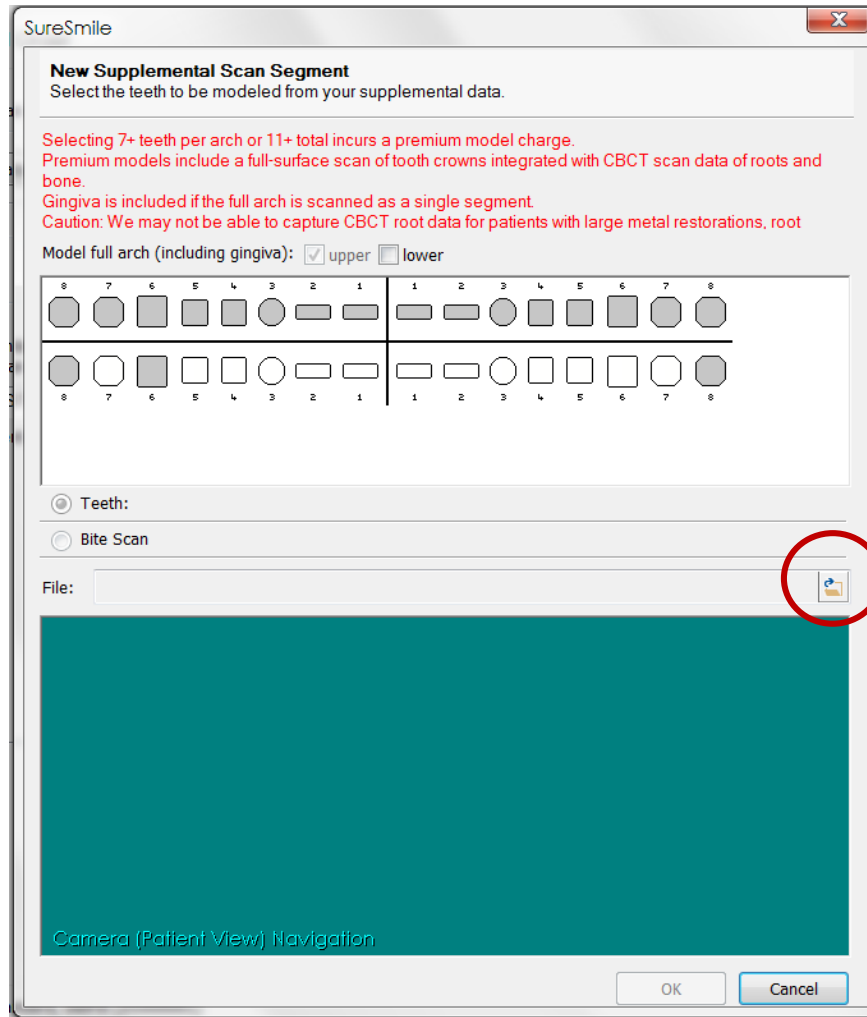
*For example, if the UR5 and UR6 both have metal fillings larger than 3 mm, select each tooth symbol.*


OR

Click the arch checkbox (upper or lower) to select all teeth and gingiva in the arch for premium modeling (additional fee applies).

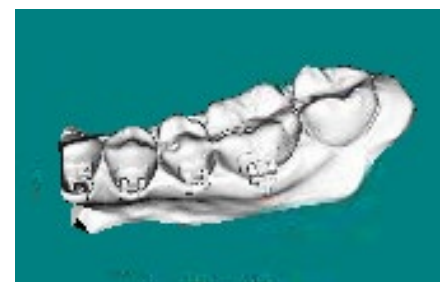



**WARNING:** This option requires full arch data for the supplemental scan to be processed successfully by the Digital Lab. If you captured partial segments, do not use this feature!



4. Click the  folder icon in the New Supplemental Scan Segment window, and browse to the patient folder you created for this purpose.
5. Select the STL file you saved for the patient's arch (or piece), and then click Open.
6. If needed, use the on-screen camera navigation controls to view the model. Click OK when you are finished to close the New Supplemental Scan Segment window.

*Notice that the name of the segment is updated according to the teeth you selected.*

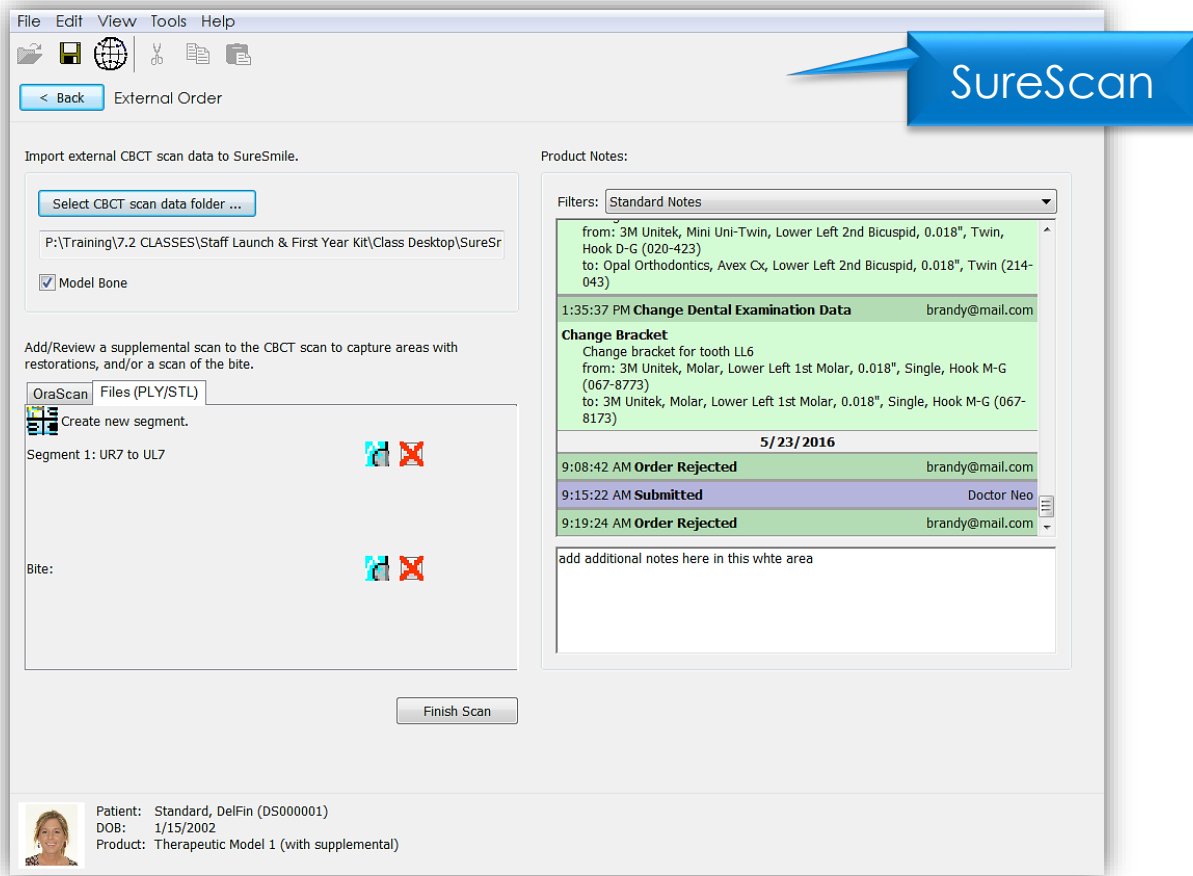


7. If you have another segment, click  **Create new segment.** to add another row of segment icons and repeat steps 2-7 to add another data segment.  
OR

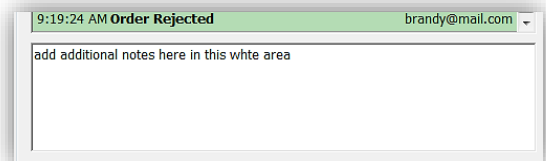
To remove a data segment, click the  button adjacent to the segment information or  to view the segment.

NOTE: The bite option is not applicable with iTero scans since bite information is stored within the upper and lower arch files.

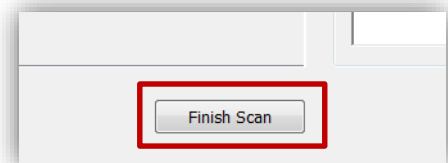
## Submit the SureSmile Advanced Order for a CBCT Scan with a Supplemental Scan



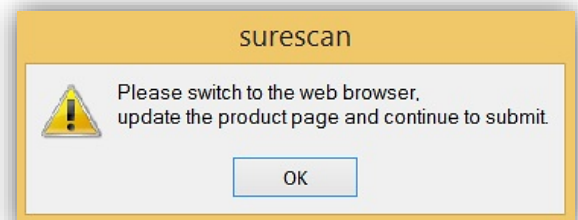
1. Once all necessary scan data have been uploaded for the CBCT scan with supplemental order, it is time to complete the task.  
Click in the white area, and type any additional notes regarding your order.



2. Click on Finish Scan to complete task for this patient and submit the scan.



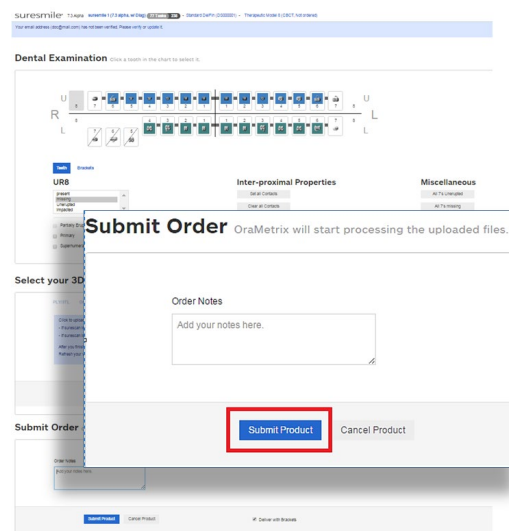
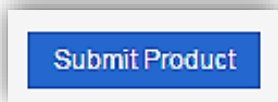
3. Click OK and return to SureSmile in the browser to submit the product.





## Return to SureSmile

1. After you've completed uploading the scan data for that patient in SureScan and have clicked Finish Scan to submit the scan data, return to SureSmile in the browser.
2. Open the order page for the patient and scroll down to Submit Order section. Enter any additional information about the order for the Digital Lab if needed (optional).



If you have not fulfilled all of the prerequisites

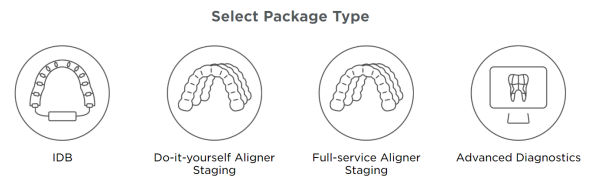
- when you return to the SureSmile browser, SureSmile opens to the Missing Prerequisites section of the Order page and shows which prerequisites are still missing.
- The system displays a reminder to refresh the screen. A message, Scan data missing, remains displayed until you manually refresh the web page. (Press the F5 key.)
- You must submit all missing prerequisites before you can submit the product order.
- Once you fulfill all missing prerequisites, click Submit Product to order the model.

# SureSmile Ortho SureSmile Aligner

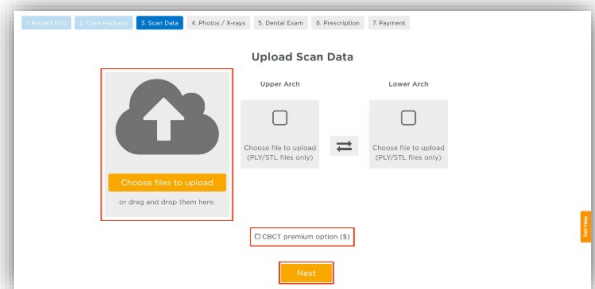
## Start a Therapeutic Model Order (for CBCT Scans)

1. In the browser, create an order for a Therapeutic CBCT scan following the instructions in the SureSmile protocol for your CBCT Scanner.
2. Select Package type. *(This step does not pertain to SureSmile Aligner)*

- Full-service Aligner Staging - Aligner Case (includes Therapeutic model + setup and staging)
  - Lab-created setup & staging
  - Evaluate and accept plan
  - Print or export 3D models
- Advanced Diagnostics - Therapeutic Model + Advanced Toolset
  - Simulate treatment options
  - Surgery, restorative & extractions
  - Optional: 3D models, IDB trays



3. Upload Surface Scan Data
  - a. Select Choose files to upload or drag and drop scan data files on the icon.
  - b. Check the check box for CBCT premium option (\$) to include a CBCT scan to order a premium model. The system will prompt you to upload the CBCT scan files after the order has been placed.
  - c. Click Next.



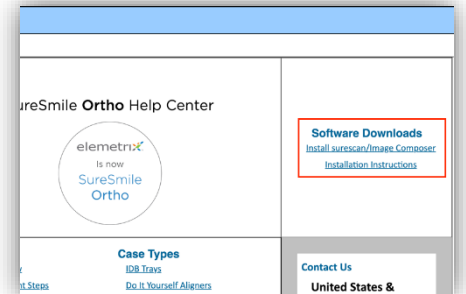
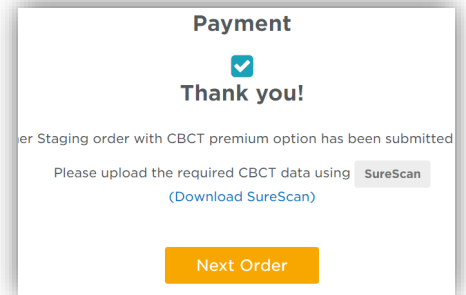
4. Upload images
  - Click 'Choose files to upload' to locate the photos & x-rays on your computer or drag them to this box.
  - Note: X-rays are optional for SureSmile Aligner
5. Complete Dental Examination - Mark any teeth that are not present in the scan as 'missing'
6. Complete Aligner Prescription
  - Choose which arch(es) to treat and decide if you want to treat to 'Ideal' or choose 'Custom' to give the Digital Lab specific instructions.
  - If you choose 'Custom' you will need to complete the aligner prescription we call MACROS. There is more information on MACROS in the next section.
7. Select payment method and place order

You will then see a confirmation that your order was submitted for processing. The Digital Lab will process your case and return it for your review. Cases are typically returned within 6 business days but no longer than 10 business days.

8. If you selected the CBCT premium option (\$) you will be prompted to upload your CBCT scan via SureScan. You will need to install SureScan on the computer where the CBCT scan files are located.
  - If you already have the SureScan software installed on the computer you are using, jump to step 10.
  - If you have SureScan installed on a different computer, jump to step 16. If you need to download SureScan to the computer you are working on, please continue to step 9.

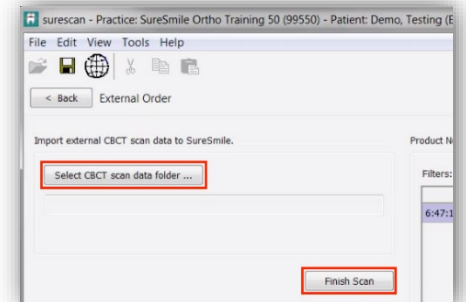
Note: SureScan can only be used on Windows; you cannot use SureScan on a Mac.

9. A few options to download SureScan:
  - Click the (Download SureScan) link; the SureSmile Ortho/SureSmile Aligner Help Center will open.
  - Click Install SureScan/Image Composer under Software Downloads and follow the prompts.
  - You can also click Installation Instructions under the install link for instructions on how to download SureScan.



If you have SureScan on the computer, you are working on:

10. Click the SureScan button to open SureScan. If you get a pop-up asking if you want to open SureScan, click the affirmative option to open the program.
11. Login with your SureSmile credentials.
12. The patient should open. If the patient does not automatically open, find the patient in the task list and double click their name to open it.
13. Click the Select CBCT scan data folder ... button and locate the CBCT scan files. Once the files have been uploaded, click Finish Scan.



OR

If you will be using SureScan on a different computer:

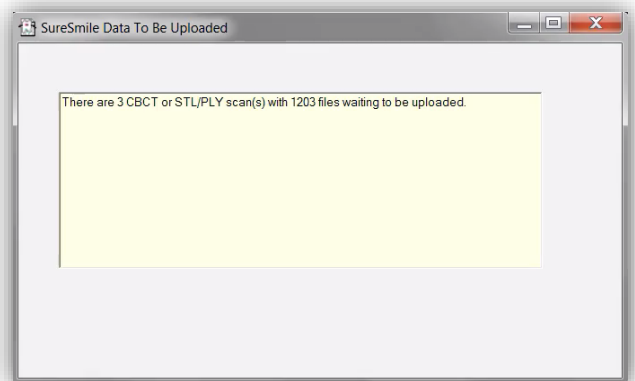
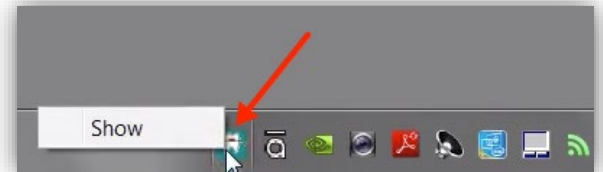
10. Open SureScan and login with your SureSmile credentials.
11. Find the patient in the task list and double click their name to open it.
12. Click the Select CBCT scan data folder ... button and locate the CBCT scan files. Once the files have been uploaded, click Finish Scan.

Once the CBCT data has been submitted, SureSmile begins transferring the data over to the Digital Lab. Due to the large size of the files, this process may take a while depending on your bandwidth.

Please do not close your computer or allow it to go into "sleep" mode for at least 3 hours after submitting so that all of the data can come across. If this is done at the end of the day, you may want to leave your computer on overnight.

If you want to check the transfer status you can right-click the green SureScan icon in the taskbar at the bottom right corner of your screen and select Show.

A window will display where you will see the number of files waiting to be uploaded. When the window is empty, all of the CBCT data has been transferred and it is safe to turn off your computer.



# Ordering Diagnostic or Final Models for SureSmile Advanced

The SureSmile software supports the same STL/PLY format option for importing data to build diagnostic and final models.

You can capture the patient's dentition using your iTero scanner or any other device that can export a PLY or STL file. For example, some offices use a tabletop scanner to capture plaster models for initial and final records.

The requirements for SureSmile scan quality are:

- 100% of every tooth surface
- 2 mm of gingiva
- No interproximal, gingival or lingual holes
- No missing cusp tips

Just like the therapeutic scan, a standard record set including photos and x-rays helps the Digital Lab with tooth modeling. For diagnostic and final models, these records are recommended rather than required.

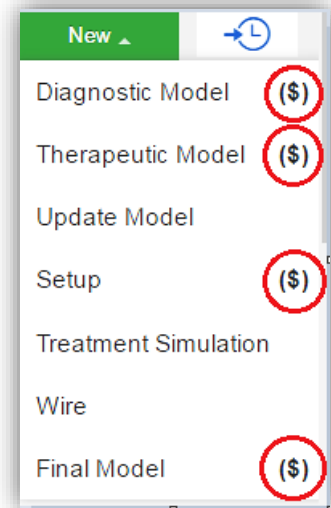
## Start a Diagnostic/Final Scan

1. Open SureSmile via your browser.

On the Patient Overview, click the New button and choose Diagnostic (or Final) Model. A new model order opens.

**NOTE:** If you see a \$ sign in the menu option, a fee applies for this service.

2. Update the Dental Exam for the Teeth tab.



*\$ indicates a fee will apply for that service*

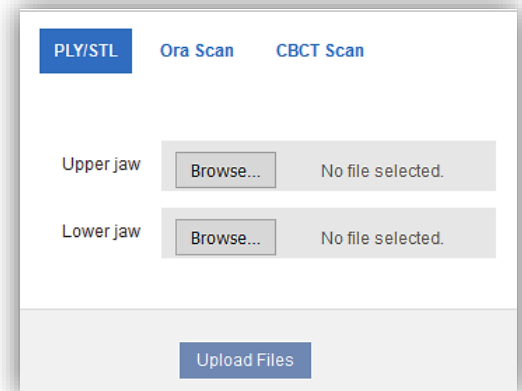


## Import STL Files for Diagnostic/Final Scans

1. For Upper Jaw, click the Choose File button, select the patient's upper scan file and click Open.
2. For the Lower Jaw, click the Choose File button, select the patient's lower scan file and click Open.

At this point, the files are simply assigned but not yet uploaded. The "Submit" button will not become available until you upload files.

NOTE: The bite data is not required since the upper/lower relationship was set at the time the data was captured.



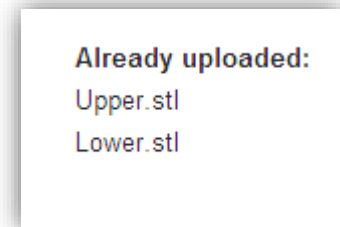
PLY/STL   Ora Scan   CBCT Scan

Upper jaw   Browse...   No file selected.

Lower jaw   Browse...   No file selected.

Upload Files

3. Click Upload Files and wait a minute for the files to be copied to the cloud. A confirmation appears in the "Already uploaded" area.



## Submit the Order for a Diagnostic/Final Model

The *Submit* Product button becomes available when you have attached data.

1. Click in the Product Notes area, and type any relevant notes regarding your order.
2. Click the "Deliver as Finished" checkbox as needed:
  - For diagnostic models, leave the box checked if you prefer the model to be delivered with a workflow task that includes options for starting an IDB tray or treatment simulation. Uncheck the box if you prefer the model to be delivered in a Review Order state.
  - For final models, leave the box checked if you prefer the model to be delivered without a task. Uncheck the box if you prefer the model to be delivered in a Review Order state.
3. Click Submit Product.

Once an order is submitted, the order status is updated to *Ordered*. The order is now restricted to "Read Only" in the practice. This means you can review it, but you cannot change it. If you have submitted an order that you would like to cancel or change, please contact SureSmile Customer Care.

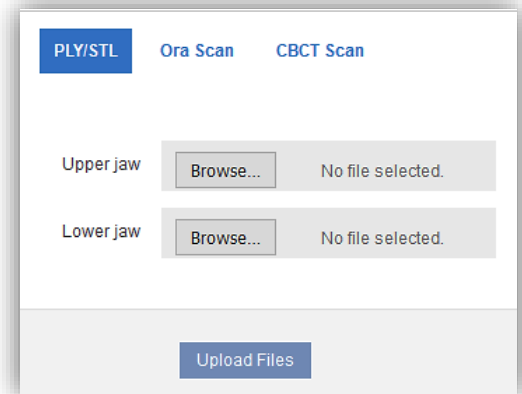


## Import STL Files for Diagnostic/Final Scans

4. For Upper Jaw, click the Choose File button, select the patient's upper scan file and click Open.
5. For the Lower Jaw, click the Choose File button, select the patient's lower scan file and click Open.

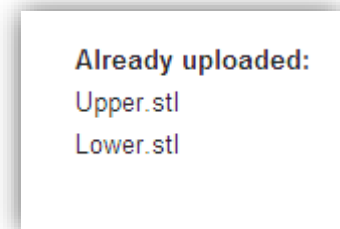
At this point, the files are simply assigned but not yet uploaded. The "Submit" button will not become available until you upload files.

NOTE: The bite data is not required since the upper/lower relationship was set at the time the data was captured.



	PLY/STL	Ora Scan	CBCT Scan
Upper jaw	<input type="button" value="Browse..."/> No file selected.		
Lower jaw	<input type="button" value="Browse..."/> No file selected.		
<input type="button" value="Upload Files"/>			

6. Click Upload Files and wait a minute for the files to be copied to the cloud. A confirmation appears in the "Already uploaded" area.



## Submit the Order for a Diagnostic/Final Model

The *Submit* Product button becomes available when you have attached data.

4. Click in the Product Notes area, and type any relevant notes regarding your order.
5. Click the "Deliver as Finished" checkbox as needed:
  - For diagnostic models, leave the box checked if you prefer the model to be delivered with a workflow task that includes options for starting an IDB tray or treatment simulation. Uncheck the box if you prefer the model to be delivered in a Review Order state.
  - For final models, leave the box checked if you prefer the model to be delivered without a task. Uncheck the box if you prefer the model to be delivered in a Review Order state.
6. Click Submit Product.

Once an order is submitted, the order status is updated to *Ordered*. The order is now restricted to "Read Only" in the practice. This means you can review it, but you cannot change it. If you have submitted an order that you would like to cancel or change, please contact SureSmile Customer Care.

# Ordering Diagnostic Models for SureSmile Ortho or SureSmile Aligner

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The SureSmile software supports the same STL/ PLY format option for importing data to build diagnostic and final models.

You can capture the patient's dentition using your ITer0 scanner or any other device that can export a PLY or STL file. For example, some offices use a tabletop scanner to capture plaster models for initial and final records.

The requirements for SureSmile scan quality are:

- 100% of every tooth surface
- 2 mm of gingiva
- No interproximal, gingival or lingual holes
- No missing cusp tips

Just like the therapeutic scan, a standard record set including photos and x-rays helps the Digital Lab with tooth modeling. For diagnostic and final models, these records are recommended rather than required.

## Start a Diagnostic/Final Scan

1. Log onto SureSmile on the web.
  - Open your web browser and type <https://login.suresmile.com> into the address bar.
  - Type your Email address and Password and click Login

Note: You should use Google Chrome, Mozilla Firefox or Safari
2. Add a new patient or open the Patient Overview for an existing patient.
3. Enter patient information
  - Enter the patient's first name, last name and DOB. The orthodontist will populate automatically but you have the option to choose a different doctor if needed. Staff is optional.
4. Select Package type (*This step only pertains to SureSmile Ortho.*)
5. Upload surface scan data. Check the check box for CBCT premium option (\$). If you select the check box, the system will prompt you to upload the CBCT scan files after the order has been placed.
6. Upload images
  - Click 'Choose files to upload' to locate the photos & x-rays on your computer or drag them to this box.
  - Note: X-rays are optional for SureSmile Aligner
7. Complete Dental Examination
8. Select payment method and place order.
9. If you chose to use CBCT data in Step 5, will you now refer to SureScan to upload the CBCT scan.

# FAQs

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**NOTE:** Please be aware that some of these questions may only pertain to SureSmile Advanced especially if it mentions brackets or wires.

## How will I learn to integrate the iTero scanner with SureSmile treatment?

If you are new to SureSmile, your Account Manager (AM) will visit your office to support you as you launch SureSmile treatment. During this visit, the AM will educate selected staff on all of the functionality for completing and managing SureSmile orders.

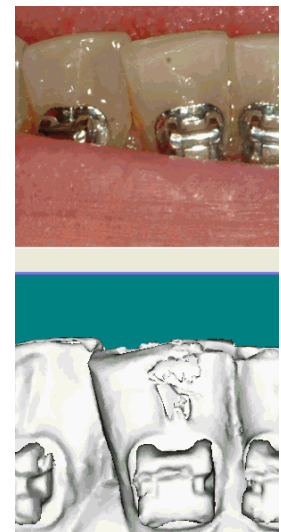
## Which brackets can we use with patients scanned using the iTero scanner?

All brackets in the SureSmile bracket library are available for use with the iTero scanner.

## Can I use an opaque solution on the teeth or brackets to help with iTero scanning?

If you are having difficulty capturing clear brackets, such as 3M Unitek Clarity™, you can apply a thin coating of an opaque solution on these brackets prior to scanning.

In addition to helping you capture clear brackets, using an opaque solution can also help you scan restorations such as veneers that inhibit data capture.



## What if I am interrupted while working on completing the order in SureSmile and cannot finish importing required records until later?

Do not click Submit. When you are ready to complete the order, select the Tasks tab and filter for Submit Order to easily find your incomplete patient records.

## Why would I submit an update model order?

An update scan is used to update the therapeutic model in the event of:

- A newly erupted tooth has been added to treatment.
- One or more brackets were rebonded or repositioned.
- The tooth anatomy has changed to the extent that the Setup is affected.

## When is a supplemental scan required?

There are three situations when a supplemental scan is required:

1. During the initial examination, you determine that the patient has restorations\* that do not meet our requirements for CBCT-only scans. (Remember to set time in your appointment schedule for a CBCT scan AND an intraoral scan.)
2. Your CBCT scan was rejected due to distortion (usually from metal fillings). In this case, recall the patient within two weeks of the date of the CBCT scan. At the appointment, reopen the SureSmile order and add a supplemental scan\* according to DL instructions.
3. For SureSmile Ortho and SureSmile Aligner, full upper and lower supplemental scans are required for cases being submitted with CBCT data.

If the patient has 7 teeth per arch (or 11 total) with problematic restorations, the CBCT scan will most likely be distorted. To compensate for this issue, you may scan full arches in the supplemental scan area to request our premium service (available for an additional fee). Or, to avoid the fee, do not submit a CBCT scan. Instead, submit a full intraoral scan of the patient using your iTero.

## Do we need to take the CBCT scan and the supplemental scan the same day?

Yes. When you examine the patient at the beginning of treatment, you will see which teeth cannot be captured in a CBCT scan and will require a supplemental scan. At that time, schedule the patient for the CBCT scan AND for chair time with the iTero scanner during the same appointment. Since the data will be combined in the SureSmile Digital Lab, the scans should be taken the same day.

## What if my scan is rejected because a supplemental scan is needed or has a problem?

Recall the patient to capture the area that was missed or is a problem. This appointment must be scheduled within 2 weeks of the CBCT scan or the new scan may not register with the CBCT scan since the teeth are moving. Refer to the SureSmile Digital Lab product notes for instructions.

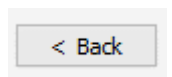
When you open the patient record, double-click the name of the rejected product (shaded in red under the Items heading). You will need to click Yes to restart work on the scan. Next, attach the new data and submit the order.

## Users of the orascanner can take a bite scan to supplement a CBCT scan. Can we do this with the iTero scanner?

No. The iTero scanner does not store a bite scan as a file that can be downloaded for import into SureSmile.

## What if I don't have a supplemental scan to upload when I'm importing my CBCT scan?

1. If supplemental cannot be provided at the same time as importing of CBCT Data, do not Finish Scan
2. Click Save
3. Click Back. This will create a task for this patient and return you back to the Tasks page in SureScan



## Do I need to capture a full arch on the iTero to submit update or supplemental scans?

Yes, for SureSmile Ortho or SureSmile Aligner.

No for SureSmile Advanced. You may capture an area of an arch following these requirements:

- In addition to capturing the teeth to be remodeled, capture the adjacent teeth which serve as “anchor teeth” to help the Digital Lab merge this data with the therapeutic model.
- A minimum of three teeth must be included in the scan to accurately merge the data.
- Follow quality and coverage requirements to accurately represent the patient.

## Since the iTero is designed for full arch scans, how do I capture areas of an arch for an update scan or supplemental scan?

Use the iTero menus to choose “Next” or “Previous” to skip to the appropriate area and capture each piece. Remember to capture adjacent teeth with a minimum of three teeth per piece.

If you need to capture multiple areas in one arch, we recommend performing a full arch scan.

## We scanned a patient before the brackets were available in the library. Now that they have been added, how do we update the patient's therapeutic model?

This situation is more common for new practices that are in the process of getting brackets added to the SureSmile Bracket Library. If none of the patient's brackets are available in the library, the order will be placed on “Hold.” In this state, the brackets can be easily identified once they are available by following the steps to release a hold.

Alternatively, if the case was processed into a finished therapeutic model because some brackets were available and registered, you will order an update model.

1. Open the patient record and start an order for an update model.
2. Select the Brackets tab and make the new bracket assignments.
3. Upload the patient's therapeutic data. (This is the same data you previously uploaded for the therapeutic model order.)

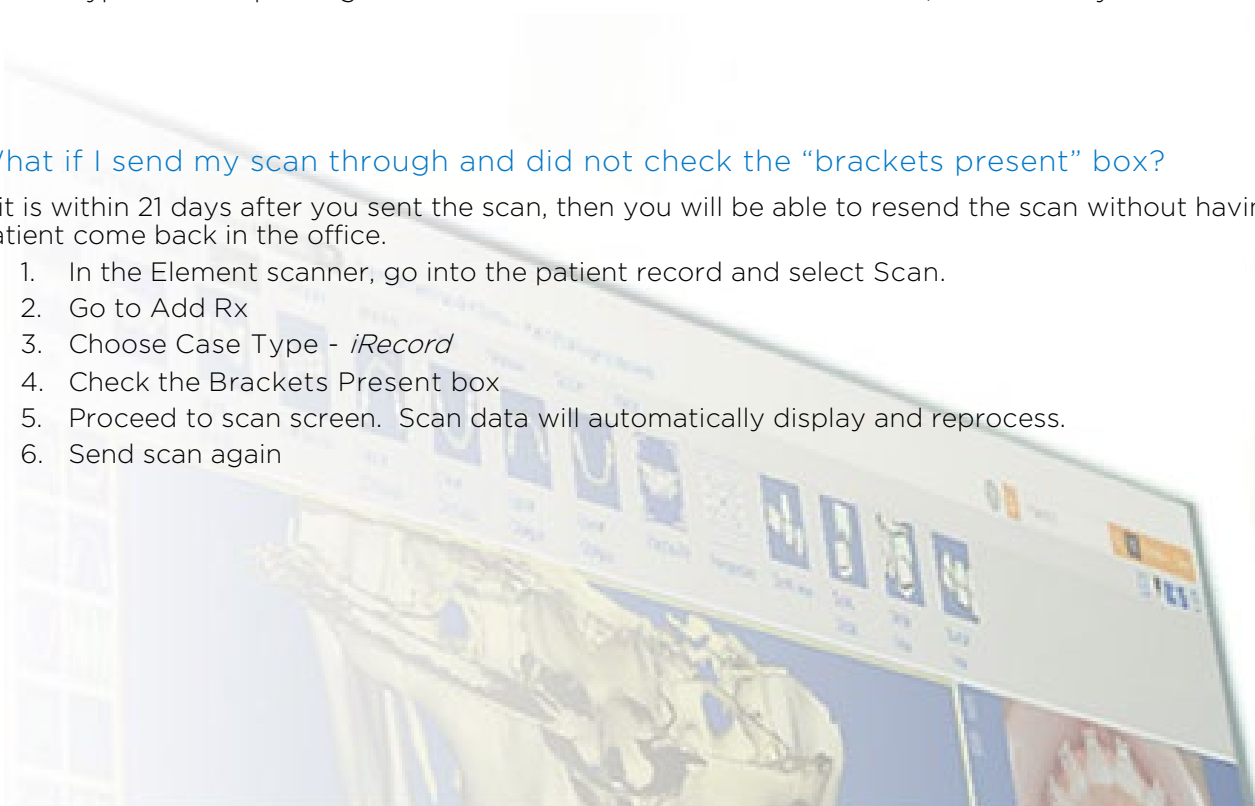
NOTE: The Digital Lab recommends keeping the patient's data until the model is finished; or, you can export it again from OrthoCAD as needed.

4. Indicate in the coverage area which brackets you are updating.
5. Type notes explaining that these brackets have become available, and submit your order.

## What if I send my scan through and did not check the “brackets present” box?

If it is within 21 days after you sent the scan, then you will be able to resend the scan without having the patient come back in the office.

1. In the Element scanner, go into the patient record and select Scan.
2. Go to Add Rx
3. Choose Case Type - *iRecord*
4. Check the Brackets Present box
5. Proceed to scan screen. Scan data will automatically display and reprocess.
6. Send scan again



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# iTero® Scanning Job Aid for Bonded Patients



For best results, submit complete scan orders that meet SureSmile's requirements for quality. Scans that must be captured intraorally are: therapeutic, supplemental segments and/or bite (CBCT users only), and update. To meet quality requirements, follow guidelines for scan criteria and scan pattern handling.



## Scan Criteria for Segments

Follow scan criteria to capture a complete representation of the patient's teeth anatomy and brackets

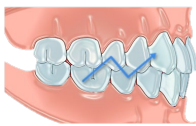
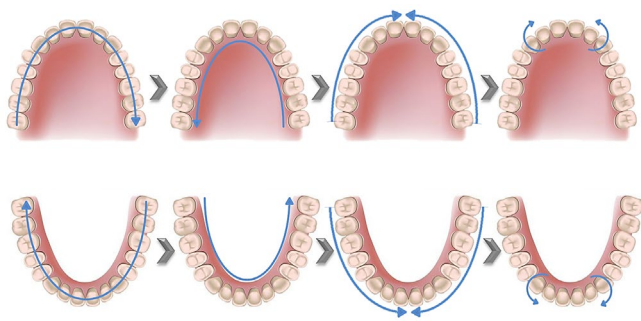
- 100% tooth coverage and interproximal areas
- 100% of bracket face/wings
- 70% of bracket mesial and distal profiles
- 2mm of gingiva

## Scan Pattern for Segments with IOC & HD2.9

### Upper & Lower Arches

- To scan the occlusal surface, move in a single continuous motion. Being sure to keep wand flat on the occlusal, steadily bring wand toward anterior.
- To capture buccal surface, hold the wand over the buccal cusps of the molars for an occlusal/buccal view of the posterior teeth. It is necessary to capture some of the occlusal view in the buccal segment to help the system merge with the lingual segment later.
- To scan the lingual use twisting motion, continue around entire arch being sure to capture the interproximal anatomy of the entire lingual surface.
- To capture the upper/lower anterior, roll from lingual surface, over incisal edge to buccal/facial surface.

## Scan Pattern for Segments with Element



### Bite

- Start with the first molars. Center the wand between the upper and lower arches and slowly move forward in a small wave-like motion, capture 3-4 teeth and then move to the contralateral side using the same technique.
- Once bite has been captured, the upper and lower arches will occlude according to the bite scan.

## Opaque Teeth and Brackets for Scanning

Before you begin scanning, retract the patient's cheeks and lips and prepare the teeth and brackets with the High Resolution Spray. Apply a thin coating that will not obscure bracket details.

You can also use an opaque solution to provide a thin coating for the bracket without obscuring its detail.

### Upper & Lower Arches

- To scan the occlusal surface, move in a single continuous motion. Being sure to keep wand flat on the occlusal, steadily bring wand toward anterior.
- To scan the lingual use twisting motion, continue around entire arch being sure to capture the interproximal anatomy of the entire lingual surface.
- To scan the buccal, tilt wand at larger angle and move towards midline to capture distal of tooth/bracket and interproximal anatomy of the buccal.
- To capture the upper/lower anterior, roll from lingual surface, over incisal edge to buccal/facial surface.

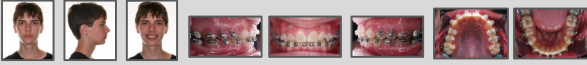
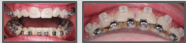





## Brackets Present

Brackets Present: ☒

While completing the case Rx, it is important to be aware of the recipient being scanned. Do the patient's teeth have brackets bonded or not? If so, it is critical that the Brackets Present field is checked. This will allow the scanner to include all attributes of the bracket in the processed scan.



# SCAN CHECKLIST

	Therapeutic Scan	Supplemental Scan (CBCT Users only)	Update Scan
	A full intraoral scan used to model the patient's current tooth anatomy and bracket positions.	A partial intraoral scan to capture optional bite and/or: <ul style="list-style-type: none"> <li>Teeth with restorations which were not captured adequately during a CBCT scan (6 or less teeth in an arch or 10 total)</li> <li>\$ Premium service to model more/all teeth</li> </ul>	A partial intraoral scan to capture changes after the therapeutic scan has been taken: <ul style="list-style-type: none"> <li>Newly erupted tooth</li> <li>Rebond</li> <li>Change in anatomy that will affect setup</li> </ul>
<b>1</b> Prepare patient	<input type="checkbox"/> Remove wires <input type="checkbox"/> Close bracket doors <input type="checkbox"/> Remove turbos/equilibrate	<input type="checkbox"/> Plan scan segments <input type="checkbox"/> Remove wire(s) for segments <input type="checkbox"/> Close bracket doors for segments <input type="checkbox"/> Remove turbos/equilibrate	<input type="checkbox"/> Plan scan segments <input type="checkbox"/> Remove wire(s) for segments <input type="checkbox"/> Close bracket doors for segments
<b>2</b> Take photos & x-rays	<p>Photos and panorex must be taken within 4 weeks before or 2 weeks after the scan.</p> <input type="checkbox"/> Standard set required  <input type="checkbox"/> Also recommended:  <input type="checkbox"/> Current panorex required:  <input type="checkbox"/> Ceph required (current preferred, but initial is acceptable): 		<p>Recommended: Take current photos to capture the reason for the scan</p>
<b>3</b> Take scan	<input type="checkbox"/> Capture upper, lower, bite <input type="checkbox"/> Use approved scanning technique (serpentine, and sweep-rock) <input type="checkbox"/> For bite scan, use natural bite	<input type="checkbox"/> Open existing order or start a new CBCT order <input type="checkbox"/> Take scan intraorally  <input type="checkbox"/> Capture teeth with restorations: crowns, bridges, PVC, PFM, metal fillings 3mm or larger) <input type="checkbox"/> Capture incisal restorations <input type="checkbox"/> Capture a minimum of 3 teeth <input type="checkbox"/> Capture 2 or more anchor teeth per segment <input type="checkbox"/> Touch  to start next segment	<input type="checkbox"/> Select ONCE for a bracket change <input type="checkbox"/> Select AGAIN for to remodel/new <input type="checkbox"/> Capture teeth with changes plus adjacent teeth <input type="checkbox"/> Use approved scanning techniques (serpentine and sweep-rock) <input type="checkbox"/> Touch  to start next segment
<b>4</b> Replace wire/Instruct	<input type="checkbox"/> Brush <input type="checkbox"/> Replace wires <input type="checkbox"/> Give instructions/wire appointment handout		
<b>5</b> Upload photos & x-rays*	<input type="checkbox"/> Upload photos and x-rays.  <i>*The steps to submit the order and upload records may be completed later in the day as time allows</i>		
<b>6</b> Submit order*	<input type="checkbox"/> Update dental exam for missing teeth <input type="checkbox"/> Update dental exam for brackets <input type="checkbox"/> Submit order/set wire appointment date	<input type="checkbox"/> Update dental exam <input type="checkbox"/> Submit order/set wire appointment date <input type="checkbox"/> For bracket updates, order new wire(s) and note the update scan <input type="checkbox"/> For tooth updates, order new setup	

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