# SunClear ALIGNER

# Case Submission
# and
# Approval Guide

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# CREATING AN ACCOUNT

> **Using a Google Chrome browser go to sundentallabs.com/sunclearsignup**

> Enter your email address
> Your email address will be your user login and the address that case notifications will be sent to. You will be able to change this later if you change your mind.
> Enter your contact information
> Click **SUBMIT**
> Within one business day you will receive an email confirmation and can begin submitting cases. The email confirmation will contain a link to the SunClear platform and a temporary password.

**(866) 561-9777**  Resources  MySun Account

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## SunClear Account Sign Up
Please enter your information below and we will contact you within 1 business day.

**First Name** *

**Last Name** *

**Email (Used For Login)** *

**Phone Number** *

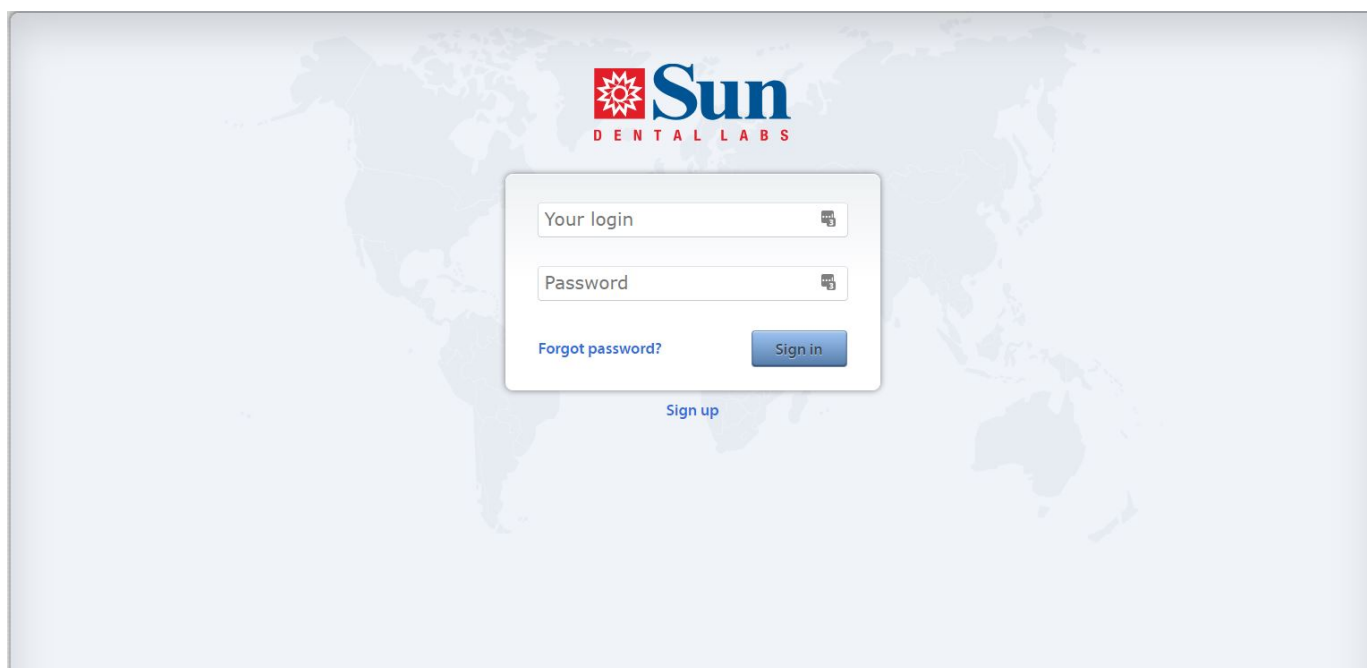**Practice Name (If Diffrent)**

**Alternate Contact / Assistant**

**Address** *

**City** *

**State** *    AL

**Zip Code** *

**Send Email**

# NAVIGATING YOUR SUN CLEAR ACCOUNT

> **Logging in:**

> Go to: **https://sunclear.sundentallabs.com**
> Enter the email address you used to sign up for an account
> Enter the temporary password you were provided in your sign-up email. You will have the opportunity to change your password when you log in.
> Click **Sign in**

# YOUR ACCOUNT - HOME SCREEN

> **The image below shows the home screen of your Sun Clear account**

> The home screen is laid out like an address book, with alphabetical tabs that you can use to easily navigate between patient cases.
> The top right side of the screen shows your user login name and profile settings
> When you click the **Profile** button you can update your login email, password, name, phone number and notification settings.
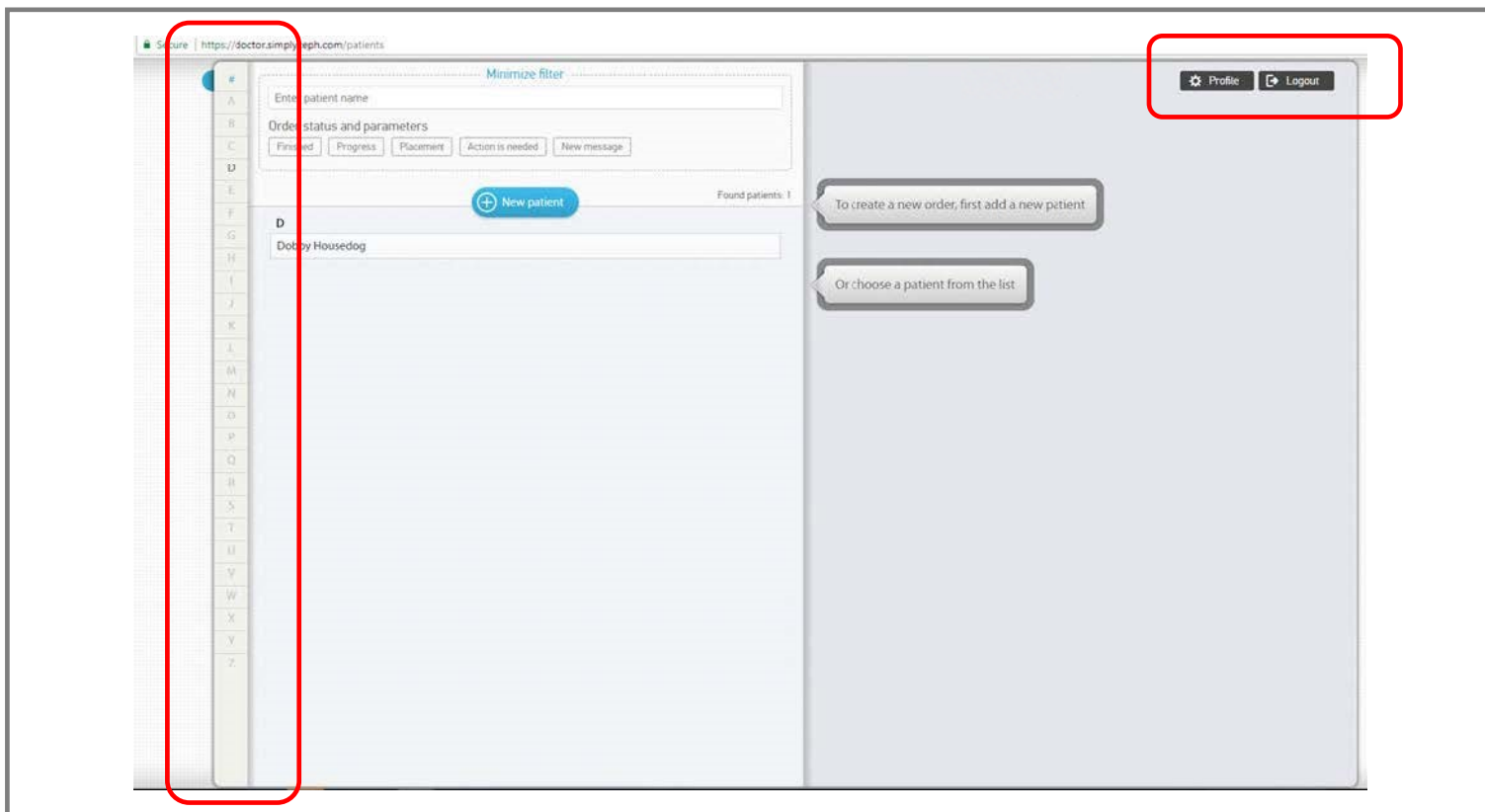
# CHANGING YOUR PASSWORD

**>> We recommend you change your password when you log in for the first time.**

- > Click on the **Profile** button in the top right corner
- > Click on the **Edit** button
- > You will be asked to enter your current password (the temporary one you were provided when your account was created) and to create a new password.
- > When complete, click the green **Edit** button
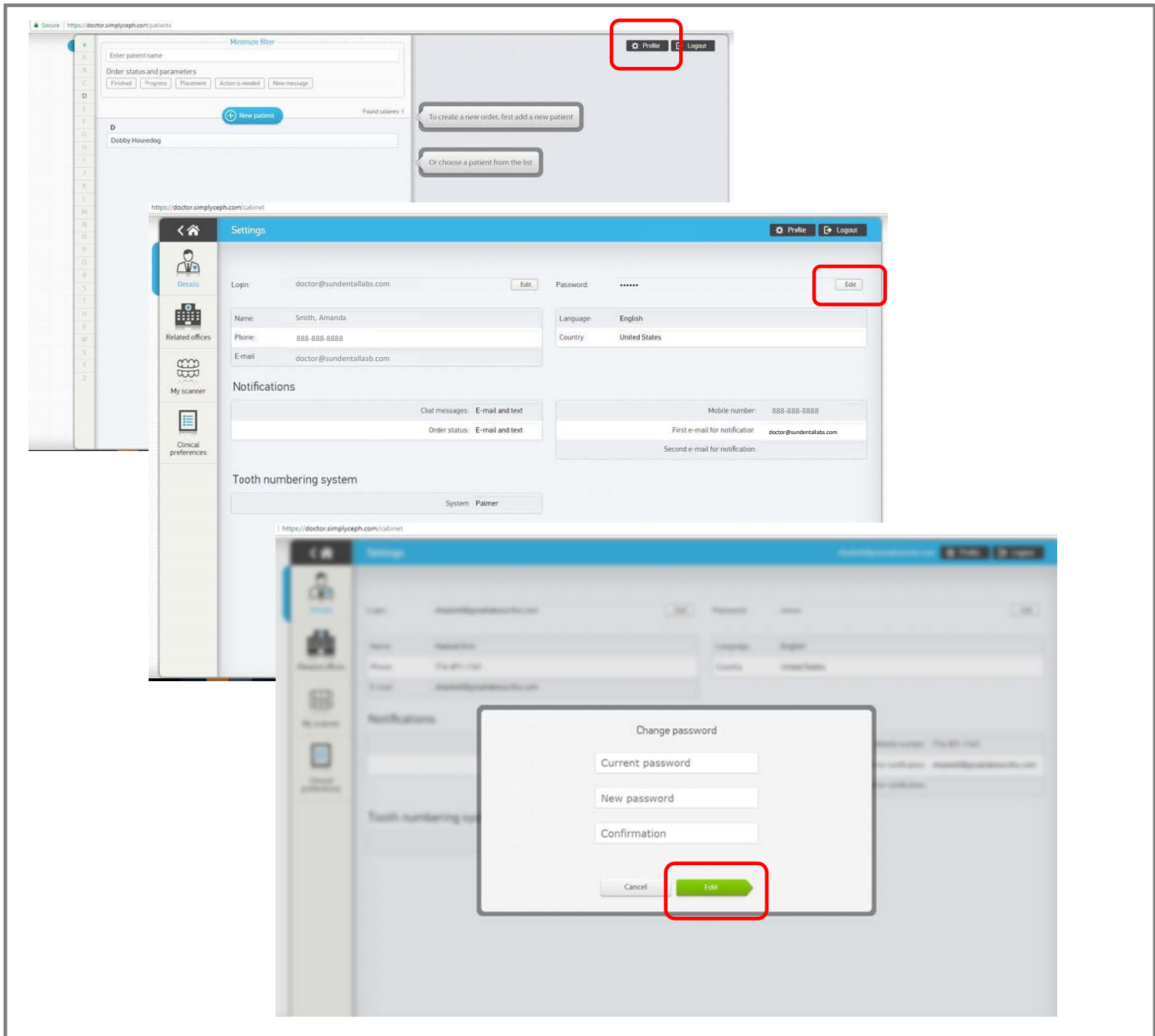
# CHANGING YOUR PROFILE SETTINGS

>> **To change your profile settings, click on the Profile button in the top right corner of your screen.**

> Within the settings screen you can click in any of the boxes to edit your preferences for:
> > Login
> > Name
> > Phone
> > Email
> > Notification preferences
> > Tooth numbering system
> > Language
> > Country
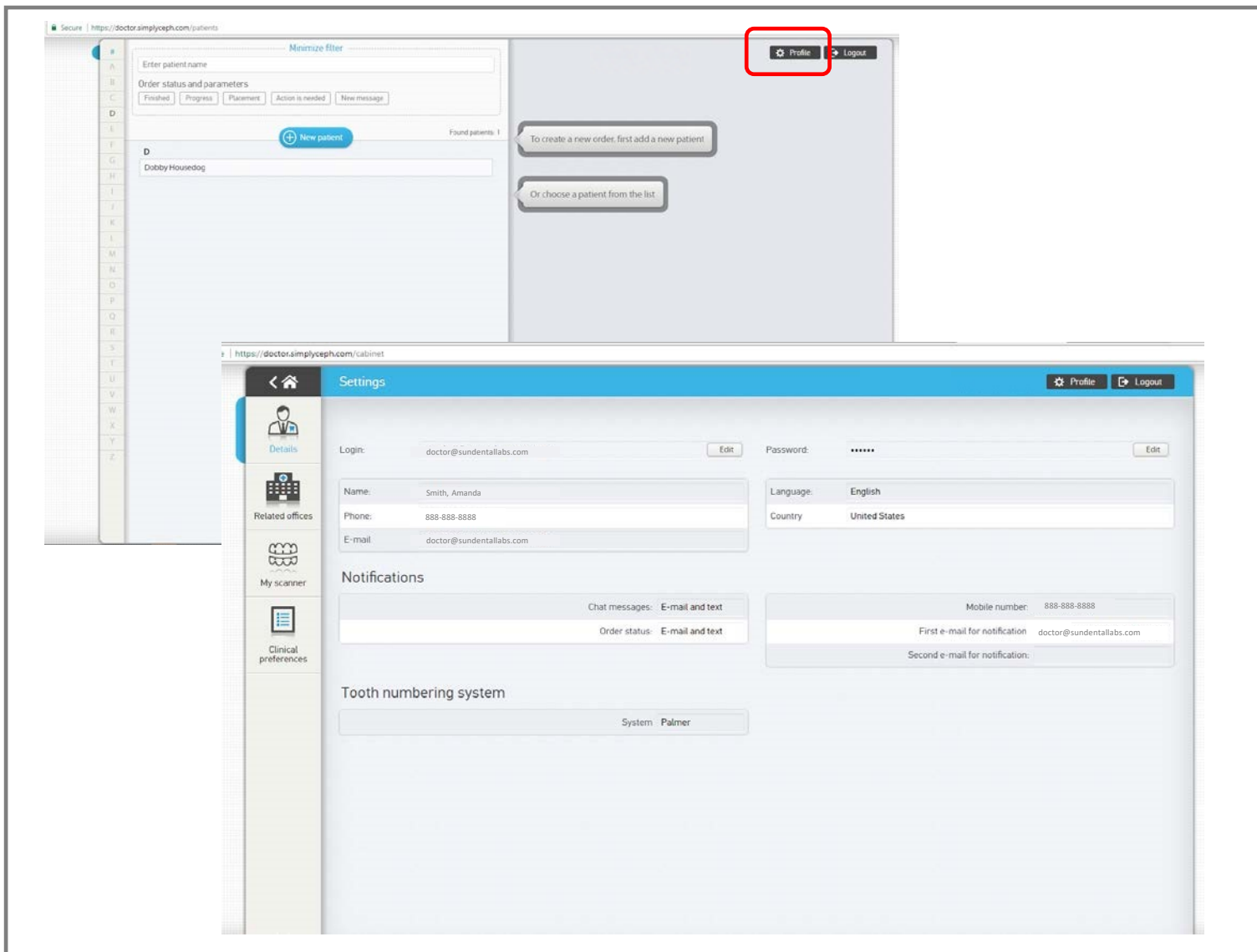
# ADDING A NEW PATIENT

**>> Navigate to the home screen by clicking on the house icon in the top left corner of your screen.**

**>** Click the **New Patient** button located on the left side of your screen
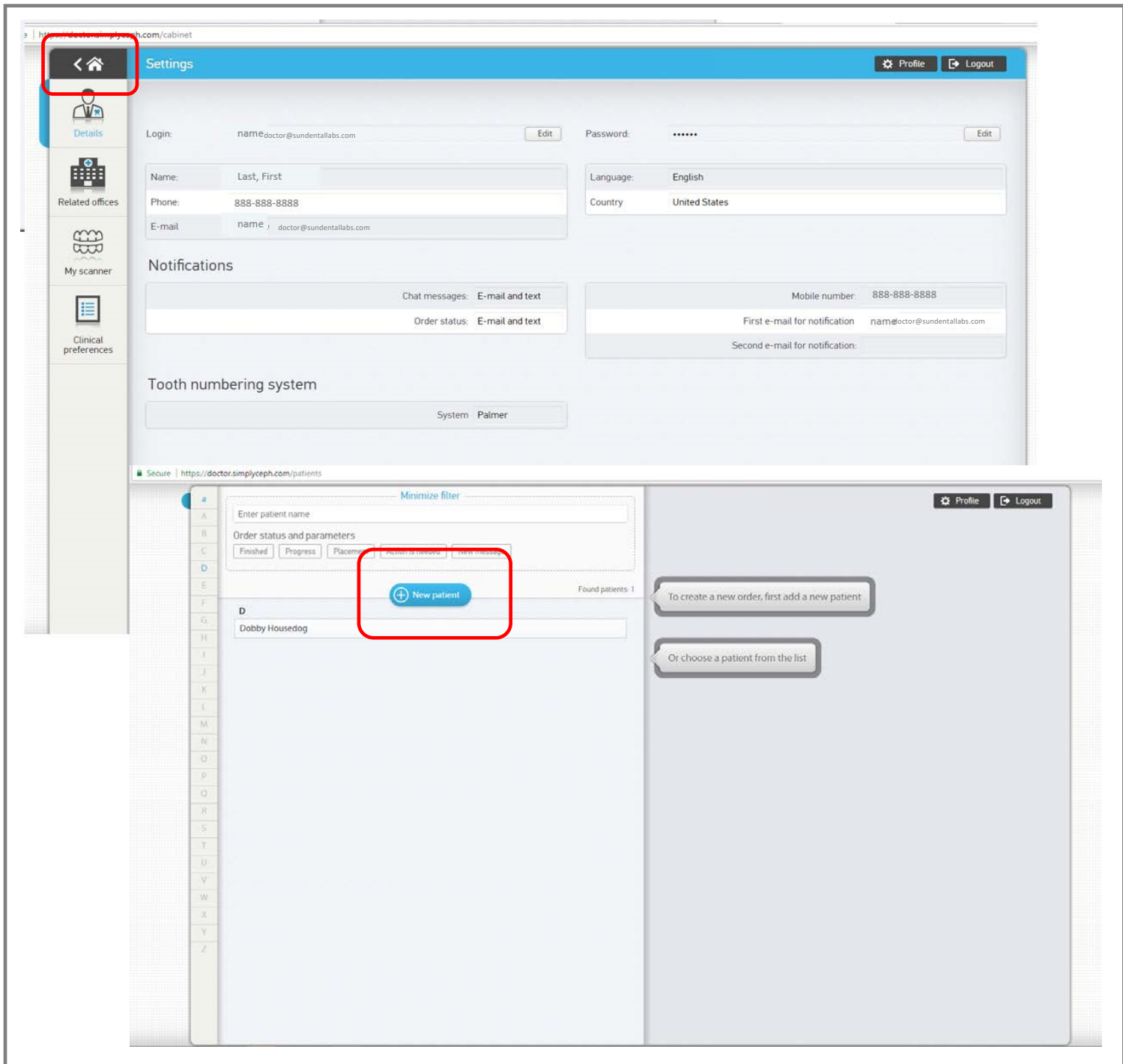
# ADDING A NEW PATIENT

## >> Enter patient information

> Enter either the patient name or a patient ID number in the pop up box
> Note: No additional information is required at this time. You can always go back and edit patient information later.
> Once you have entered a first and last name, or an ID number, click **Create** to save the information.
> Click **Save and close**

# ADDING ADDITIONAL NEW PATIENTS

> **You have now entered your first patient into the Sun Clear system. As you add additional patients their names will appear alphabetically by last name on the screen.**

> Navigate between patients by using the tabbed letters on the left side of the screen
> Or search for a patient by entering an existing patient name in the field that says **Enter patient name**
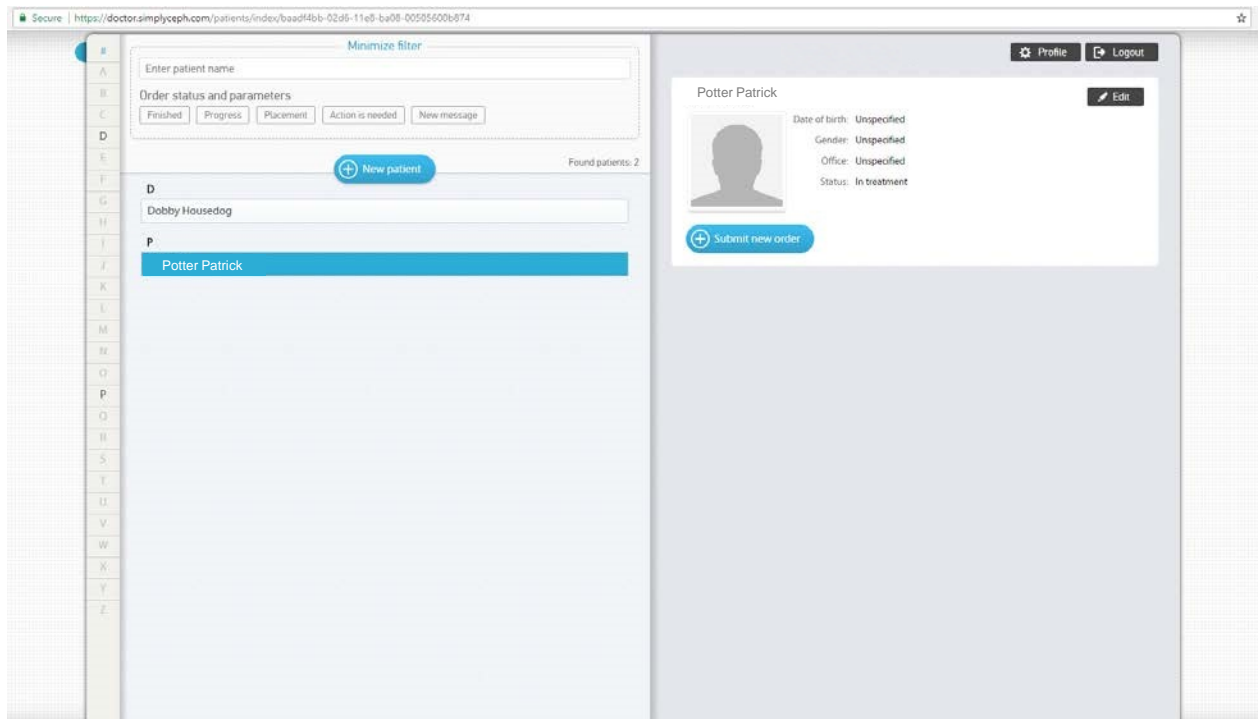
# SUBMITTING A CASE

**>> To submit a case, navigate to the patient section**

> Click on the name of the patient you would like to submit a case for
> The selected patient's name will be highlighted in blue, and the right portion of the screen will display that patient's information.
> Click on **Submit new order**
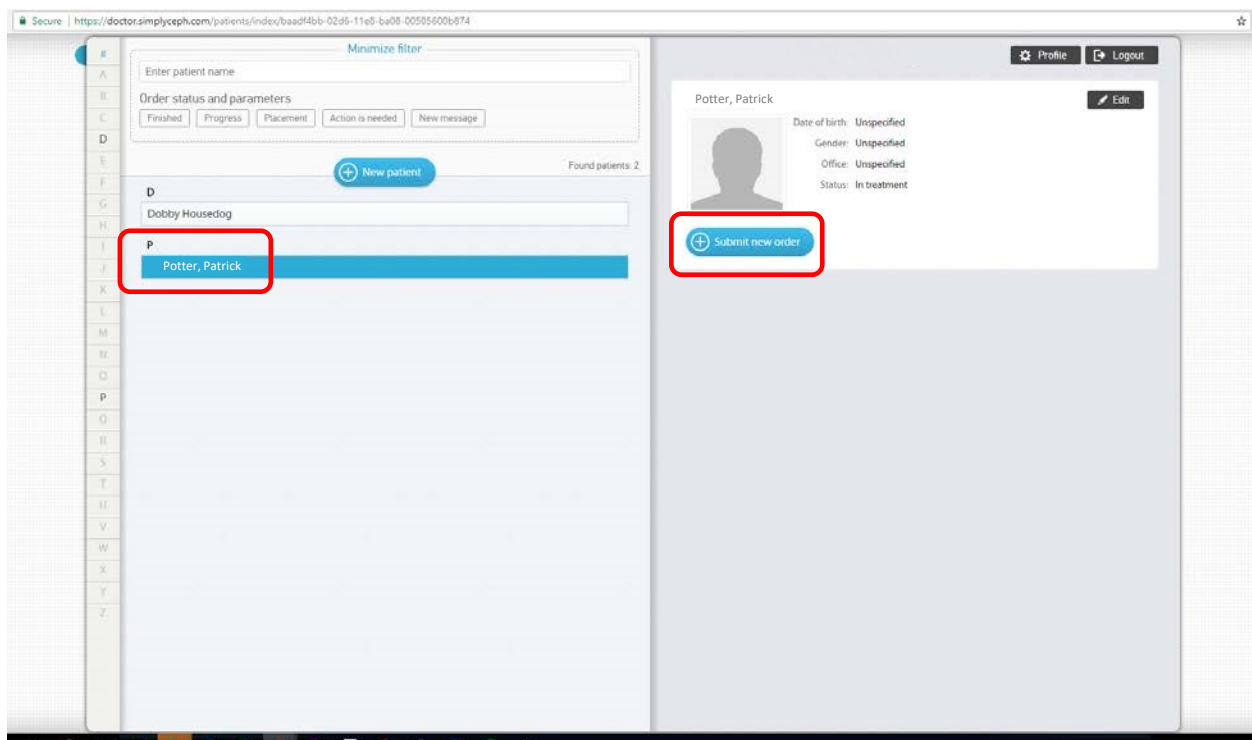
# SUBMITTING A CASE

**> After clicking Submit new order, a screen appears that will take you through the three main steps involved in submitting a SunClear case.**

> The three steps are shown as tabs across the top of the screen
> > Records
> > Treatment Plan
> > Delivery
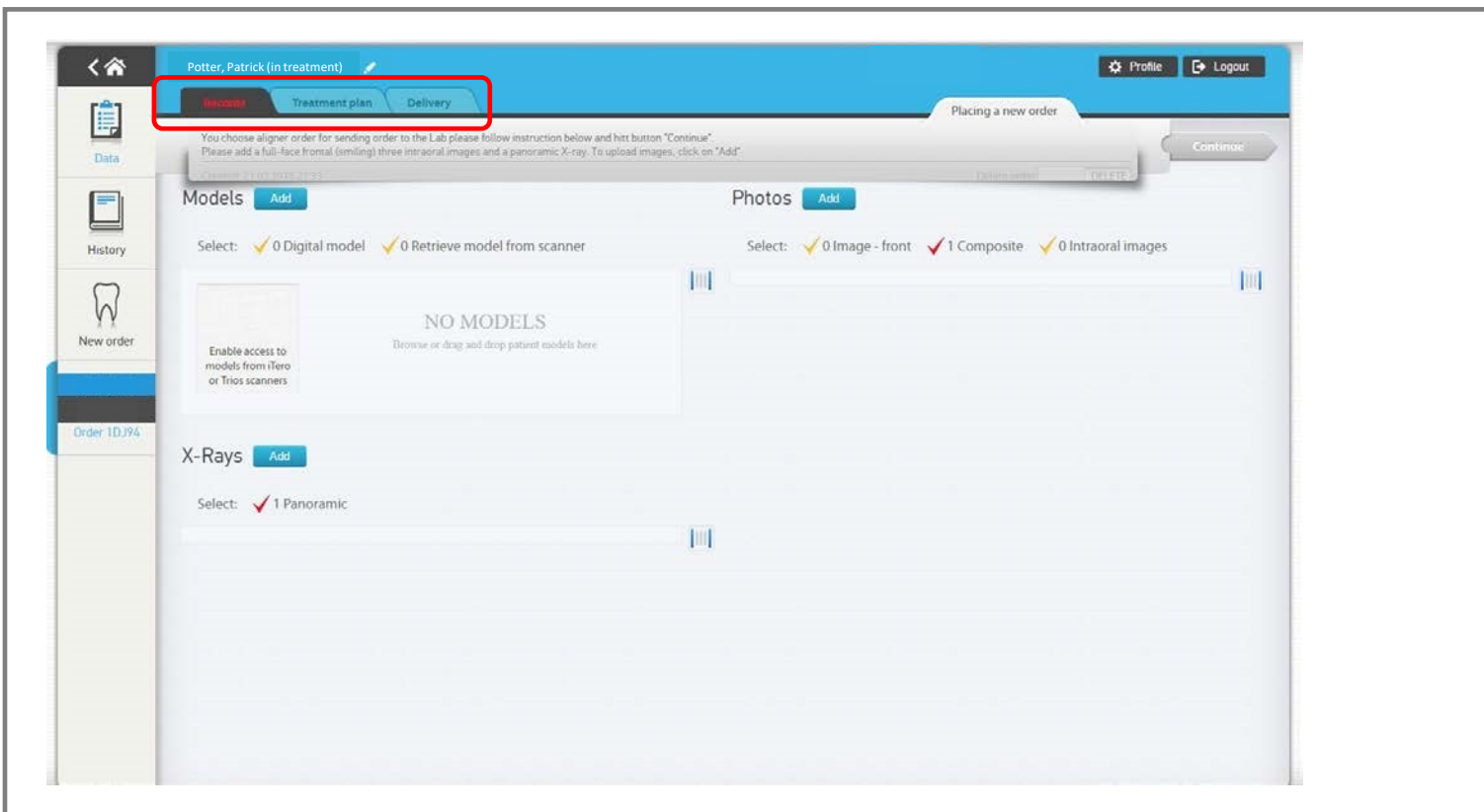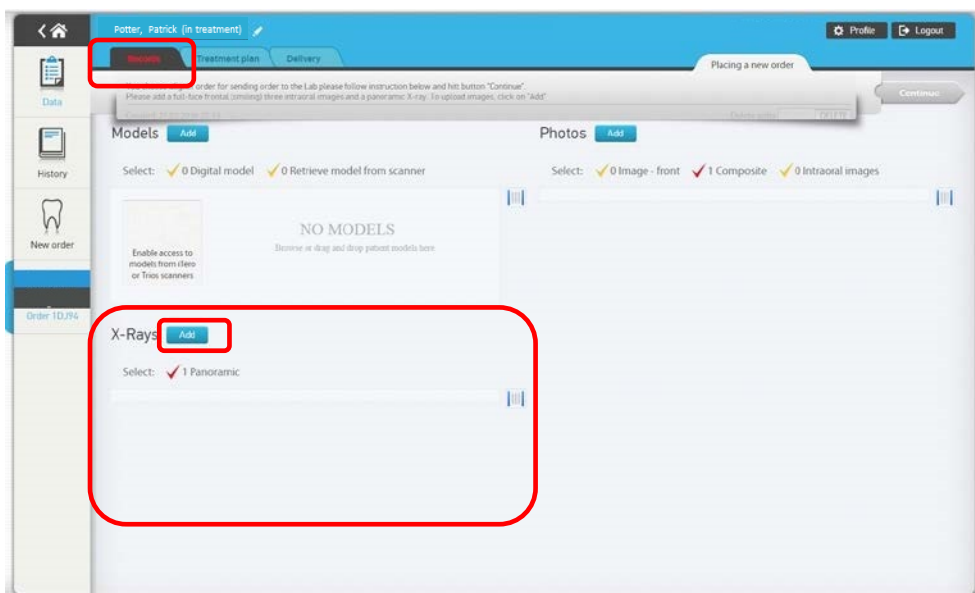
# SUBMITTING A CASE

**> RECORDS > Models >** X-Rays > Photos

> Click on the **Records** tab
> SunClear requires an occluded orthodontic model which can be submitted one of three ways:
>> Shipping upper and lower PVS impressions and bite registration
>>> If you plan to ship an impression to Sun Dental you will skip the step that says **Add** in the models section and move directly to adding photos.
>> Uploading a digital .STL model
>> Sending a scan to Sun Dental through your scanner
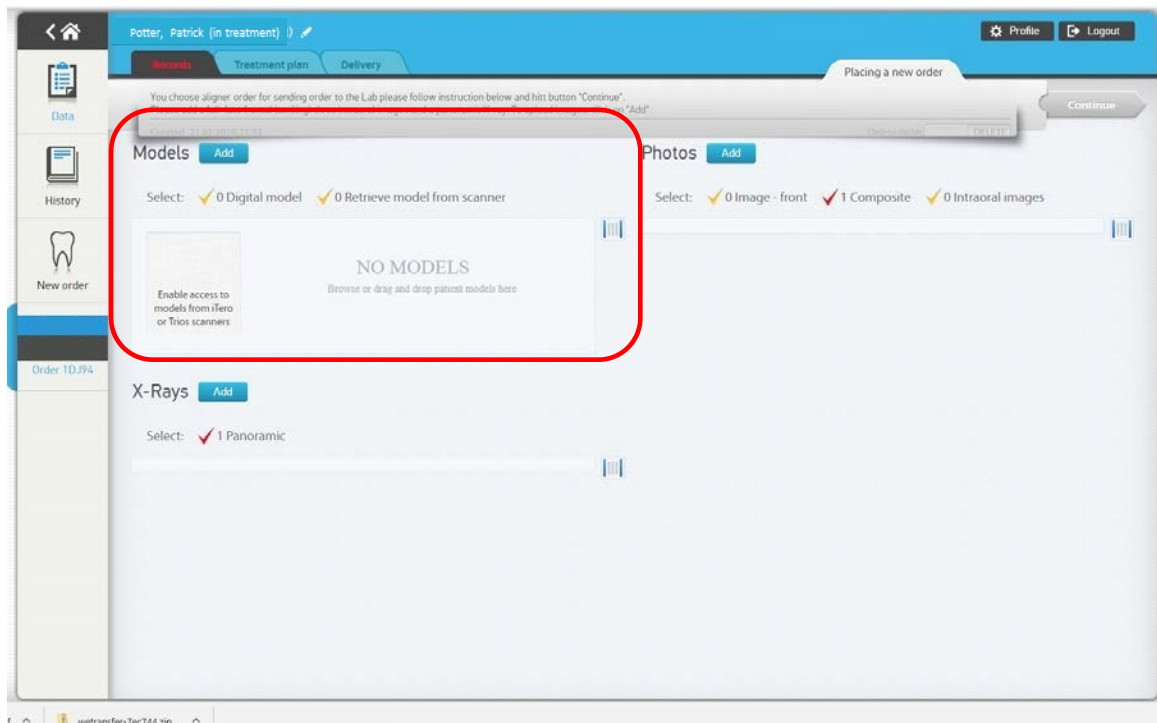
# SUBMITTING A CASE

**>> RECORDS** > Models > **X-Rays** > Photos

> A panoramic x-ray is required to submit a case
> To upload a panoramic x-ray click the blue **Add** button in the x-rays section of the records page
> A box will pop up where you can drag and drop an image or you can click the button to **Select file from folder**
> You may upload a JPEG, PNG, GIF, or BMP file. No other file types are accepted.
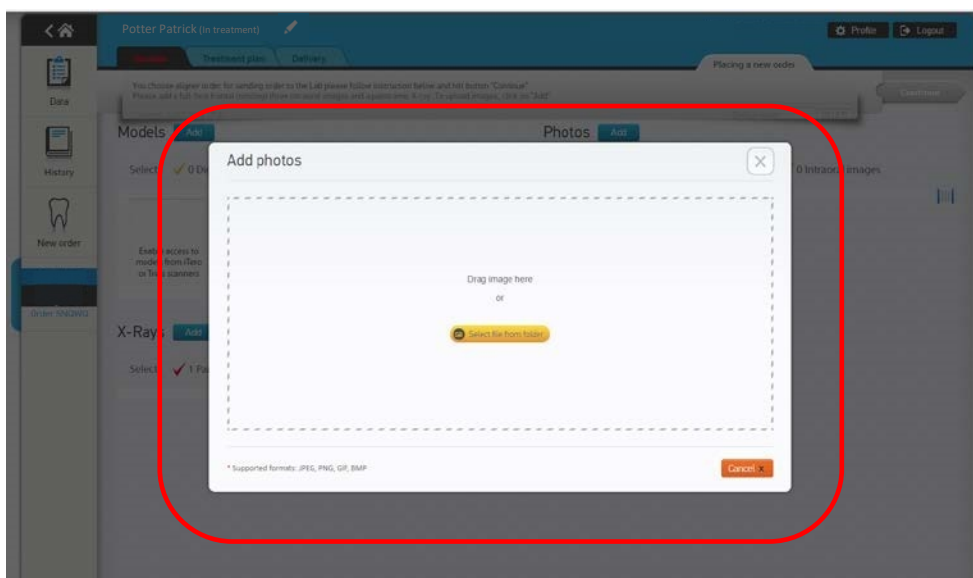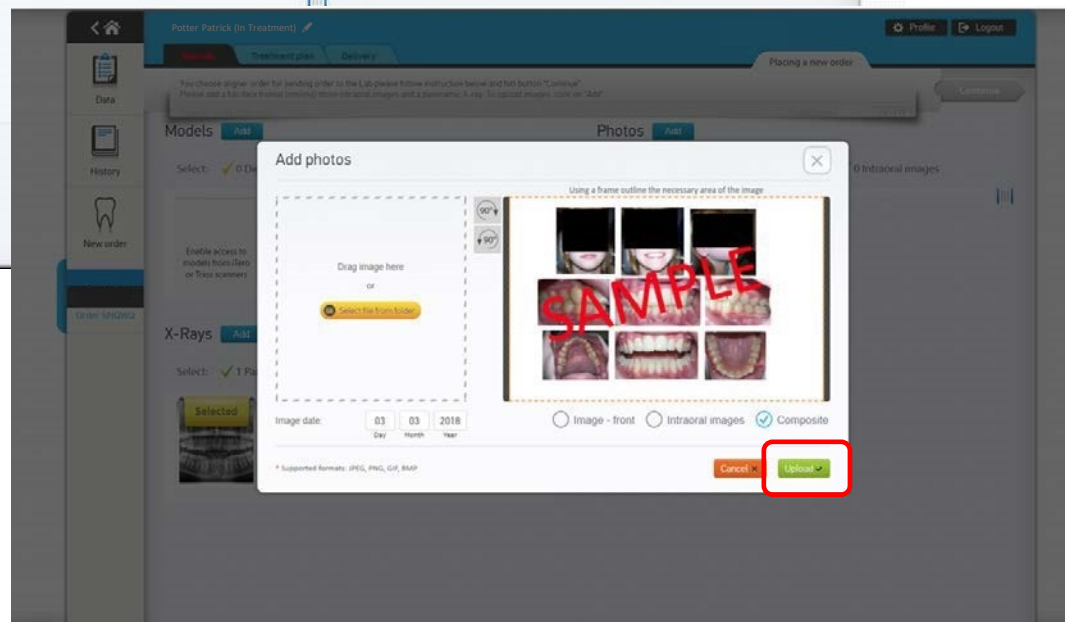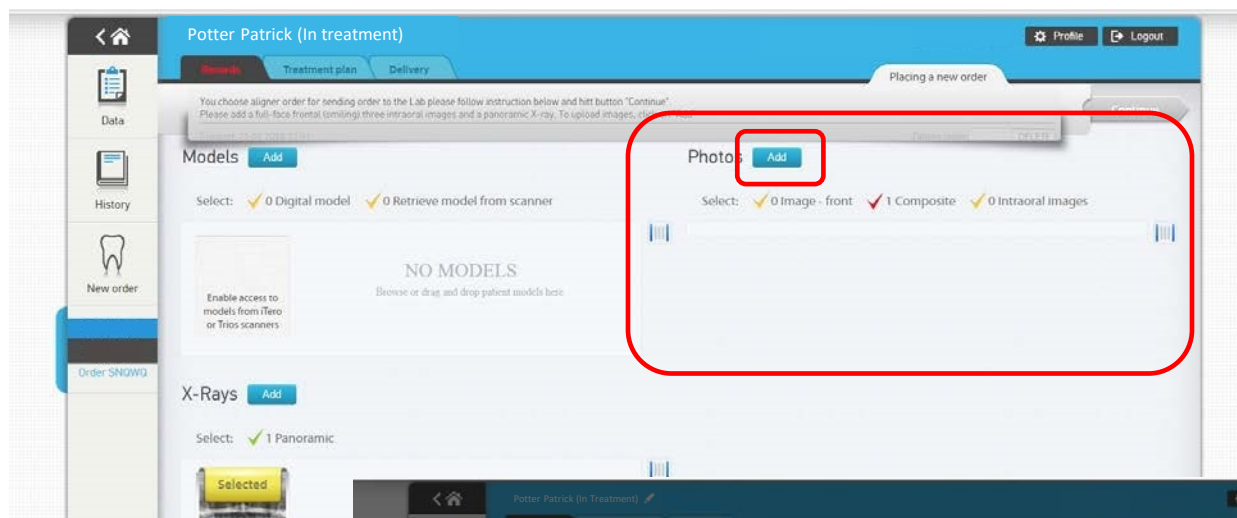
# SUBMITTING A CASE

> When an image has been selected, it will appear in the pop up window.
> Once you have uploaded the image you can make edits to:
>> Rotate the image clockwise or counterclockwise
>> Edit the image date
>> Crop the image frame if necessary using the orange dotted box on the right side of the screen outlining the image
> Once you have uploaded your image and made adjustments to the settings, you can click the green **Upload** button
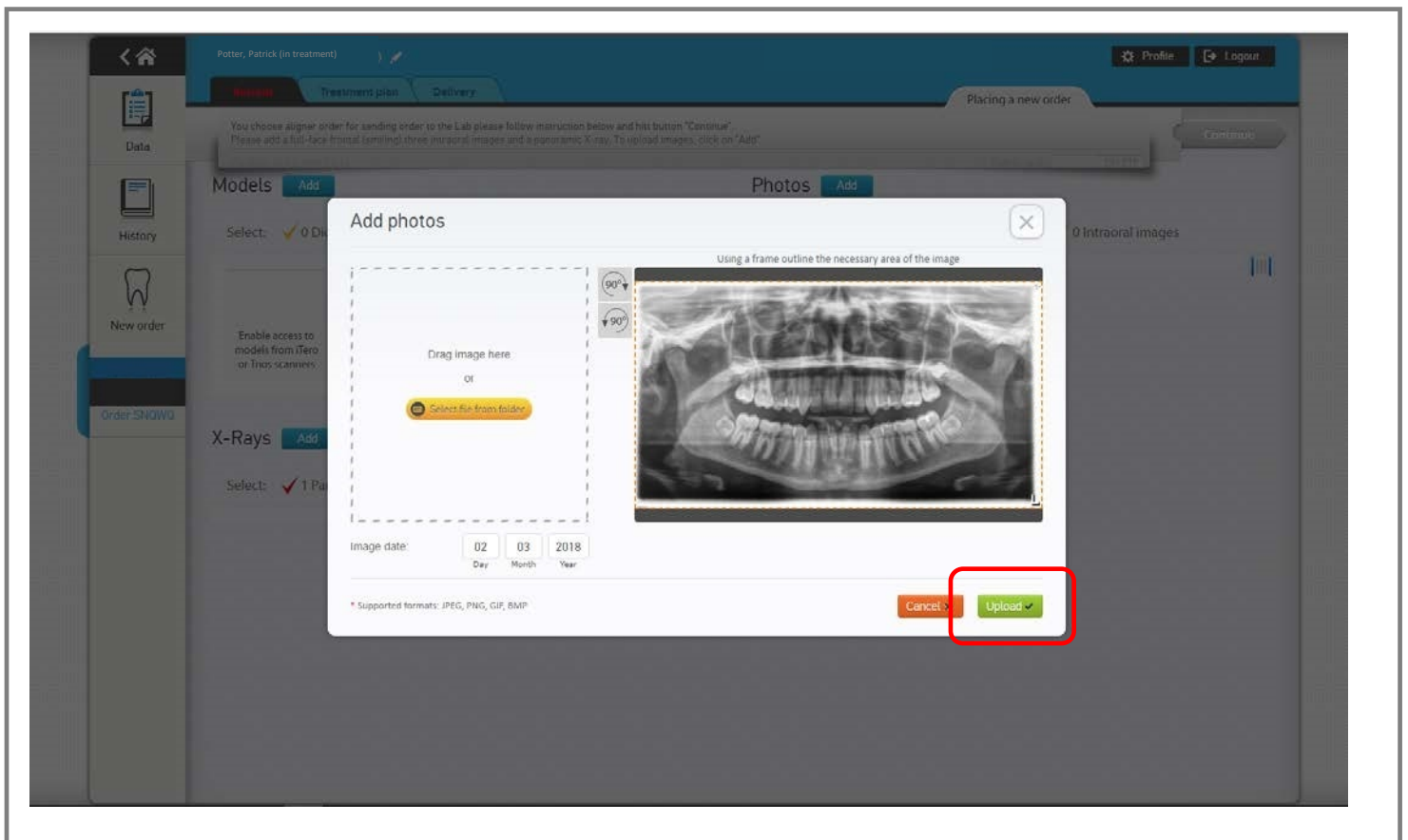
# SUBMITTING A CASE

## >> RECORDS > Models > X-Rays > Photos

> To upload a photo, click the blue **Add** button in the photos section of the records page
> A box will pop up where you can drag and drop an image or you can click the yellow button to **Select file from folder.**
> You may upload a JPEG, PNG, GIF, or BMP file. No other file types are accepted.
> When an image has been selected it will appear in the pop up window
> There are two options for uploading photos
>> Option one: You may supply a composite image that has intraoral and facial photos
>>> If you are uploading a composite image you will only need to upload the composite before moving on to the next step.
>> Option two: You can supply separate images. If you are supplying separate images you need to supply:
>>> 2 facial photos
>>> 3 intraoral photos
>>> If you are uploading separate images you will need to repeat this process until all photos are uploaded.
> Once you have selected your image, click the green **Upload** button

# SUBMITTING A CASE

**>> RECORDS** > Models > X-Rays > Photos **> Complete**

> Once you have uploaded the required x-rays and photos, the **Continue** button on the top right side of your screen will turn green, allowing you to continue
> Click **Continue** to proceed to the treatment plan tab

# SUBMITTING A CASE

## >> Treatment plan > Treatment Objectives

> The only required step on the treatment plan tab is entering treatment objectives into the Treatment Plan 1 text box. *Tip: Most doctors use this box to describe aesthetic patient concerns, i.e. "my front teeth are separated", etc.*
> Once you have entered treatment plan text click **Continue**

# SUBMITTING A CASE

**>> Treatment plan** > Treatment Objectives **> Optional**

> Optional, but not required, you may use the click-able diagram to indicate:
>> > Final class desired
>> > Extractions
>> > Tooth eruption, bridge, or implant
>> > Passive/active aligners

# SUBMITTING A CASE

> **Delivery > Send to Sun Dental**

> The final step in case submission is confirming that the shipping address is correct.
> Once you have reviewed these details and confirm their accuracy click the green **Send to** Sun Dental button
> After clicking **Send to Sun Dental**, you will see a confirmation box pop up. Click **Ok**

# CHECK CASE STATUS

> **To check on the status of a case**

> Go to: **https://sunclear.sundentallabs.com**
> Enter the email address you used to sign up for an account
> Enter your password
> Click **Sign in**

# CHECK CASE STATUS

## >> To check on the status of a case

- > Click on the name of the patient whose case you would like to view. The selected patient name will be highlighted in blue.
- > The envelope icon indicates that the case has an update to view
- > The right side of the screen will show you the open order for the patient and includes a progress bar so you can quickly check the status of the case.
- > Click **View**

# CHECK CASE STATUS

>> **Under the records tab look at the Models section**

> The most recent treatment projection of your case will have a yellow overlay button that says **New.**
> Click on the model itself to open the model viewer, an interactive treatment projection tool.
> The model viewer will open in a new tab
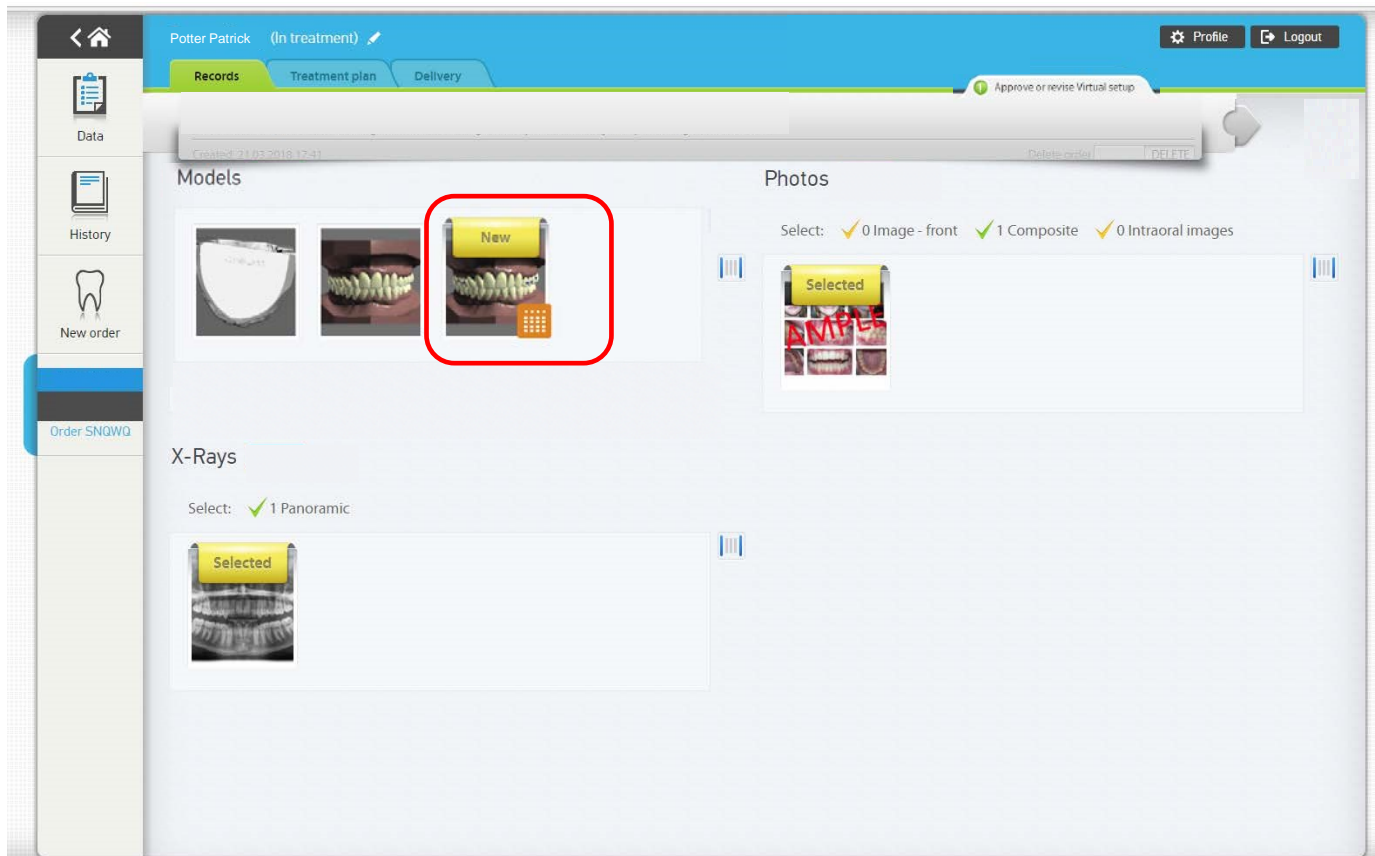
# REVIEW TREATMENT PROJECTION

## >> Model Viewer > Basic Navigation

> **Right click** on the model to rotate or spin the model
> **Roll** the mouse wheel to zoom in and out of the model
> **Click and hold** the mouse wheel tool to move the model
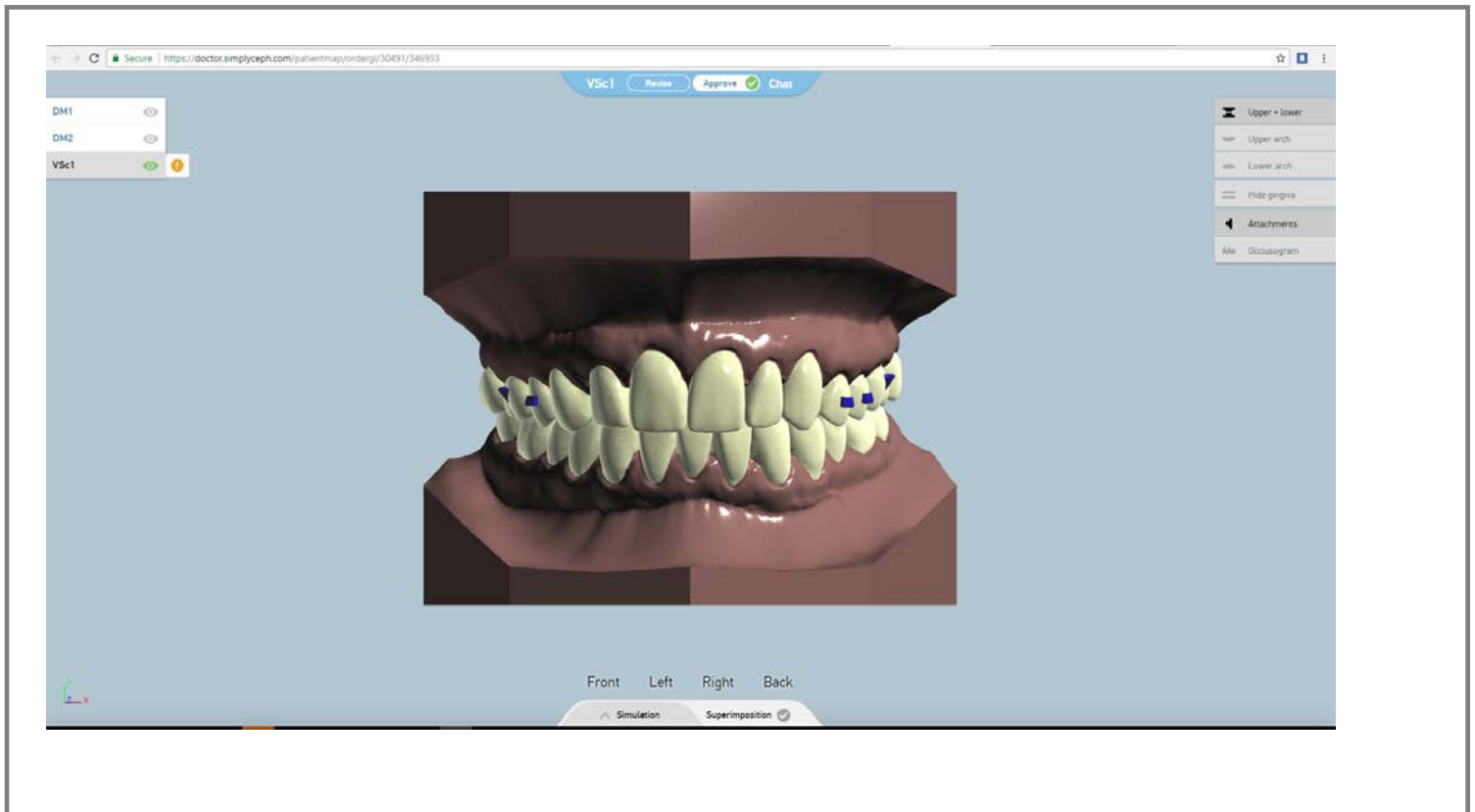
# REVIEW TREATMENT PROJECTION

**>> There are five main navigational buttons on the treatment projection page**

- > Most Recent Projection Icon
    - > What you select from this is what shows on the page
    - > The yellow (!) icon indicates the most recent treatment projection
    - > Revision history is shown in this area as revisions occur
- > Feature Menu
    - > Allows you to select between viewing upper and lower arch together or viewing arches independently.
    - > You can also toggle attachments and view occlusogram. To view occlusogram, select either upper or lower arch.
- > Quick View Menu
    - > Allows you to quickly re-orient the model
- > Simulation Viewer
    - > Provides an animated simulation of tooth movement
    - > This can be viewed in any orientation desired, just toggle between desired orientations using the Feature Menu and the Quick View Menu.
    - > Simulation viewer displays the total number of projected upper and lower aligners.
- > Approval Bar
    - > The Approval bar is where you can either approve the case as it is presented, or you can click the **Revise** button to make revisions.
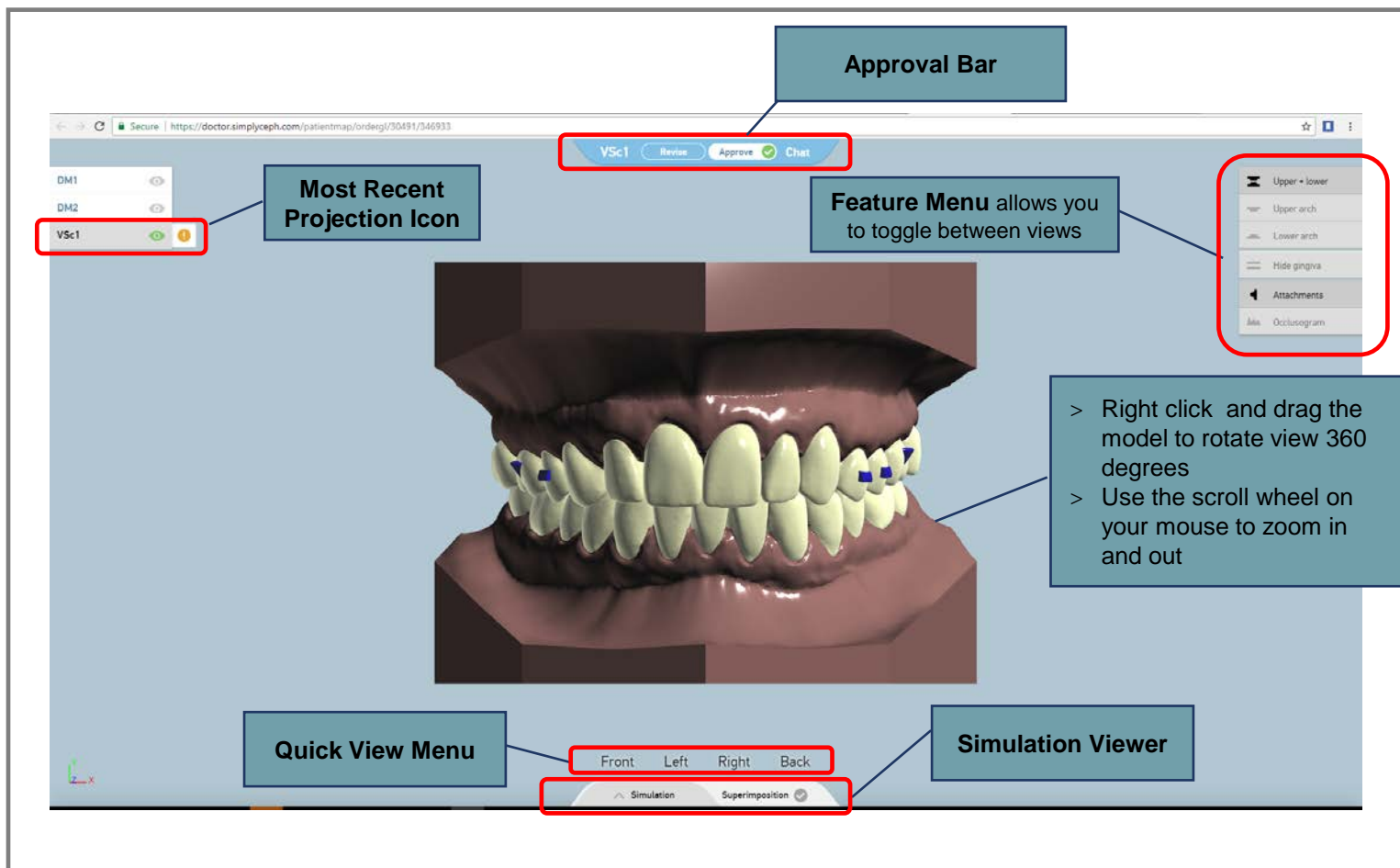
# APPROVE TREATMENT PROJECTION

## >> Approving a case

> The **Approval bar** is where you can either approve the case as it is presented, or you can click the **Revise** button to make revisions.
> If you are satisfied with the treatment projection, you may approve the case for aligner production.
> Clicking approve will trigger a formal notification to prevent accidental approval.
> You may click **Ok** to move to the approval screen
> To finalize the approval click the green **Approve** button
> Your case will now display a status of Accepted
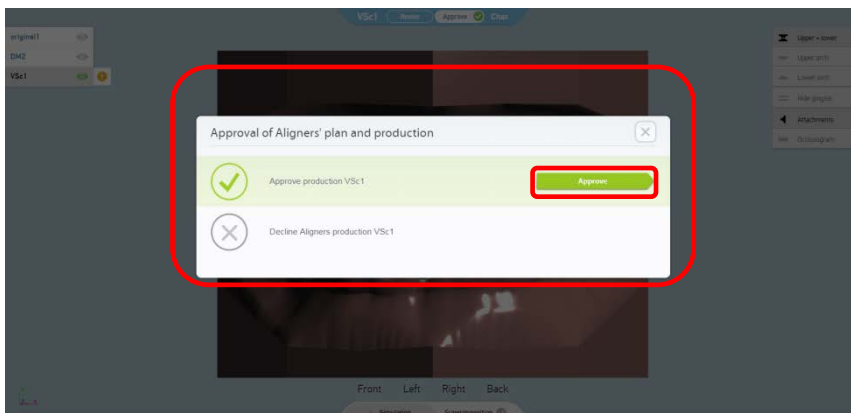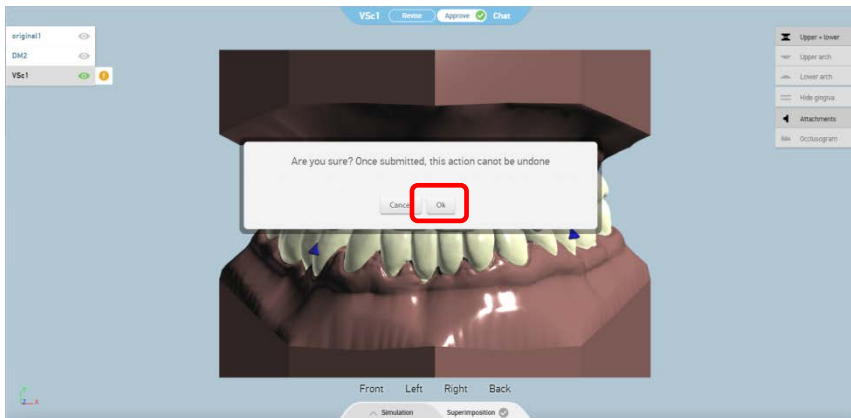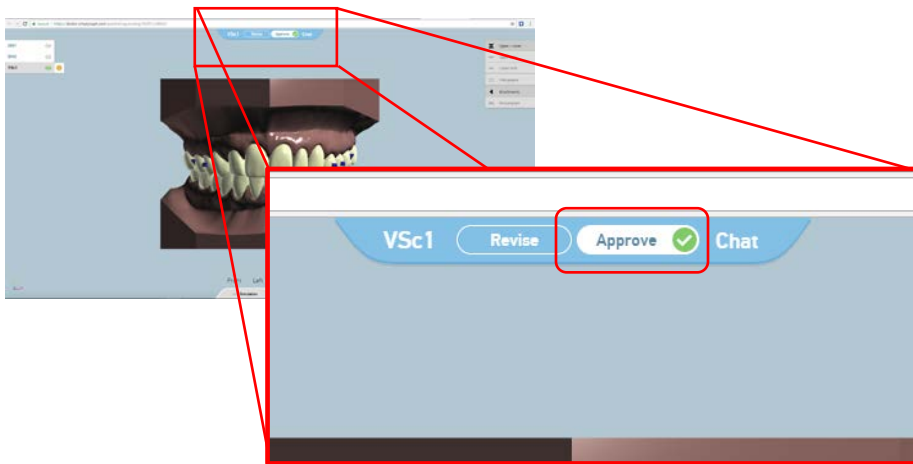
# REVISE TREATMENT PROJECTION

> **To make a revision click "Revise" on the approval bar**

> A pop up box will appear where you can enter revision comments
> Click the **Envelope** icon in the text box to submit your comment
> A SunClear technician will post an updated treatment projection within the next business day.