

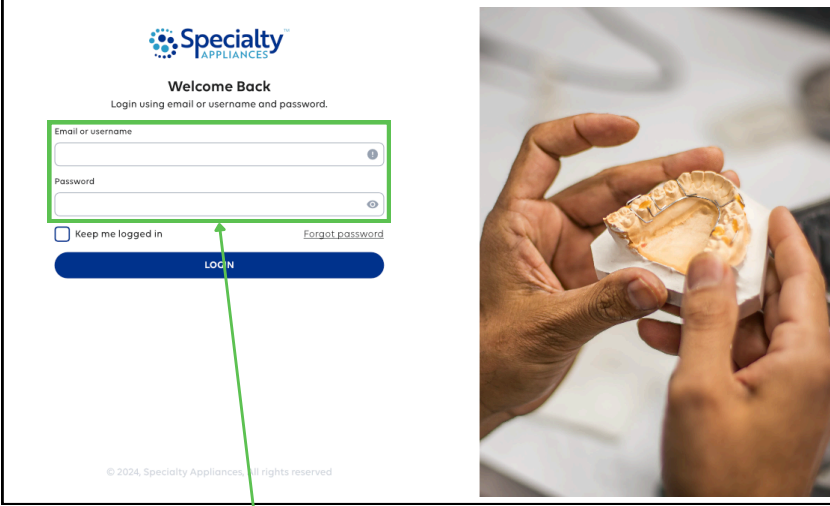
SmileSync User Guide



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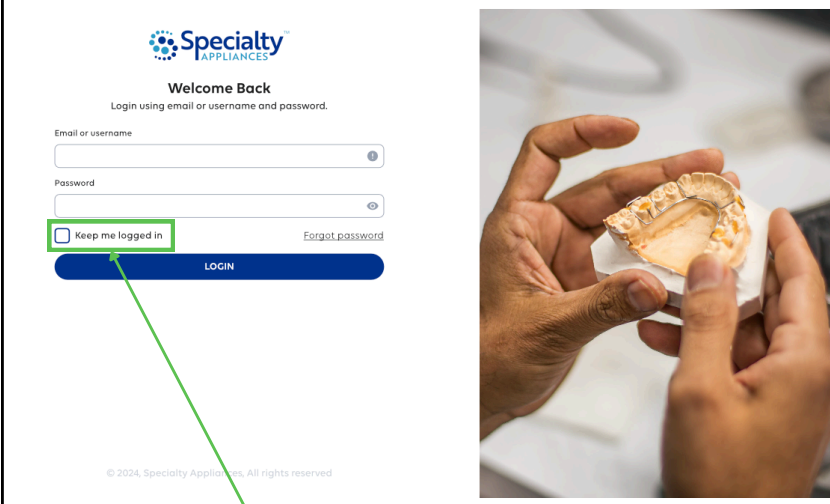
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1. LOGIN AND CHANGE PASSWORD



The screenshot shows the Specialty Appliances login page. At the top is the Specialty Appliances logo. Below it is the heading "Welcome Back" followed by the instruction "Login using email or username and password." There are two input fields: "Email or username" and "Password". A green rectangular box highlights both of these fields. Below the "Email or username" field is a checkbox labeled "Keep me logged in" and a link labeled "Forgot password". Below the "Password" field is a blue "LOGIN" button. A green arrow points from the bottom of the green box to the "Keep me logged in" checkbox. At the bottom left, there is a copyright notice: "© 2024, Specialty Appliances, All rights reserved." To the right of the login form is a photograph of a person's hands holding a dental model of a maxilla with a clear aligner.

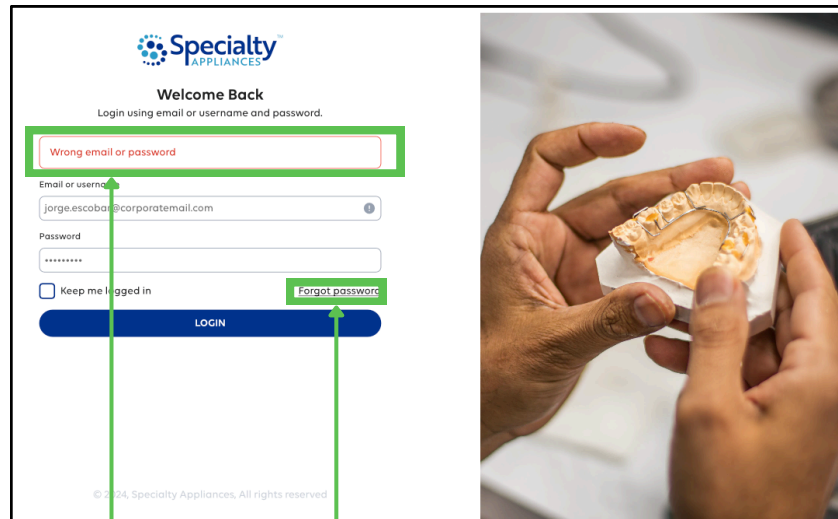
Navigate to the portal login page and enter your credentials. You can use your email or portal username.



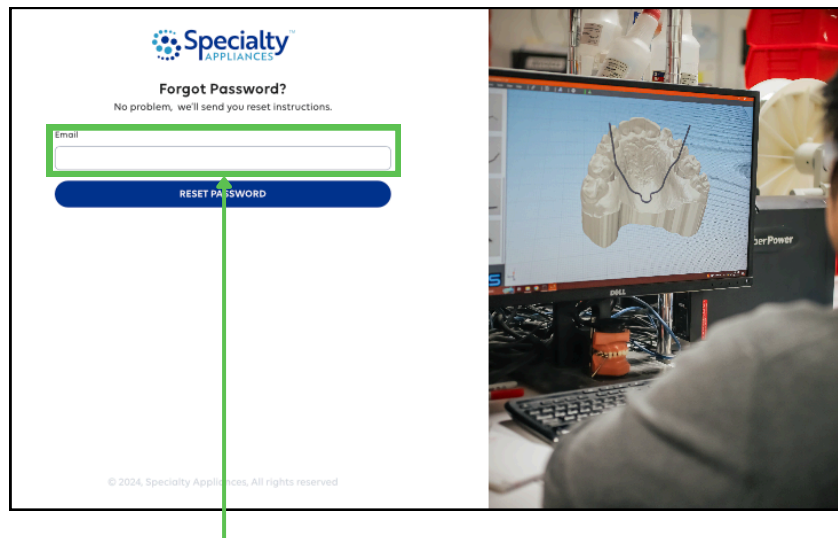
This screenshot is identical to the one above, showing the Specialty Appliances login page. However, in this version, a green rectangular box highlights the "Keep me logged in" checkbox, and a green arrow points from the bottom of this box to the checkbox itself. All other elements, including the logo, heading, input fields, "Forgot password" link, "LOGIN" button, and copyright notice, remain the same. The photograph of the dental model is also present on the right.

After entering your credentials, you can click "Keep me logged in". This will keep you logged into the portal and you will not need to re-enter your credentials when you come back to login; however, for security measures after a certain amount of time you will need to re-enter your login credentials.

1. LOGIN AND CHANGE PASSWORD



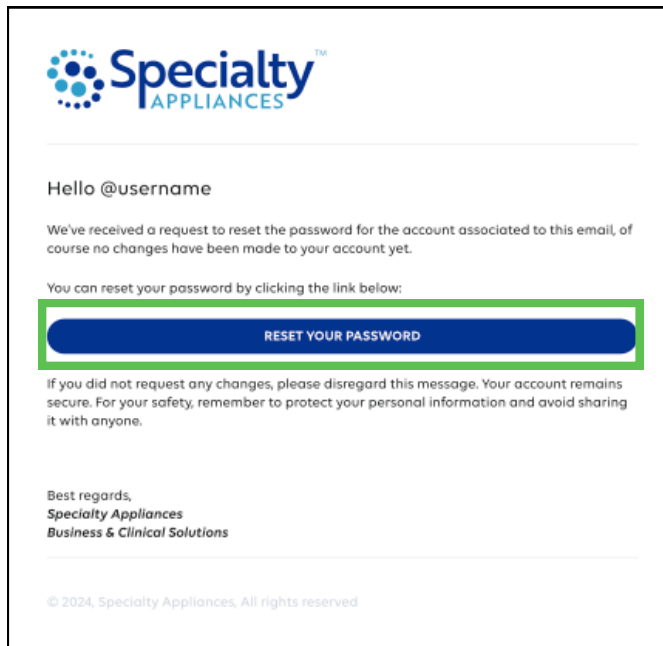
If you enter an incorrect combination of login credentials, you'll receive an error message. You can retry or click "Forgot password".



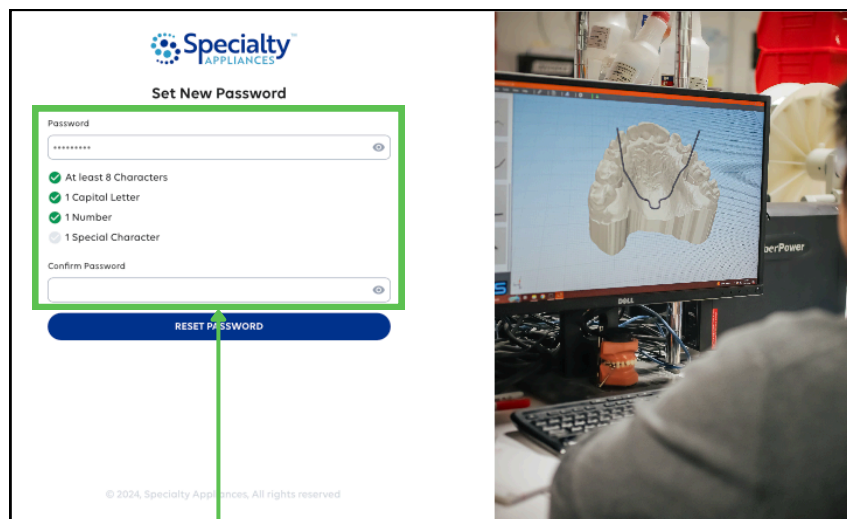
When you click on "Forgot password" on the login screen, you'll be brought to the forgot password page. You must enter your email associated to your account to proceed with resetting your password.

After you enter your email associated to your portal account, you'll receive an email with instructions to reset your password.

1. LOGIN AND CHANGE PASSWORD

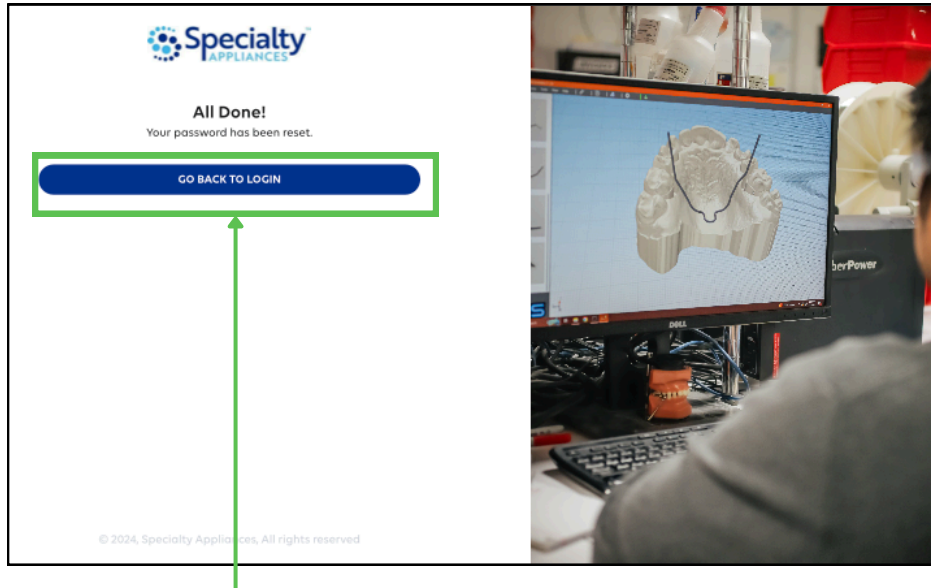


When you receive the email, click on "RESET YOUR PASSWORD"



After clicking the link in the email, you'll be brought to the Set New Password page. Here, you can enter a new password that adheres to the password complexity requirements. You'll be required to re-enter / confirm your new password to successfully reset.

1. LOGIN AND CHANGE PASSWORD



Once you successfully enter and confirm a new password, you'll see a success message. Click on the "GO BACK TO LOGIN" button to login with your new password.

2. HOME SCREEN

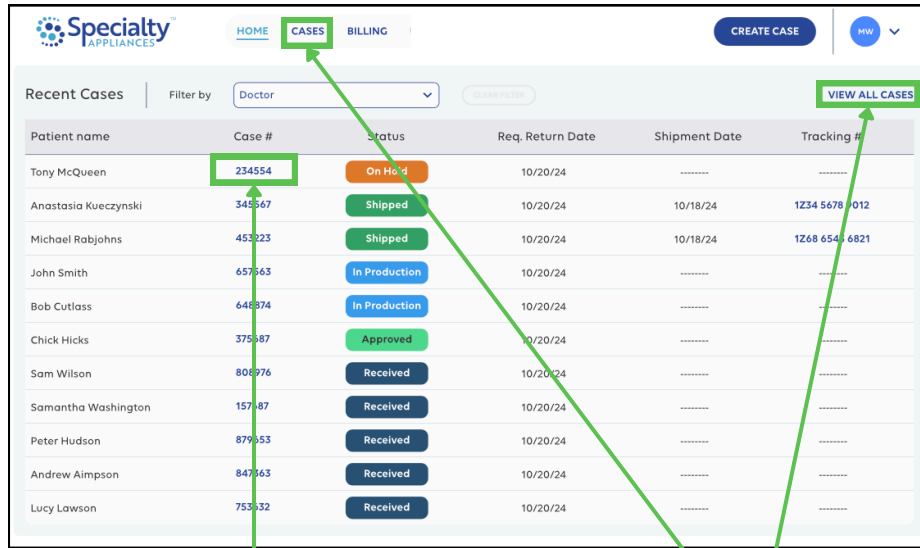
Patient name	Case #	Status	Req. Return Date	Shipment Date	Tracking #
Tony McQueen	234554	On Hold	10/20/24	-----	-----
Anastasia Kuczynski	345567	Shipped	10/20/24	10/18/24	1234 5678 9012
Michael Rabjohns	453223	Shipped	10/20/24	10/18/24	1268 6543 6821
John Smith	657563	In Production	10/20/24	-----	-----
Bob Cutlass	648874	In Production	10/20/24	-----	-----
Chick Hicks	375687	Approved	10/20/24	-----	-----
Sam Wilson	808976	Received	10/20/24	-----	-----
Samantha Washington	157687	Received	10/20/24	-----	-----
Peter Hudson	879653	Received	10/20/24	-----	-----
Andrew Aimpson	847363	Received	10/20/24	-----	-----
Lucy Lawson	753632	Received	10/20/24	-----	-----

When you login to the portal, you'll be brought to the HOME page. The key aspect of this page is displaying the most recent cases.

Patient name	Case #	Status	Req. Return Date	Shipment Date	Tracking #
Tony McQueen	234554	On Hold	10/20/24	-----	-----
Anastasia Kuczynski	345567	Shipped	10/20/24	10/18/24	1234 5678 9012
Michael Rabjohns	453223	Shipped	10/20/24	10/18/24	1268 6543 6821
John Smith	657563	In Production	10/20/24	-----	-----
Bob Cutlass	648874	In Production	10/20/24	-----	-----
Chick Hicks	375687	Approved	10/20/24	-----	-----
Sam Wilson	808976	Received	10/20/24	-----	-----
Samantha Washington	157687	Received	10/20/24	-----	-----
Peter Hudson	879653	Received	10/20/24	-----	-----
Andrew Aimpson	847363	Received	10/20/24	-----	-----
Lucy Lawson	753632	Received	10/20/24	-----	-----

The Home Page will showcase your most recent cases, based on when the case was created. You'll see most recent cases first that are then ordered based on STATUS.

2. HOME SCREEN



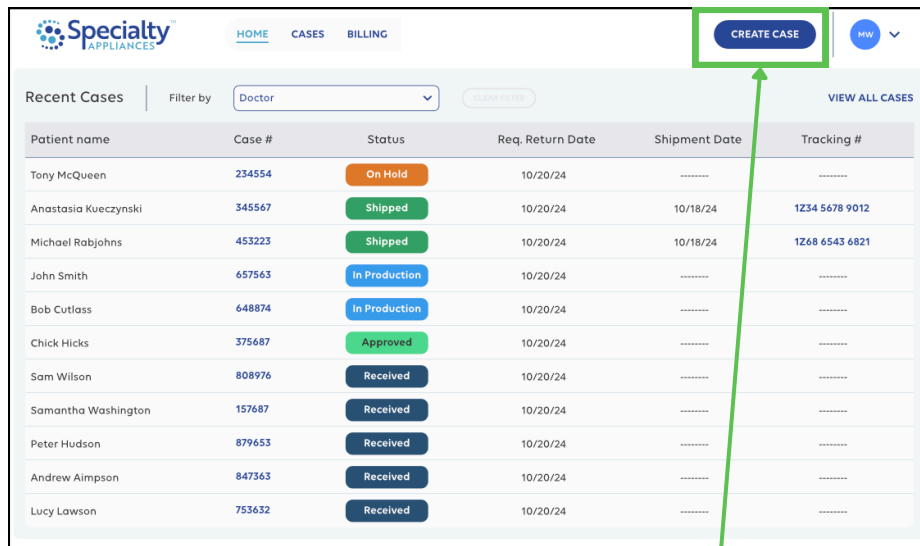
The screenshot displays the Specialty Appliances Home Screen. At the top, there are navigation tabs: HOME, CASES, and BILLING. The CASES tab is highlighted with a green box and a green arrow. Below the tabs, there is a 'Recent Cases' section with a filter dropdown set to 'Doctor' and a 'VIEW ALL CASES' button highlighted with a green box and a green arrow. The main content is a table of cases with columns: Patient name, Case #, Status, Req. Return Date, Shipment Date, and Tracking #. The first row is highlighted with a green box around the Case # '234554' and a green arrow pointing to it. The table lists 12 cases with various statuses like 'On Hold', 'Shipped', 'In Production', 'Approved', and 'Received'.

Patient name	Case #	Status	Req. Return Date	Shipment Date	Tracking #
Tony McQueen	234554	On Hold	10/20/24	.....	.....
Anastasia Kueczynski	345567	Shipped	10/20/24	10/18/24	1Z34 5678 9012
Michael Rabjohns	456023	Shipped	10/20/24	10/18/24	1Z68 6543 6821
John Smith	657563	In Production	10/20/24	.....	.....
Bob Cutlass	648874	In Production	10/20/24	.....	.....
Chick Hicks	375987	Approved	10/20/24	.....	.....
Sam Wilson	806976	Received	10/20/24	.....	.....
Samantha Washington	157987	Received	10/20/24	.....	.....
Peter Hudson	879553	Received	10/20/24	.....	.....
Andrew Almpson	847563	Received	10/20/24	.....	.....
Lucy Lawson	755532	Received	10/20/24	.....	.....

To view an individual case, click on the Case #.

As the Home Page only shows the most recent cases, to view all cases click on "VIEW ALL CASES" or "CASES" in the main navigation

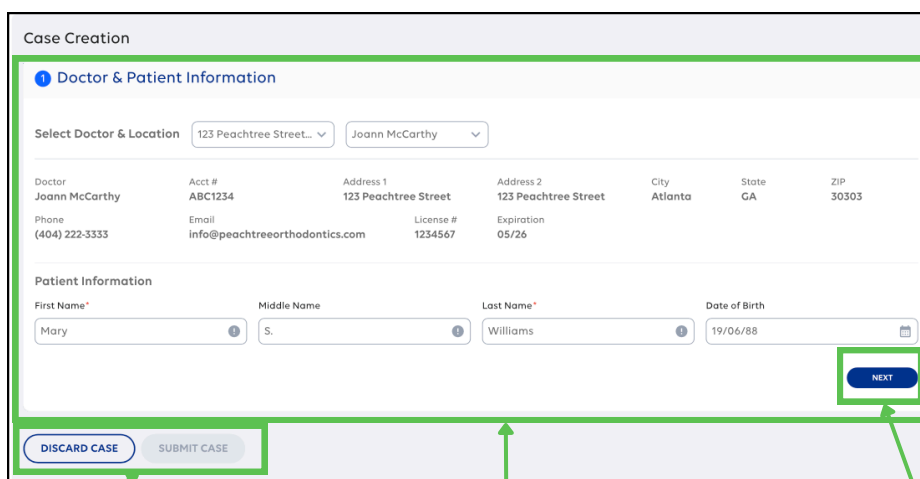
3. SUBMITTING A NEW CASE



The screenshot shows the Specialty Appliances dashboard. At the top, there are navigation tabs: HOME, CASES, and BILLING. In the top right corner, there is a blue button labeled 'CREATE CASE' which is highlighted with a green box. Below the navigation bar, there is a 'Recent Cases' section with a filter dropdown set to 'Doctor' and a 'VIEW ALL CASES' link. A table lists recent cases with columns for Patient name, Case #, Status, Req. Return Date, Shipment Date, and Tracking #. The status for each case is indicated by a colored button: On Hold (orange), Shipped (green), In Production (blue), or Received (dark blue).

Patient name	Case #	Status	Req. Return Date	Shipment Date	Tracking #
Tony McQueen	234554	On Hold	10/20/24	-----	-----
Anastasia Kueczynski	345567	Shipped	10/20/24	10/18/24	1Z34 5678 9012
Michael Rabjohns	453223	Shipped	10/20/24	10/18/24	1Z68 6543 6821
John Smith	657563	In Production	10/20/24	-----	-----
Bob Cutlass	648874	In Production	10/20/24	-----	-----
Chick Hicks	375687	Approved	10/20/24	-----	-----
Sam Wilson	808976	Received	10/20/24	-----	-----
Samantha Washington	157687	Received	10/20/24	-----	-----
Peter Hudson	879653	Received	10/20/24	-----	-----
Andrew Aimpson	847363	Received	10/20/24	-----	-----
Lucy Lawson	753632	Received	10/20/24	-----	-----

Select CREATE CASE in the upper right hand of the screen.



The screenshot shows the 'Case Creation' form. The first step is 'Doctor & Patient Information'. It includes a 'Select Doctor & Location' section with dropdowns for '123 Peachtree Street...' and 'Joann McCarthy'. Below this, there is a table with patient details: Doctor (Joann McCarthy), Acct # (ABC1234), Address 1 (123 Peachtree Street), Address 2 (123 Peachtree Street), City (Atlanta), State (GA), ZIP (30303), Phone ((404) 222-3333), Email (info@peachtreerthodontics.com), License # (1234567), and Expiration (05/26). The 'Patient Information' section has fields for First Name (Mary), Middle Name (S.), Last Name (Williams), and Date of Birth (19/06/88). At the bottom, there are three buttons: 'DISCARD CASE' (highlighted with a green box), 'SUBMIT CASE' (disabled), and 'NEXT' (highlighted with a green box). Arrows point from the 'DISCARD CASE' and 'NEXT' buttons to the explanatory text below.

You can click "DISCARD CASE" at any point. You will not be able to click "SUBMIT CASE" until you complete all steps.

The first step to create a case is filling out all of the patient details. Anything required will have a red asterisk next to the field name.

On any step, if there's additional steps then you proceed by clicking "NEXT".

3. SUBMITTING A NEW CASE

The screenshot shows the 'Case Creation' interface for Specialty Appliances. The top navigation bar includes 'HOME', 'CASES', and 'BILLING'. The user is logged in as 'MW'. The 'Case Creation' section has a dropdown menu showing '1 Doctor & Patient Information'. Below it, '2 Dental Arch Type' is selected. The interface displays three dental arch diagrams: UPPER, LOWER, and BOTH. The 'BOTH' option is selected with a radio button. A green box highlights the arch selection area. At the bottom, there are buttons for 'DISCARD CASE' and 'SUBMIT CASE', and a 'NEXT' button.

The second step to create a case is to select the applicable arch for the appliance(s). You can choose UPPER or LOWER or BOTH.

The screenshot shows the 'Case Creation' interface for Specialty Appliances, Step 3: Product Category & Appliance / Upper Arch. The top navigation bar is the same. The 'Case Creation' section has a dropdown menu showing '1 Doctor & Patient Information', '2 Dental Arch Type', and '3 Product Category & Appliance / Upper Arch'. The interface displays a list of appliance groups on the left and a list of appliances on the right. The 'CLASS II CORRECTION' group is selected. The 'STANDARD HERBST' appliance is selected. A green box highlights the appliance selection area. To the right, a representative diagram of the Standard Herbst appliance is shown. At the bottom, there are buttons for 'DISCARD CASE' and 'SUBMIT CASE', and a 'NEXT' button.

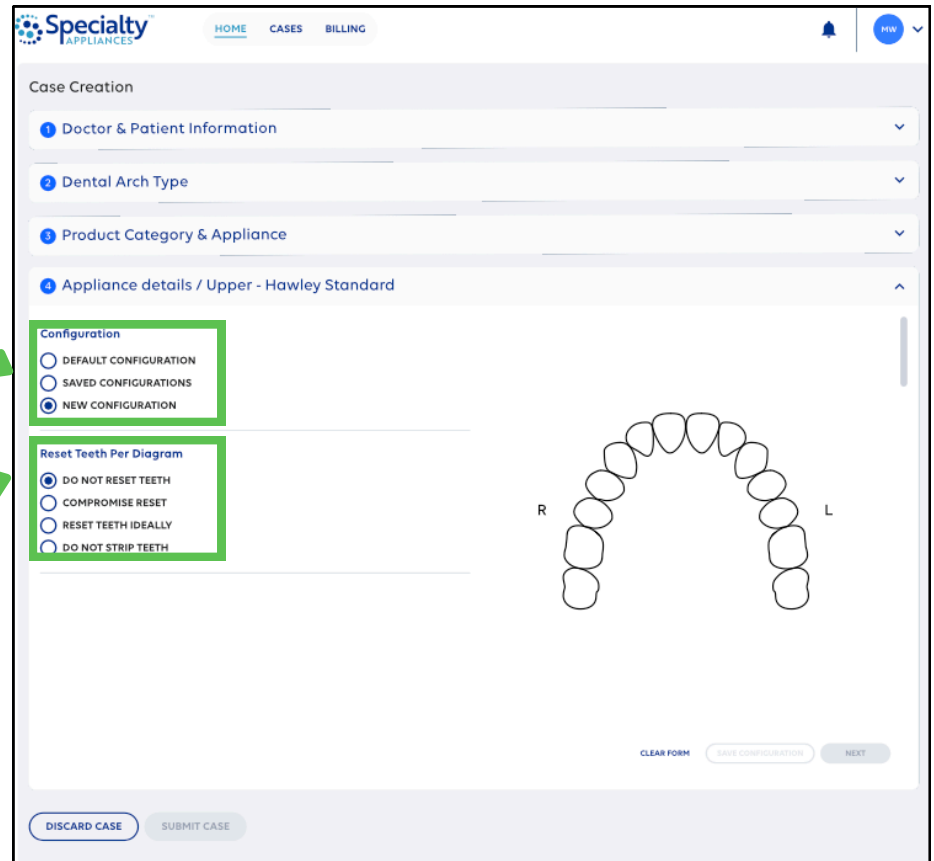
After you select the arch(s), choose the appliance. Appliances are organized in groups.

Each appliance will have a representative diagram. For more information on the appliances, visit specialtyappliances.com.

3. SUBMITTING A NEW CASE

You must choose a configuration. If you'd like the Specialty Appliances standard, select "DEFAULT CONFIGURATION." Otherwise, you can use one of your "SAVED CONFIGURATIONS" or a "NEW CONFIGURATION".

Regardless of the configuration, you're able to select the appropriate options and accessories available for the selected appliance.



The screenshot shows the 'Case Creation' form in the Specialty Appliances system. The form is divided into several sections, with the 'Appliance details / Upper - Hawley Standard' section expanded. Within this section, there are two sub-sections highlighted with green boxes and green arrows. The first sub-section, 'Configuration', contains three radio button options: 'DEFAULT CONFIGURATION', 'SAVED CONFIGURATIONS', and 'NEW CONFIGURATION'. The second sub-section, 'Reset Teeth Per Diagram', contains four radio button options: 'DO NOT RESET TEETH', 'COMPROMISE RESET', 'RESET TEETH IDEALLY', and 'DO NOT STRIP TEETH'. To the right of these sub-sections is a diagram of an upper dental arch with teeth labeled 'R' and 'L'. At the bottom of the form, there are buttons for 'DISCARD CASE', 'SUBMIT CASE', 'CLEAR FORM', 'SAVE CONFIGURATION', and 'NEXT'.

3. SUBMITTING A NEW CASE

Appliance configuration is handled within groupings (e.g., Accessories, Clamping Options, etc.).

When selecting a certain option within a grouping, there can also be various teeth selectors to mark where the given option applies. It's important to select everything you'd like configured on the appliance.

The options you see are specific to and available for the selected Appliance and arch.

NEW CONFIGURATION

Reset Teeth Per Diagram

☐ DO NOT RESET TEETH

☐ COMPROMISE RESET

☐ RESET TEETH IDEALLY

☒ DO NOT STRIP TEETH

Please select up to 4 teeth

R	L
1/a	1/a
2/b	2/b
3/c	3/c
4/d	4/d
5/e	5/e
6	6
7	7

Placement of Labial Bow [Edit](#)

2-2

Clamping Options [Edit](#)

C-CLASPS

Accessories (optional) [Add Accessories](#)

☒ **FINGER SPRING**

Choose teeth and placement

RIGHT	LEFT
1/a -None-	1/a -None-
2/b -None-	2/b -None-
3/c -None-	3/c -None-
4/d -None-	4/d -None-
5/e -None-	5/e -None-
6 -None-	6 -None-
7 -None-	7 -None-

☐ SOLDERED SPRING

☐ CLOSING SPRING

☒ **HOLDING SPURS**

Choose teeth and placement

RIGHT	LEFT
1/a -None-	1/a -None-
2/b -None-	2/b -None-
3/c -None-	3/c -None-

3. SUBMITTING A NEW CASE

For digital cases, you can upload your STL file directly into the portal or select "Submit by Scanner."

For analog cases, select "Stone Model".

The screenshot shows the 'Case Creation' form in the Specialty Appliances portal. The form has five steps: 1. Doctor & Patient Information, 2. Dental Arch Type, 3. Product Category & Appliance / Upper, 4. Appliance details / Upper - Invisible Retainer, and 5. Model submission type. Step 5 contains two upload boxes: 'Upload STL Files' and 'Upload OTHER Files', both with 'Or Drag & Drop here' text. Below these is a red note: '*To proceed with the case creation upload at least one .STL file.' and two checkboxes: 'STONE MODEL' and 'SUBMIT BY SCANNER'. At the bottom are 'DISCARD CASE' and 'SUBMIT CASE' buttons, and a 'NEXT' button on the right. Green arrows point from the text annotations to the 'STONE MODEL' checkbox, the 'Upload STL Files' box, and the 'Upload OTHER Files' box.

Specialty APPLIANCES

HOME CASES BILLING

Case Creation

1 Doctor & Patient Information

2 Dental Arch Type

3 Product Category & Appliance / Upper

4 Appliance details / Upper - Invisible Retainer

5 Model submission type

Upload STL Files

Or Drag & Drop here

Upload OTHER Files

Or Drag & Drop here

*To proceed with the case creation upload at least one .STL file.

☐ STONE MODEL

☐ SUBMIT BY SCANNER

DISCARD CASE SUBMIT CASE

NEXT

You also have the option to submit other documents, such as drawings; however, it's encouraged to include all details of your case within the configuration options / appliance details and STL file.

3. SUBMITTING A NEW CASE


Case Creation

- 1 Doctor & Patient Information
- 2 Dental Arch Type
- 3 Product Category & Appliance
- 4 Appliance details / Upper - Hawley Standard
- 5 Appliance details / Lower - Aligners
- 6 Modal submission type
- 7 Return Date

Shipping Address

Address 1	Address 2	City	State	ZIP
123 Peachtree Street	123 Peachtree Street	Atlanta	GA	30303

Select a Req return date*

17/08/88 

10 business days from today

☐ Request express shipping (\$85 fee) to receive appliance within 7 business days.

NEXT

DISCARD CASE SUBMIT CASE

After adding the model submission type, you must select a request return date for your case. You will see the earliest date available based on our current operating capacity, and can always choose a later date.

Should you need it sooner, you can request expedited shipping for an additional charge.

3. SUBMITTING A NEW CASE

This is the final step of the case submission process. You'll see a summary of the case and your authorization.

Links are surfaced throughout the summary to easily go back and view/edit case details.

You cannot submit your case until you check and agree to the terms and conditions.

5 Appliance details / Lower - Aligners

6 Modal submission type

7 Return Date

8 Authorization

Retainers - Aligners / Anastasia Kueczynski

Submitted on: 10/10/24 Req. return date: 10/20/24

Submitted by: Helen Bowman Doctor name: Dr. McCarthy

Prescription details: Retainer

Shipping address: 132, My Street, Kingston, New York 12401.

Prescription files:

- filename.patientname.doctorname.case#.stl
- filename.patientname.doctorname.case#.stl
- filename.patientname.doctorname.case#.stl

By marking this checkbox I accept the terms and conditions and confirm that all information submitted is correct. Please verify that all the information is correct.

[Terms and Conditions](#)

☐ I agree to the terms and conditions and that the information I sent is correct.

[Edit Information](#) [view files](#) [Re-Upload Files](#) [Edit RX](#)

[DISCARD CASE](#) [SUBMIT CASE](#)

Once you agree to the terms and conditions you'll have the ability to click "SUBMIT CASE".

4. CREATING SAVED CONFIGURATIONS

A. CREATING A SAVED CONFIGURATION

Within the case creation module,

Regardless of the configuration, you're able to select the appropriate options and accessories available for the selected appliance.

The screenshot displays the 'Case Creation' interface for Specialty Appliances. The navigation bar at the top includes 'HOME', 'CASES', and 'BILLING'. The main content area is titled 'Case Creation' and features a vertical list of steps: 1. Doctor & Patient Information, 2. Dental Arch Type, 3. Product Category & Appliance, and 4. Appliance details / Upper - Hawley Standard. The fourth step is currently selected. Within this step, there are two sections highlighted with green boxes and green arrows. The first section, 'Configuration', contains three radio button options: 'DEFAULT CONFIGURATION', 'SAVED CONFIGURATIONS', and 'NEW CONFIGURATION', with 'NEW CONFIGURATION' being selected. The second section, 'Reset Teeth Per Diagram', contains four radio button options: 'DO NOT RESET TEETH' (selected), 'COMPROMISE RESET', 'RESET TEETH IDEALLY', and 'DO NOT STRIP TEETH'. To the right of these sections is a diagram of an upper dental arch with teeth labeled 'R' and 'L'. At the bottom of the form, there are buttons for 'DISCARD CASE', 'SUBMIT CASE', 'CLEAR FORM', 'SAVE CONFIGURATION', and 'NEXT'.

4. CREATING SAVED CONFIGURATIONS

B. MODIFYING A SAVED CONFIGURATION

Within the case creation module, select the Saved Configuration that you would like to modify

The screenshot shows the 'Case Creation' interface. At the top, there's a breadcrumb trail: 'Product Category & Appliance / Upper'. Below that, 'Appliance details / Upper - Cantilever Herbst Upper'. The 'Configuration' section has two radio buttons: 'SPECIALTY APPLIANCE CONFIGURATION' and 'SAVED CONFIGURATIONS'. The 'SAVED CONFIGURATIONS' option is selected and highlighted with a green box. Below it, there's a dropdown menu showing 'Test Configuration'. Further down, there's a section 'Does Patient Currently Have:' with several checkboxes: 'BRACKETS' (checked), 'KEEP *' (selected), 'REMOVE', 'ATTACHMENTS', 'BANDS', and 'ARCHWIRE'.

Once the configuration is selected, make changes to the template according to your preferences.

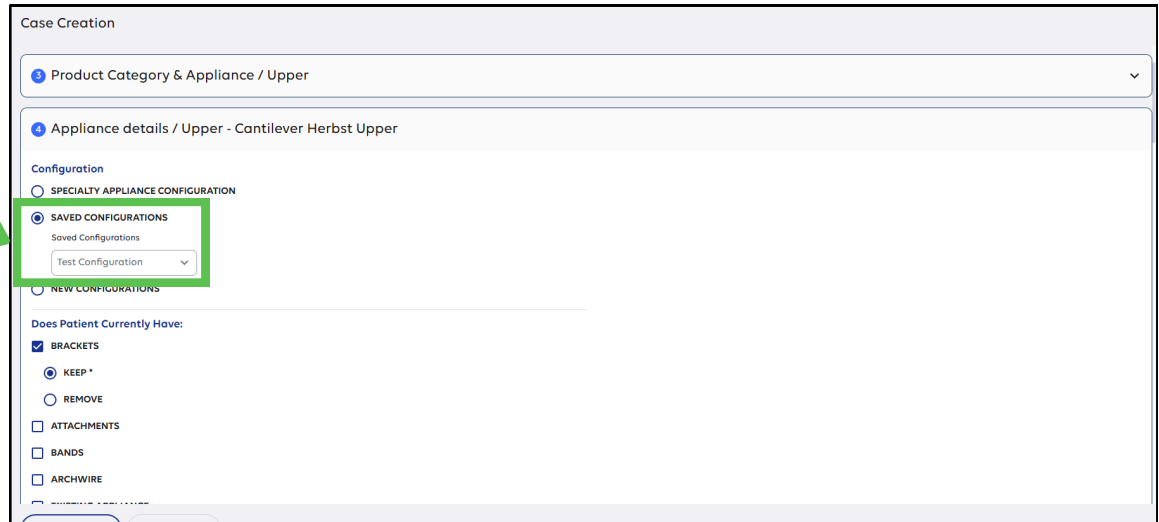
The screenshot shows the 'Case Creation' interface with various configuration options. Under 'WIRE', there's a section 'Choose at least 1 teeth and placement' with 'RIGHT' and 'LEFT' columns. Each column has four rows of tooth numbers (4/d, 5/e, 6, 7) with dropdown menus. Below this are checkboxes for '.036 WIRE' and 'NO RESTS'. Under 'Crown Options', there are checkboxes for 'ADD VENT HOLES' (checked), 'ADD DEBONDING HOLES' (checked), 'Size' (dropdown), and 'ADD VERTICAL SLITS'. At the bottom right, there are four buttons: 'CLEAR FORM', 'UPDATE' (highlighted with a green box), 'DELETE', and 'NEXT'.

Once you have modified the Saved Configuration to your liking, scroll down to the bottom of the section and select "Update"

4. CREATING SAVED CONFIGURATIONS

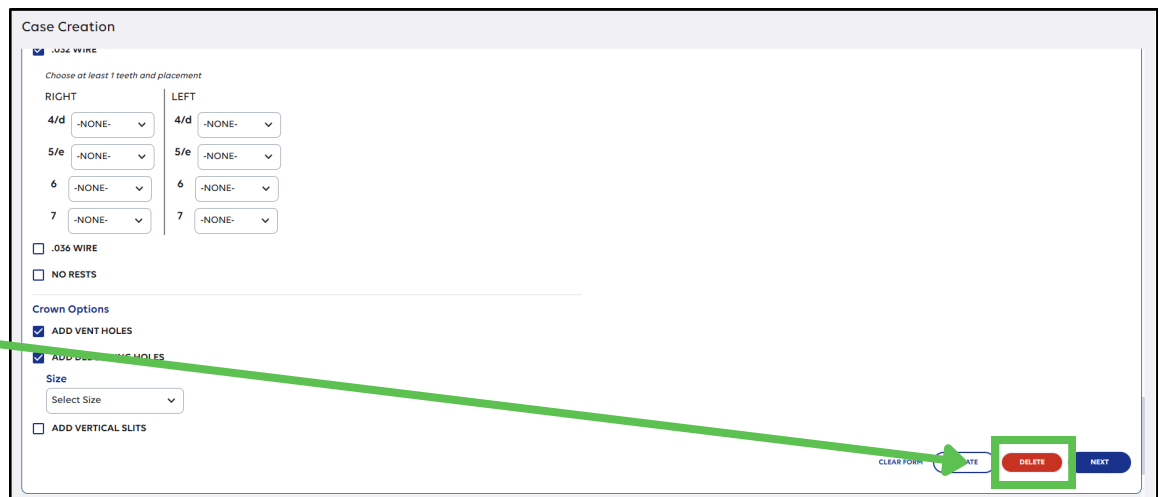
C. DELETING A SAVED CONFIGURATION

Within the case creation module, select the Saved Configuration that you would like to delete.



The screenshot shows the 'Case Creation' interface. At the top, there's a breadcrumb trail: 'Product Category & Appliance / Upper'. Below that, 'Appliance details / Upper - Cantilever Herbst Upper'. The 'Configuration' section has three radio buttons: 'SPECIALTY APPLIANCE CONFIGURATION', 'SAVED CONFIGURATIONS' (which is selected), and 'NEW CONFIGURATIONS'. Under 'SAVED CONFIGURATIONS', there's a dropdown menu showing 'Test Configuration'. A green arrow points from the text on the left to this dropdown menu.

Scroll down to the bottom of the section. Then select "Delete". This will remove the saved configuration from your account.



The screenshot shows the bottom of the 'Case Creation' interface. It includes sections for 'WIRE' (with options for .036 WIRE and NO RESTS), 'Crown Options' (with checkboxes for ADD VENT HOLES and ADD BUSHING HOLES), and 'ADD VERTICAL SLITS'. At the bottom right, there are three buttons: 'CLEAR FORM', 'DELETE' (highlighted with a green box and a green arrow from the text on the left), and 'NEXT'.

5. CHECK CASE STATUS

Specialty
APPLIANCES

HOME CASES BILLING

CREATE CASE

Case List

Search by patient name or case number

SEARCH

Filter by All Status All Doctors

CLEAR FILTERS

Patient name	Case #	Status	Req. Return Date	Shipment Date	Tracking #
Tony McQueen	134520	On Hold	10/22/24		
Anastasia Kueczynski	304892	Shipped	10/19/24	10/18/24	1290 5678 9012
Michael Rabjohns	912503	Shipped	10/20/24	10/18/24	1256 2533 1123
John Smith	125029	In Production	10/24/24		
Bob Cutlass	582103	In Production	10/25/24		
Chick Hicks	124905	In Production	10/26/24		
Sam Wilson	903854	Approved	10/27/24		
Samantha Washington	912053	Approved	10/27/24		
Peter Hudson	349078	Recieved	10/26/24		
Andrew Simpson	097834	Recieved	10/26/24		
James Jameson	907813	Delivered	10/17/24	10/18/24	
Sally Highland	123098	Delivered	10/17/24	10/18/24	
Luke Kansas	634571	Delivered	10/16/24	10/18/24	
Mike Carlton	456078	Delivered	10/15/24	10/18/24	
Peter Parker	978546	Delivered	10/14/24	10/18/24	
Blake Fish	657132	Delivered	10/13/24	10/18/24	
Daniela Thompson	214465	Delivered	10/12/24	10/18/24	
Ophelia Young	123625	Delivered	10/11/24	10/18/24	
George Lopez	155463	Delivered	10/10/24	10/18/24	
Lucy Lawson	104017	Cancelled	10/20/24	10/18/24	

1 - 20 of 200

To find a specific case, you can:

- Search by patient name or case number in the search field
- Filter by an individual status or doctor

The cases section serves as your entry point to view and access all cases.

5. CHECK CASE STATUS

Specialty APPLIANCES

HOME CASES BILLING

CREATE CASE MW

Case List

Search by patient name or case number SEARCH

Filter by All Status All Doctors CLEAR FILTERS

Patient name	Case #	Status	Req. Return Date	Shipment Date	Tracking #
Tony McQueen	134520	On Hold	10/22/24		
Anastasia Kueczynski	304892	Shipped	10/19/24	10/18/24	1290 5678 9012
Michael Rabjohns	912503	Shipped	10/20/24	10/18/24	1256 2533 1123
John Smith	125029	In Production	10/24/24		
Bob Cutlass	582103	In Production	10/25/24		
Chick Hicks	124905	In Production	10/26/24		
Sam Wilson	903854	Approved	10/27/24		
Samantha Washington	912053	Approved	10/27/24		
Peter Hudson	349078	Recieved	10/26/24		
Andrew Simpson	097834	Recieved	10/26/24		
James Jameson	907813	Delivered	10/17/24	10/18/24	
Sally Highland	123098	Delivered	10/17/24	10/18/24	
Luke Kansas	634571	Delivered	10/16/24	10/18/24	
Mike Carlton	456078	Delivered	10/15/24	10/18/24	
Peter Parker	978546	Delivered	10/14/24	10/18/24	
Blake Fish	657132	Delivered	10/13/24	10/18/24	
Daniela Thompson	214465	Delivered	10/12/24	10/18/24	
Ophelia Young	123625	Delivered	10/11/24	10/18/24	
George Lopez	155463	Delivered	10/10/24	10/18/24	
Lucy Lawson	104017	Cancelled	10/20/24	10/18/24	

1 - 20 of 200

If a case has been shipped, you'll also see and can click on the Tracking #.

The current status of each case will display in this column.

6. VIEW AND MANAGE CASE

A. FINDING YOUR CASE

The screenshot shows the Specialty Appliances web application. At the top, there are navigation tabs: HOME, CASES, and BILLING. A 'CREATE CASE' button and a user profile icon (HW) are on the right. Below the navigation, there's a search bar with 'Anast' entered and a 'SEARCH' button. To the right of the search bar are filter dropdowns for 'All Status' and 'All Doctors', and a 'CLEAR FILTERS' button. Below the search bar is a table with the following data:

Patient name	Case #	Status	Req. Return Date ↑↓	Shipment Date ↑↓	Tracking #
Anastasia Kuczynski	304892	Shipped	10/19/24	10/18/24	1Z90 5678 9012

To find a specific case, you can:

- search by patient name or case number in the search field
- Filter by an individual status or doctor

All cases that match your search will display in the cases table.

Your entered search term will appear in the search field. You do not need to enter the full name to search.

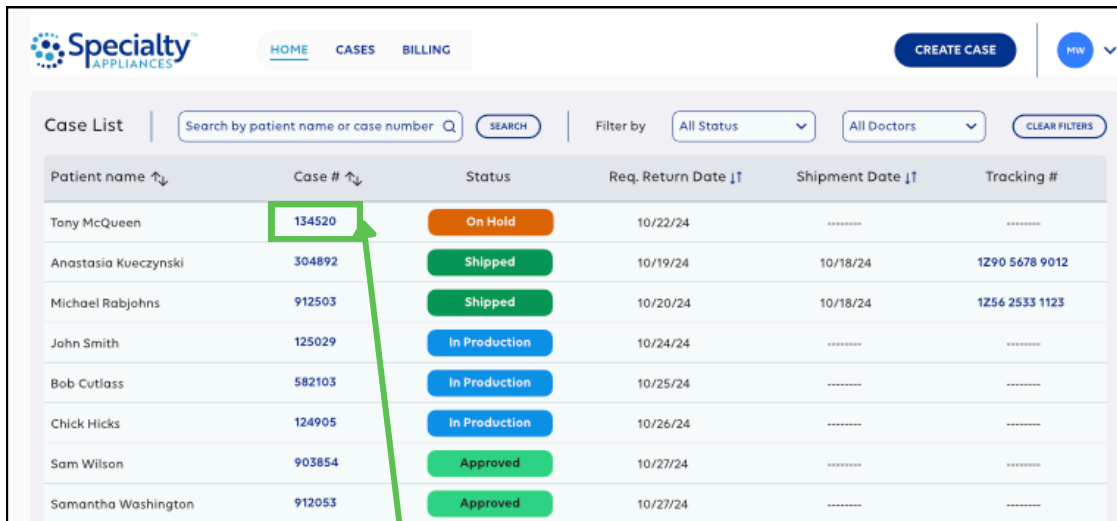
B. SEARCH RESULTS

If you enter a search that yields zero results, you'll see a zero results message. You can clear your search by hitting the "X" in the search field.

The screenshot shows the Specialty Appliances web application with the search bar containing 'Anast'. The table below the search bar is empty, and a message 'No results for "Anast"' is displayed. A green arrow points from the text above to the 'X' icon in the search field.

6. VIEW AND MANAGE CASE

C. SELECT CASE TO VIEW DETAILS



Patient name ↑↓	Case # ↑↓	Status	Req. Return Date ↓↑	Shipment Date ↓↑	Tracking #
Tony McQueen	134520	On Hold	10/22/24	-----	-----
Anastasia Kuczynski	304892	Shipped	10/19/24	10/18/24	1290 5678 9012
Michael Rabjohns	912503	Shipped	10/20/24	10/18/24	1256 2533 1123
John Smith	125029	In Production	10/24/24	-----	-----
Bob Cutlass	582103	In Production	10/25/24	-----	-----
Chick Hicks	124905	In Production	10/26/24	-----	-----
Sam Wilson	903854	Approved	10/27/24	-----	-----
Samantha Washington	912053	Approved	10/27/24	-----	-----

To view the details of a case, click the Case #.

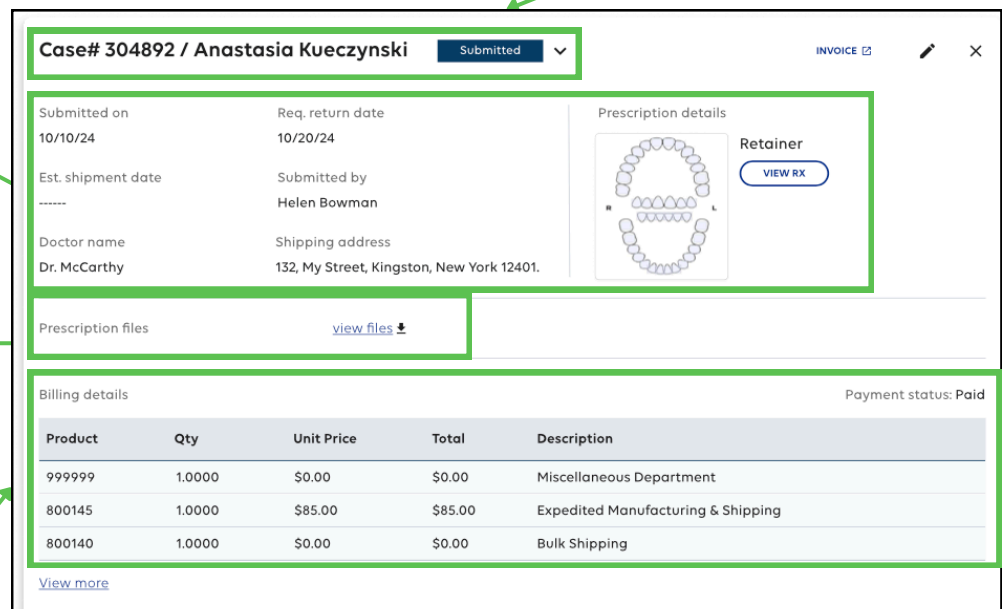
D. INDIVIDUAL CASE DETAILS

Here you'll see the case #, patient name, and current case status.

Here you'll see background information on the case and the prescription.

Here you can access all files (e.g., STL Scan) associated to the case.

Here you'll see all billing details, including the payment status in the top right of this section.



Case# 304892 / Anastasia Kuczynski Submitted

Submitted on: 10/10/24, Req. return date: 10/20/24, Est. shipment date: -----, Submitted by: Helen Bowman, Doctor name: Dr. McCarthy, Shipping address: 132, My Street, Kingston, New York 12401.

Prescription details: Retainer (VIEW RX)

Prescription files: [view files](#)

Billing details: Payment status: Paid

Product	Qty	Unit Price	Total	Description
999999	1.0000	\$0.00	\$0.00	Miscellaneous Department
800145	1.0000	\$85.00	\$85.00	Expedited Manufacturing & Shipping
800140	1.0000	\$0.00	\$0.00	Bulk Shipping

[View more](#)

6. VIEW AND MANAGE CASE

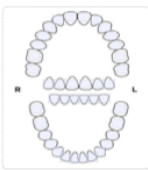
E. KEY ACTIONS

Case# 304892 / Anastasia Kueczynski Submitted ▼


Submitted on: 10/10/24 Req. return date: 10/20/24

Est. shipment date: ----- Submitted by: Helen Bowman

Doctor name: Dr. McCarthy Shipping address: 132, My Street, Kingston, New York 12401.

Prescription details: 

Retainer: [VIEW RX](#)

Prescription files: [view files](#) 

Billing details: Payment status: Paid

Product	Qty	Unit Price	Total	Description
999999	1.0000	\$0.00	\$0.00	Miscellaneous Department
800145	1.0000	\$85.00	\$85.00	Expedited Manufacturing & Shipping
800140	1.0000	\$0.00	\$0.00	Bulk Shipping

[View more](#)

Click here to edit / make changes to the case.

Click here to view the invoice.

Click here to view the RX for the case.

Click here to view all files (e.g., STL Scan) associated to the case.

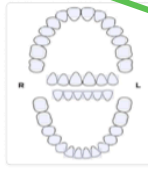
If there are more billing details than what's displayed by default, you'll see a View more link. Click here to view all billing details.

Case# 304892 / Anastasia Kueczynski Shipped ▼ Tracking # 1294 5678 9012 INVOICE ×


Submitted on: 10/10/24 Req. return date: 10/20/24

Est. shipment date: ----- Submitted by: Helen Bowman

Doctor name: Dr. McCarthy Shipping address: 132, My Street, Kingston, New York 12401.

Prescription details: 

Retainer: [VIEW RX](#)

Prescription files: [view files](#) 

If the case has been shipped, you'll see the Tracking #. Click on the tracking number to view tracking / delivery status.

6. VIEW AND MANAGE CASE

G. EDIT CASE

Change the requested return date and/or shipping address.
NOTE: this is only available up until a certain point in the case lifecycle.

Case# 304892 / Anastasia Kueczynski Submitted

Submitted on: 10/10/24

Est. shipment date: -----

Doctor name: Dr. McCarthy

Req. return date: 10/20/24

Submitted by: Helen Bowman

Shipping address: 132, My Street, Kingston, New York...

Prescription details: Retainer (VIEW RX)

Prescription files: view files

filename.patientname.doctorname.case#.stl

filename.patientname.doctorname.case#.stl

filename.patientname.doctorname.case#.stl

Drag and drop your files here or SELECT FILES

File extension: .stl, .pdf, .jpg

Max file size 50mb

Billing details: Payment status: Paid

Product	Qty	Unit Price	Total	Description
999999	1.0000	\$0.00	\$0.00	Miscellaneous department
800145	1.0000	\$85.00	\$85.00	Expedited manufacturing & shipping
800140	1.0000	\$0.00	\$0.00	Bulk shipping

View more

CANCEL CASE DISCARD CHANGES SAVE CHANGES

CANCEL CASE: will cancel the case. This is only available up until a certain point in the case lifecycle.

DISCARD CHANGES: None of your changes to the case will be saved.

SAVE CHANGES: All of your changes to the case will be saved.

7. BILLING

When you navigate to BILLING, you'll see all of your invoices.

For each invoice, you'll see the relevant information (e.g., Patient name, Case #, etc) ordered by most recent first.

The screenshot shows the Specialty APPLIANCES interface. At the top, there are navigation links: HOME, CASES, and BILLING. The BILLING link is highlighted. Below the navigation, there are tabs for INVOICES and STATEMENTS. The INVOICES tab is selected. On the right, there is a 'CREATE CASE' button and a user profile icon. Below the tabs, there is a section for 'Invoices' with an 'Outstanding balance: \$2,099.00' and a 'MAKE PAYMENT' button. A search bar is present with the text 'Search by patient name or case number'. To the right of the search bar are filters: 'Filter by' with a dropdown menu set to 'All Invoices (Paid, Unpaid)', and 'All Doctors' with a dropdown menu. Below the filters is a table of invoices. The table has columns: Patient name, Case #, Doctor Name, Created at, Due date, Amount, and Actions. The first row is highlighted with a green box.

Patient name	Case #	Doctor Name	Created at	Due date	Amount	Actions
Tony McQueen	134520	Dr Joann McCarthy	10/22/24	10/25/24	\$99.95	PAY INVOICE
Anastasia Kuczynski	154658	Dr Joann McCarthy	10/21/24	10/24/24	\$88.20	PAY INVOICE
Michael Rabjohns	532412	Dr Joann McCarthy	10/20/24	10/23/24	\$123.75	PAY INVOICE
John Smith	457689	Dr Daniel Richards	10/19/24	10/22/24	\$332.10	PAY INVOICE
Bob Cutlass	321456	Dr Gene Peterson	10/18/24	10/21/24	\$119.49	PAY INVOICE
Alex Rodriguez	525456	Dr Daniel Richards	10/17/24	10/19/24	\$121.49	PAY INVOICE
Sam Hamilton	086752	Dr Gene Peterson	10/16/24	10/18/24	\$119.49	PAY INVOICE
Daniel Field	374511	Dr Joann McCarthy	10/15/24	10/17/24	\$119.49	PAY INVOICE

You can narrow the results by filtering by a Doctor, which will only show invoices for that Doctor.

If you apply one or many filters, you can reset / clear by clicking "CLEAR FILTERS".

The screenshot shows the Specialty APPLIANCES interface with filters applied. The 'Filter by' dropdown is set to 'All Invoices (Paid, Unpaid)'. The 'All Doctors' dropdown is set to 'Dr Joann McCarthy'. The 'CLEAR FILTERS' button is highlighted. Below the filters is a table of invoices. The table has columns: Patient name, Case #, Doctor Name, Created at, Due date, Amount, and Actions. The first row is highlighted with a green box.

Patient name	Case #	Doctor Name	Created at	Due date	Amount	Actions
Tony McQueen	134520	Dr Joann McCarthy	10/22/24	10/25/24	\$99.95	PAY INVOICE
Anastasia Kuczynski	154658	Dr Joann McCarthy	10/21/24	10/24/24	\$88.20	PAY INVOICE
Michael Rabjohns	532412	Dr Joann McCarthy	10/20/24	10/23/24	\$123.75	PAY INVOICE
Daniel Field	374511	Dr Joann McCarthy	10/15/24	10/17/24	\$119.49	PAY INVOICE
Dolores Martinez	798024	Dr Joann McCarthy	10/11/24	10/13/24	\$1244.99	INVOICE
Fernando Valenzuela	893641	Dr Joann McCarthy	10/04/24	10/06/24	\$23.99	INVOICE

7. BILLING

You can narrow the results by searching by Patient Name or Case #.

You can clear / reset a search by clicking the "X".

When you enter a search query, click enter or "SEARCH" to search against your invoices.

The screenshot shows the 'Invoices' section of the Specialty Appliances portal. The search bar contains 'Tony McQueen', and the 'SEARCH' button is highlighted. A green box highlights the search bar and the 'SEARCH' button. The table below shows one result for Tony McQueen with Case # 134520, Dr Joann McCarthy, and an amount of \$99.95. The 'PAY INVOICE' button is visible in the Actions column.

Patient name	Case #	Doctor Name	Created at ↑↓	Due date ↑↓	Amount	Actions
Tony McQueen	134520	Dr Joann McCarthy	10/22/24	10/25/24	\$99.95	PAY INVOICE

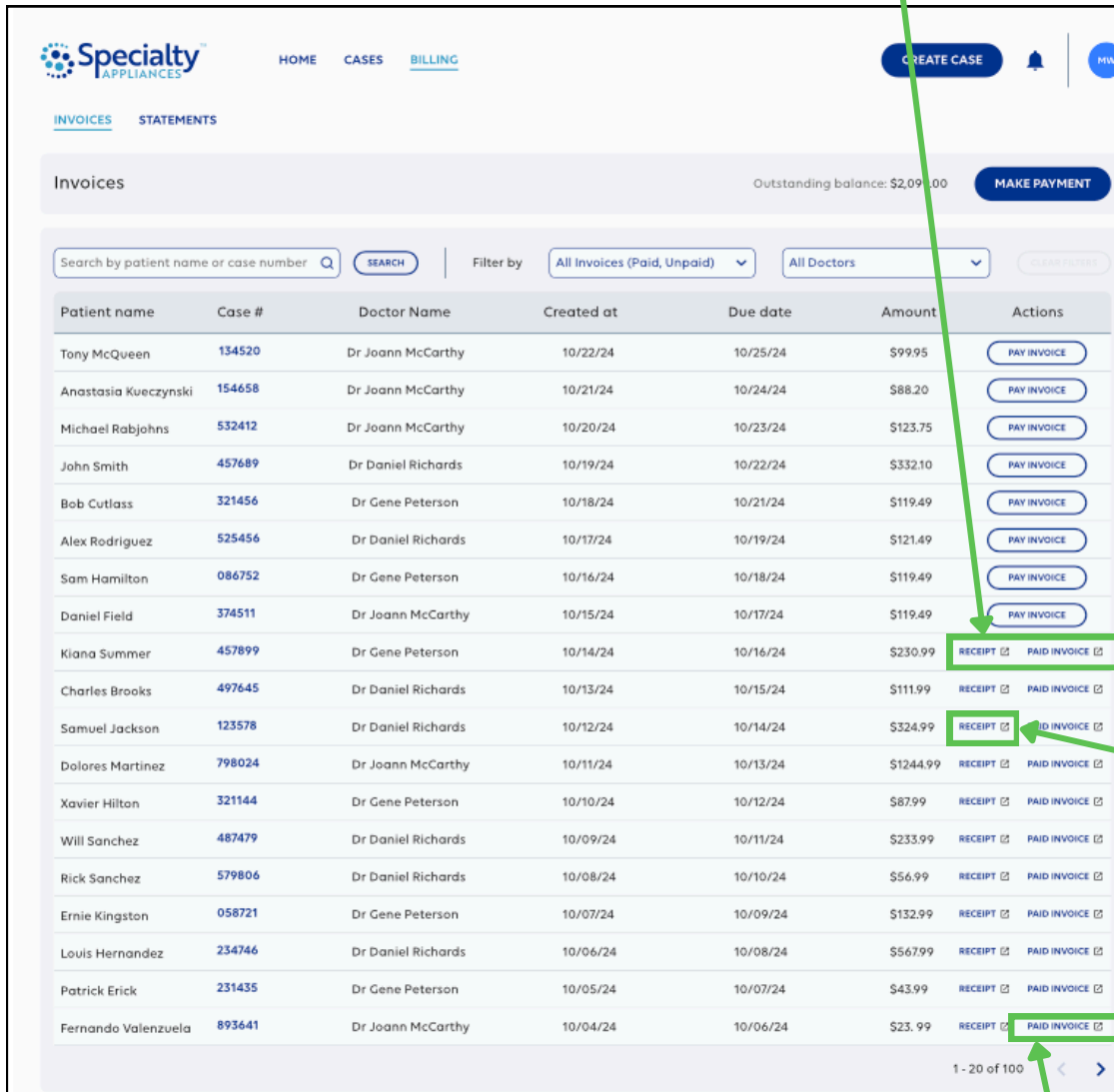
If you enter a search query that yields zero results, you'll see a notification and can clear your search and try again.

The screenshot shows the 'Invoices' section of the Specialty Appliances portal. The search bar contains 'Antonio McQueen', and the 'SEARCH' button is highlighted. A green box highlights the search bar and the 'SEARCH' button. The table below shows 'No results for "Antonio McQueen"'. The 'CLEAR FILTERS' button is visible in the top right corner.

Patient name	Case #	Doctor Name	Created at ↑↓	Due date ↑↓	Amount	Actions
No results for "Antonio McQueen"						

7. BILLING

Any invoice that's been paid, instead of seeing "PAY INVOICE" you'll see a link for the "RECEIPT" and "PAID INVOICE".



Specialty APPLIANCES

HOME CASES BILLING

CREATE CASE

INVOICES STATEMENTS

Invoices Outstanding balance: \$2,094.00 MAKE PAYMENT

Search by patient name or case number SEARCH Filter by All Invoices (Paid, Unpaid) All Doctors CLEAR FILTERS

Patient name	Case #	Doctor Name	Created at	Due date	Amount	Actions
Tony McQueen	134520	Dr Joann McCarthy	10/22/24	10/25/24	\$99.95	PAY INVOICE
Anastasia Kueczynski	154658	Dr Joann McCarthy	10/21/24	10/24/24	\$88.20	PAY INVOICE
Michael Rabjohns	532412	Dr Joann McCarthy	10/20/24	10/23/24	\$123.75	PAY INVOICE
John Smith	457689	Dr Daniel Richards	10/19/24	10/22/24	\$332.10	PAY INVOICE
Bob Cutlass	321456	Dr Gene Peterson	10/18/24	10/21/24	\$119.49	PAY INVOICE
Alex Rodriguez	525456	Dr Daniel Richards	10/17/24	10/19/24	\$121.49	PAY INVOICE
Sam Hamilton	086752	Dr Gene Peterson	10/16/24	10/18/24	\$119.49	PAY INVOICE
Daniel Field	374511	Dr Joann McCarthy	10/15/24	10/17/24	\$119.49	PAY INVOICE
Kiana Summer	457899	Dr Gene Peterson	10/14/24	10/16/24	\$230.99	RECEIPT PAID INVOICE
Charles Brooks	497645	Dr Daniel Richards	10/13/24	10/15/24	\$111.99	RECEIPT PAID INVOICE
Samuel Jackson	123578	Dr Daniel Richards	10/12/24	10/14/24	\$324.99	RECEIPT PAID INVOICE
Dolores Martinez	798024	Dr Joann McCarthy	10/11/24	10/13/24	\$1244.99	RECEIPT PAID INVOICE
Xavier Hilton	321144	Dr Gene Peterson	10/10/24	10/12/24	\$87.99	RECEIPT PAID INVOICE
Will Sanchez	487479	Dr Daniel Richards	10/09/24	10/11/24	\$233.99	RECEIPT PAID INVOICE
Rick Sanchez	579806	Dr Daniel Richards	10/08/24	10/10/24	\$56.99	RECEIPT PAID INVOICE
Ernie Kingston	058721	Dr Gene Peterson	10/07/24	10/09/24	\$132.99	RECEIPT PAID INVOICE
Louis Hernandez	234746	Dr Daniel Richards	10/06/24	10/08/24	\$567.99	RECEIPT PAID INVOICE
Patrick Erick	231435	Dr Gene Peterson	10/05/24	10/07/24	\$43.99	RECEIPT PAID INVOICE
Fernando Valenzuela	893641	Dr Joann McCarthy	10/04/24	10/06/24	\$23.99	RECEIPT PAID INVOICE

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To access a receipt, click on the "RECEIPT" link for the invoice of interest. Your receipt will open in a new tab and you'll be able to view, download, and/or print.

To view an already paid invoice, click on the "PAID INVOICE" link for the invoice of interest. Your invoice will open in a new tab and you'll be able to view, download, and/or print.

7. BILLING

Your entire outstanding balance will be displayed here. This is a summation of the total balance of all unpaid invoices.

Specialty APPLIANCES

HOME CASES BILLING

CREATE CASE

INVOICES STATEMENTS

Invoices

Outstanding balance: \$2,099.00

MAKE PAYMENT

Search by patient name or case number

SEARCH

Filter by All Invoices (Paid, Unpaid)

All Doctors

Patient name	Case #	Doctor Name	Created at	Due date	Amount	Actions
Tony McQueen	134520	Dr Joann McCarthy	10/22/24	10/25/24	\$99.95	PAY INVOICE
Anastasia Kueczynski	154658	Dr Joann McCarthy	10/21/24	10/24/24	\$88.20	PAY INVOICE
Michael Rabjohns	532412	Dr Joann McCarthy	10/20/24	10/23/24	\$123.75	PAY INVOICE
John Smith	457689	Dr Daniel Richards	10/19/24	10/22/24	\$332.10	PAY INVOICE
Bob Cutlass	321456	Dr Gene Peterson	10/18/24	10/21/24	\$119.49	PAY INVOICE
Alex Rodriguez	525456	Dr Daniel Richards	10/17/24	10/19/24	\$121.49	PAY INVOICE
Sam Hamilton	086752	Dr Gene Peterson	10/16/24	10/18/24	\$119.49	PAY INVOICE
Daniel Field	374511	Dr Joann McCarthy	10/15/24	10/17/24	\$119.49	PAY INVOICE
Kiana Summer	457899	Dr Gene Peterson	10/14/24	10/16/24	\$230.99	PAY INVOICE

RECEIPT PAID INVOICE

You can either pay many invoices at once or an individual invoice. To pay across many invoices at once, click "MAKE PAYMENT" here. You'll be brought to the payment page.

Any invoice that hasn't been paid will have a "PAY INVOICE" button. Click on this button to pay for that individual invoice. You'll be brought to the payment page.

7. BILLING

In addition to viewing Invoices, you can view your Statements by clicking here.

All your statements will be organized per year.

For each statement, you'll see the period, statement balance, and a link to the statement. Clicking the "STATEMENT" link will open the corresponding statement in a new tab where you can view, download, and/or print.

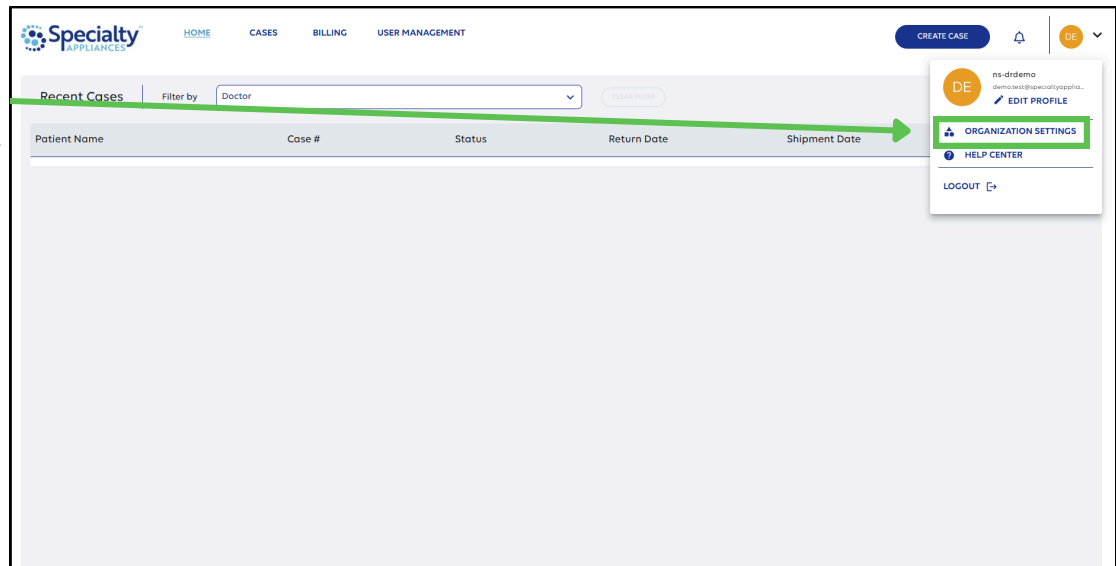
To view statements for a given year, click on the corresponding year to expand all statements for that year.

Statements					
2024					
Period	Statement balance	Actions	Period	Statement balance	Actions
October	\$300.00	STATEMENT 📄	June	\$300.00	STATEMENT 📄
September	\$300.00	STATEMENT 📄	May	\$300.00	STATEMENT 📄
August	\$300.00	STATEMENT 📄	April	\$300.00	STATEMENT 📄
July	\$300.00	STATEMENT 📄	March	\$300.00	STATEMENT 📄
			February	\$300.00	STATEMENT 📄
			January	\$300.00	STATEMENT 📄
2023 ▾					
2022 ▾					
2021 ▾					
2020 ▾					

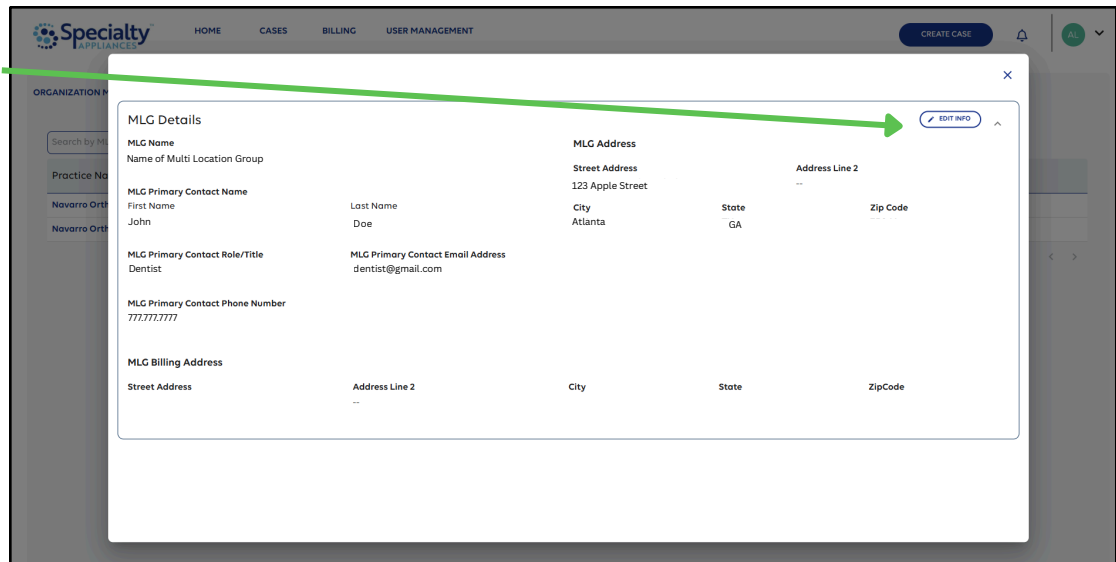
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8. ORGANIZATION SETTINGS

To view your organizational settings, click your profile icon and choose "Organization Settings."



To edit your organizational settings, click "Edit Info".



9. USER MANAGEMENT

To view, add, or modify users, click "User Management".

To add an additional user, click "+Add User".

The screenshot shows the Specialty Appliances web application interface. The top navigation bar includes links for HOME, CASES, BILLING, and USER MANAGEMENT, with the latter highlighted by a green box and an arrow. On the right, there are buttons for CREATE CASE, a notification bell, and a user profile icon. Below the navigation bar, the page title is "USER MANAGEMENT" with a sub-tab "ROLES AND PERMISSIONS". A search bar labeled "Search by User name" with a magnifying glass icon and a "SEARCH" button is present. To the right of the search bar is a "Filter by" dropdown menu set to "Role". Further right are buttons for "EXPORT DATA" and "+ ADD USER". Below these elements is a table with columns: "User Name |1", "Email", "Role |1", "Status |1", and "Actions". A green arrow points from the "+ ADD USER" button to the table area.

Select the user role. This will determine the user's permissions.

Add the user's first name, last name, user name and email address.

Once added, the user will receive an email to set up their account.

For multi-location practices, select the practices the user can manage.

The screenshot shows the "ADD USER" form within the USER MANAGEMENT section. The form fields include: "User Role" (a dropdown menu), "First Name" (text input), "Last Name" (text input), "User Name" (text input), and "Email" (text input). Below the email field is a toggle switch labeled "Allow email notifications for this user". A note states: "This email cannot be changed once account is created. Please enter valid email." At the bottom, there is a link "Associated Practice(s) * MANAGE ASSOCIATED PRACTICES >". On the right side of the form are two buttons: "X CANCEL" and "SAVE CHANGES". A green arrow points from the "First Name" field to the "User Name" field.

9. USER MANAGEMENT

Click “Roles and Permissions” to see the types of roles that you can assign to users.

If you are an independent practice, you will see each of the roles available to practices.

If you are the admin of a multi location group, you will see the practice roles as well as the multi location group roles.

The screenshot displays the 'Specialty APPLIANCES' user management interface. The top navigation bar includes 'HOME', 'CASES', 'BILLING', and 'USER MANAGEMENT'. A 'CREATE CASE' button and a user profile icon are on the right. The 'USER MANAGEMENT' section is active, with a sub-tab 'ROLES AND PERMISSIONS' highlighted by a green box and an arrow. The interface is divided into two main columns. The left column, titled 'Roles', lists 'Multi-Location Group Roles' (Admin, Accounting, Practitioner, Clinical Staff, Front Office) and 'Practice Roles' (Admin, Accounting, Practitioner, Clinical Staff, Front Office). The right column lists various system functions with their corresponding permissions, all set to 'Write (No Restrictions)'.

Function	Permission
Account Management	Write (No Restrictions)
User Management	Write (No Restrictions)
Permissions Management	Write (No Restrictions)
My Profile Management	Write (No Restrictions)
Home Page	Write (No Restrictions)
Cases Page	Write (No Restrictions)
Case Details Screen	Write (No Restrictions)
Case Creation	Write (No Restrictions)
Billing Page	Write (No Restrictions)