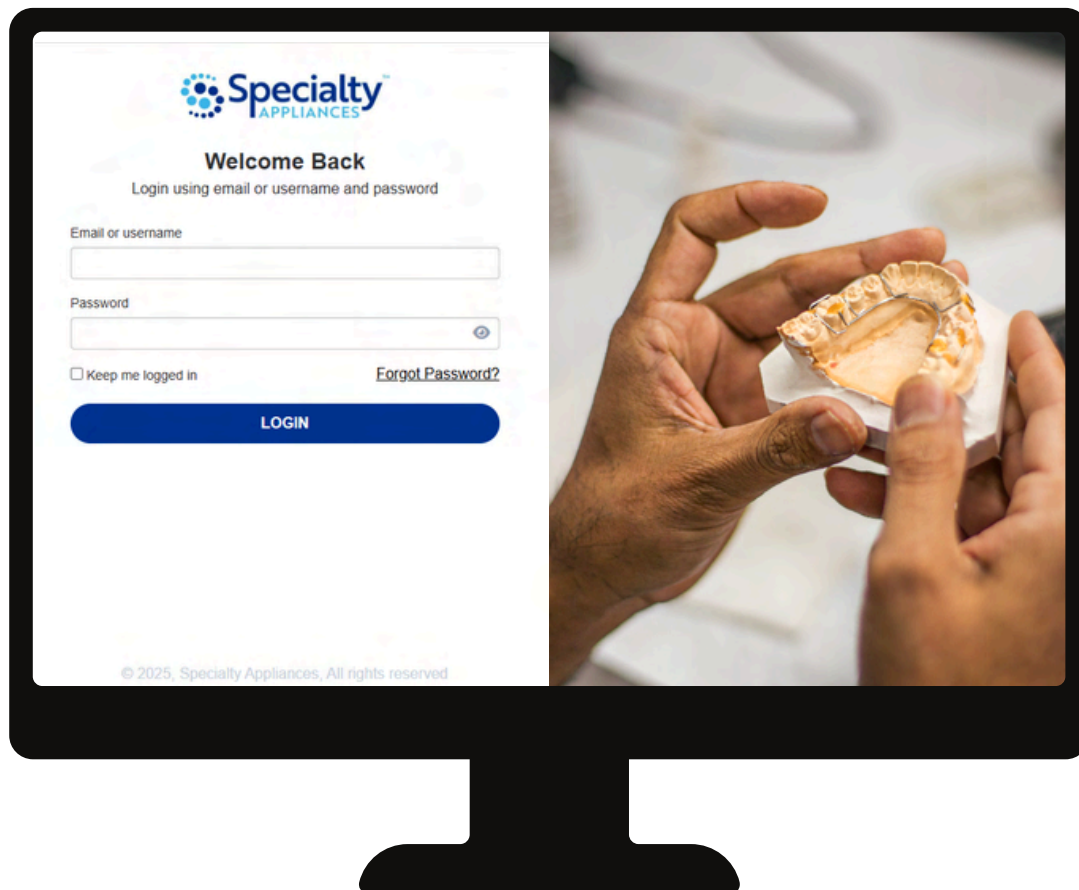




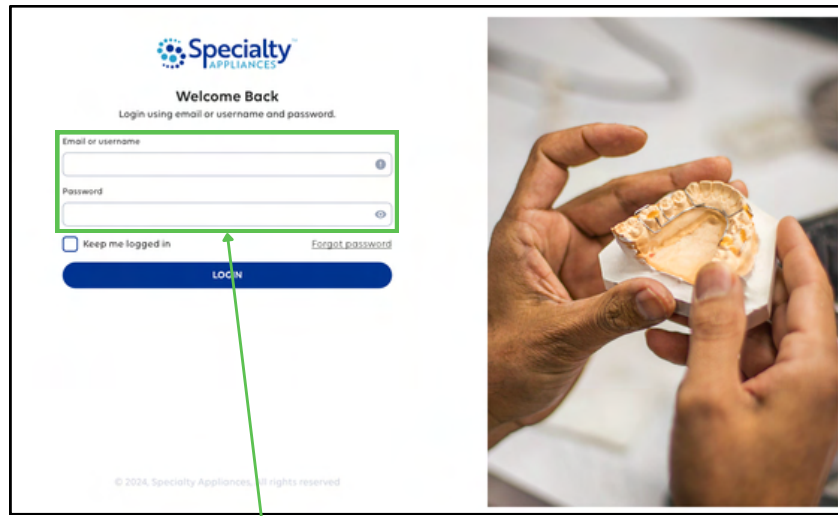
SmileSync User Guide



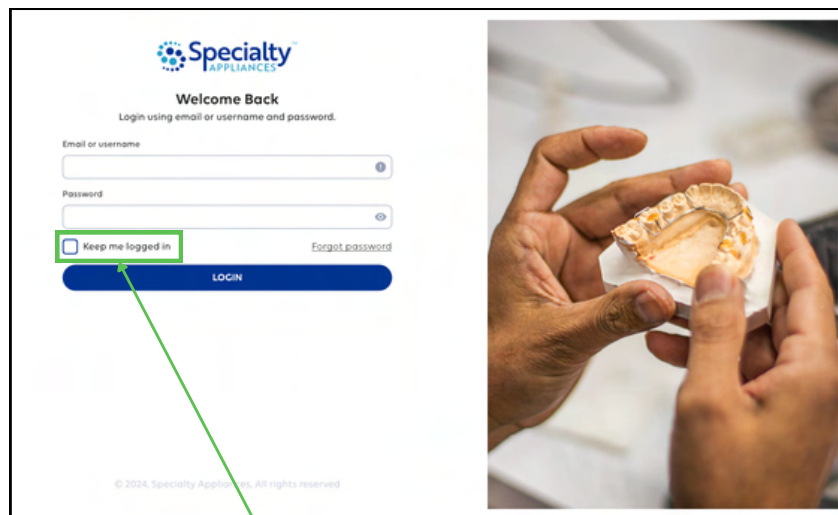
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- 7. BILLING**
- 8. ORGANIZATION SETTINGS**
- 9. USER MANAGEMENT**
- 10. REMAKES**

1. LOGIN AND CHANGE PASSWORD

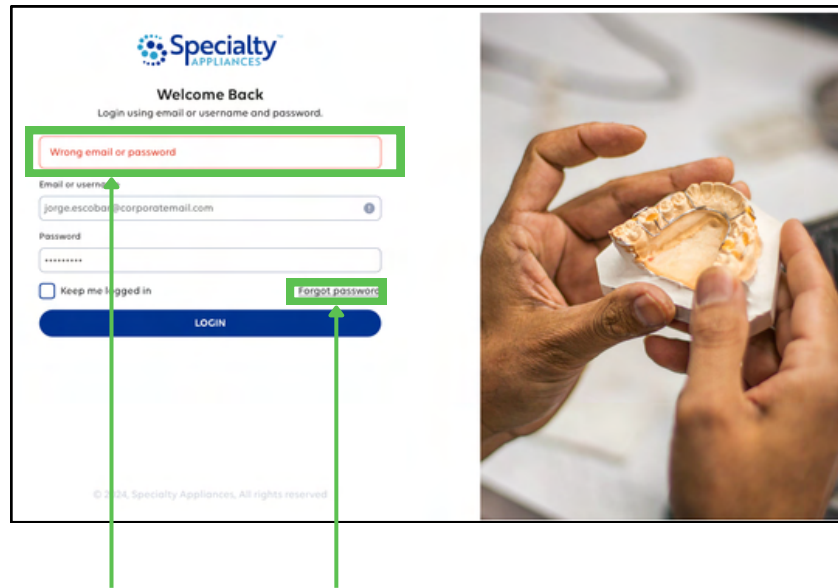


Navigate to the portal login page and enter your credentials. You can use your email or portal username.

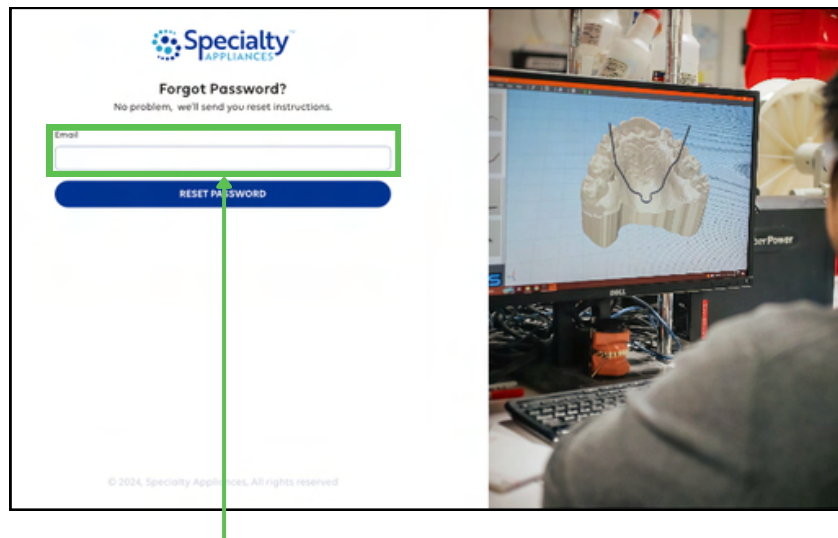


After entering your credentials, you can click "Keep me logged in". This will keep you logged into the portal and you will not need to re-enter your credentials when you come back to login; however, for security measures after a certain amount of time you will need to re-enter your login credentials.

1. LOGIN AND CHANGE PASSWORD



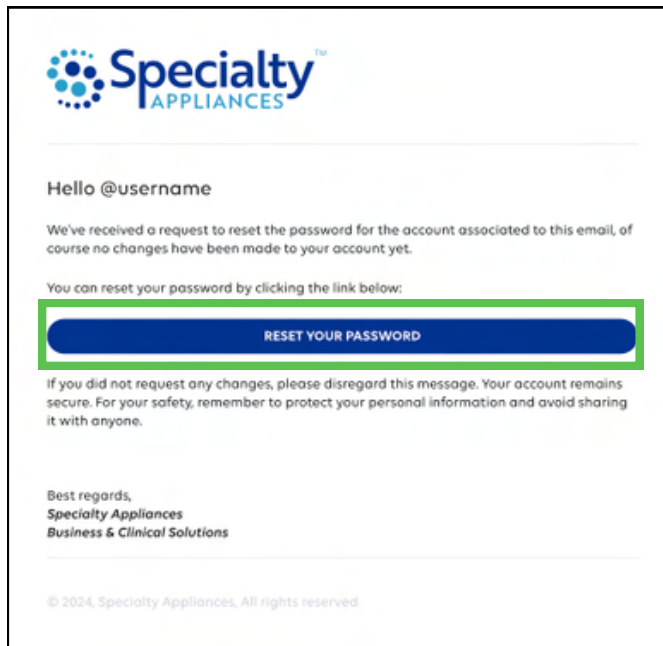
If you enter an incorrect combination of login credentials, you'll receive an error message. You can retry or click "Forgot password".



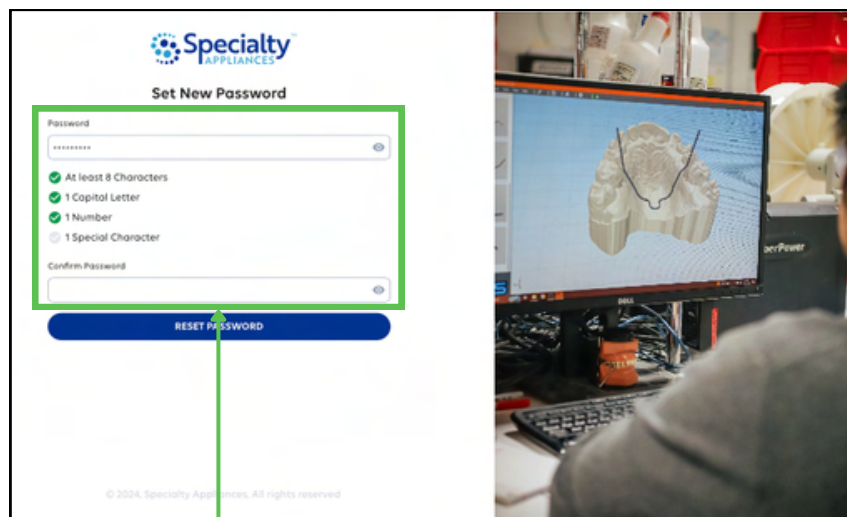
When you click on "Forgot password" on the login screen, you'll be brought to the forgot password page. You must enter your email associated to your account to proceed with resetting your password.

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

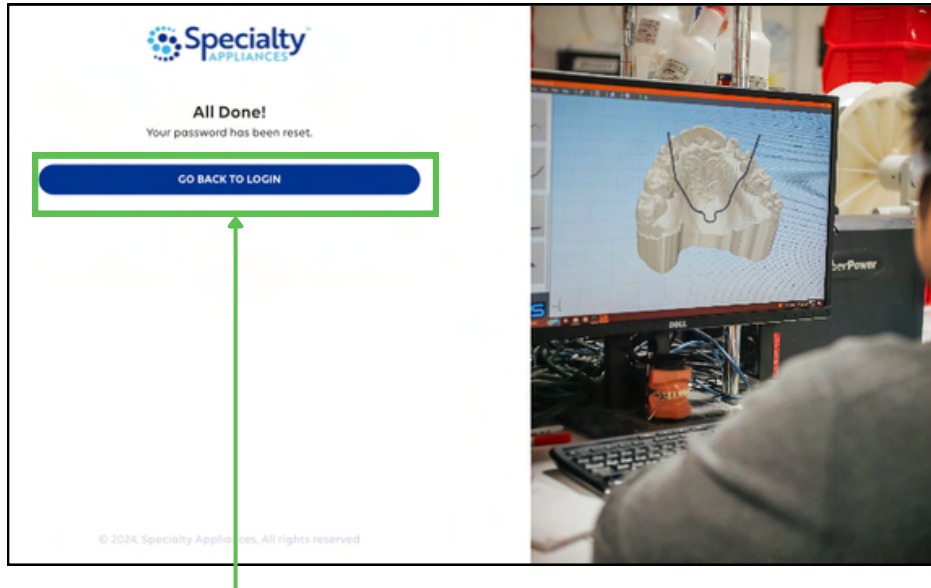


When you receive the email, click on "RESET YOUR PASSWORD"



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

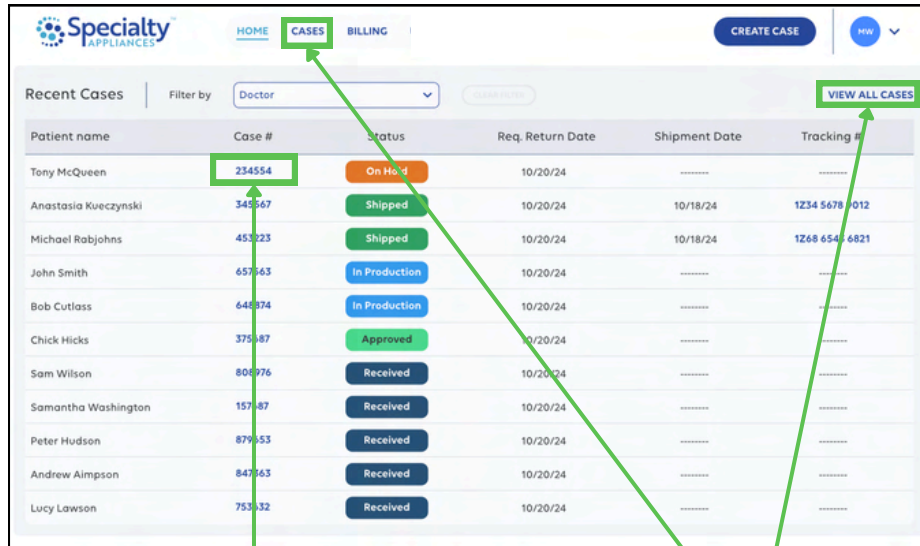
Patient name	Case #	Status	Req. Return Date	Shipment Date	Tracking #
Tony McQueen	234554	On Hold	10/20/24	*****	*****
Anastasia Kueczynski	345567	Shipped	10/20/24	10/18/24	1234 5678 9012
Michael Rabjohns	453223	Shipped	10/20/24	10/18/24	1268 6543 6821
John Smith	657563	In Production	10/20/24	*****	*****
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 Kueczynski	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



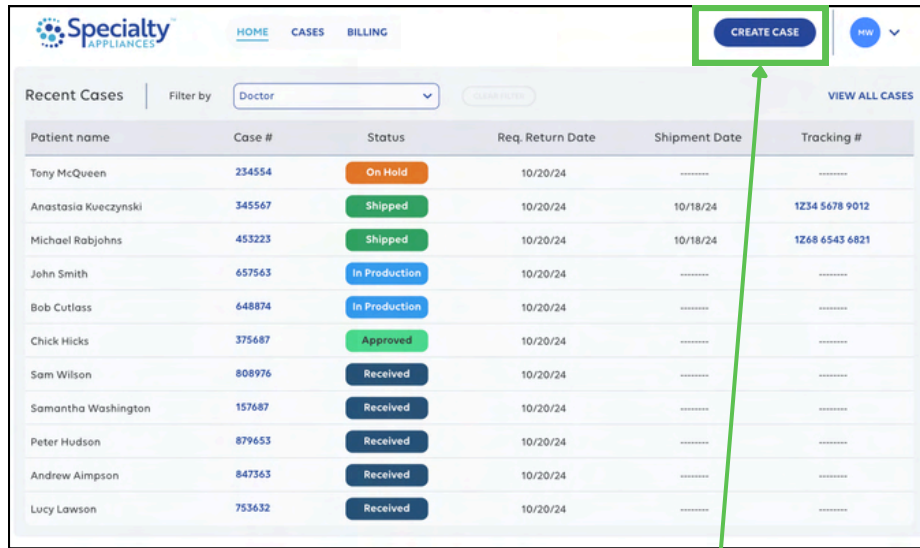
The screenshot displays the Specialty Appliances Home Screen. At the top, there are navigation tabs: HOME, CASES, and BILLING. The CASES tab is highlighted with a green box and a green arrow. Below the tabs, there's a 'Recent Cases' section with a filter dropdown set to 'Doctor' and a 'VIEW ALL CASES' 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, for Tony McQueen with Case # 234554, is highlighted with a green box and a green arrow. The status for this case is 'On Hold'.

Patient name	Case #	Status	Req. Return Date	Shipment Date	Tracking #
Tony McQueen	234554	On Hold	10/20/24	*****	*****
Anastasia Kveczynski	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	648974	In Production	10/20/24	*****	*****
Chick Hicks	375187	Approved	10/20/24	*****	*****
Sam Wilson	800976	Received	10/20/24	*****	*****
Samantha Washington	157187	Received	10/20/24	*****	*****
Peter Hudson	879553	Received	10/20/24	*****	*****
Andrew Almpson	847563	Received	10/20/24	*****	*****
Lucy Lawson	753132	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

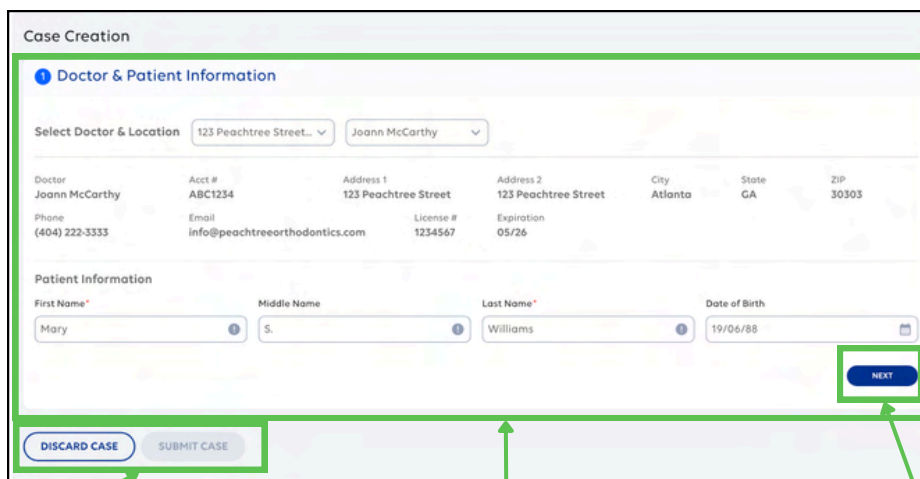
3. SUBMITTING A NEW CASE



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 'CREATE CASE' button highlighted with a green box. Below the navigation bar, there is a 'Recent Cases' section with a filter dropdown set to 'Doctor'. A table lists recent cases with columns for Patient name, Case #, Status, Req. Return Date, Shipment Date, and Tracking #. A green arrow points from the 'CREATE CASE' button to the 'Case Creation' form below.

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 Almpson	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 'Doctor & Patient Information' section is highlighted with a green box. It includes a 'Select Doctor & Location' dropdown, a 'Doctor' dropdown, and a 'Patient Information' section with fields for First Name, Middle Name, Last Name, and Date of Birth. The 'DISCARD CASE' button is highlighted with a green box. A green arrow points from the 'DISCARD CASE' button to the text below.

Case Creation

1 Doctor & Patient Information

Select Doctor & Location: 123 Peachtree Street... Joann McCarthy

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, Expiration: 05/26

Patient Information

First Name*: Mary, Middle Name: S., Last Name*: Williams, Date of Birth: 19/06/88

DISCARD CASE SUBMIT CASE NEXT

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' form with the following elements:

- Navigation bar: HOME, CASES, BILLING
- User profile: MW
- Step 1: Doctor & Patient Information
- Step 2: Dental Arch Type (highlighted with a green border)
- Diagram showing three dental arches: UPPER, LOWER, and BOTH.
- Radio buttons: UPPER, LOWER, BOTH (BOTH is selected).
- Buttons: DISCARD CASE, SUBMIT CASE, NEXT.

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' form with the following elements:

- Step 1: Doctor & Patient Information
- Step 2: Dental Arch Type
- Step 3: Product Category & Appliance / Upper Arch (highlighted with a green border)
- Left panel: Select Group (CLASS II CORRECTION, CLASS III CORRECTION, EXPANSION, DISTALIZATION, RETAINERS, HABIT & HOLDING APPLIANCES, SPRINTS & MOUTH GUARDS, INDIRECT BONDING, DIGITAL ORTHODONTICS, ALIGNERS & POSITIONERS, HYBRID TREATMENT & ACCESSORIES).
- Right panel: Select Appliance (Fixed: STANDARD HERBST, CANTILEVER HERBST, SPACE CLOSING HERBST, ACRYLIC/METAL HERBST, M.A.R.A, X-BOW; Removable: Twin Block).
- Diagram showing a dental arch with two appliances (highlighted with a green border).
- Buttons: DISCARD CASE, SUBMIT CASE, NEXT.

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: 'Doctor & Patient Information', 'Dental Arch Type', 'Product Category & Appliance', and 'Appliance details / Upper - Hawley Standard'. The 'Configuration' section is highlighted with a green box and contains three radio button options: 'DEFAULT CONFIGURATION', 'SAVED CONFIGURATIONS', and 'NEW CONFIGURATION'. The 'Reset Teeth Per Diagram' section is also highlighted with a green box and contains four radio button options: 'DO NOT RESET TEETH', 'COMPROMISE RESET', 'RESET TEETH IDEALLY', and 'DO NOT STRIP TEETH'. To the right of these sections is a diagram of a dental arch with teeth labeled 'R' and 'L'. At the bottom of the form 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](#)

22

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

The screenshot shows the 'Case Creation' form in the Specialty Appliances portal. The form is divided into five main sections, each with a dropdown arrow on the right:

- 1 Doctor & Patient Information
- 2 Dental Arch Type
- 3 Product Category & Appliance / Upper
- 4 Appliance details / Upper - Invisible Retainer
- 5 Model submission type

Section 5, 'Model submission type', contains two large upload areas and two checkboxes:

- Upload .STL Files:** A box with a button 'Upload .STL Files' and the text 'Or Drag & Drop here'.
- Upload OTHER Files:** A box with a button 'Upload OTHER Files' and the text 'Or Drag & Drop here'.
- ☐ STONE MODEL
- ☐ SUBMIT BY SCANNER

Below these options is a red asterisk note: '*To proceed with the case creation upload at least one .STL file.' At the bottom of the form are buttons for 'DISCARD CASE', 'SUBMIT CASE', and 'NEXT'.

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

For analog cases, select "Stone Model".

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: Neha Gowman Doctor name: Dr. McCarthy

Prescription details

Retainer

Editing 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	☐
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,

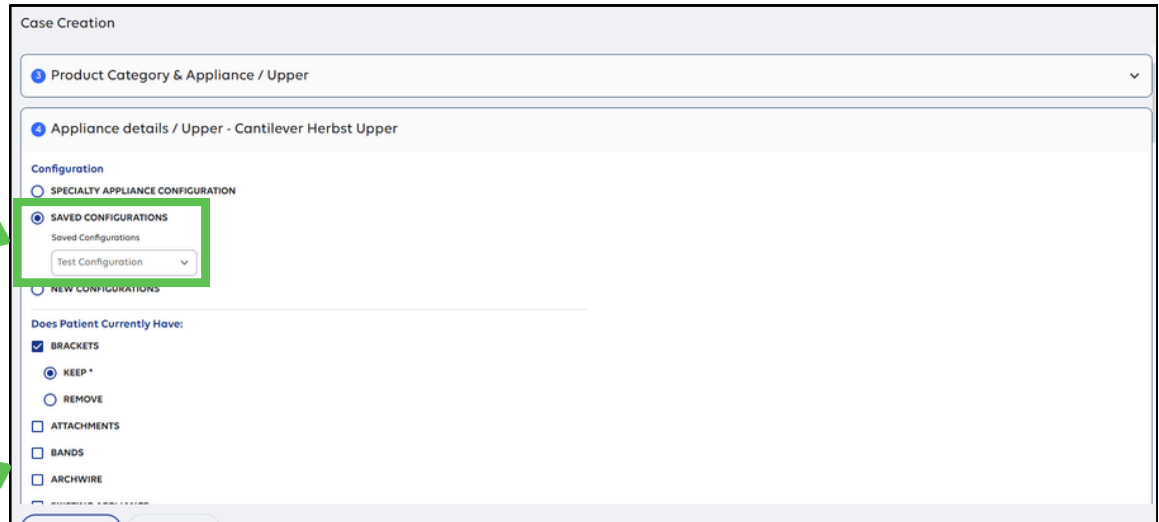
Regardless of the configuration, you're able to select the appropriate options and accessories available for the selected appliance.

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 active. 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' 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

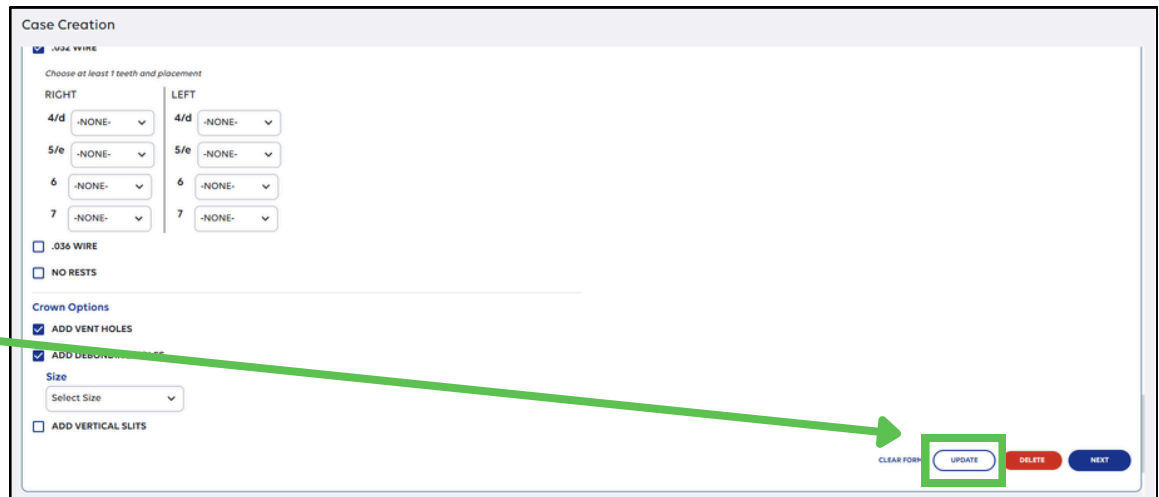
B. MODIFYING A SAVED CONFIGURATION

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 three radio buttons: 'SPECIALTY APPLIANCE CONFIGURATION', 'SAVED CONFIGURATIONS' (which is selected and highlighted with a green box), and 'NEW CONFIGURATIONS'. Under 'SAVED CONFIGURATIONS', there's a dropdown menu showing 'Test Configuration'. Below this, the 'Does Patient Currently Have:' section has several checkboxes: 'BRACKETS' (checked), 'KEEP *' (selected with a radio button), 'REMOVE', 'ATTACHMENTS', 'BANDS', and 'ARCHWIRE'.

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



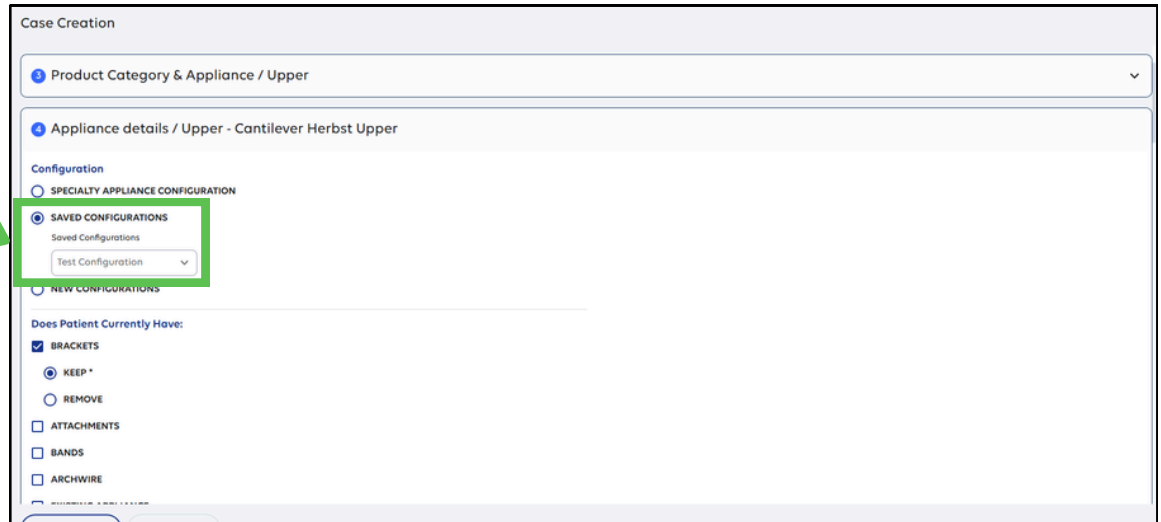
The screenshot shows the 'Case Creation' interface with various options. Under 'Crown Options', there's a checked box for 'ADD VENT HOLES' and a checked box for 'ADD DEBRIS HOLES'. Below these, there's a 'Size' dropdown menu. At the bottom right, there are three buttons: 'CLEAR FORM', 'UPDATE' (highlighted with a green box), and 'DELETE'. A green arrow points from the 'Update' button to the text below.

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

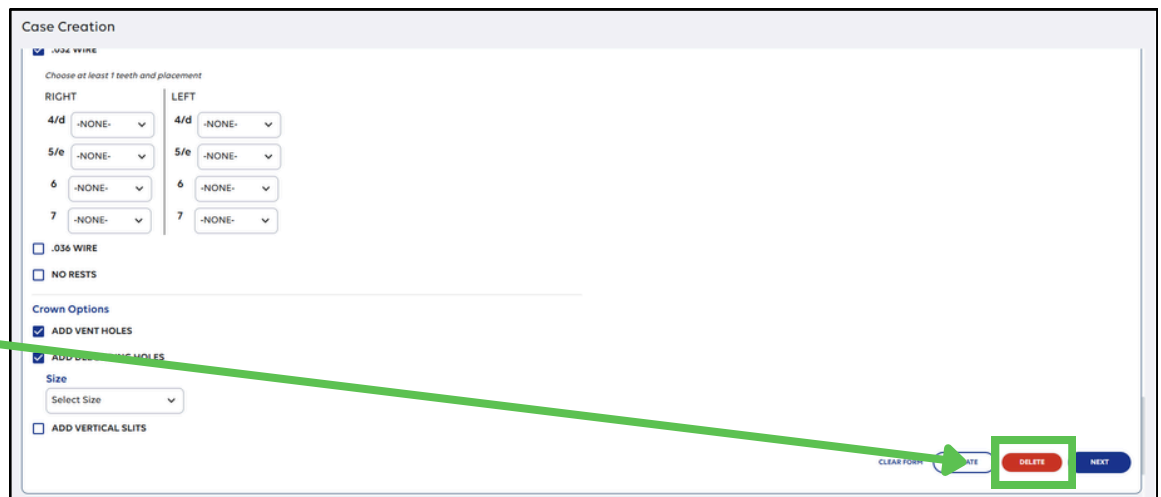
C. DELETING A SAVED CONFIGURATION

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 'select the Saved Configuration that you would like to delete.' 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 like .036 WIRE, NO RESTS), 'Crown Options' (with options like ADD VENT HOLES, ADD BUSHING HOLES, ADD VERTICAL SLITS), and a 'Size' dropdown. At the bottom right, there are three buttons: 'CLEAR FORM', 'DELETE' (highlighted with a green box and a green arrow), and 'NEXT'. A green arrow points from the text 'Then select "Delete". This will remove the saved configuration from your account.' to the 'DELETE' button.

5. CHECK CASE STATUS

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 Robjohns	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	-----

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	

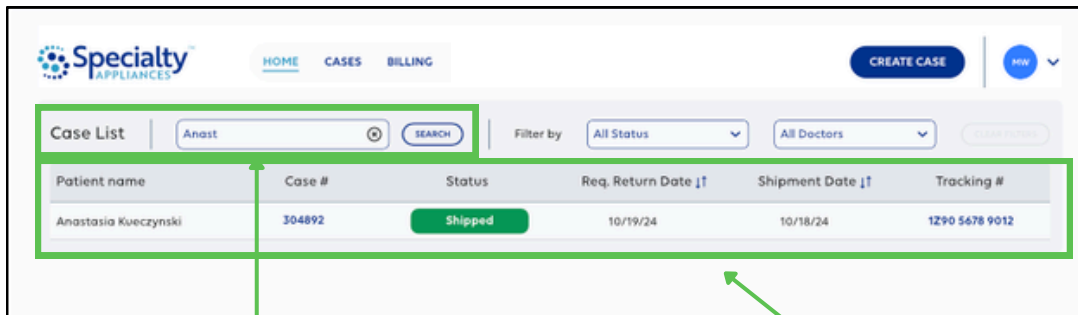
1 - 20 of 200

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 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 filters for 'All Status' and 'All Doctors'. Below the search bar is a table with the following data:

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

To find a specific case, you can:

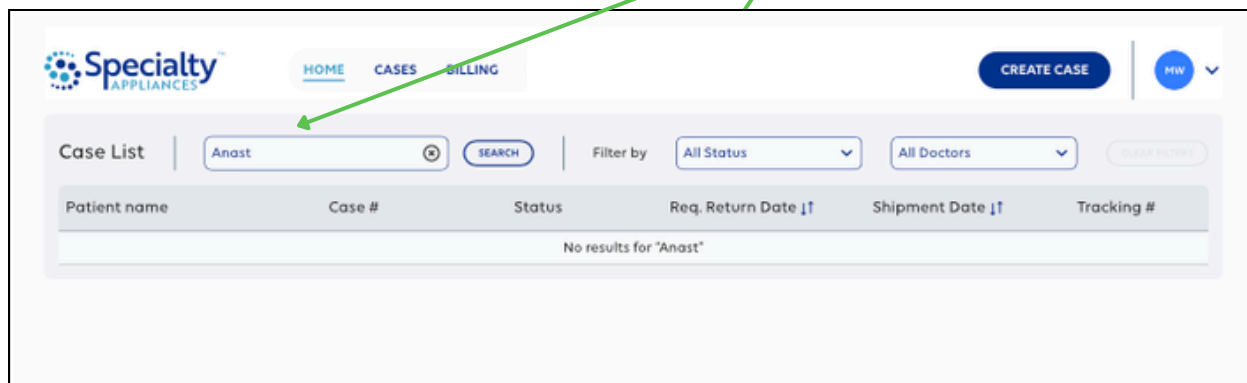
- search by patient name or case number in the search field
- Filter by an individual status or doctor

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

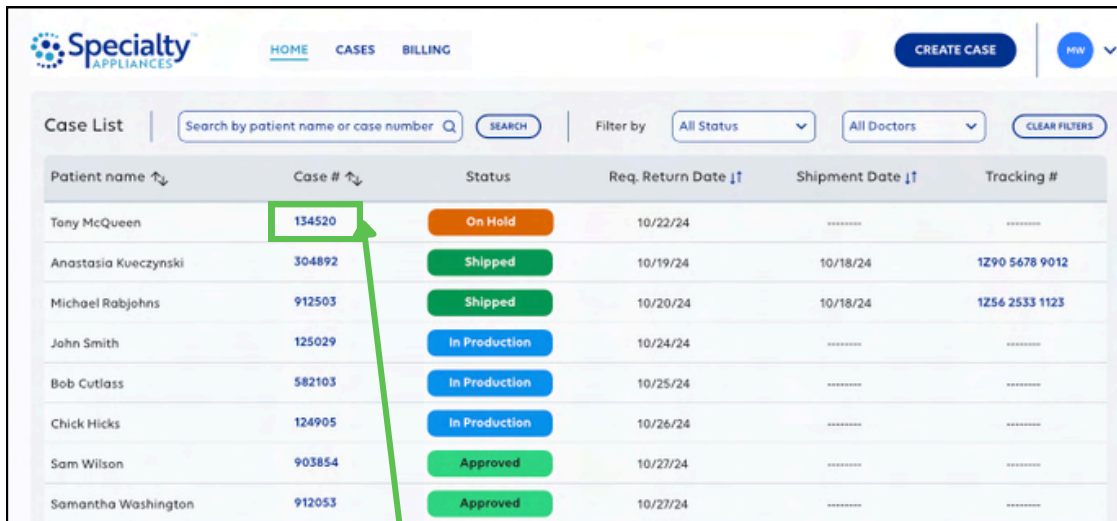
If you enter a search that yields zero results, you'll see a zero results message. You can clear your search by hitting the "X" in the search field.



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 bar.

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 #.

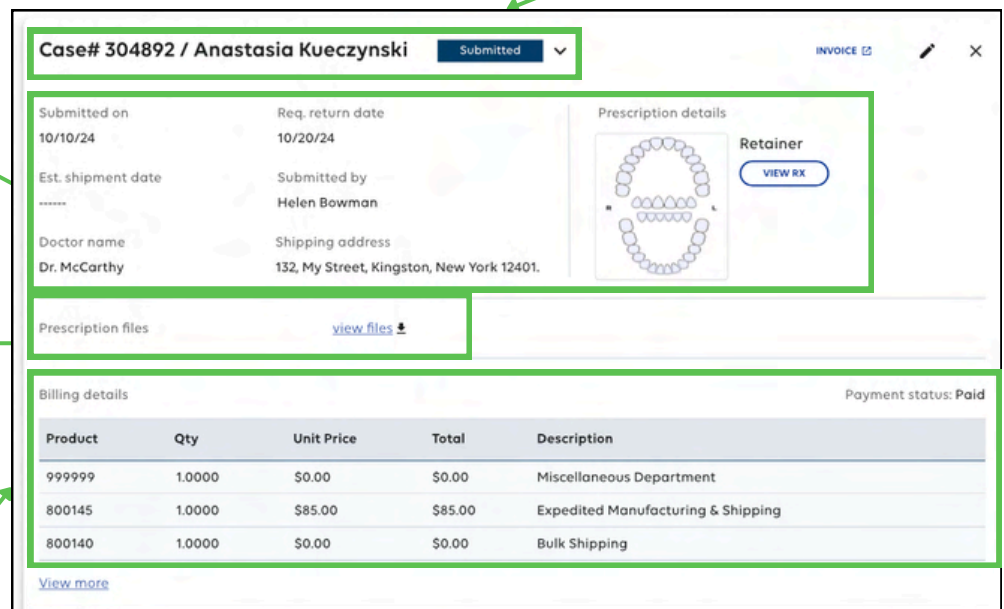
D. INDIVIDUAL CASE DETAILS

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 | Prescription details: Retainer (VIEW RX)

Est. shipment date: ***** | Submitted by: Helen Bowman

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

Prescription files: [view files](#)

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

Payment status: Paid

[View more](#)

6. VIEW AND MANAGE CASE

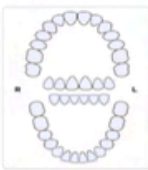
E. KEY ACTIONS

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.

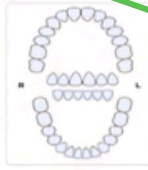
If there are more billing details than what's displayed by default, you'll see a View more link. Click here to view all billing details.

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 Kuczynski 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 Kveczynski	154658	Dr Joann McCarthy	10/21/24	10/24/24	\$88.20	PAY INVOICE
Michael Robjohns	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 Kveczynski	154658	Dr Joann McCarthy	10/21/24	10/24/24	\$88.20	PAY INVOICE
Michael Robjohns	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 input and the 'SEARCH' button. Another green box highlights the 'X' icon next to the search input. A third green box highlights the 'SEARCH' button. The table below shows one result for Tony McQueen with Case # 134520, Doctor Name Dr. Joann McCarthy, and an amount of \$99.95. The 'Actions' column has a 'PAY INVOICE' button.

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	<button>PAY INVOICE</button>

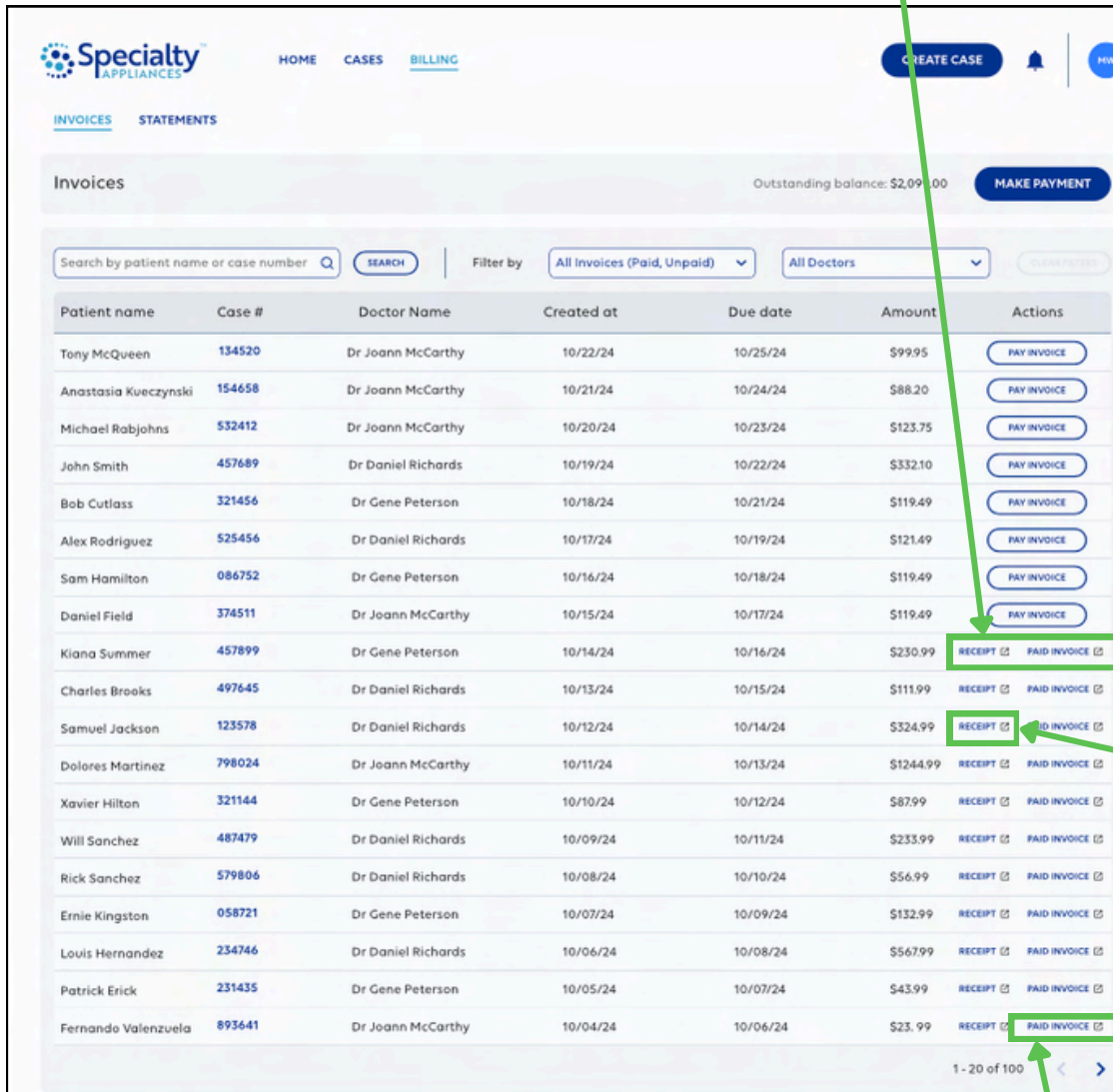
If you enter a search query that yields zero results, you'll see a notification and can clear your search and try again.

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 input and the 'SEARCH' button. Another green box highlights the 'X' icon next to the search input. A third green box highlights the 'SEARCH' button. The table below shows 'No results for "Antonio McQueen"'. The 'Actions' column is empty.

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: \$2,091.00 MAKE PAYMENT

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

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 Robjohns	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

1 - 20 of 100

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	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.

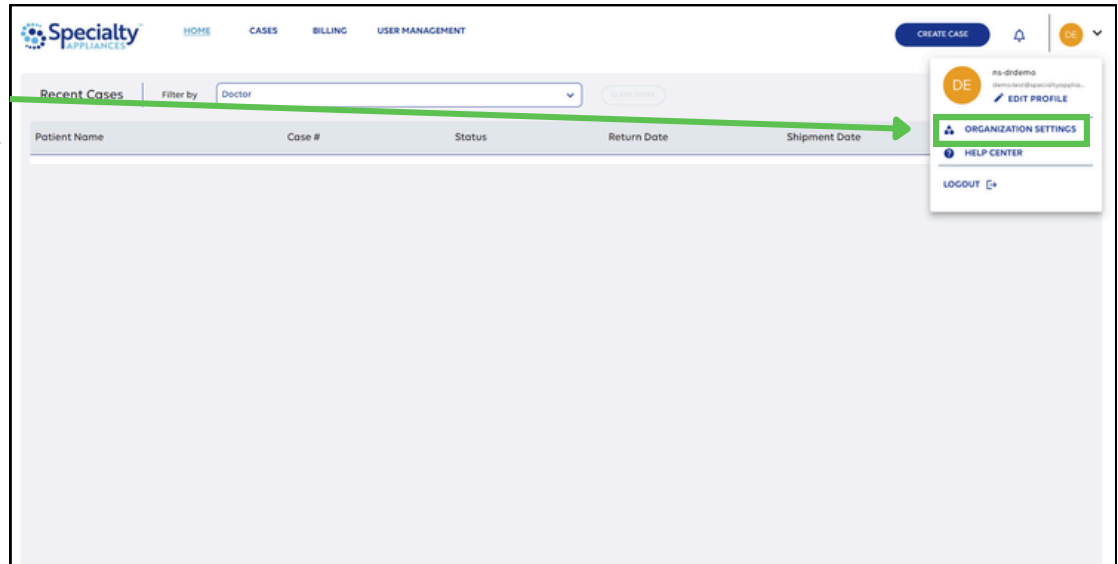
For each statement, you'll see the period, statement balance, and a link to the statement. Clicking the "STATEMENT" link will open the corresponding statement in a new tab where you can view, download, and/or print.

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

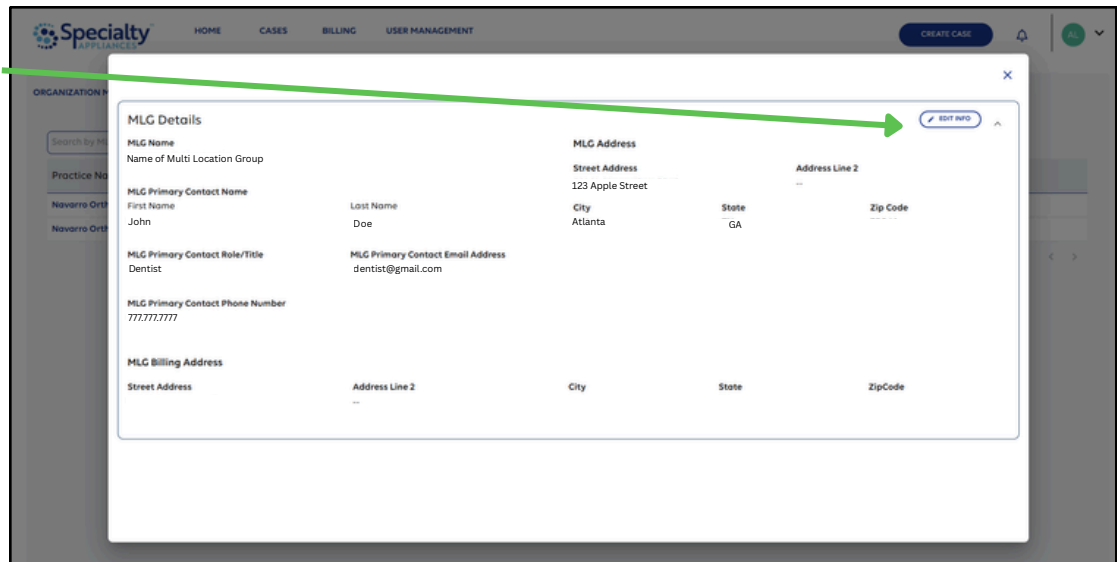
Statements					
2024					
Period	Statement balance	Actions	Period	Statement balance	Actions
October	\$300.00	STATEMENT	June	\$300.00	STATEMENT
September	\$300.00	STATEMENT	May	\$300.00	STATEMENT
August	\$300.00	STATEMENT	April	\$300.00	STATEMENT
July	\$300.00	STATEMENT	March	\$300.00	STATEMENT
			February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

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".

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. A green arrow points from the text instruction to this box. On the right side of the navigation bar, there are buttons for CREATE CASE, a notification bell, and a user profile icon labeled 'All'. Below the navigation bar, the main content area is titled 'USER MANAGEMENT' and 'ROLES AND PERMISSIONS'. It features a search bar labeled 'Search by User name' with a magnifying glass icon and a 'SEARCH' button. To the right of the search bar is a 'Filter by' dropdown menu currently set to 'Role'. Further right is a '+ ADD USER' button, which is pointed to by a green arrow from the text instruction below. Below these elements is a table with columns: 'User Name |1', 'Email', 'Role |1', 'Status |1', and 'Actions'. The table is currently empty.

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

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 contains several input fields: a 'User Role' dropdown menu, and three text boxes for 'First Name', 'Last Name', and 'User Name'. Below these is an 'Email' text box. A toggle switch labeled 'Allow email notifications for this user' is currently turned on. A small note below the email field states: 'This email cannot be changed once account is created. Please enter valid email.' At the bottom of the form is a section for 'Associated Practice(s)' with a link to 'MANAGE ASSOCIATED PRACTICES >'. At the bottom right of the form are two buttons: 'X CANCEL' and 'SAVE CHANGES'.

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 green box highlights the 'ROLES AND PERMISSIONS' tab, with a green arrow pointing to it from the text on the left. The main content area is titled 'USER MANAGEMENT' and is divided into two sections: 'Roles' and 'Permissions'. The 'Roles' section is further divided into 'Multi-Location Group Roles' and 'Practice Roles'. The 'Multi-Location Group Roles' section lists 'Admin', 'Accounting', 'Practitioner', 'Clinical Staff', and 'Front Office'. The 'Practice Roles' section lists 'Admin', 'Accounting', 'Practitioner', 'Clinical Staff', and 'Front Office'. The 'Permissions' section lists various system functions and their associated permissions, all set to 'Write (No Restrictions)'. The functions listed are: Account Management, User Management, Permissions Management, My Profile Management, Home Page, Cases Page, Case Details Screen, Case Creation, and Billing Page.

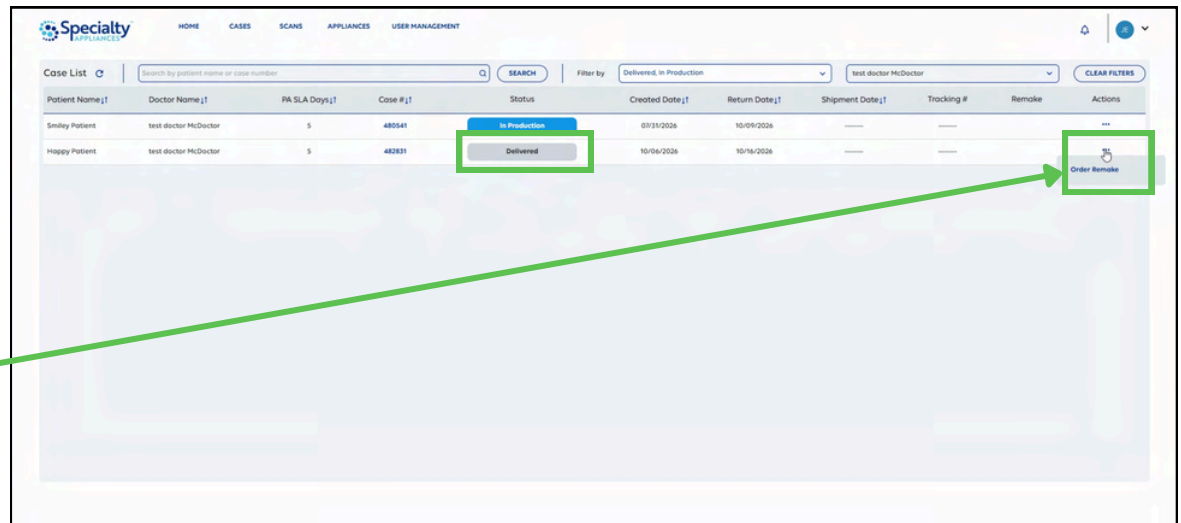
Function	Permission
Account Management	Write (No Restrictions)
User Management	Write (No Restrictions)
Permissions Management	Write (No Restrictions)
My Profile Management	Write (No Restrictions)
Home Page	Write (No Restrictions)
Cases Page	Write (No Restrictions)
Case Details Screen	Write (No Restrictions)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

10. REMAKES

Remakes can be initiated within the portal for cases that are in the "Delivered" status.

Find the case that you would like to begin the remake for on the "Cases" tab.

Select the three dots under Actions and choose "Order Remake"



In the popup menu, choose to use the same prescription or change the prescription.

Then, select the arch to remake.

Specify if you would like to use the same scan or upload a new one.

Select the reason for the remake from the dropdown button.

Optionally, provide additional details (e.g., 'the acrylic is too thick').

10. REMAKES

Confirm the original case number, shipping address, and review the default return date.

If the lab has any additional questions, we will reach out.

The screenshot shows a mobile application interface with a modal form titled "REMAKES". The background is a blurred view of a table with columns "Case #", "Return Date", and "Shipme". The modal form contains the following sections:

- Select ***
 - ☒ Use same prescription
 - Uses the original prescription • Arch : Upper, Lower
 - ☐ Upper Arch - E-Arch Upper
 - ☒ Lower Arch - Guardian: Lower
 - Do you want to use the same scan file? *
 - ☒ Yes ☐ No
 - ☐ Change prescription
 - Creates a new prescription • Arch : Upper, Lower, Both
- Reason ***
 - Does not fit
- Will you be returning the appliance? ***
 - ☒ Yes ☐ No
- Secondary Reason ***
 - Acrylic
- Detail ***
 - Calendar view for October 2026 with the 14th selected.
 - 10/14/26
 - [Warranty Policy Link](#)
- Buttons:** X CANCEL, CONTINUE