ACTIVE ALIGNERS

Case step by step checklist

From the first consultation to manufacture.

PATIENT NAME

DATE

1 Initial consultation

- [ ] **1.** Normal consultation to ensure all cavities and/or dental work is complete, and cleaning is done.
- [ ] **2.** Informed consent (download at www.activealigners.co.za/doctors-library/)
- [ ] **3.** Use the Rx aligner document to guide you with instructions for uploading to your case.
- [ ] **4.** Quality control images (8 photos – guide in the Doctors Library)
- [ ] **5.** Supporting documentation (x-rays, etc.)

NOTE Check that scans show 2–3 mm gingiva and include the 8's. Please check for drag, bubbles, missing anatomy and debris. Inferior scans will be rejected.

2 Submit for treatment planning

Planning · 3 working days

- [ ] **1.** Create your patient folder with quality control images, your patient's scans and x-rays. Name it your patient's name, and .zip it.
- [ ] **2.** Create the patient's case on the treatment platform: www.activealigners.co.za/doctors-login/ (include instructions for treatment planners; any information entered is for the patient, as the profile belongs to the Doctor)

NOTE A guide to Case Creation is available in the Doctors Library. Treatment planning will proceed once all information has been loaded for the case. Treatment planning takes 3 working days.

3 Review case

- [ ] **1.** Review your case on the platform to be sure the outcome is what was requested (contact us if you need help).
- [ ] **2.** If need be, send for redesign with new instructions.

NOTE Once the case has been treatment planned, it moves to Needs Approval. Click Actions (top right) and choose Review Case to see the 3D simulation, the IPR, the attachment positions and the treatment plan PDF.

4 Send case to manufacture

Manufacture · 7–10 working days

- [ ] **1.** Approve case on the platform.
- [ ] **2.** Complete our online lab slip (contact us if the link has not been received).

NOTE Manufacture takes 7–10 working days after approval and lab slip have been received.

DOCTORS LIBRARY
activealigners.co.za/doctors-library
Under the Doctor's Resources tab

SCANS
submissions@smileclublab.co.za

CONTACT US
smile@activealigners.com

Case step by step checklist

Case delivery, monitoring, adjustments and retention

5 Case delivery

- [ ] **1.** Check if the stage 1 aligner fits correctly.
- [ ] **2.** Attachment requirements checked. Attachments placed using template.
- [ ] **3.** IPR requirements checked – perform stage 1 IPR and schedule future IPR with the patient. Make sure an IPR gauge has been used to check all measurements.
- [ ] **4.** Patient's stage 1 aligner engages attachments and fits correctly over all teeth.
- [ ] **5.** Patient is shown how to use chewies to fit aligners, and how to correctly remove aligners with the removal tool.
- [ ] **6.** Patient has been made aware of their responsibility and ownership of the case in order for the desired outcome to be reached.
- [ ] **7.** Patient Instruction Manual has been explained to the patient, and the patient has this in their possession. The insert in the accessories box for the patient journal and before and after submissions has been given to the patient.
- [ ] **8.** Patient has downloaded and been shown how to use the TRAYMINDER App.
- [ ] **9.** Discuss how to keep aligners clean, together with maintaining good oral health during treatment.

6 Treatment monitoring / follow-up appointments

- [ ] **1.** We recommend monitoring treatment every 6–8 weeks. For more complex cases, use your discretion but consider shorter review periods.
- [ ] **2.** Check that the current stage is seating correctly and all attachments are engaging. Confirm that the patient is using their chewies to seat the aligners.
- [ ] **3.** Check all contact points. Pay special attention to areas where IPR needs to be done. Movements can be blocked due to contacts; additional IPR can be done to free those contacts. Always use a gauge to check IPR measurements. Proceed with further IPR if required or indicated in the plan.
- [ ] **4.** Check that the patient has been compliant – if the patient does not wear their aligners as directed, they will not reach the desired outcomes. Each stage will be a worse fit, until eventually fitment is not possible and the case will not track.
- [ ] **5.** Deliver the next set of Active Aligners and schedule the next appointment.

NOTE If the aligners are not fitting 100%, some teeth may still move. It may then not be possible to backtrack to a previous stage. In some cases, incorrect forces will be applied, which in turn will cause teeth to move in undesired directions (especially if attachments are not engaging correctly), which may then require a mid-course correction.

! Adjustments (if a case is not tracking)

- [ ] **1.** The patient may need to wear their aligner stage for longer than the recommended 2 weeks.
- [ ] **2.** Backtrack to an aligner that fits and continue from this point.
- [ ] **3.** Additional IPR may be necessary.
- [ ] **4.** If an attachment has come off, the CURRENT stage may be used as a template to re-attach the attachment.
- [ ] **5.** If in doubt, or backtracking more than two stages, submit a current scan to submissions@smileclublab.co.za and complete a lab form to request an overlay. Remember to include the patient's current stage and your concerns on the lab slip request.

NOTE There should be no changes / restorative work done during treatment, as this will result in aligners not fitting correctly and therefore not being effective!

7 Retention

- [ ] **1.** At completion of the last aligner, confirm that the patient is happy with the outcome before removing attachments.
- [ ] **2.** Full-time retention for 3 months or more. Thereafter indefinitely at night.
- [ ] **3.** To prevent relapse, fixed retainers, in addition to removable, may be a better option for some patients.