

ACTIVE ALIGNERS

PROVIDER GUIDE · GLOBAL

Platform basics for creating a new case

How to create, submit and approve an Active Aligners case on the 3Shape Design Service platform.



[WATCH THE VIDEO](#)

Scan to watch the case creation video (6 min)

vimeo.com/1230884537

BEFORE YOU START

- Only the **Dental Professional's login** can create a new case for that practice on the platform.
- Once you've created the case, the lab can add scan files to it: scans sent directly to the lab.
- Send scans to submissions@smileclublab.co.za

FIRST

Create a .zip file

The only way to create a new case is with a .zip file. We suggest you create an Active Aligners folder on your computer, and add a folder for each patient to it. Each patient's folder should be named with the patient's name, and will contain the quality control images, scans and x-rays for that patient.

01 · SELECT

Select the images

Hold left-click and drag a box around all of the patient's quality control images.

02 · COMPRESS

Send to

Right-click the selection, choose **Send to**, then **Compressed (zipped) folder**.

03 · NAME

Name it

Name the .zip with your patient's name, e.g.

John_Brown.zip

MAC On a Mac, right-click the selected files and choose **Compress**, then rename the .zip.

STEPS TO CREATE A CASE

Log in

1 Check your .zip

Make sure the .zip file is saved as your patient's name, e.g. **John_Brown.zip**

2 Log in to the 3Shape Design Portal

Go to design.3shape.com. Your username is your email address. You can also log in through the Active Aligners website, www.activealigners.com.
Forgotten your password? Use the reset link below the login box.

3shape Design Service

Sign In

Email Or Username

Password

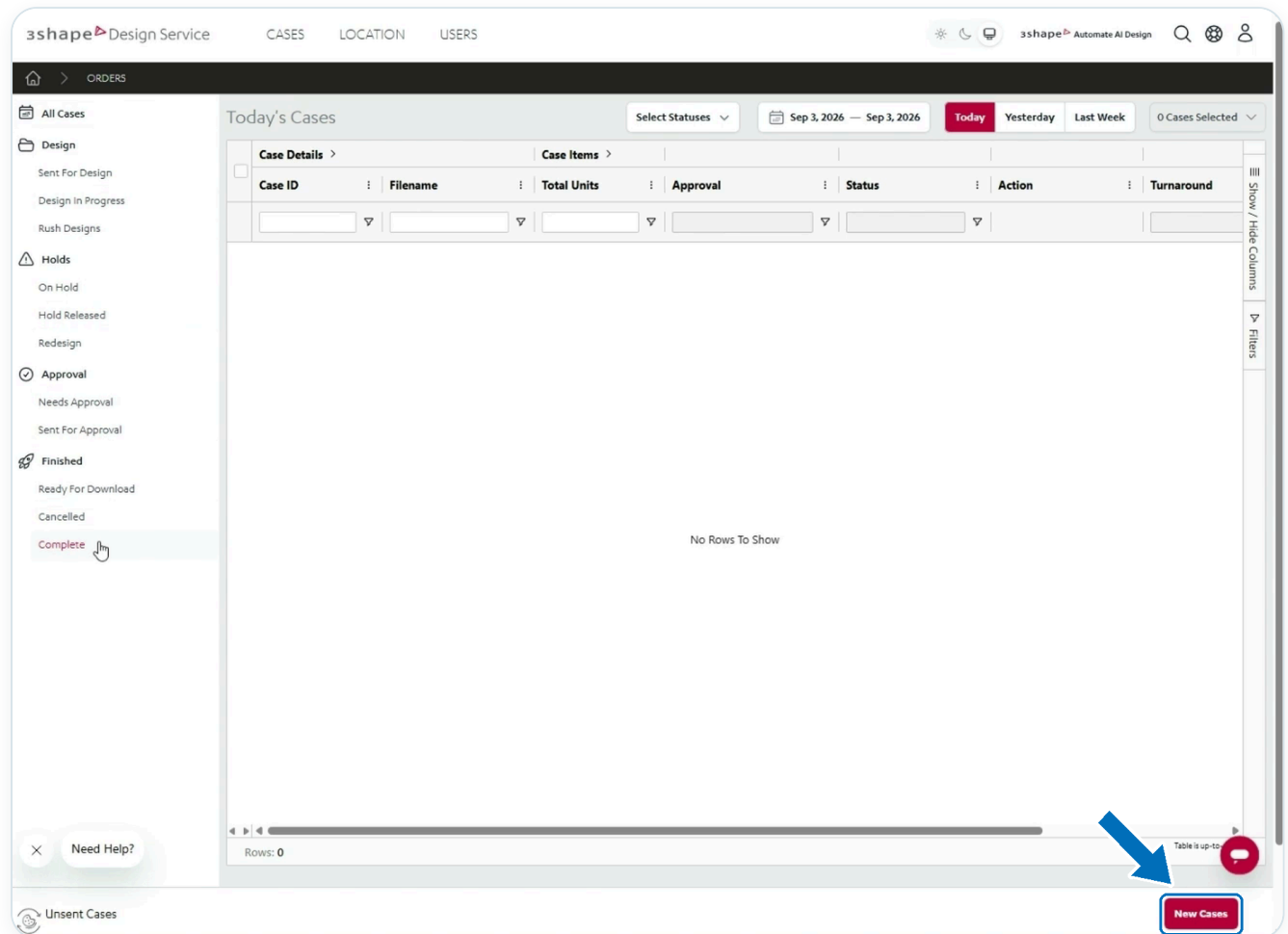
[Forget your password? Reset password](#)

Sign In

The login page. The arrow points to the password reset link.

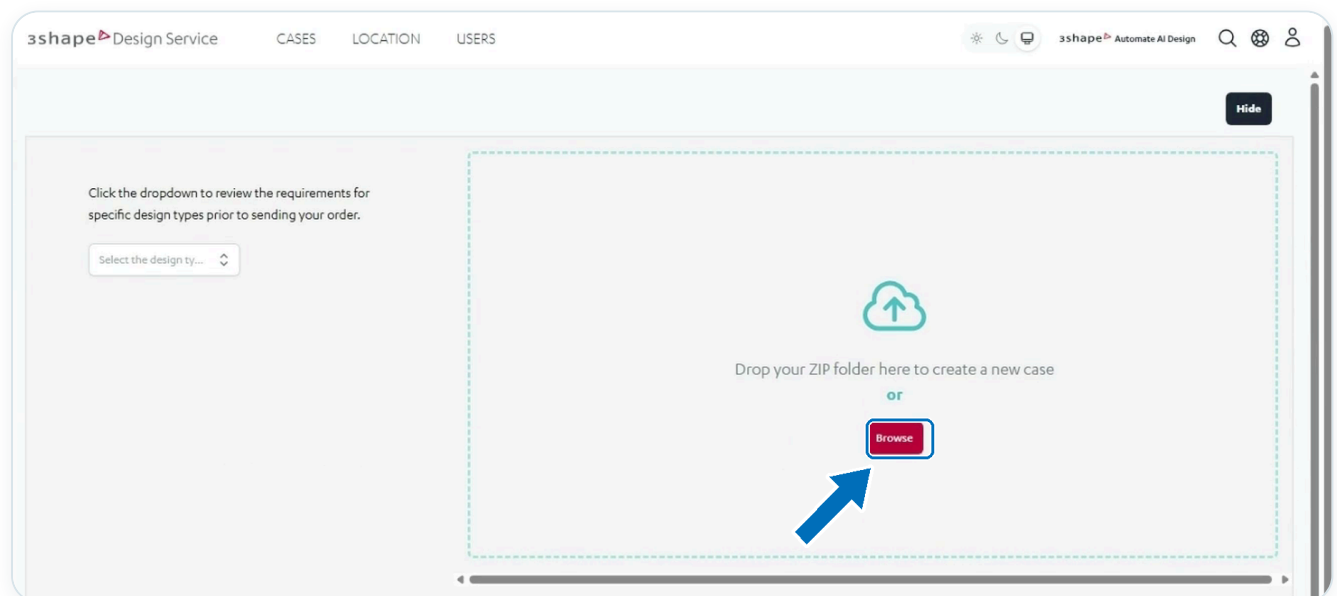
3 Click New Cases

Click the red **New Cases** button (bottom right).



4 Upload your .zip

Drag and drop your .zip folder with the photos into the upload area, or click **Browse** and select the folder.



STEPS 5 TO 11

Fill in the case and submit

The new case row. The numbers match the steps below.

5 Let the page load

Make sure the page is loaded completely: a full green line runs horizontally across the top of the page.

7 Design type

Select **Clear Aligners – Anterior** or **Clear Aligners – Full Arch**. Only create a refinement once the patient has completed an Active Aligners treatment.

9 Add-ons (modifiers) *

Select the specific action required under each modifier. Under **Retainers**, select **Yes, export retainers** for your free set of retainers (without attachments).

11 Submit the case

Click the **red arrow** at the top right of the case row to submit the case for treatment planning.

6 Patient name

Check the patient name is filled in correctly.

8 Arches

Click **Arches** and select the arch or arches to be treatment planned (one or both).

10 Patient instructions

Add any instructions not covered by the modifiers in **Additional Case Comments** on the left, e.g. a pontic or an implant on a tooth (with the tooth number).

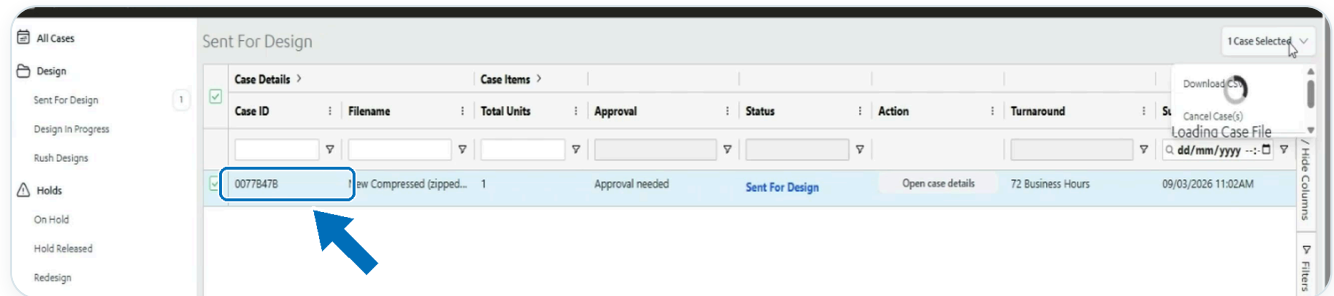
NOTE *Model clean-up and bracket removal carry an extra charge. If selected, it's added to your treatment plan invoice.

Step 8: select one or both arches, then Apply.

Step 9: the Retainers option (arrow). Model Clean Up and Bracket Removal, above and below it, are charged extra.*

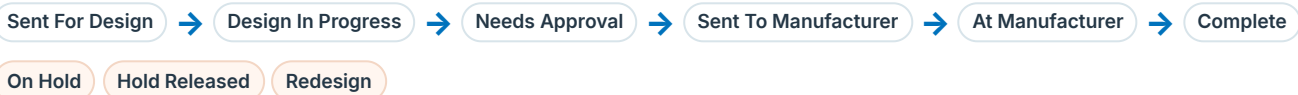
12 Find your case under Sent for Design

Once the order is created, you'll see it under **Sent for Design**. We'll add the scans to the case so treatment planning can begin (around 3 working days). Click the case ID to open the case.



TRACK YOUR CASE

The status list on the left of the platform shows where each case is.

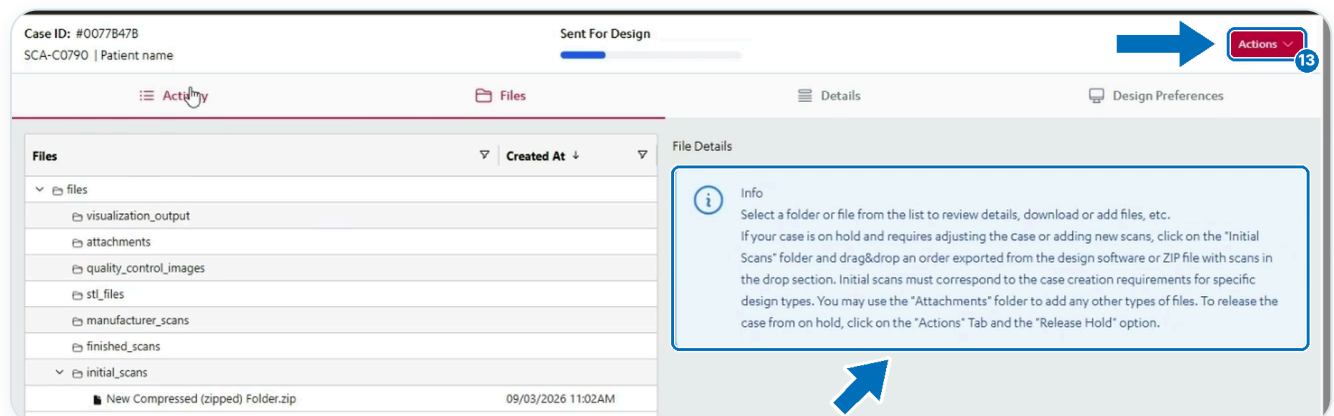


NOTE Cases will automatically move to **Complete** 10–14 days after approval, even if not completed. Please make sure you send the lab slip when a case is approved. Once the approval and lab slip have been received, the case moves from **Sent To Manufacturer** to **At Manufacturer**.

SENT FOR APPROVAL If a case is in **Sent For Approval**, it means a patient or Dr link has been sent. The Dr will still need to approve the case when sending it to manufacture. See [A](#), Share the plan.

+ Adding extra images

Need to add more images? Open the case and go to the **Files** tab. The info panel on the right shows how to upload or drag in new files.



The info panel (large ring) and the Actions button (ring 13).

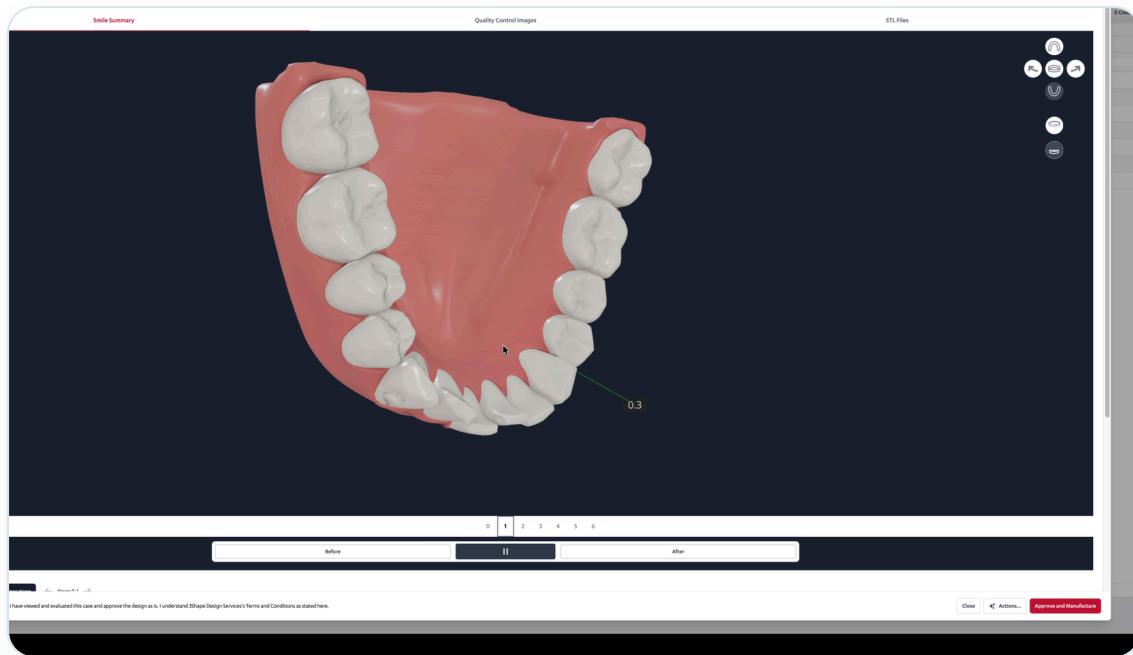
13 Review the treatment plan

Once the case has been treatment planned, it moves to **Needs Approval**. To review it, click **Actions** (top right) and choose **Review Case**.

STEP 13 CONTINUED

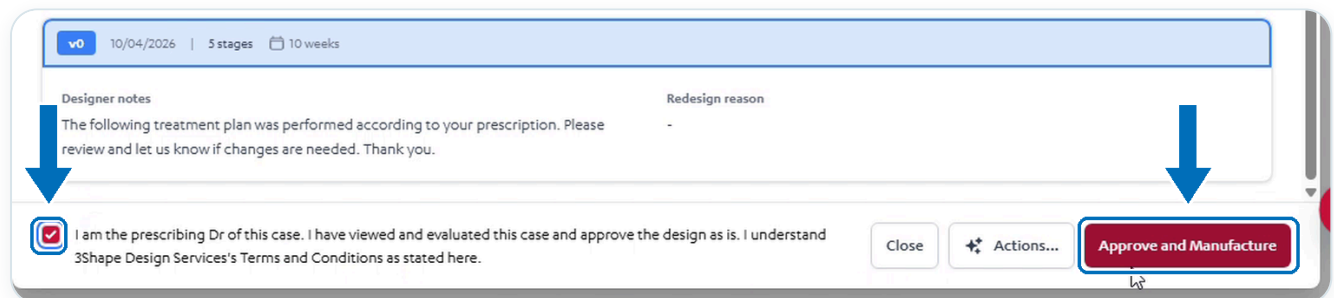
The review window

A new window opens. Here you'll see the 3D simulation of the treatment plan, how much IPR is needed and at which stage, the attachment positions, and a downloadable treatment plan PDF.



14 Approve and send to manufacture

If you're happy with the outcome, scroll to the bottom of the review window. Tick the box next to **"I am the prescribing Dr"**. The **red Approve and Manufacture** button becomes available. Click it to send the case to manufacture.



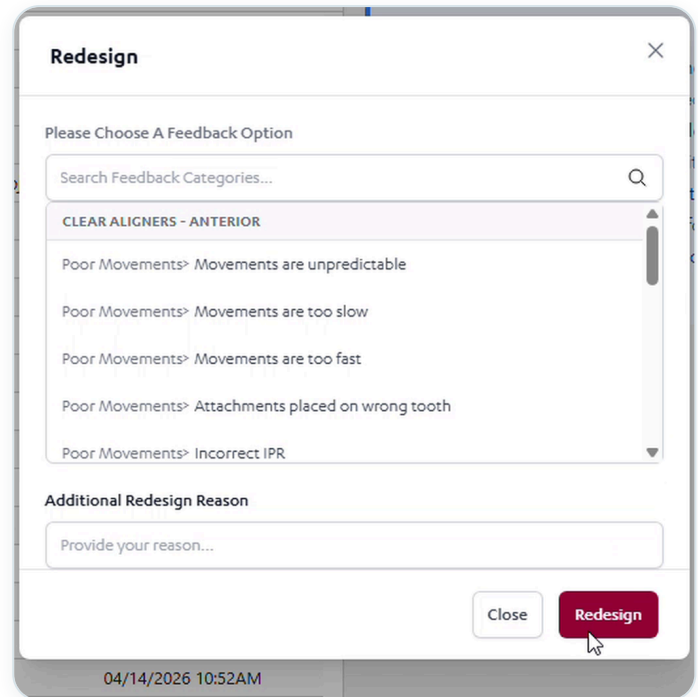
A Share the plan

Click **Actions...** at the bottom of the review window to send a link to the treatment plan to the patient or to a doctor.



B Send to Redesign

Not happy with the plan? Send the case to **Redesign** with your reason and instructions for the changes you want.



The Redesign modal window is titled "Redesign" and has a close button (X) in the top right corner. It contains a section "Please Choose A Feedback Option" with a search bar labeled "Search Feedback Categories...". Below the search bar is a list of feedback options: "CLEAR ALIGNERS - ANTERIOR", "Poor Movements> Movements are unpredictable", "Poor Movements> Movements are too slow", "Poor Movements> Movements are too fast", "Poor Movements> Attachments placed on wrong tooth", and "Poor Movements> Incorrect IPR". There is an "Additional Redesign Reason" section with a text input field labeled "Provide your reason...". At the bottom right are "Close" and "Redesign" buttons. A timestamp "04/14/2026 10:52AM" is displayed at the bottom of the modal.

C If your case is on hold

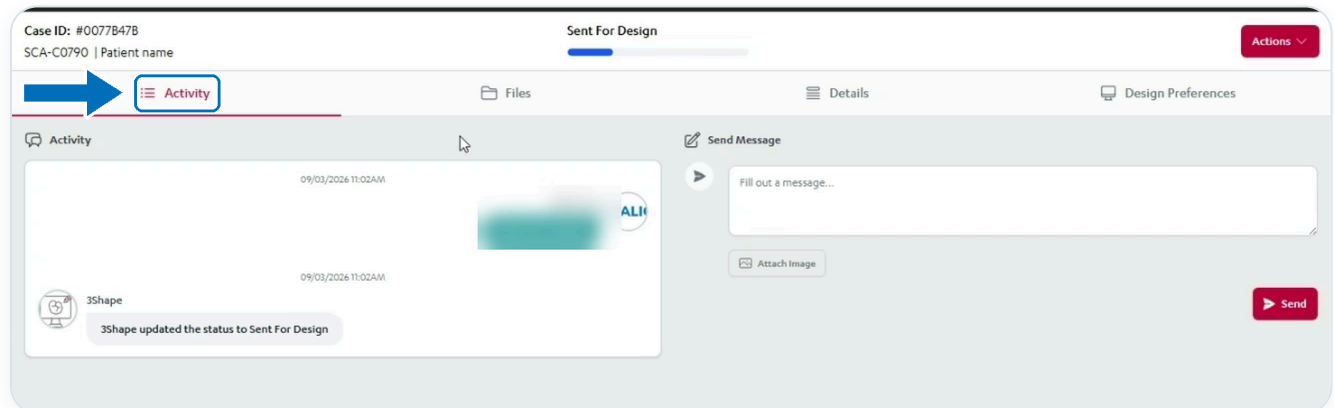
Open the patient's case and check the **Activity** tab (on the left). The reason for the hold is noted there. It can include:

No scans uploaded

Scans are not of acceptable quality

The patient is not a candidate

The treatment planners need more information



The interface shows a case titled "Case ID: #0077B478" and "SCA-C0790 | Patient name". The status is "Sent For Design". There are tabs for "Activity", "Files", "Details", and "Design Preferences". The "Activity" tab is active, showing a list of activities. One activity is from "3Shape" dated "09/03/2026 11:02AM", stating "3Shape updated the status to Sent For Design". There is a "Send Message" section with a text input field labeled "Fill out a message...", an "Attach Image" button, and a "Send" button.

LAB SLIP

Manufacturing requires a lab slip. We have an online lab slip that you can bookmark, so it's ready whenever you submit a job to our lab. Please contact us at smile@activealigners.com if you haven't saved the lab slip link yet.