



**CLEAR BLUE SMILES™**

# **SureSmile Aligner™**

## **Finding and Completing Tasks**

# 1. Login into SureSmile

Dentsply Sirona

SureSmile®

Log in with your account details

Email address

Password

Login

[Forgot your password?](#)

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New to SureSmile®?  
Click here to create an account

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# Dashboard Page-*Tasks*

The Tasks page lists the actions you or your team must do to continue moving patients through SureSmile Aligner treatment

To sort and filter tasks:  
4 drop-down menus

The screenshot shows the 'Tasks' page in the SureSmile Aligner dashboard. At the top, there is a navigation bar with the AuraSmile Dental logo, a search bar for Patient ID, a 'New Patient' button, and user information for Dr. Brian Gaudreault. Below the navigation bar, there are four filter and sort controls: 'Sort by' (set to Task), 'Show Tasks of' (set to All Types), 'Tasks for' (set to Douglas W. V...), and 'View' (set to list view). A secondary navigation bar includes tabs for 'Tasks (3)', 'Patients', 'Shipments', 'Jobs', 'DS CEREC Orders', 'Reports', and 'Active Tasks'. The main content area is a table with the following columns: Flag, Card, Last name, First name, Patient ID, Owner, Item, Task, Due Date, Notes, Setup Approval Date, Status, and Deferred To. Three tasks are listed, all with a status of 'Active' and a due date of 2022-10-26.

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>		Gigliotti	Adrian	Y4S3	Douglas W. Voiers, DDS		Review setup & staged models	2022-10-26		2022-11-21	Active	
<input type="checkbox"/>		Taylor	Michael	X6I6	Douglas W. Voiers, DDS		Review setup & staged models	2022-10-26		2022-11-15	Active	
<input type="checkbox"/>		Dimuzio	Luke	X4E5	Douglas W. Voiers, DDS		Review setup & staged models	2022-10-26		2022-11-15	Active	

# Dashboard Page-*Tasks*

**Tasks-** *Patients that you need to approve initial or refinement treatments*

**Patients-** *Find charts for Patients in Treatment.*

The screenshot shows the 'Tasks' section of the SureSmile Aligner dashboard. At the top, there is a navigation bar with the AuraSmile Dental logo, a search bar for Patient ID, a 'New Patient' button, and user information for Dr. Brian Gaudreault. Below the navigation bar, there are filters for 'Sort by' (Task), 'Show Tasks of' (All Types), and 'Tasks for' (Douglas W. V...). A 'View' toggle is set to 'List'. A secondary navigation bar includes tabs for 'Tasks (3)', 'Patients', 'Shipments', 'Jobs', 'DS CEREC Orders', 'Reports', and 'Active Tasks'. The main content area displays a table of tasks.

Flag	Card	Last name	First name	Patient ID	Owner	Item	Task	Due Date	Notes	Setup Approval Date	Status	Deferred To
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Gigliotti	Adrian	Y4S3	Douglas W. Voiers, DDS		<a href="#">Review setup &amp; staged models</a>	2022-10-26		2022-11-21	Active	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Taylor	Michael	X6I6	Douglas W. Voiers, DDS		<a href="#">Review setup &amp; staged models</a>	2022-10-26		2022-11-15	Active	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Dimuzio	Luke	X4E5	Douglas W. Voiers, DDS		<a href="#">Review setup &amp; staged models</a>	2022-10-26		2022-11-15	Active	

# Sorting and Filtering- *Tasks*

Menu	Options
Sort by ...	<p><b>Task</b> (default)</p> <p><b>Due Date</b> (Due dates are generated according to the timeline settings which can be managed in Preferences under the Treatment tab.)</p> <p><b>Flag</b> (Flags are an optional method for flagging patient records by color to indicate special attention for that patient.)</p> <p><b>Patient ID</b> (Every patient is given a 4-digit Patient ID by the system in a letter, number, letter, number format)</p>
Show ... Tasks	<p><b>All Types</b> shows all tasks. (default)</p> <p><b>Action Needed</b> shows items on hold, rejected, and those needing additional information. The filter shows these tasks: Resolve Hold, Action Needed. (Example: The technician needs more information to process the setup.)</p> <p><b>Review Order</b> shows items needing review. The filter shows these tasks: Review Order and Review Changes. (Example: the setup &amp; staging once the Digital Lab has processed the case.)</p> <p><b>Submit Order</b> shows items to be submitted. This filter shows only Submit Order tasks. (Example: if you start an order but do not complete it, it will show as a Submit Order task.)</p> <p><b>Create Order</b> shows items that are due to be started according to the timeline date. This filter shows tasks such as Scan &amp; Order therapeutic model and Order Setup.</p> <p><b>Reminder</b> shows all patients with past-due actions required by the clinic. The filter shows these tasks: Upload scan data &amp; Upcoming Case Cancellation.</p>
Tasks for ...	<p><b>Currently logged in user</b> * (default)</p> <p><b>All Doctors</b> (followed by login name of each doctor)</p> <p><b>All Staff</b> (followed by login name of each staff member)</p> <p><b>All</b></p> <p>* If the currently logged in user has no assigned patients, then all patients are shown.</p>
Show ... Tasks	<p><b>Active</b> (default)</p> <p><b>Expired</b></p> <p><b>Deferred</b></p> <p><b>Completed</b></p> <p><b>All</b></p>

# Sorting and Filtering- *Tasks*

- The Patients page lists all patients that have been entered into SureSmile

The screenshot displays the 'Patient Database' interface. At the top, there is a search bar for 'Patient ID' and a 'New Patient' button. Below this, a navigation bar includes 'Tasks', 'Patients (8)', 'Shipments', 'Jobs', and 'Reports'. To the right of the navigation bar are three drop-down menus: 'Sort by' (set to 'Modification ...'), 'Patients for' (set to 'All'), and 'Show' (set to 'Active Patien...'). A callout box points to these menus with the text: 'To sort and filter patients, select from these 3 drop-down menus.' The main area shows a grid of eight patient cards. Each card includes a profile picture, a checkbox, an eye icon, a patient ID, and a description of the task. The 'Cards Per Page' selector at the bottom left is set to 12.

ID	Task	Date	Status
P7E7			
I4J8	Therapeutic Model 1 (wit...)	09-09-2021	Approved
T2Z8			
W7L2			
U3L7			
W4F6	Setup & Staging 1	08-30-2021	Approved / Approved
J9N7	Therapeutic Model 1	08-23-2021	Approved
U5I5	Therapeutic Model 1 (wit...)	08-24-2021	Approved

# Sorting and Filtering- *Tasks*

- This table lists each menu with its options for sorting and filtering on the Patients page.

Menu	Options
Sort by...	<b>Modification Date</b> (default) <b>Patient ID</b> (Every patient is given a 4-digit Patient ID by the system in a letter, number, letter, number format) <b>Flag</b> (Flags are an optional method for flagging patient records by color to indicate special attention for that patient.)
Patients for...	<b>Currently logged in user*</b> (default) <b>All Doctors</b> (followed by login name of each doctor) <b>All Staff</b> (followed by login name of each staff member) <b>All</b> *If the currently logged in user has no assigned patients, then all patients are shown.
Show... Patients	<b>Active</b> (default) <b>Finished</b> <b>Quit</b> <b>Transferred</b> <b>Cancelled</b> <b>MD</b> (Marked for Deletion) <b>Demo</b> <b>All</b>

# Filter by Patient ID or Name

- If you are looking for a specific patient, the system assumes that you want to see this patient's tasks regardless of the staff member assigned or task type. Therefore, entering the patient ID or name in the search box will override the "Tasks for..." and "Show Tasks" filters.

*Note: The system does not make this assumption for doctors. For example, if Dr. A enters a patient ID for a record assigned to Dr. B and Dr. A is filtering on his patients, the record will not be shown. Instead, Dr. A should change the filter to "Tasks for All Doctors" or filter for Dr. B's username to find the other doctor's patient.*



# Shipping

Tasks Patients **Shipments** Jobs DS CEREC Orders Reports ⋮

Show: All Shipment... Of: All Types For: All

Avon (1) Enter tracking # or product ID to receive... **Receive**

Last Name	First Name	Patient ID	Product ID	Product Name	Upper/Lower	Tracking Number	Order Date	Shipped Date	Receive Date	Receive By	Site
McCully	Jessica	V8D2	000008493884	Aligners for [Setup & Staging 1] 1		397792412131	2020-09-23	2020-10-14	2021-01-13	Automatic	Avon (1)
Jagunic	Allison	V3K4	000008495506	Aligners for [Setup & Staging 1] 1		397858731670	2020-09-23	2020-10-16	2021-01-15	Automatic	Avon (1)
Anderson	Larry	V7T5	000008531154	Aligners for [Setup & Staging 1] 2		397796724746	2020-09-25	2020-10-14	2021-01-13	Automatic	Avon (1)
Cerny	Andy	G5J3	000008559230	Aligners for [Setup & Staging 1] 1		397909628150	2020-09-28	2020-10-16	2021-01-15	Automatic	Avon (1)

# Select Tracking Number Fed Ex Locator

Tasks Patients **Shipments** Jobs DS CEREC Orders Reports ⋮

Show: All Shipment... Of: All Types For: All

Avon (1) Enter tracking # or product ID to receive... **Receive**

Last Name	First Name	Patient ID	Product ID	Product Name	Upper/Lower	Tracking Number	Order Date	Shipped Date	Receive Date	Receive By	Site
McCully	Jessica	V8D2	000008493884	Aligners for [Setup & Staging 1] 1		397792412131	2020-09-23	2020-10-14	2021-01-13	Automatic	Avon (1)
Jagunic	Allison	V3K4	000008495506	Aligners for [Setup & Staging 1] 1		397858731670	2020-09-23	2020-10-16	2021-01-15	Automatic	Avon (1)
Anderson	Larry	V7T5	000008531154	Aligners for [Setup & Staging 1] 2		397796724746	2020-09-25	2020-10-14	2021-01-13	Automatic	Avon (1)
Cerny	Andy	G5J3	000008559230	Aligners for [Setup & Staging 1] 1		397909628150	2020-09-28	2020-10-16	2021-01-15	Automatic	Avon (1)