Invisalign

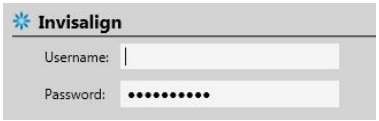
Integration Instructions for Edge

The Edge/Invisalign integration allows you to connect your patient records in Edge with their corresponding records on Invisalign's website. Once connected, you can view your patient's Invisalign details, request videos, and open a patient's Invisalign record directly from Edge.

Setup

In order to integrate Invisalign with Edge, Align Technology's ClinCheck Software License Agreement Amendment must be signed and returned to Ortho2. This amendment can be located at www.ortho2.com > Support & Learning > Requests/Forms > Align ClinCheck License Amendment. For details about the process, please contact your Regional Manager at (800) 678-4644.

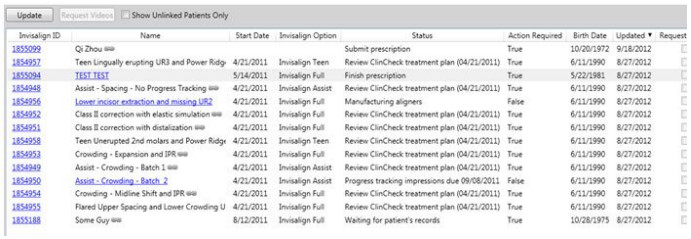
1) Access Edge's Editors by clicking the **Editors** button in the Tools section of the home ribbon bar.
2) Once the Editors screen opens, select System Integrations from the Integrations category.
3) Under the Invisalign section, enter the Username and Password provided by Align Technology.
4) Click **Save** in the upper left corner of the screen.



Using the Integration

With the necessary Invisalign credentials in place, Edge can now pull patient information from Invisalign.

1) Select **Integrations** from the Tasks section of the home ribbon bar. This will open the Invisalign screen, which displays Invisalign patient information broken down into several columns. The Invisalign ID also acts as a link to the patient's record in the Invisalign system.



2) Select **Update** to update your Invisalign records within Edge. Invisalign and Edge will attempt to link Invisalign records to their respective Edge patient records based on the patient's name and birthdate.
3) To manually link a patient's record to their Invisalign record, click the small link button next to the patient's name. This will open a search window; search for the correct patient within Edge and click **OK**. Once a patient is linked to their Invisalign record, the patient's name becomes a link to the patient's record. Their Invisalign information can also be found within the patient's biographical details.

4) To request Invisalign videos from Edge, check the Request Videos checkbox for a patient and click **Request Videos**. A confirmation message will appear; click **OK** to close it. A check mark will appear in the Pending Videos column for the patient until the video is complete. The next time you open the Invisalign screen or select update after the videos are complete, you will receive a notification that new videos have been completed, the Pending Videos checkbox will be removed, and the Videos Created column will contain a date.

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