

# Invisalign

Integration Instructions for Edge Cloud



The Edge Cloud/Invisalign integration allows you to connect your patient records in Edge Cloud 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 Cloud.

## Setup

In order to integrate Invisalign with Edge Cloud, Align Technology's ClinCheck Software License Agreement Amendment must be signed and returned to Ortho2. For details about the process, please contact your Regional Manager at (800) 678-4644.

- 1) Access Edge Cloud'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.


**Invisalign**





























Username:

Password:

## Using the Integration

With the necessary Invisalign credentials in place, Edge Cloud 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 Cloud. Invisalign and Edge Cloud will attempt to link Invisalign records to their respective Edge Cloud 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 Cloud 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 Cloud, 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

Invisalign ID	Name	Start Date	Invisalign Option	Status	Action Required	Birth Date	Updated	Request
1855099	Qi Zhou 	4/21/2011	Invisalign Teen	Submit prescription	True	10/20/1972	9/18/2012	
1854937	Teen Lingually erupting UR3 and Power Ridg 	5/14/2011	Invisalign Full	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1855094	<b>TEXT TEST</b> 	4/21/2011	Invisalign Full	Finish prescription	True	5/22/1981	8/27/2012	
1854948	Assist - Spacing - No Progress Tracking 	4/21/2011	Invisalign Assist	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1854956	Lower incisor extraction and missing UR2 	4/21/2011	Invisalign Full	Manufacturing aligners	False	6/11/1990	8/27/2012	
1854952	Class II correction with elastic simulation 	4/21/2011	Invisalign Full	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1854951	Class II correction with distalization 	4/21/2011	Invisalign Full	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1854958	Teeth Unerupted 2nd molars and Power Ridg 	4/21/2011	Invisalign Teen	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1854953	Crowding - Expansion and IPR 	4/21/2011	Invisalign Full	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1854949	Assist - Crowding - Batch 1 	4/21/2011	Invisalign Assist	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1854950	Assist - Crowding - Batch 2 	4/21/2011	Invisalign Assist	Progress tracking impressions due 08/08/2011	False	6/11/1990	8/27/2012	
1854954	Crowding - Maline Shift and IPR 	4/21/2011	Invisalign Full	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1854955	Flared Upper Spacing and Lower Crowding U 	4/21/2011	Invisalign Full	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1855188	Some Guy 	8/12/2011	Invisalign Full	Waiting for patient's records	True	10/28/1975	8/27/2012	

**Carla P Joiner** 

Or: JS Of: LNK As:

**Id. No.** 05-164

**Model No.** R-13

**Status** WA **Treatment** Phase II

**Age** 13y 2m **DOB** 6/12/1999

**School** **SSN**

**Parent** **Notes** Dad=Rob 8-5-...


**Appt.** [Net Ck. Tue 10/30/2012](#)

**Address**

123 Main St.  
Ames, IA 50010


**Contact Details**

**Home** (515) 333-4444 


**Email** [joiner@pat.com](mailto:joiner@pat.com) 

**Cell Dad** (515) 333-4444 

**Responsible Party**

**Parents** [Mr. & Mrs. Rob & Cindy Joiner](#) 

**Referrer**

**Other** [Dr. Bob Glenn](#) 

**Professionals**

**Dentist** [Dr. David Becker](#)

**Oral Surgeon** [Dr. James Ronbace](#)

**Invisalign**

**ID** 1854950 **Option** Invisalign Assist

**Status** Progress tracking impressions due 09/08/2011

completed, the Pending Videos checkbox will be removed, and the Videos Created column will contain a date.

## Contact

### **Invisalign**

Align Technology, Inc.  
2560 Orchard Parkway  
San Jose, CA 95131  
[www.invisalign.com](http://www.invisalign.com)  
(408) 470-1000

### **Edge Cloud**

Ortho2  
1107 Buckeye Avenue  
Ames, IA 50010  
[www.ortho2.com](http://www.ortho2.com)  
(800) 346-4504 or (515) 233-1026