

align education

Invisalign® fundamentals course

Welcome to the start of your Invisalign journey.

Practice: _____

Your role: _____

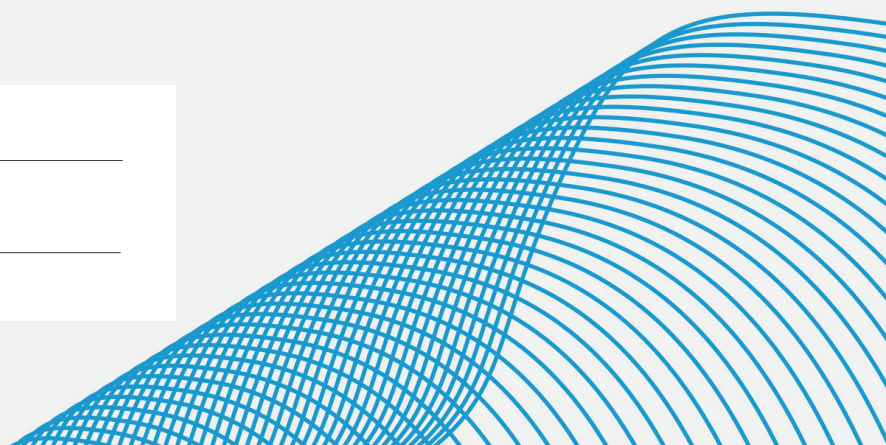
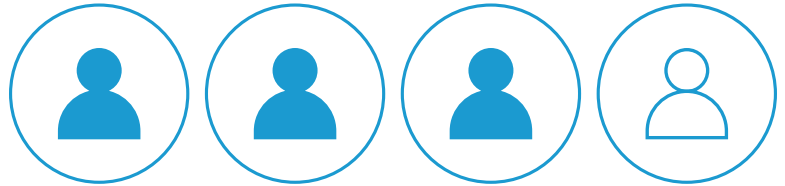


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Opportunity in your office

75%
of adult patients
could benefit from
teeth straightening*



What does that mean for your office?

Take 5 minutes to understand the opportunity in your office.

How many hygiene visits do you have a week? **A.** _____

x 0.75 = **B.** _____

If you convert only 5% of those patients, what would that mean to your office growth?

B. _____ x 0.05 = **C.** _____ x 4 week/m = **D.** _____ per/m

D. _____ x Invisalign fee \$ _____ = \$ _____ per/m

*Data Source: *Brunelle JA, Bhat M, Lipton MA. Prevalence and distribution of selected occlusal characteristics in the U.S. population, 1988-1991., J Dent Res. 1996;75 Spec No:706-13.

Invisalign® product portfolio

Invisalign Product	Invisalign Express 5	Invisalign Express Package	Invisalign Express 10	Invisalign Lite Package	Invisalign Assist Package	Invisalign Go	Invisalign Moderate Package	Invisalign Comprehensive Package
Number of aligners	5	7	10	14	13 Unlimited	Up to 20	20	Unlimited
Additional aligners	One refinement available for purchase	One set included for 1 year	One refinement available for purchase	Two sets included for 2 years	Unlimited for 5 years	One set	One set included for 2 years	Unlimited for 5 years
Clinical scope	Very mild	Relapse to mild	Mild treatment	Mild to moderate	Aesthetically oriented	Mild to moderate	Mild to moderate	Moderate to severe

Invisalign Go system

The Invisalign Go system was made to combat the barriers dentists face with Invisalign treatment, including:



Difficulty with patient selection



Not clinically confident



Chair time and profitability



Complicated treatment planning



Patient communication and conversion

The Invisalign Go system includes:

- Treatment designed for mild to moderate malocclusion cases
- Up to 20 aligners
- Treatment of second pre-molar to second pre-molar
- Arch width expansion
- Pre-restorative anterior alignment
- One set of additional aligners

Case assessment tool

Three easy ways to run a case assessment

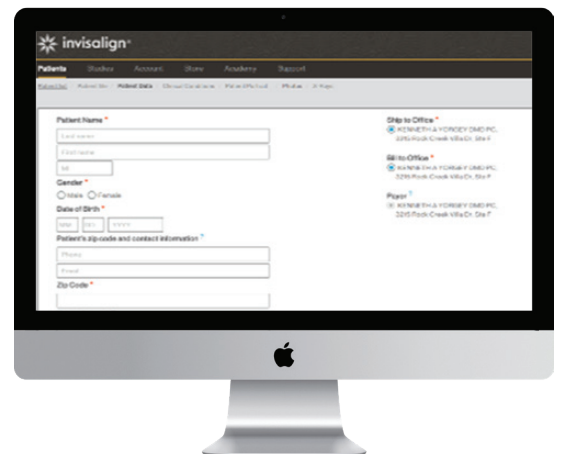
Invisalign® Photo Uploader app (IPU)



iTero Element® scanner



Invisalign Doctor Site (IDS)



Benefits of the Invisalign case assessment tool:

- Helps simplify patient and product selection
- Quickly determine if chief concerns can be addressed with the Invisalign Go treatment
- Access the Case Assessment tool in multiple ways

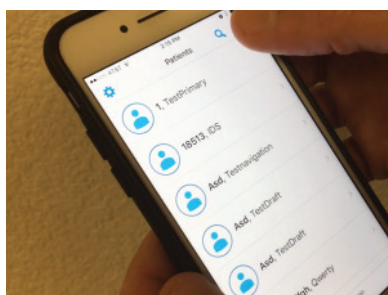
Case assessment tool

Invisalign® Photo Uploader app

Materials needed:

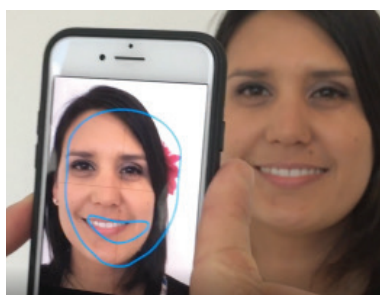
- iPhone, iPad, and iPod Touch with iOS 11.0 or later.
- Samsung Galaxy S5(Android 5.0), S7(Android 6.0.1), S8(Android 7.0), and S9+(Android 8.0.0)

Step 1. Create a patient



Open the Mobile Photo Uploader app, create a new patient and add patient info.

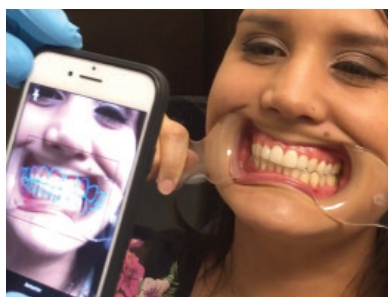
Step 2. Take initial extra-oral photos



For extra-oral photos, position the patient in front of a non-distracting background, with some distance to prevent background shadows.

Stand directly in front of the patient and align with the photo guide on the template.

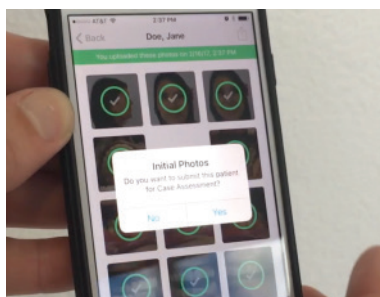
Step 3. Take initial intra-oral photos



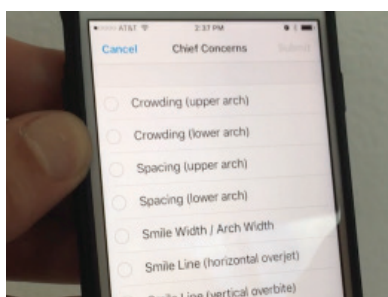
Provide the patient with cheek retractors and show how to use them.

Align the photo template grid with the patient's teeth to take all intra-oral photos required.

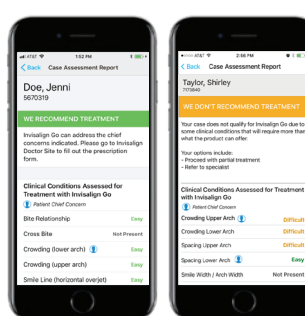
Step 4. Request a case assessment



Step 5. Select the chief concerns



Step 6. Receive case assessment results



Your case assessment result will be delivered via notification to your device.

If the result is: **Recommend Treatment**, the doctor can take action in IDS and create the treatment plan.

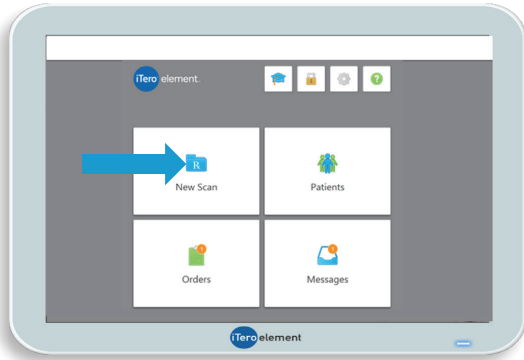
If the result is: **Don't Recommend Treatment**, the doctor has two options listed, 1) Proceed with partial treatment and switch to comprehensive, or 2) Refer to a specialist

Case assessment tool

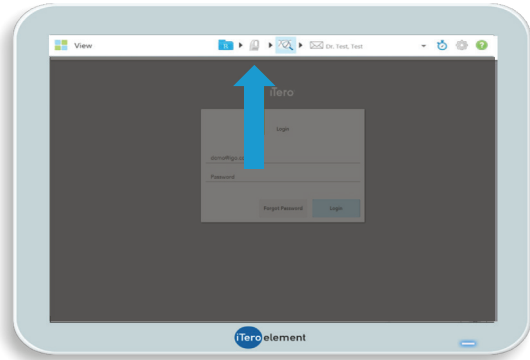
iTero Element® scanner

You can also start an Invisalign® Go case assessment using the iTero® Element 2 and iTero Element Flex® scanners.

Step 1. New scan

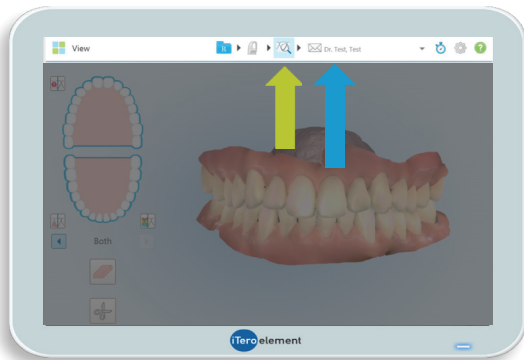


- Select “New Scan”
- Fill out required information

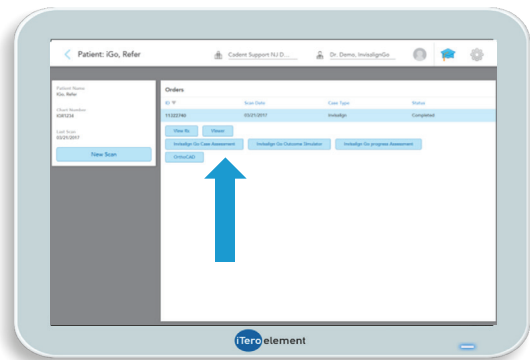


- Select the scan sleeve button to begin scanning

Step 2. Submit case

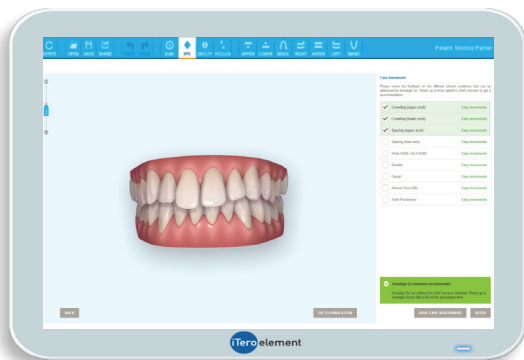


- Select the magnifying glass icon to process the digital image
- Then select the envelope icon to send the scan to your “My iTero” to be viewed or submitted

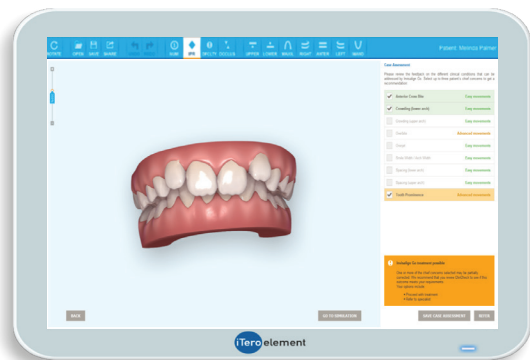


- Select “Invisalign Go Case Assessment”

Step 3. Evaluate case assessment results



- “Invisalign Go treatment recommended”
- Proceed with Invisalign Go treatment



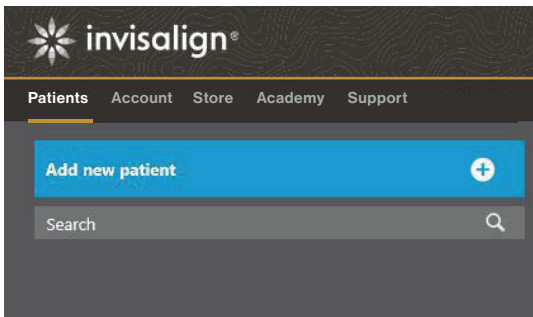
- “Invisalign Go treatment possible”
- Continue with partial Invisalign Go treatment
- Switch to Comprehensive
- Refer to a specialist

Case assessment tool

Invisalign® Doctor Site

You can also access this feature using the Invisalign Doctor site

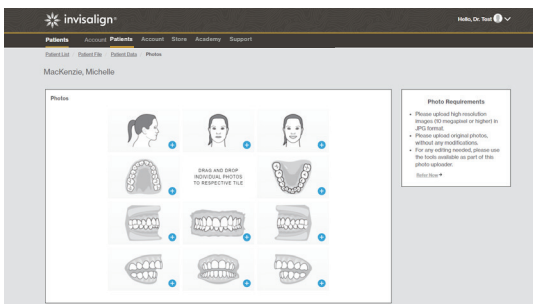
Step 1. Create patient's profile



- Select "Add new patient"

- Enter patient's data

Step 2. Submit case

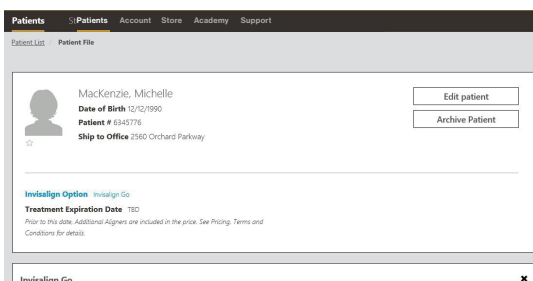


- Upload intra-oral pictures (10 megapixel or higher; JPEG format) in original format. Extra-oral pictures are optional at this point.

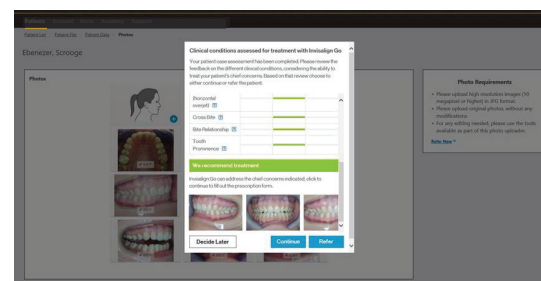


- Identify missing teeth and landmark teeth
- Submit case for assessment

Step 3. Evaluate case assessment results



- Review case assessment result on patient's file



- Evaluate case assessment result and proceed with next steps accordingly:
 - Refer to Specialist (see Case Referral)
 - Submit the case (see Submission Process)

Invisalign Go office workflow

Worksheet

Take 15 minutes to work with your team to complete the following worksheet.



Activity	Assigned to
01 _____	___ Reception ___ RDA ___ RDH ___ Dentist Other _____
02 _____	___ Reception ___ RDA ___ RDH ___ Dentist Other _____
03 _____	___ Reception ___ RDA ___ RDH ___ Dentist Other _____
04 _____	___ Reception ___ RDA ___ RDH ___ Dentist Other _____
05 _____	___ Reception ___ RDA ___ RDH ___ Dentist Other _____
06 _____	___ Reception ___ RDA ___ RDH ___ Dentist Other _____
07 _____	___ Reception ___ RDA ___ RDH ___ Dentist Other _____

Successful patient conversion

Financial conversation exercise

Please fill in the blanks, then create your own talk-tracks using the scenarios provided. Feel free to make these as specific as possible using your actual financing options so you may reference this sheet to help with these conversations in the future.

Name of third-party financing _____

Current Invisalign® fee _____

“As low as” number _____

Scenario	What response could lead to a potential Invisalign patient?
<p>“Yes, but I bet it’s expensive.”</p>	<p>“I understand your concern. I would have the same concern; the good news is we offer flexible options that may fit comfortably with your lifestyle. Did you know the doctor cares so much about your orthodontic treatment that he/she is willing to offer _____ financing (0% low interest, etc.)?”</p> <p>“It’s also important to understand that straightening your teeth may prevent more treatments and expenses in years to come.”</p>
<p>“Yes, but I don’t have any insurance.” or</p> <p>“I would, but my insurance doesn’t cover this.”</p>	<p>“Many dental insurance plans cover Invisalign treatment just as they would other orthodontic treatments and may cover up to \$3,500 of your treatment cost. Even without insurance coverage, we have options that may comfortably fit your lifestyle.”</p>
<p>Fifteen-year-old Trey arrives at his hygiene appointment with his parents. Trey’s father mentions that his son has been asking for braces. You mention a consultation but he immediately declines, claiming he “does not have \$5,000 laying around the house.”</p>	
<p>Thirteen-year-old Katherine is coming in for another cleaning. Her crowded teeth make it difficult for her to floss properly. Her older brother drops her off and says their mother will be picking her up in an hour. During her appointment, Katherine mentions that her friend started Invisalign treatment and “it’s really cool.” She asks you how much it is.</p>	

Successful patient conversion

Payment options worksheet example

Take 10 minutes to work with your team to complete the following worksheet.

Current Invisalign fee

Concern	Cost
Your orthodontic treatment includes: <ul style="list-style-type: none"> • Comprehensive orthodontic exam • Orthodontic x-rays, records, and impressions • Professional dental photographs • Invisalign clear aligners • Vivera retainers • Additional aligners for fine-tuning 	\$1500
Less ortho insurance coverage	
Your investment	
Monthly payments (24 months, zero down, 0% interest)	
Monthly payments (18 months, zero down, 0% interest)	
Monthly payments (12 months, zero down, 0% interest)	
Cost if paying with cash	

Treatment submission process

Prescription form

Tips & tricks

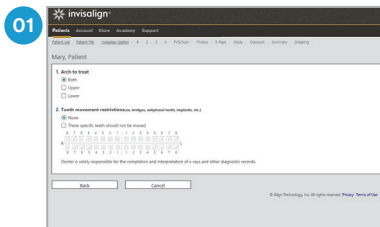
- Retain an original copy of all records; submitted records will not be returned.
- For your own records take alginate impressions to create study models or take an intra-oral scan if desired.

Invisalign® submission box checklist

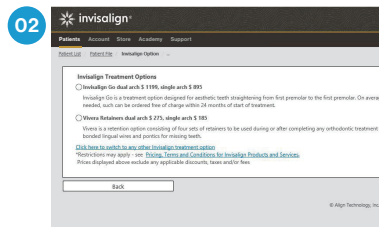
The following records are required for Invisalign treatment submission:

- Upper and lower PVS impressions or intra-oral scan
- Online Prescription Form
- Online photos (extra-oral are optional)

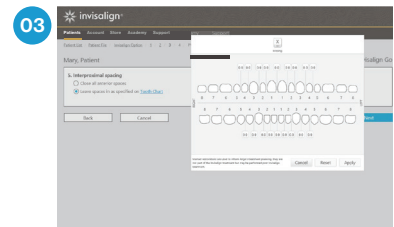
Procedure – Prescription form



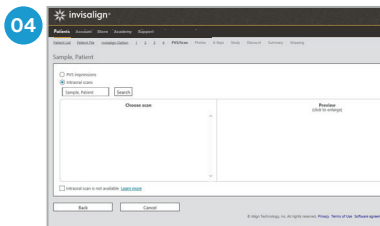
Go to the patient's file and select "Start Prescription".



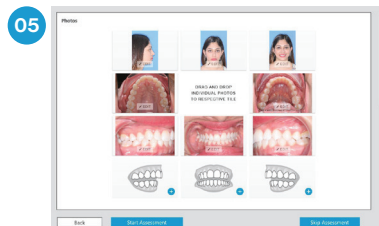
Choose Invisalign Go treatment option.



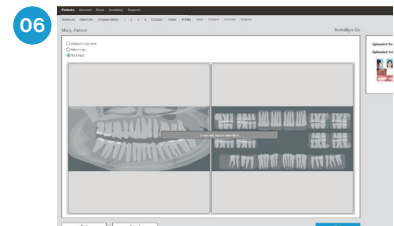
Fill out questions with specific patient treatment plan.



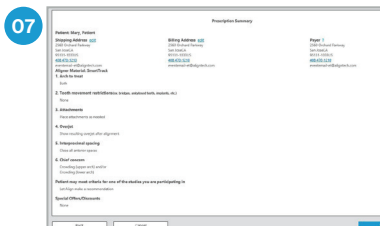
Upload intra-oral scan or indicate that you will send PVS impressions.



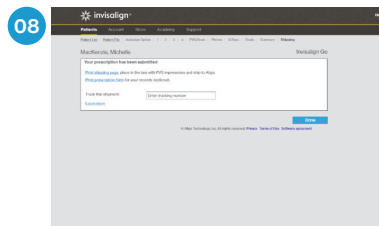
Upload patient photos.



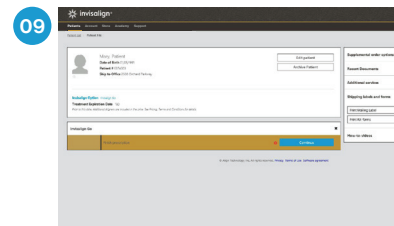
Upload radiographs (optional step).



Check summary of the Prescription Form before submitting it.



Print shipping page with barcode and include in the Invisalign submission box. Optional: Print the Prescription Form summary with barcode and include in the Invisalign submission box.



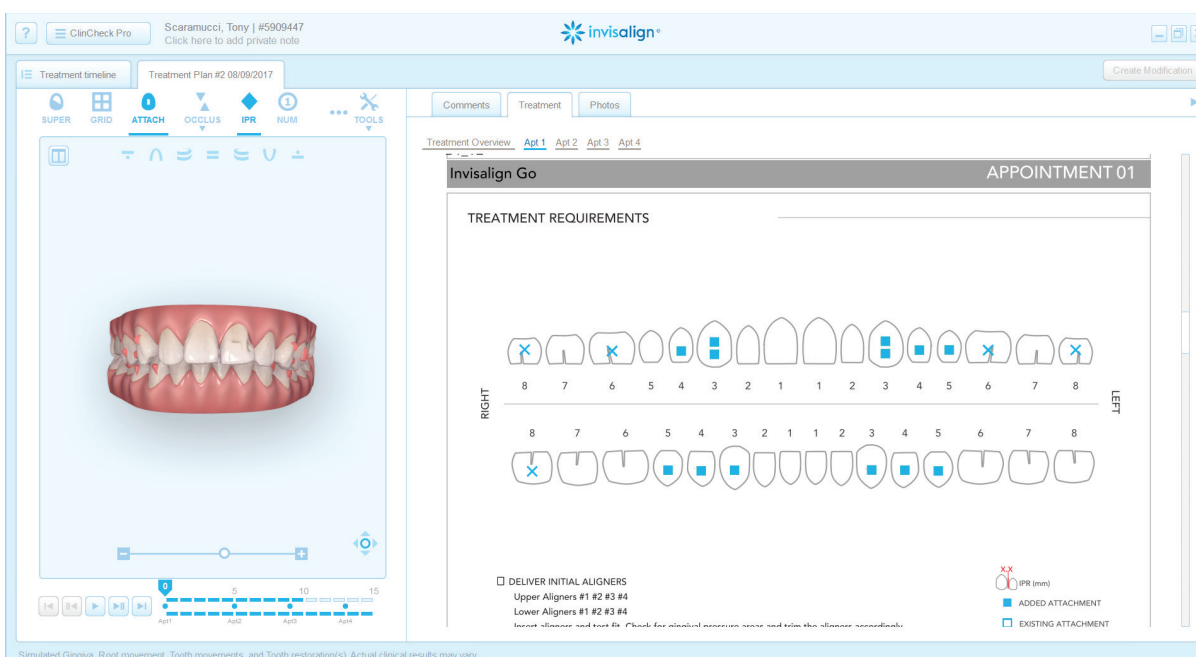
Final submitted Prescription Form available at Patient File Page for reference.

Doctor section

Treatment monitoring

Appointment plan

- Check the Appointment Plan to see what is programmed for each monitoring appointment. In this document you will find treatment requirements and detailed instructions on the actions you need to take on that specific appointment.
- You can download the pdf from the Treatment Overview section in the Latest Documents section on the Patient's file on IDS, or check it in the Treatment tab on the ClinCheck® Treatment Plan.



Procedure – Prescription form

- Follow the steps indicated for the specific monitoring appointment in the Appointment Plan.
- The basic actions you have to take during monitoring appointments:
 - Check for fit of current aligners
 - Check to ensure all attachments are intact. Replace attachments if needed
 - Check all contacts with unwaxed dental floss to determine if there are tight contacts
 - Proceed with IPR or placing/removing attachments if programmed
 - Deliver next sets of aligners

Retention

Vivera® retainers

Retention

- Retention is the phase of orthodontic treatment that maintains the teeth in their orthodontically corrected positions following the cessation of active orthodontic tooth movement. The paradigm today is that retention is for life.

Definition

- Vivera retainers are the premium option for removable clear retention.

How to order Vivera retainers

Step 1. Select Vivera retainers to start prescription form

- Via IDS link, you can access the Prescription Form.

Step 2. Select the preferred options following the prescription step by step

Step 3. Choose records for order

- Retainer orders can be based on the last stage of the ClinCheck Treatment Plan or a new impression/scan
- Align® Technology recommends using new impressions/scan for retainers in order to capture the most current and accurate position of the patient's teeth.


Step 4. Retainer customization

- Pontics and fixed wires can be prescribed to customize Vivera® retainers.
- With fixed lingual wires, there are 3 options:
 - Maintain the wire and cover it with the retainer.
 - Maintain the wire and trim the retainer around.
 - Virtually remove the wire.

Step 5. Precision bite ramps can also be prescribed

Step 6. Confirm the order

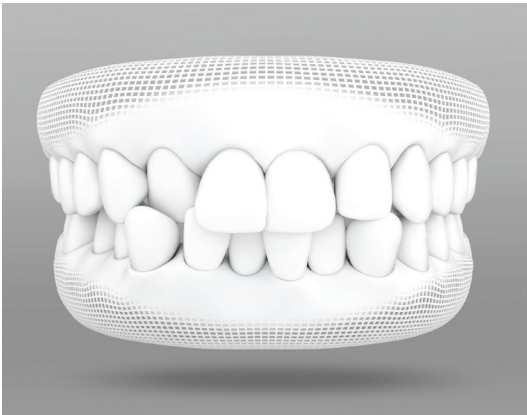


 Wartwtw, Wetwet Date of Birth 03/03/2010 Patient # 634467 Ship to Office 3480 Granada Ave	<input type="button" value="Edit patient"/> <input type="button" value="Archive Patient"/>	Supplemental order options ✕ <input type="text" value="Additional Aligners"/> <input type="text" value="Replacement"/> <input type="text" value="Attachment Template"/> <input type="text" value="Please order for Vivera Retainers here."/> <input type="text" value="Vivera Retainers"/> <input type="text" value="Invisalign Retainers"/> <input type="text" value="Start New Treatment"/>
Invisalign Option Invisalign Full Treatment Expiration Date 12/12/2022 <small>Prior to this date, Additional Aligners are included in the price. See Pricing, Terms and Conditions for details.</small>		
Clinical Conditions Study Power_Arm_Silent_Routing_Pilot		

4 common case types

Malocclusion-related issues

Crowding



May create the following issues

- Improper occlusal function
- If teeth are not upright, vertical forces do not transfer down from crown to root to bone during occlusion
- Lateral stress on posterior teeth and surrounding periodontal structures

May lead to or show signs of

- Occlusal trauma – abfractions
- Uneven wear, chipping
- Gum, periodontal problems – gingival recession, bone loss
- Overlapping teeth that get worse over time if left untreated

Potential patient symptoms

- Tooth sensitivity from wear
- Receding gums
- Loose teeth

Spacing



May create the following issues

- Insufficient anterior support from lack of canine guidance
- Tongue thrust may flare anterior teeth, including canines

May lead to or show signs of

- Premature posterior wear
- Periodontal problems

Potential patient symptoms

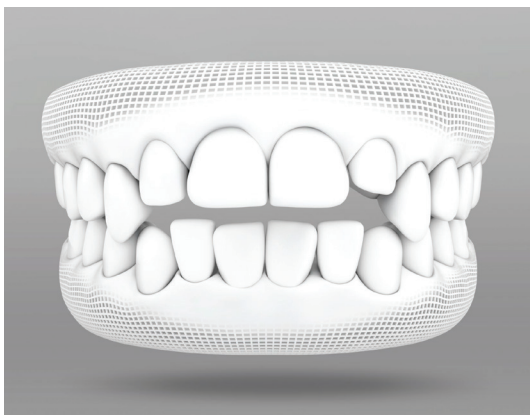
- Increasingly flared anterior teeth

Doctor section

4 common case types

Malocclusion-related issues

Open bite

**May create the following issues**

- Improper function of anterior and posterior teeth – lack of anterior contact, posterior contact overload

May lead to or show signs of

- Premature wear on posterior teeth
- Occlusal trauma – abfractions
- Periodontal problems – deep pocketing of posterior teeth and gum recession, bone loss, poor root support

Potential patient symptoms

- Abnormal wear on posterior teeth
- Small notch in teeth at gum line
- Gum recession
- Loose teeth

Deep bite

**May create the following issues**

- Improper function of anterior teeth

May lead to or show signs of

- Occlusal trauma – Fremitus and periodontal problems, including bone loss
- Abnormal wear, chipping of lower anterior teeth
- Lower front teeth may over-erupt and damage palate behind top front teeth

Potential patient symptoms

- Receding gums
- Abnormal wear of teeth

4 common case types

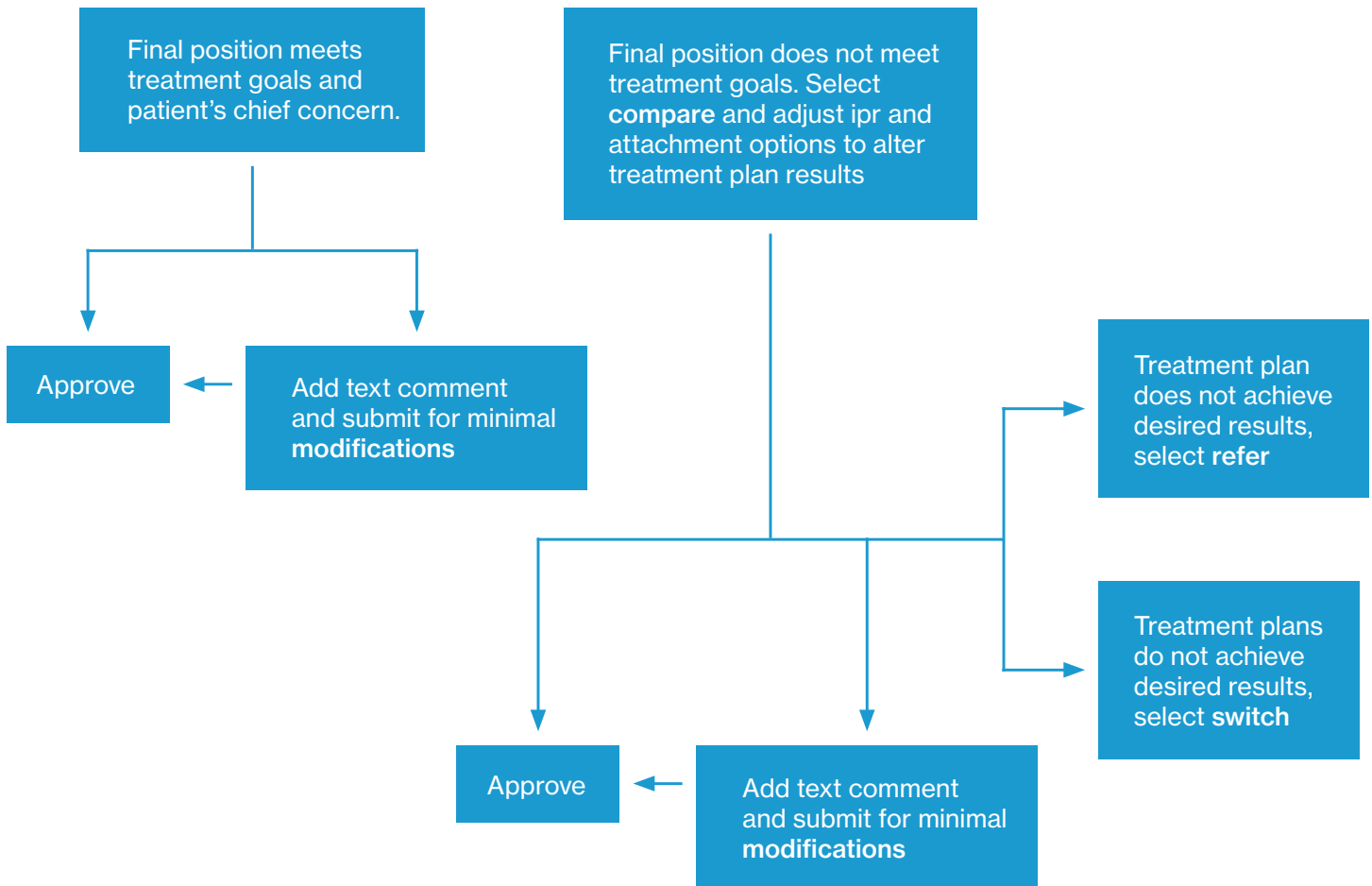
Treatment plan review

Tips & tricks

- Review ClinCheck treatment plan and check accuracy in set up
- Evaluate completed position of teeth at last aligner stage
- Approve, make minimal modifications or select refer
- Approve, make minimal modifications, switch to another Invisalign® product, or refer.

ClinCheck treatment plan review and approval procedure

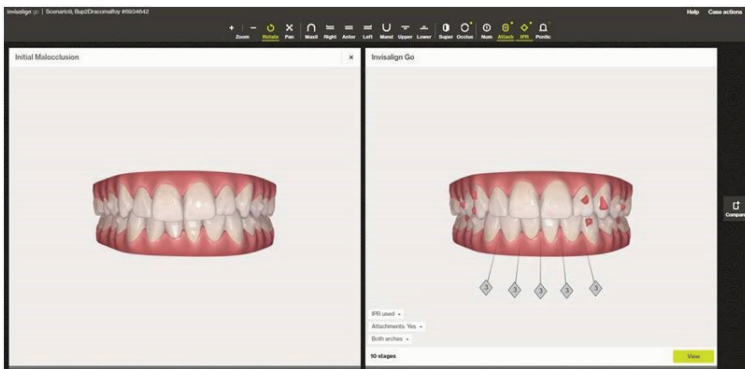
- Review initial position and suggested Invisalign Go treatment.



Doctor section

4 common case types

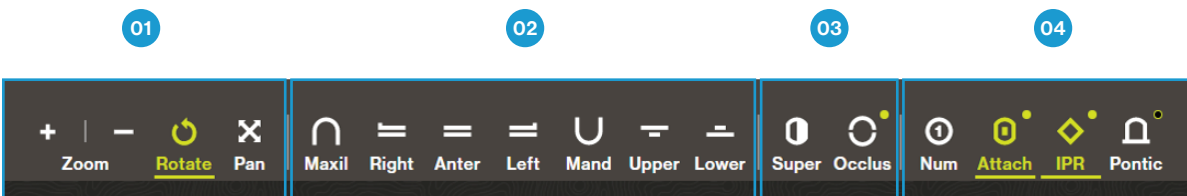
Tools



Side-by-side comparison

- Review the patient's initial malocclusion with multiple treatment plans by selecting COMPARE
- View each stage of the assumed final position by selecting VIEW.

ClinCheck tool bar



Section 1: Zoom, rotate & pan

Section 2: Select all or partial views of the ClinCheck treatment plan model

Section 3: Superimposition tool, and review occlusal view of the model

Section 4: Switch on and off tooth numbering, attachments, IPR indicators, and pontics.

ClinCheck tool bar



Staging bar indicates the position of the teeth at each aligner interval

The green box indicates which aligner is active for the patient

The shades of gray indicate active, passive or no aligner present for the treatment.

Starting treatment

IPR

Before starting, carefully review the exact amount of IPR programmed for that specific stage.

Step 1. Finishing strips

- Work up from the finest to the most coarse strip until the desired amount of enamel reduction is reached.
- Protect soft tissues using cheek retractors or cotton rolls.
- Open interproximal contact with the thinnest diamond strip. Use a gentle back and forth motion until the strip is passive.
- Step to a thicker strip to widen the contact. Work to the thickest strip needed.
- Take care near the cervical regions of contact to avoid creating ledges.
- Exercise caution using IPR when there is restricted access, insufficient enamel thickness, or restorative work such as crown and bridges.



Step 2. Gauges

- Confirm the amount of interproximal enamel removed with thickness gauges.
- Feel for slight tactile resistance when the correct amount has been removed.



Step 3. Polishing

- Polish interproximal surface with polishing strips, until adjacent surface is rounded and smooth.
- Verify the final gap dimension with thickness gauges.
- Record date and amount of IPR in patient record.



*Each provider takes full responsibility and is solely liable for the techniques and methodologies used in treatment. Providers are encouraged to utilize the techniques and materials that are best suited for each patient. Please refer to manufacturer's instructions for use.

Note: Check the appointment plan in the treatment requirements PDF to see if attachments placement is planned for that appointment. You can download the PDF from the treatment overview section in patient's file on IDS, or check it in the treatment tab on the ClinCheck® treatment plan.

Successful patient conversations

The path to patient acceptance

It takes a team

Each member of the dental team plays a vital role in gaining patient acceptance.



Hygienist



Doctor



Treatment Coordinator



Assistant



Hygiene assessment

In the recare appointment, the hygienist should:

- Perform a hard-/soft-tissue exam, keeping in mind if any conditions are related to malocclusion
- Conduct the 1-second ortho exam and look for CLAWS



Clear aligner therapy suggested

- Use Bib-on/Bib-off conversations and ING words to suggest Invisalign® therapy
- Share findings with doctor



Gather patient information

The Treatment Coordinator should:

- Reinforce patient satisfaction with clear aligner therapy
- Gather insurance and FSA information
- Schedule complimentary Invisalign consultation



Doctor periodic exam

During the exam, the doctor can:

- Confirm hygienist's findings
- Suggest a complimentary Invisalign consultation using the PCS model



Reinforce benefits

The Assistant should:

- Reinforce health benefits of aligned teeth
- Alleviate patient anxiety and answer questions with confidence

Talk tracks

Top five clues to disclose malocclusion (CLAWS)

Conduct a one-second ortho exam by asking the patient to “close” and inspect the bite. This allows you to see the anterior view and other things easily missed with just an occlusal view. The acronym CLAWS will help remind you what to consider as you look for malocclusion.

- C** Clefting/recession
- L** Lingual inclination
- A** Abfractions
- W** Wearing (night guard candidates)
- S** Shifting (slipped the contact)

Six words to avoid: Bib-on conversations

Solve instead of sell: Follow these conversational tips with patients to help convey a positive, solution-based partnership that positions Invisalign therapy as an aid toward better oral health. A few simple word choices can directly affect how attentively patients listen, how much they comprehend, and how receptive they are to your recommendations.

Words to avoid	Replace with
Invisalign (as the solution)	“Teeth out of trauma” (solution)
Orthodontics/braces	Clear aligner therapy
Crowded	Shifting or crowding
Straighten	Align
Crooked	Misaligned

Placing attachments

Tips & tricks

Tips & tricks

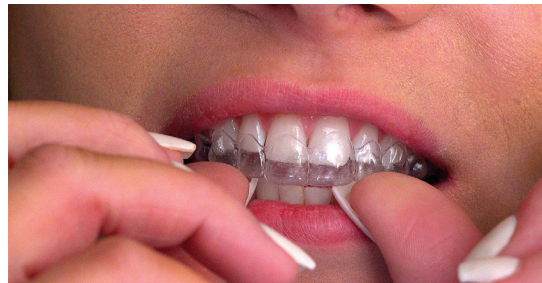
- Bonding to porcelain can be difficult and technique sensitive. If you need to bond an attachment to porcelain, use dental products designed to help condition porcelain so that attachment material may adhere to them.
- For optimal dimensional accuracy, wear resistance and bond strength, Align Technology recommends certain composites and compatible bonding adhesives*.
- You can refer to the list of recommended materials accessible via the Academy tab on IDS.

Materials needed

- Attachment template
- Composite material for creating attachments
- Bonding agent
- Attachment materials or similar dental supplies, including:
- Finishing burs to remove any flash
- Composite dispenser

Step 1. Test fit

Rinse the attachment template in cold water and test fit in the mouth.



Step 2. Isolate teeth for bonding

Isolate the teeth and prepare each tooth that will receive an attachment according to the material instructions. Be sure teeth are free of contamination and completely dry before bonding the attachment.



Step 3. Dispense attachment material

Thoroughly dry template and load a small amount of attachment composite into each attachment well of the template until it is slightly overfilled. Ensure the composite material is evenly distributed in the template well, and leveled or slightly above the top of the well.



Note: Check the Appointment Plan in the Treatment Requirements PDF to see if attachments placement is planned for that appointment. You can download the PDF from the Treatment Overview section in Patient's file on IDS, or check it in the Treatment tab on the ClinCheck Treatment Plan.

Team section

Placing attachments

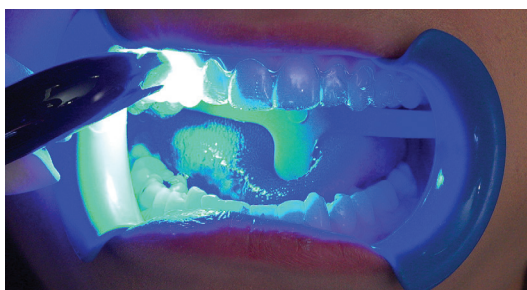
Step 4. Conform to teeth

Fully seat the loaded template onto the teeth and apply gentle pressure around each attachment to ensure full adaptation. Do not disturb the template when it is in the patient's mouth for attachment placement. This can cause movement resulting in bonding failure.



Step 5. Cure attachment

Cure each attachment according to composite manufacturer's instructions.



Step 6. Remove template and flash

Remove the template and any flash from the teeth using a carbide finishing bur. Inspect the attachments for any voids, cracks, or bubbles. Repeat process for opposite arch.



Step 7. Check aligner fit



Note: Optimized Root Control Attachments are smaller than other attachments, additional care and consideration should be taken when bonding to your patient's teeth. In order to minimize flash between the attachments do not attempt to deposit the composite directly from the unidose capsule into the template. This method does not dispense small amounts well. For better results, try dispensing the composite onto a dental composite spatula instrument, then transfer the composite into the attachment well of the template and remove excess.

Team section

Invisalign® Go treatment goals

Weekly targets

How many case assessments _____

How many case starts _____

Next week's schedule

- What time is the targeted patient's appointment?
- Who on your team is going to initiate the conversation?
- Who on your team is going to run the case assessment?

Monday

Tuesday

Wednesday

Thursday

Friday

Next week's schedule

What are you going to do to ensure the team meets their Invisalign Go treatment goals?
