Invisalign

Integration Instructions for Edge Cloud

ORTHO2

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. You can use one or multiple logins for your office.

One Login

1) Click 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.

Multiple Logins

1) In the System Integrations Editor, check the Enable Staff Login box. Click Save in the Quick Access toolbar.

2) Select User Options in the Tools tab of the Home ribbon bar, and click Integrations.

3) From the Integrations drop down menu, select Invisalign, and then click Add.

4) Enter the new Username and Password. Note that if this is an additional doctor's credentials, click the Doctor Login checkbox to enable their doctor options in the Invisalign site.

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.

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

Contact

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