

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. 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.

A screenshot of the Invisalign login interface. It features the Invisalign logo at the top left, followed by a Username field and a Password field with a masked password (represented by dots).

Invisalign ID	Name	Start Date	Invisalign Option	Status	Action Required	Birth Date	Updated	Request
1855099	Qi Zhou			Submit prescription	True	10/20/1972	9/18/2012	
1854927	Teen Lingually erupting UR3 and Power Ridge	4/21/2011	Invisalign Teen	Review ClinCheck treatment plan (04/21/2011)	True	6/11/1990	8/27/2012	
1855094	TEST TEST	5/14/2011	Invisalign Full	Finish prescription	True	5/22/1961	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	Teen Unerrupted 2nd molars and Power Ridge	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 09/08/2011	False	6/11/1990	8/27/2012	
1854954	Crowding - Midline 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	

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.

A screenshot of the Invisalign integration configuration form. It includes a 'Remove' button at the top, a 'Title' field with 'Invisalign' entered, a 'Staff/Doctor Username' field, a 'Password' field, and a 'Doctor Login' checkbox.

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

		Edit
Carla P Joiner		
Or: IS 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. View	Tr: 10/08/2011	
Address		
123 Main St. Ames, IA 50010		
Contact Details		
Home (515) 333-4444		
Email 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 Bonbace		
Invisalign		
ID 1854950	Option	Invisalign Assist
Status	Progress tracking impressions due 09/08/2011	

Contact

Invisalign

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Edge Cloud

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