3shape▷

How to
Set up a 3Shape Communicate Account in the TRIOS Software.

To send Clear Aligner cases from your TRIOS software, your 3Shape Communicate account needs to be set up in the TRIOS software.
Follow the guide below to set up your 3Shape Communicate in TRIOS software and to add your connections.
If you have already set up a 3Shape communicate account in your TRIOS software, follow the instructions below in the section entitled Refreshing 3Shape Communicate connections in TRIOS software.
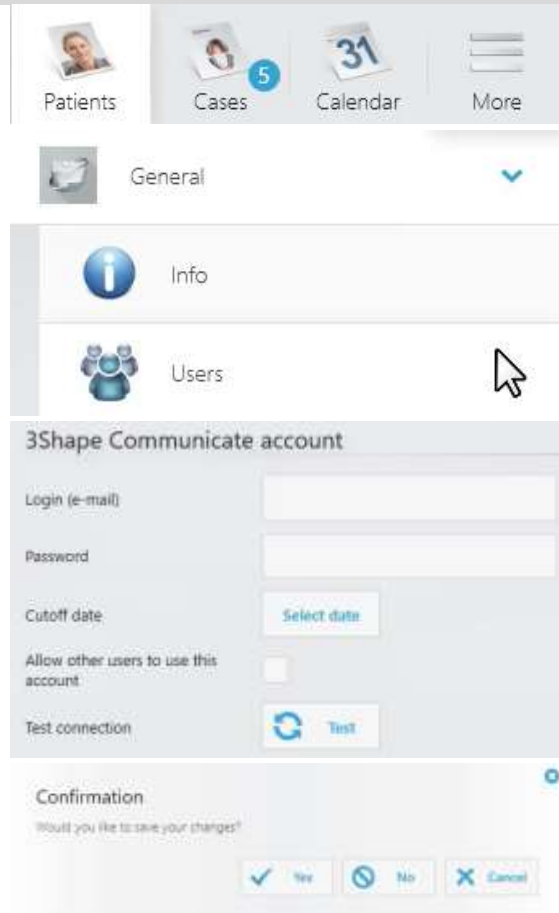
Setting up 3Shape Communicate account in TRIOS software:

Step 1. Open your TRIOS software, go to the **Patients** page and press **More**.

Step 2. From the drop-down menu select **Setting**, **General** and then **Users**.

Step 3. In the **3Shape Communicate account** menu, fill in your login details (email address) and your password, for your 3Shape Communicate account. Then press the **Test** button to check the connection.

Step 4. Once the software has finished the connection test, return to the home page. Make sure to confirm the changes by pressing **Yes** in the pop-up window.

Step 5. You will now be able to see all the labs you are connected with. When you want to create a new order, you can select the lab you want to send your order to.

Refreshing 3Shape Communicate connections in TRIOS software:

Step 1. Once you have connected with your Argen Clear Aligner lab via the **3Shape Communicate** portal, open the TRIOS software.
On the **Patients** page, press **More** and then select **Settings**.

> You will need to add a separate Connection for aligners. Search for D&S under **aligners@dnsdental.com.**

Step 2. Now select **Connections** and then **Practices** and press the **Refresh** button. Once the software refreshes the page, select **Labs** and repeat the same action.
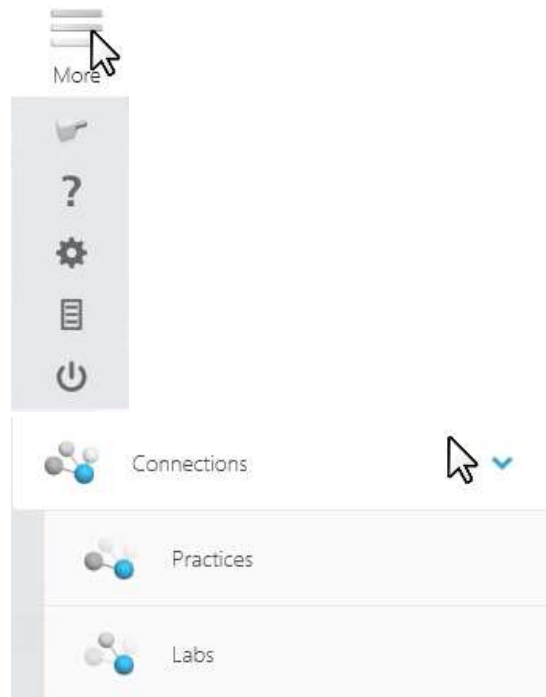
Step 3. After both the **Practices** and **Labs** tabs have been refreshed return to the home page. Make sure to confirm the changes by pressing **Yes** in the pop-up window.

Step 4. You will now be able to see all the labs you are connected with. When creating a new order, select the one you want to send your order to

How to
Enable Treatment Review (for Dentists).

To order Argen Clear Aligners from your lab, you need to enable Treatment Review in your 3Shape Communicate account. To learn how to do so, go through the steps below:
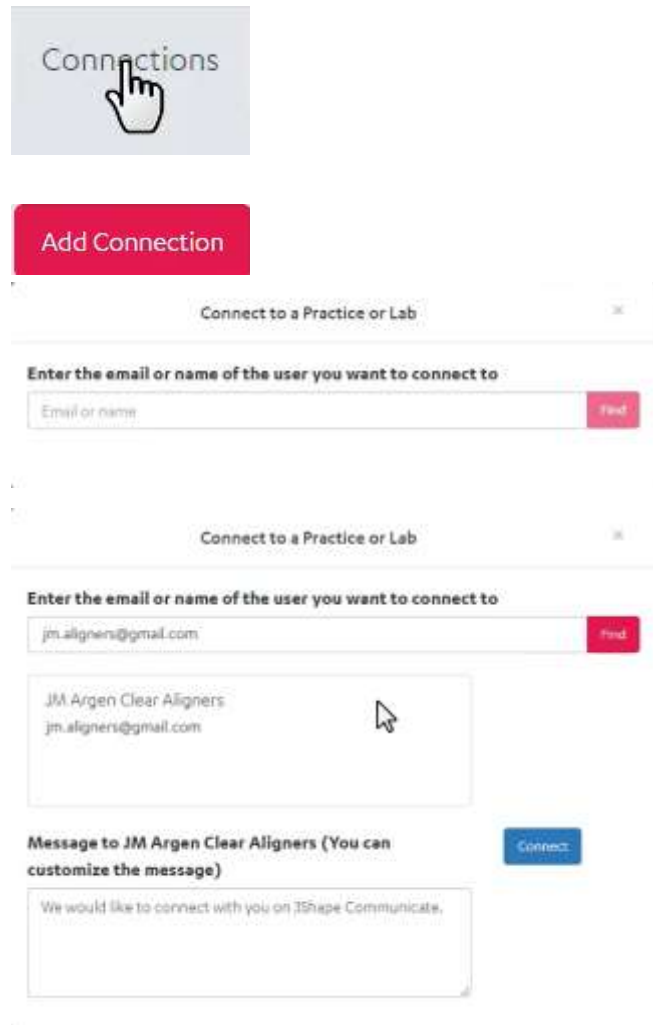
Step 1. First, you will need to connect to your Argen Clear Aligner lab. To do so, login to **3Shape Communicate** and select the **Connections** tab.

Step 2. Now press **Add Connection** and enter the lab's name or email address into the search box. Press **Find**.

Note: Remember to enter the details of the lab's 3Shape Communicate account.

Step 3. Once you have found your lab, press **Connect**. You can customize the message that will be sent with the connection request. After your request is approved by the lab, you will receive a notification email.

You will need to add a separate Connection for aligners. Search for D&S under **aligners@dnsdental.com.**

Connections

Add Connection

Connect to a Practice or Lab

Enter the email or name of the user you want to connect to

Email or name   Find

Connect to a Practice or Lab

Enter the email or name of the user you want to connect to

jm.aligners@gmail.com   Find

JM Argen Clear Aligners
jm.aligners@gmail.com

Message to JM Argen Clear Aligners (You can customize the message)

We would like to connect with you on 3Shape Communicate.

Connect

Step 4. If a Clear Aligner lab sent you a connection request, you will also find the request in the **Connections** tab. To accept the request, simply press on the green check button. The status will change from **Waiting for approval** to **Active**.

Clear Aligners   Show Details

Type

Email

⬤ Waiting for approval

✔   🚫

Cases   Treatment Review   Connections   Integrations   More ▾

Step 5. The **Treatment Review Portal** is now available in the menu and you are now able to order Argen Clear Aligners from your lab.
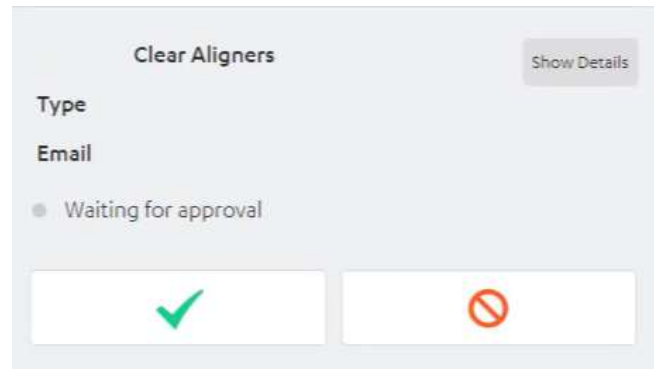
How to
Scan for Clear Aligners with TRIOS.

In order to ensure that your scans will be optimal for designing Clear Aligners, you need to follow some specific rules during the scanning. To learn what those rules are, go through the steps below:

When scanning for Clear Aligners, always scan both jaws, even if the treatment is planned for one jaw only.
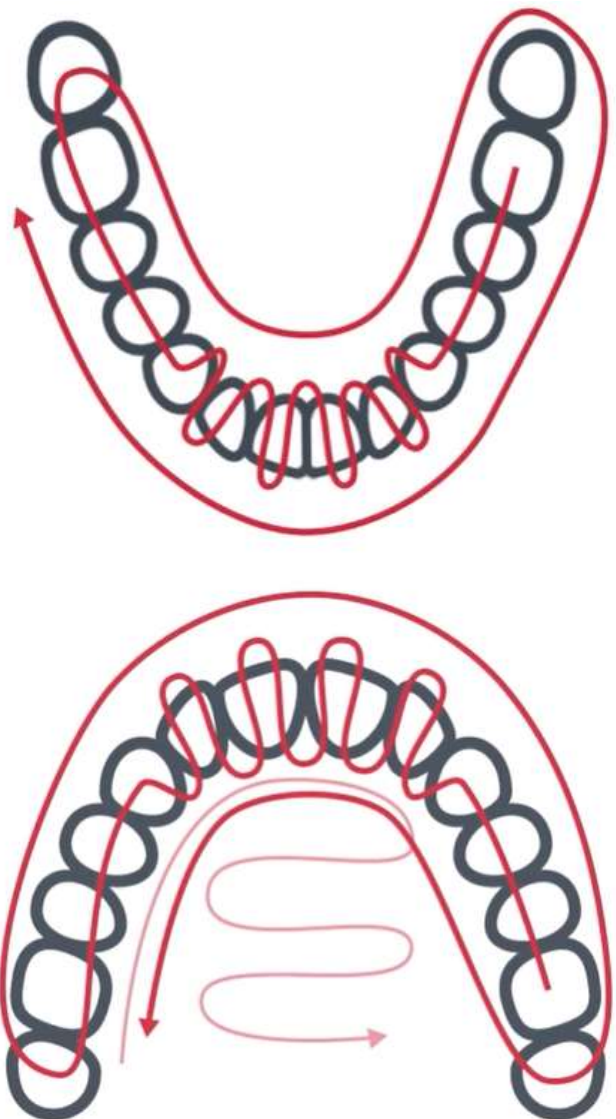Always follow the official 3Shape Scanning Strategy.
For lower jaw the recommended scanning path consists of three swipes:

- o Occlusal
- o Lingual
- o Buccal

For the upper jaw the recommended path is as follows:

- o Occlusal
- o Buccal
- o Palatal

When scanning the upper jaw make sure to include the palatal surface in the scan.

While scanning the occlusion always start at the buccal surface of the molars and make sure to capture both upper and lower teeth. Keep scanning until scans snap into position, however, scan no less than 4 teeth for perfect alignment.
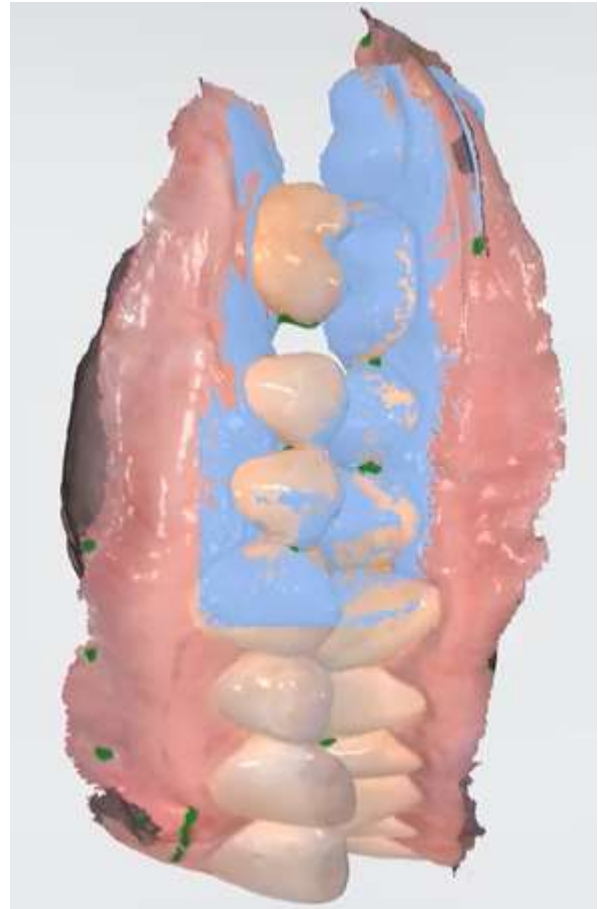
While scanning pay attention especially to:

Interproximal areas – make sure not to leave them open. If, after inspecting the scans you notice any holes, re-scan those areas.


Incisal edges – make sure to capture all of them, while avoiding stitching issues. To ensure a good data coverage, wiggle the scanner while scanning the anterior teeth.

Gingiva – capture a minimum of 2-4 millimeters of gingiva from the margin to ensure a better fit of the aligner.

2-4 mm

Molars – always capture all the back teeth even if the treatment does not involve them as the aligner will cover parts of the back molars.
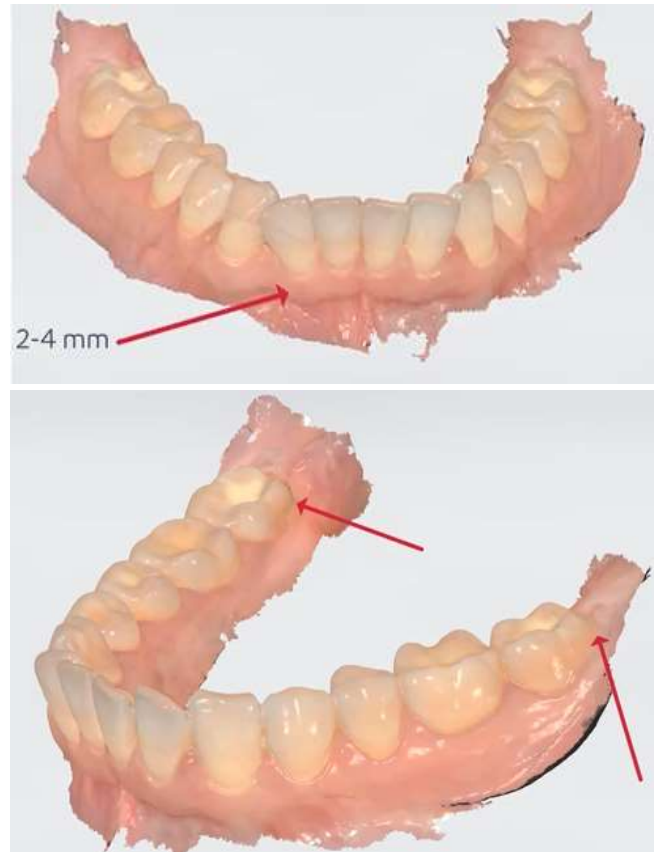
How to
Fill in an Order Form in the Treatment Review Portal.

Before you are able to send your case to a Clear Aligner lab, you will need to fill in an order form available in the Treatment Review Potal on 3Shape Communicate. To learn how to do it, go through the steps below:
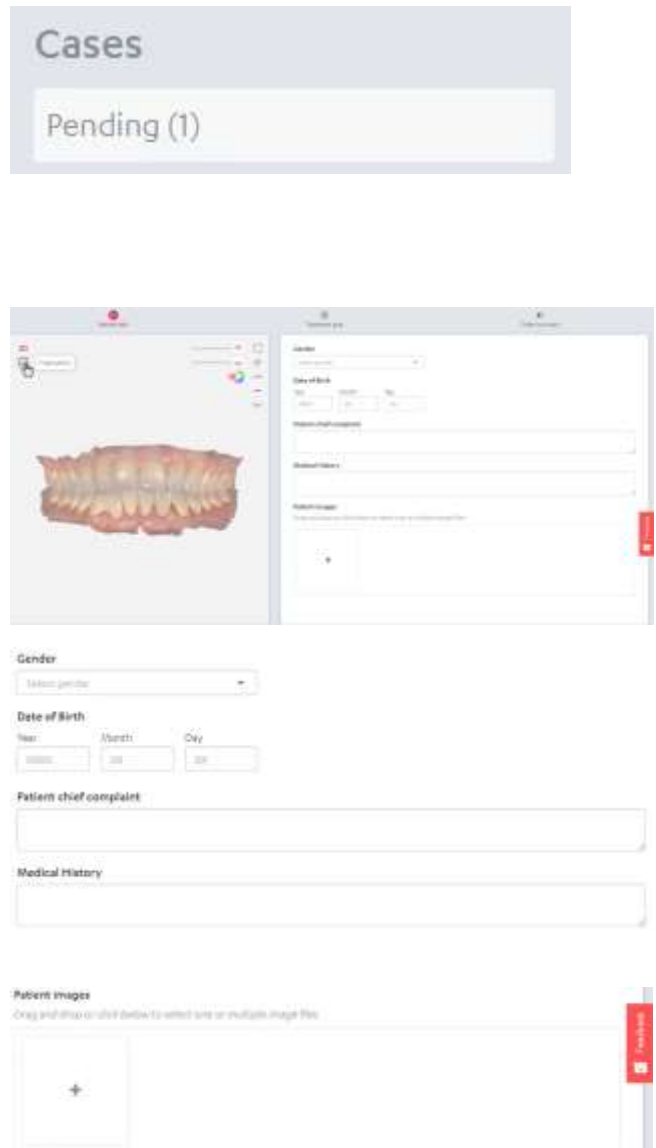
Step 1. Login to your **3Shape Communicate** account and go to the **Treatment Review Portal**. Search for your patient in the **Pending** tab. You can either go through the list of the cases or enter the patient's details in the search box.

Step 2. Press on your patient's name to open the order form.
Note: Here TRIOS users will have access to image gallery with the 3D scans of the patient.

Step 3. Fill in the **Patient info**: select gender from the drop-down menu and enter the date of birth. In the **Patient chief complaint** field, you can specify your patient's wishes. If your patient has a medical history relevant to the treatment, type in that information in the **Medical history** field.

Step 4. To upload any additional case records of your patient, such as intraoral or extraoral photos and x-ray images press on the plus button under **Patient images**. You can also simply drag and drop those records.

Step 5. Once you have filled all the relevant fields, press **Next** to move on to the **Treatment plan** step.

Step 6. On this step you'll need to provide specific details regarding the treatment by choosing the correct options. In case of any doubts, you can hover over the question mark icons to see a short explanation.

Step 7. By default, both arches are selected. If you're planning treatment for one arch only, you can deselect one of the boxes.
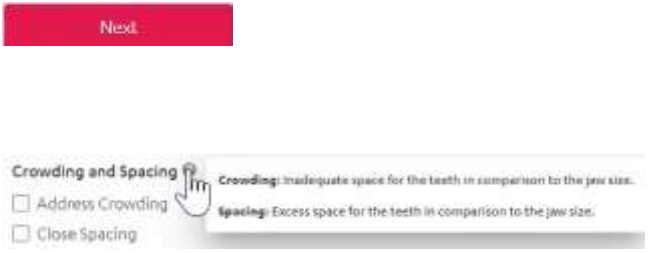
Step 8. If the treatment requires addressing crowding or close spacing, you need to select the relevant option under the **Crowding and Spacing** menu.

Step 9. Next, select the type of bite that needs to be corrected from the available list.

Step 10. By default, the midline correction is set to **Maintain**. If you need to move it to the left or to the right, you can do that for both arches separately.

Step 11. Next, you have the option to choose whether you want to correct the anterior posterior relation. You have the option to either:

- o **Maintain** the existing one
- o **Move toward class I** (Angle classification)
- o **Move toward class II** (Angle classification)

Next

Crowding and Spacing
☐ Address Crowding
☐ Close Spacing

Crowding: Inadequate space for the teeth in comparison to the jaw size.
Spacing: Excess space for the teeth in comparison to the jaw size.

Choose arch for treatment
☑ Upper Arch
☑ Lower Arch

Crowding and Spacing ⊘
☐ Address Crowding
☐ Close Spacing

Bite Correction ⊘
☐ Correct Deep Bite
☐ Correct Open Bite
☐ Correct Overjet
☐ Correct Underbite
☐ Correct Crossbite

Correct Midline ⊘
☑ Upper | Maintain
☐ Lower | Move Left
Correct Ant | Move Right

Correct Anterior Posterior Relation ⊘
☑ Left | Maintain
☐ Right | Move Towards Class I
Treatment | Move Towards Class II
☐ Allow IPR

You can change those settings for each side independently.

Step 12. Now decide on **Treatment Specifications** for both jaws by specifying whether you want to allow interproximal reduction and placement of attachments. To do it, simply check the corresponding box.

Step 13. To specify preferences for individual teeth separately, press it under **Teeth Restrictions** menu and then select the chosen option. You can choose between:

- o **Extract**
- o **Missing**
- o **Allow Attachments**
- o **Allow IPR**
- o **Immovable**

You have the option to select more than one tooth at the same time.

Note: If you have allowed IPR and attachment for all teeth, you can now change it for individual teeth by pressing on them and selecting **No IPR** or **No Attachments**.

Step 14. In the last field you can type in any information that might be helpful for the lab and then press **Next**.

Treatment Specifications

☐ Allow IPR
☐ Allow Attachments

Teeth Restrictions
Select multiple teeth at once or select a single tooth to add restrictions

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16
32 31 30 29 28 27 26 25 24 23 22 21 20 19 18 17

- Extract   - Missing   - Allow Attachment   - Allow IPR   - Immovable

Teeth Restrictions
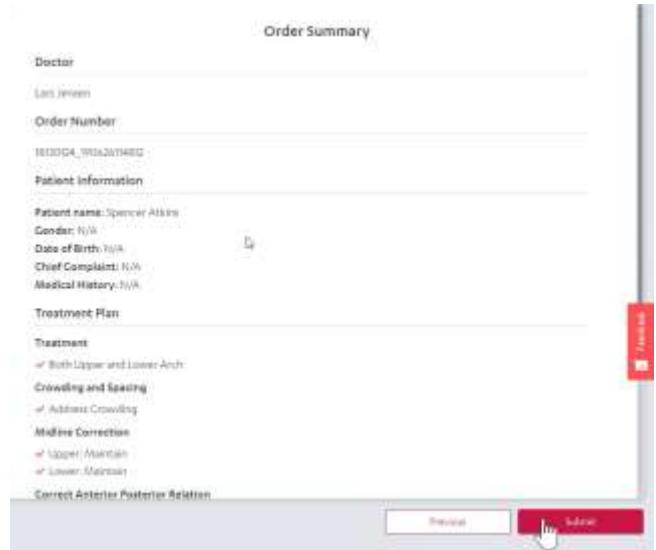Select multiple teeth at once or select a single tooth to add restrictions

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16
32 31 30 29 28 27 26 25 24 23 22 21 20 19 18 17

- Extract   - Missing   - Allow Attachment   - Allow IPR   - Immovable

Additional Information

Previous   Next

Step 15. On the last step, **Order Summary**, you can check an overview of the Clear Aligner treatment plan. If you need to make any changes, press **Previous**. If the plan is ready, simply press **Submit** to send the case.

How to
Use Treatment Review Portal (for dentists).

To send a case for design, follow the progress of the case, approve the design or request changes, use the Treatment Review Portal. To learn how to navigate it, go through the steps below:

Step 1. Login to your **3Shape Communicate** account and select the **Treatment Review Portal**.

Step 2. Here you'll have an overview of your existing cases, divided into 5 categories. To navigate between those categories, use the menu on the left. You can choose between:
- o **Pending**
- o **Sent**
- o **Designs Pending Review**
- o **Approved Treatment Proposals**
- o **Completed**
- o **All**

Step 3. The **Pending** category includes all the cases that haven't been sent for design yet. The status of the case in this category depends on whether you're a TRIOS user or not.
As a TRIOS user you'll see your cases as:
Scanned – those cases include intraoral scans, and after the patient information and order form have been filled in, the case can be sent to the lab.
As a non-TRIOS user, you'll see your cases as:
Created – fill in the patient's information and

Treatment Review

Cases

Pending (18)

Sent

Designs Pending Review

Approved Treatment Proposals

Completed

All

Pending (18)

Patient		Order Number	State
Spencer Atkins		18130124_190626114812	Scanned

Patient	Order Number	State
Marcus Smith	994005292_20012200394	Created

the order form to send it to the lab, which will later add scans to the case.

Step 4. Once the case has been sent to the lab, it appears in the **Sent** category. Here your case can go through different statuses as well:

Scan Requested – applicable only to non-TRIOS users. The case has been sent to the lab that currently awaits a scan of the gypsum model or the PVS impression that was shipped to them.

Design Requested – the case is waiting for approval from the lab.

Design Requested Approved – the case has been approved by the lab.

Design Requested Rejected – the case has been rejected. You need to contact your lab for more details.

Step 5. Once the design has been made and sent to you for approval, the case is automatically moved to the **Designs Pending Review** category. Here cases can have one of the two available statuses:

Treatment Designed – the treatment proposal was sent to you for a review.

Treatment Designed Changes Requested – after reviewing the treatment proposal you requested some changes and now are awaiting a new design.

Step 6. Once you review and approve the design, the case appears in the **Approved Treatment Proposals** category. If the treatment proposal has just been approved the case will have **Treatment Designed Approved** status. Once the case is ready for manufacturing the status changes into **Ready for Manufacturing**.

Sent (23)		
Camille Magpet	994005292_19120304091S	ScanRequested
Tom Jones	994005292_191204080036	DesignRequested
Lars Henriksen	889082303_20191114_1418_14	✔ DesignRequested
Wadsa Smith	994005292_191023070806	⊘ DesignRequested

Designs Pending Review (8)		
Patient	Order Number	State
Spencer Brooks	18130123_190626174812	↻ TreatmentDesigned
Spencer Brooks L	18130123_190626174812	TreatmentDesigned

Approved Treatment Proposals (2)		
Patient	Order Number	State
Spencer Atkins	18130124_190626174812	ReadyForManufacturing
Cao-julius Renders	994005292_190823121404	✔ TreatmentDesigned

Step 7. Finally, once the Clear Aligners have been manufactured, the case is moved to the **Completed** category with a **Manufactured** status.

Step 8. If you want to get an overview of all your cases, go to the **All** category. Here you can see every case with its current status.

How to
Review Treatment Proposal.

All Clear Aligner cases are available for your review before being sent for manufacturing. You can either approve the treatment proposal or request changes. To learn how to do it, go through the steps below:

Step 1. All cases with new treatment proposals are available in the **Treatment Review Portal**. To review the proposals, login to your **3Shape Communicate** account, press **Treatment Review** and then **Designs Pending Review**.

Step 2. Select the patient whose treatment proposal you want to review. A new page will open.

Step 3. On the left, you can see the visual representation of the proposed treatment. Press the full screen icon to see the detailed view.

Step 4. Use the timeline to view the stages of the proposed treatment. You can move between the stages to see the visualizations. There are three ways you can navigate between the stages:

o Drag the red bubble icon visible on the timeline. The number displayed in it corresponds with the stage number.
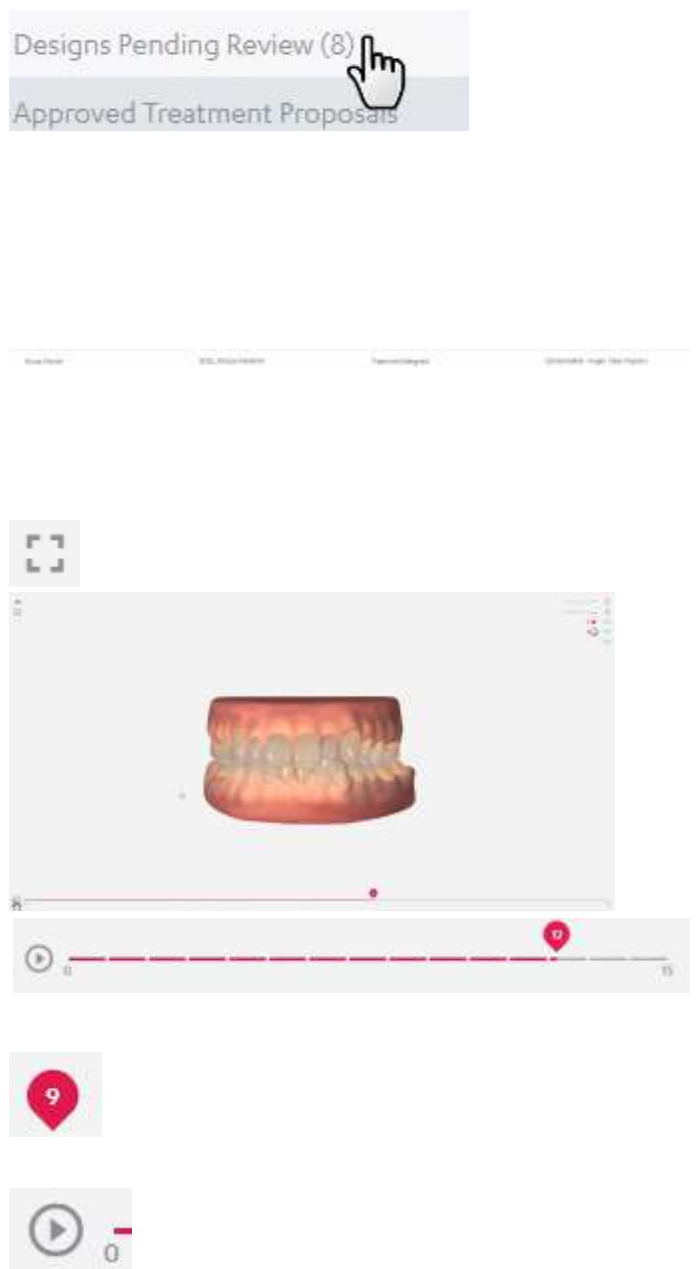
- o Press the play icon on the timeline to see the animation of all the stages.
- o Press the arrow icons on the top right from the viewer frame, available in the **Treatment Summary** box.

Step 5. You can also turn on and off the model texture. To do this, press the toggle. You can turn the texture back at any time, by simply pressing the toggle again.

Step 6. If attachments are present at any stage, you can change their visibility by using the attachment toggle

Step 7. On the right hand side, you can see the **Treatment Summary**, which is a detailed overview of all tooth movements. By default, it is opened in the **Total Movements** viewing mode, which represents the full proposed treatment per individual tooth.
In this mode you can see:
- o The total sum of all movements
- o The total sum of IPR in millimeters
- o Extractions
- o Attachments

Step 8. To change the viewing mode to **Movements per stage**, press on the corresponding button. Here you can see the changes in:
- o The movement
- o The IPR
- o Extractions
- o Attachments

from the previous to the current stage per individual tooth. Use the navigation arrows to move between stages.
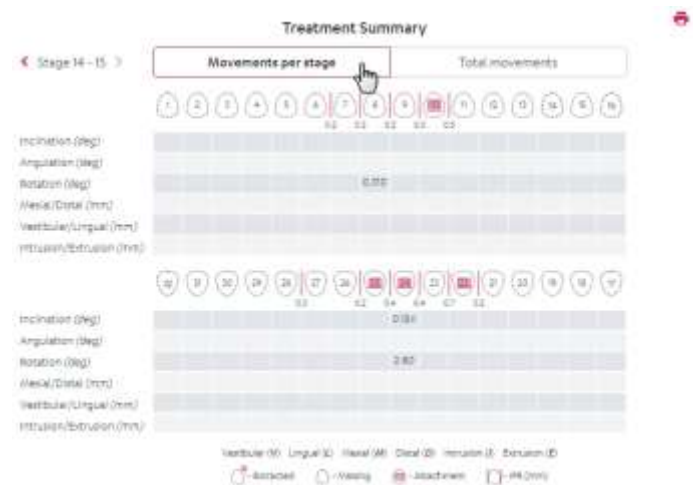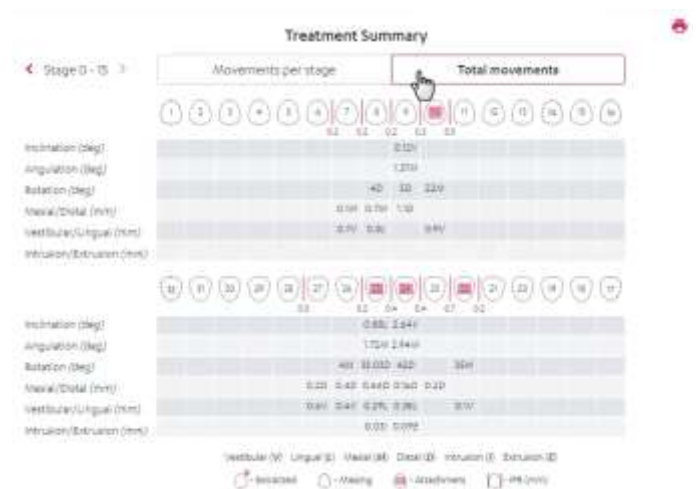
Step 9. To compare your treatment plan with the proposed treatment, press the **Treatment Summary** button and check the information provided there.

Step 10. You can also read and add any comments by pressing the **Comment** button, as well as attach and download relevant for the treatment documents.

Step 11. Once ready, you have the option to approve this treatment proposal or to request changes. To approve it and confirm that it's ready for manufacturing, press the **Approve** button.
Your case will be automatically moved to the **Approved Treatment Proposals** category in the **Treatment Review Portal**.

Step 12. You can also have the treatment proposal modified – to do this, press the **Request changes** button and specify what changes should be made. Once the requested changes have been made by the designer, the new treatment proposal will be available for your review in the **Design Pending Review** category.