## Invisalign® Go quick start guide



From initial assessment to final outcome, learn the end-to-end digital workflow and get started with the Invisalign® Go Digital System

invisalign° go

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## Getting started with Invisalign® Go

Getting started with Invisalign Go is an easy, streamlined process that can be defined in 3 simple, critical steps!

#### Step 1. Learn the Digital Workflow



Step 2. Ensure your systems are set up for Invisalign Go treatment. If you have an iTero<sup>®</sup> scanner you need to call 1-800-577-8767 to ensure that Invisalign Go treatment is added to your iTero scanner before getting started.

#### Step 3. Share your goals to integrate Invisalign clear aligner therapy with your team

- Tell them "Why" you want to start offering Invisalign clear aligners to your patients
- Build excitement around the role they will play in the process and what's in it for them?
- Define clear roles for each of them to play in the Invisalign process
  - · DA: Scanning or photos on every patient
  - Hygienist: Chairside conversations presenting treatment and diagnosing maloclucsion
  - · Doctor: Presenting treatment formally to patient
  - TC/Office Manager: Financial options to get started into treatment.
- During your next team meeting identify the patients you will target and have your team present Invisalign treatment.

## Invisalign® treatment supplies

#### Materials needed for submissions:

#### For photos:

- Mobile device with Invisalign Photo Uploader app installed
- Cheek retractors
- Photographic / palatal mirrors

#### For dental records:

- For digital impressions:
  - Align's iTero intra-oral scanner and software<sup>1</sup>
  - Only clean the wand with the supplied cloth, using anything else could damage it
- For PVS impressions:
  - PVS materials for impressions (the PVS materials should be putty and a light body for the best impressions at the most affordable cost)
  - Vinyl, nitrile or powder free latex gloves
  - Invisalign impression trays: small, medium, large and x-large tray

#### Materials needed for treatment:

#### For Attachment Placement:

- Composite material for creating attachments<sup>2</sup>
- Bonding agent<sup>2</sup>
- Composite dispenser<sup>2</sup>
- Finishing burs to remove any flash
- Unwaxed floss to check interproximal contacts

#### Dental supplies for Interproximal Reduction (IPR):

- Manual diamond strip<sup>2</sup>
- Polishing strips<sup>2</sup>
- Burs<sup>2</sup>
- Slow speed disks<sup>2</sup>

## Case assessment tool

The Case Assessment tool is the foundation to the Invisalign<sup>®</sup> Go System! This tool will allow you to easily, accurately, and effectively identify mild to moderate cases that can be fully addressed by the Invisalign Go system, simplifying the case selection process chairside.

#### 3 digital platforms to perform 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 selection and choose the relevant Invisalign product
- Quickly determine if the patient's chief concerns can be fully addressed with Invisalign Go treatment given its clinical parameters
- Access the Case Assessment tool using any of the 3 digital platforms

## Case assessment tool

#### Using the Invisalign® Photo Uploader app

Materials Needed - Download the app using the following devices

- 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 Invisalign Photo Uploader (IPU) app, login with the doctor's credentials, create a new patient, and add the patient info.\*

#### Step 2. Take initial 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. Submit a case assessment



Within just seconds, your case assessment result will be delivered via notification to your device. If the result is: 'Green' – Invisalign Go treatment recommended, the doctor can take action in IDS and submit the prescription form. 'Orange' – Invisalign Go treatment may be possible, the doctor has three options, 1) Proceed with Invisalign Go treatment, 2) Switch to

Step 5. Select up to 3 chief concerns that the patient desires to address







Note: \*In order to use the case assessment tool inside IPU, the doctor must be Invisalign Go certified.

Step 6. Receive case assessment results

Invisalign Comprehensive Product, or 3) Refer to a specialist

## Case presentation

#### **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.



#### Six words to avoid while the patient is seated in the chair

• 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

## Case presentation

#### **Talk tracks**

#### **ING conversion starters**

Please create a list of your ING words you will use with your patients next week

#### "This concerns me because..."

Using active ING verbs when discussing patients' dental issues helps them understand that change is progressive and facilitates a more positive conversation about treatment options.

#### Show and tell

- "Your gums are receding."
- "Your teeth are chipping."
- "The enamel is thinning."
- "Your teeth are shifting."
- "Your teeth are wearing."
- "Your teeth are colliding rather than sliding."

## Case referral

This digitally aided referral process allows you to transfer patient photos to an experienced Invisalign<sup>®</sup> specialist if the case is too complex for Invisalign Go treatment and/or Invisalign Go provider. Referrals can be done at any time before approving the ClinCheck® treatment plan.

#### This includes:

- 1. After evaluating the case assessment result, or
- 2. During ClinCheck<sup>®</sup> treatment plan review.

#### Preselect Invisalign specialists on IDS (Go to IDS site Account/Dr. Profile page)

- · Go to your Dr. profile page on IDS and preselect up to 5 Invisalign specialists as referral recipient doctors.
- Make changes at any time by visiting your Dr. profile page.
- You can select one Invisalign specialist as the referral default.



#### Step 1. Click on "refer"



· Click refer from IDS



· Click refer from mobile photo uploader



Click refer from iTero<sup>®</sup> Element Scanner



Click refer from ClinCheck® treatment plan

## Case referral

#### Step 2. Complete referral form



#### Step 3. Send referral to specialist

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Confirm Email Address*	

- · Choose or search for a referral recipient doctor
- You can choose another referral recipient doctor if preferred
- Send the referral request to the referral recipient doctor.

Patients	Studies	Account	Store	Academy	Support
Patient List	Patient File	1 2 3	Confirmation		
Tiny, T					
Patient	referral requ	est has been :	ubmitted		
Your refe	ral request was	sent to EventE	nail-PPR@ali	gntech.com.	
If the refe	rral request is a	ccepted, the pa	tient's photos	s with Align will b	be transferred to the selected referral recipient doctor.
You will n	ceive a messag	e confirming th	e referral or l	letting you know	that the selected referral recipient doctor declined or did not accept within 30 day
			and all the second		nother potential referral recipient doctor.

- Check the status of your patient referral requests in the pending requests tab
- If the referral request is accepted, the patient's photos and information will be transferred to the selected referral recipient doctor
- If declined, you can send the patient referral request to another referral recipient doctor.

#### Step 4. Referral request acceptance from referral recipient



· Referral request notification on IDS patient list.

ny, T		Refer Pati
	into my Invisalign Doctor Site including the patient's ClinCheck files. I understand that by doing so, I accept and w Intreatment charges. Align shall not be responsible for any cost, liability, or obligation resulting from transferring th	
Provider's Name: Dr. Alexander Dr	sque	
Provider's Invisalign ClinID: c002	01625	
Patient Contact Information?		
Last Name Initial: T	First Name: T	
Notes From Referring Doctor:		
Practice Address: Dr. karan harpreet pannu 5105 laguna blvd suite 4		
elk grove, CA 95758-5260 US		

Click 'Accept' to complete the referral request process.

## Case referral

#### Step 5. Invisalign® patient referral form

#### **Invisalign Patient Referral Form**

This Patient Referral Form notifies and authorizes Align Technology, Inc. its representatives, successors, assigns and agents (together "Align"), to transfer all of the patient's Medical Records in its possession to selected Referral Recipient Doctor listed below. "Medical Records" include, but are not limited to, x-rays, scans, reports, charts, prescriptions, medical history, photographs, findings, plaster models or impressions of teeth, diagnosis, medical testing, test results, billing, and other treatment records on file with Align for treatment purposes.

#### **Patient Information**

Tiny, T. Patient name (Last, First) 11/03/1974 Date of birth MM/DD/YYYY 6766131 Patient ID number

#### Release of patient by Current Doctor

Please transfer the patient listed above out of my Invisalign Doctor Site including the patient's ClinCheck® files. I understand that by doing so, I relinquish all control of this patient to the Referral Recipient Doctor listed below. Align shall not be responsible for any cost, liability, or obligation resulting from my decision to refer the patient to another provider for treatment or from transferring the Medical Records. I acknowledge that I am still responsible for any open balance incurred for this patient's treatment prior to the referral. I represent that I have obtained all necessary patient consent required to complete this patient referral.

Smith, Samantha Provider's Name (Please Print)

Electronic Signature Provider's Signature c01234567 Provider's Invisalign ClinID 06/26/2018 Date Signed

#### Acceptance of patient by Referral Recipient Doctor

Please transfer the patient listed above into my Invisalign Doctor Site including the patient's ClinCheck files (if available). I understand that by doing so, I accept and will assume full responsibility of any future Invisalign treatment charges. Align shall not be responsible for any cost, liability, or obligation resulting from transferring the patient or from my decision to accept the patient for treatment.

Smith, Samantha Provider's Name (Please Print)

Electronic Signature

12345 Main street, Ell Grove, CA 95876-3256 Practice address samsmith Provider's Invisalign ClinID

06/26/2018 Date Signed

## Submission process

#### Invisalign submission box checklist

- · PVS impressions, physical photos, and x-rays will not be returned if submitted inside the submission box.
- You will have access to digital records.

#### **Procedure – Step 1: Prescription Form**

Step 1: Log into IDS



Step 2: Find patient profile

- Click the "Patients" tab
- Type patient's name in the search bar or add a new patient
- Click on Patient Profile

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#### Step 5: Answer four questions on the Rx form

- · Arch to treat
- · Tooth movement restrictions
- Chief Concerns
- · Anterior space management preference

Step 3: Select patient type

Select 'Adult' as patient type

(default for Invisalign Go treatment)

- Step 6: Upload patient photos
- If you have already taken photos from Invisalign Photo Uploader app (IPU) and uploaded them, the patient's photos will be shown here.



Step 4: Select product type

- Select 'Invisalign Go clear aligners' • as treatment option
- The option for Invisalign Go will be shown to you: Up to 20 stages. Select this option

FC 2020, AGC TEST		Invisaligr
		Patient Type: An
<li>Intraoral scans ()</li>	) PV3 impressions	
Patient name / /Tero order code		
FC 2020, AGC TEST Search		
IFG 2020, AGC TEST Search		
Choose scan	Preview	
SmokeTest, invisalign (5818735)	(click to enlarg	a)
O ViveraExportSVN, SmokeTest (E593272)		
CBOsvn, SmokeTest (8593274)	1	
O smoke1708-3, test (7014100)		
O Scenario6. SmokeTest (7023587)		
O Scenario7, SmokeTest (7023619)		
A		
Intraoral scan is not available Learn more		

#### Step 7: Patient impressions

- Digital impression: If you've already taken a digital impression with the iTero® scanner, it will automatically search for patient name.
- PVS impression: If you took PVS impressions you will need to ship impressions and forms



#### Step 8: Submit

- Review prescription summary
- Click "Submit"

## Submission process

#### Procedure - Step 2: Prepare Invisalign Submission Box for Shipment

Provider (Print Name)	Patient (Print Name)	Patient ID #
PLEASE FILL OUT THIS CHECKLIST AFT	ER FILLING OUT THE ONLINE PRESCRIPTIC	ON FORM AND INCLUDE THEM IN THE
SUBMISSION BOX. Please let us kno	ow if the required patient records are enc	osed in the box or were submitted online by
checking ( $ sigma$ ) the appropriate box. Fail	ure to provide all the required records wi	l result in processing delays of this case. If one
or more items are missing, the case wi	Il not be processed until all records are re	
PATIENT RECORD	INCLUDED IN BOX	SUBMITTED ONLINE
PATIENT RECORD		
PATIENT RECORD 1. Upper impression or intra-oral scan		
PATIENT RECORD 1. Upper impression or intra-oral scan 2. Lower impression or intra-oral scan		



Always use an Invisalign submission box to submit your Invisalign Go treatments.



Insert records into submission box with printed shipping page (printed Prescription Form is optional to include).

## Digital impression – iTero® Scan

#### Incorporate Invisalign® Go treatment and iTero Element® intraoral scanners to your everyday practice.

Get the maximum benefit of our digital system with two powerful options, the iTero Element<sup>®</sup> 2 scanner and the iTero Element Flex<sup>™</sup> scanner for bolstering your capabilities in restorative and orthodontic cases.

• Real-time chairside 3D visualization

Legend Report panel

Step 4: Invisalign Go progress assessment

Show patients their progress during Invisalign treatment.

- Simulated treatment outcomes with the Invisalign
   Outcome Simulator
- Track tooth movement, tooth wear, and changes in soft tissue over time with TimeLapse Technology
- The iTero Element 2 scanner processes restorative scans up to 25% faster
- Intuitive user interface design

			New Scan	<b>▶ → → → →</b>	. ÷ 6		Orders		
Doctor Name	Dr., Invisalign Go	2	Dottor Dr Deno, InvisalignGo	License *	en15008	3	ID 👻 Scan Date		itatus
User (Email)	Dr., Invisalign Go		Fini Name *	Case Type.* Due Date: Send Ex	Cet		9526832 06/08/2016 View Rx Viewer Invisalign Outcome Simulator Invisalign Pre	Invisalign + IRecord	Completed
Password	Dr. Scanner, iTero		Notes Annues	200112	Installys Vives			Case Assessment Invisalign Go Progress Assessment	
Remember M					Vive Pis-Labord Investiga - Record Coar Sele Ming Investiga Fist Recorder				
Step 1: Log		:	Step 2: New	scan			Step 3: Access	all products	
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case asse	visalign Go ssment – 'green'/treat bur Invisalign patient nfidence.		<ul> <li>Review pla</li> </ul>	ment – 'ye an and deci Compreher	llow'/review p de - switch to asive treatmen		<ul> <li>Step 6: Invisalig outcome simula</li> <li>Show patients smile and enga treatment plar</li> </ul>	tion their simulated age them in	
Stage controls									

#### Create your end to end digital ecosystem using the iTero Element intraoral scanner.

## Taking PVS impressions

#### **Materials Needed**

- Putty
- Light-body wash PVS
- Invisalign impression trays
- Technique note: To get the best results, doctors should use the impression technique which they are most comfortable. Many doctors find the One-Step technique is a simple and reliable method for capturing full arch impressions.

#### **Tips & Tricks**

- · Wear vinyl, nitrile, or powder free latex gloves
- Use Invisalign® impression trays only
- Use PVS for impressions, not other materials
- Use a timer to monitor setting time

#### Procedure



#### Step 1: Mix putty

- Use equal amounts of putty and mixPutty is ready when uniform in
  - color, without swirls F

2



Step 4: Apply wash to trayPlace tip of light wash against putty,

- release material into trayFirmly press tip into the light wash
- material to prevent bubbles



- Step 2: Load putty into tray
  Roll material into hot dog shape and load into tray
- Press putty against tray, locking into the perforations



- Step 5: Insert tray
- Insert tray straight and evenly into mouth, center the tab to patient's nose
- Using a timer, follow recommended setting time in mouth
- Remove impression tray from mouth



3

 Step 3: Prepare putty for light wash
 Create a trough and build up the putty at distal of tray to contain the light wash and capture terminal molars



Step 6: Repeat & disinfect

- Repeat procedure for opposing arch
- Disinfect impressions before shipping

## ClinCheck<sup>®</sup> 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, refer or make changes

#### **ClinCheck Treatment Plan Review and Approval Procedure**



treatment plan.

## ClinCheck<sup>®</sup> In-Face Visualization tool

ClinCheck<sup>®</sup> In-Face Visualization tool is a powerful visualization tool that takes the treatment planning experience to the next level. This innovative tool allows doctors to visualize the ClinCheck treatment plan within an image of the patient's face instead of a 3D model. This tool gives doctors the ability to asses and plan a case in relation with patients' facial features.

• To get started, take a new wide smile photo in the Invisalign Photo Uploader (IPU) app.

• Use the new Smile button to toggle the before and after

• Zoom in on both the 3D model and in-face simulation views

- Compare multiple treatment plans using the in-face simulation views
- ClinCheck modifications using 3D controls
- Adjust plan and refresh in-face view using 3D controls
- Compare multiple treatment plans setup by toggling filters
- Adjust plan and approve



## Attachments placement

#### **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 recommends certain composites and compatible bonding adhesives\*.

#### **Materials Needed**

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

#### Procedure

#### 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.





Note: \*You can refer to the list of recommended materials accessible via the Academy tab on IDS. 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.

## Attachments placement

#### Step 3. Match tooth shade

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.

#### 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.

# 3







6



Step 7. Check aligner fit

Note: For additional techiques of IPR like Slow Speed Disk or burs, research online. 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.

## Interproximal reduction (IPR)

• Carefully review the exact amount of IPR programmed for that specific stage.

#### Procedure

#### **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.





Note: \*Each provider takes full responsibility and is solely liable for the techniques and methodologies used in treatment. Providers are encouraged to utilize the 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.

## 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

- 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

## Treatment finishing & retention

#### Retention

- Retention is the phase of orthodontic treatment which maintains the teeth in their orthodontically corrected positions following the cessation of active orthodontic tooth movement.
- This approach is supported by histological studies which have shown that the supracrestal periodontal fibers remain stretched and displaced for more than 7 months after the cessation of orthodontic tooth movement, suggesting that the retention period should generally be at least 7 months.
- The paradigm today is that retention is for life.

	Fixed retention	Removable clear retention
	• Effective	Esthetic and effective
Pros	<ul> <li>Dependable as it requires minimum patient cooperation</li> </ul>	<ul> <li>Good for de-bonding and delivering retainers on the same appointment</li> </ul>
	<ul> <li>Good for de-bonding and delivering retainers on the same appointment</li> </ul>	• Proper fit
	<ul> <li>Technique sensitive to place</li> </ul>	Patient compliance
	Difficult for patients to maintain	Patients can lose them
Cons	Can adversely impact oral hygiene	
	<ul> <li>If wire breaks, kinks or becomes active, can cause unwanted tooth movement</li> </ul>	
	<ul> <li>Usually limited to anterior teeth and lowers as uppers are in occlusion</li> </ul>	

#### Fixed vs. Removable clear retention

## Vivera® Retainers

#### 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

#### **Step 7. Delivery instructions**

- Upon delivery of your Vivera® retainers, you will recieve four sets. They will include:
  - First set Full-time, wear every day and night for 90 days.
  - Second set Graduate to nightly wear for one year.
  - · Third set Every night and weekends off
  - Fourth set Keep as an extra in case you lose any of the above.





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