

# **DENTALMONITORING (SOFTWARE AS A SERVICE)**

## **HEALTHCARE PROFESSIONAL**

### **USER GUIDE**

## **TABLE OF CONTENTS**

<b>1.</b>	<b>DEFINITIONS</b>	<b>4</b>
<b>2.</b>	<b>DESCRIPTIVE INFORMATION</b>	<b>5</b>
◆	INTENDED USE	5
◆	DESCRIPTION	5
◆	CONTRAINDICATIONS	6
◆	GENERAL WARNINGS AND PRECAUTIONS	6
◆	LIST OF REQUIRED NON-PROVIDED PRODUCTS	7
◆	COMPATIBILITY REQUIREMENTS	7
◆	CYBERSECURITY	7
<b>3.</b>	<b>OPERATING INFORMATION</b>	<b>8</b>
◆	REGISTERING TO THE DASHBOARD	8
◆	SIGNING IN TO THE DASHBOARD	8
◆	DIFFERENCES BETWEEN DOCTOR AND PRACTICE EMPLOYEE ACCOUNTS	8
◆	POTENTIAL ERROR MESSAGES	9
◆	INTERFACE OVERVIEW OF THE DASHBOARD	9
1-	NOTIFICATIONS	9
2-	PATIENTS	10
A.	MONITORED PATIENTS	10
B.	NOT MONITORED	10
C.	SHARED WITH ME	10

3-	TO-DO-LIST	10
4-	PROTOCOLS	11
5-	RESOURCES	11
A.	RANGE	11
B.	INTEGRATIONS	11
1.	Dolphin imaging	11
a.	Create a DM button	11
b.	Create a <i>DentalMonitoring (Software as a Service)</i> patient profile from Dolphin	12
c.	Import patients into <i>DentalMonitoring (Software as a Service)</i>	12
d.	Go to <i>DentalMonitoring (Software as a Service)</i> patient from Dolphin Imaging	12
e.	Particular cases	13
2.	ClinCheck	14
3.	3 Shape	14
a.	Setting up and using 3Shape® scanners with <i>DentalMonitoring (Software as a Service)</i>	14
6-	SHOP	15
7-	SUPPORT	15
8-	HELP	15
9-	MY ACCOUNT	16
10-	LOGOUT	16
◆	MONITORING PLANS	16
1-	PHOTO MONITORING LIGHT	16
2-	PHOTO MONITORING FULL	16
A.	PHOTO MONITORING FULL WITH ALIGNERS	16
1.	DYNAMIC ALIGNER CHANGE	16
2.	SCAN INTERVAL WITH DYNAMIC ALIGNER CHANGE	17
3.	FORCE GO	17
4.	SET THE ALIGNER NUMBER	17
3-	3D MONITORING: LIGHT AND FULL	17
A.	STARTING A PATIENT ON 3D MONITORING	18
B.	ADDING A 3D MODEL	18
C.	REQUIREMENTS FOR 3D MODELS	18
◆	PROTOCOLS	21

<b>1-</b>	<b>WHAT IS A PROTOCOL?</b>	<b>21</b>
<b>2-</b>	<b>HOW TO CREATE AN ACTIVATED PROTOCOL IN THE PROTOCOL LIBRARY?</b>	<b>21</b>
A.	PARAMETER SETTINGS	22
<b>3-</b>	<b>PATIENT INSTRUCTIONS</b>	<b>23</b>
A.	ADDING VARIATIONS TO A PATIENT INSTRUCTION	24
B.	DELETING A VARIATION	24
C.	EDITING A VARIATION	24
D.	GREETING AND SIGNATURE OF THE AUTOMATED SCAN REPORT	25
<b>4-</b>	<b>TEAM INSTRUCTIONS</b>	<b>25</b>
A.	ADDING A TEAM INSTRUCTION	26
B.	EDITING A TEAM INSTRUCTION	26
C.	EDIT A PROTOCOL APPLIED TO A SPECIFIC PATIENT (PATIENT PROTOCOL)	26
D.	APPLY AN ACTIVATED PROTOCOL TO MULTIPLE PATIENTS AT ONCE	26
<b>5-</b>	<b>QUICKSTARTS</b>	<b>27</b>
<b>◆</b>	<b>PATIENT MANAGEMENT</b>	<b>28</b>
<b>1-</b>	<b>CREATE A NEW PATIENT</b>	<b>28</b>
<b>2-</b>	<b>START A MONITORING</b>	<b>28</b>
<b>3-</b>	<b>PATIENT CARD OVERVIEW</b>	<b>28</b>
A.	PATIENT CARD SUMMARY	28
B.	MONITORING TAB	29
C.	TIMELINE/ACTIONS	29
D.	PATIENT INFO TAB	29
E.	SCANS	30
F.	NOTES	30
G.	SCHEDULED ACTIONS	30
H.	SEND ANNOTATED PHOTOS TO THE PATIENT	30
I.	NOTIFICATIONS PANEL	30
J.	COMMUNICATION	31
K.	GOALS	31
1.	Configuring and tracking Goals	31
2.	Messaging behaviors for Goals	32

3.	Goal statuses	32
4.	Parameter definition with Goals	33
4-	<b>SPECIFIC ADDITIONS TO 3D MONITORING</b>	<b>33</b>
A.	ACTIVITY GRAPH	33
B.	TOOTH STATUS INDICATOR	33
C.	3D MATCHING	35
D.	NEW ACTION	36
◆	<b>VIDEO CONSULTATION</b>	<b>37</b>
◆	<b>SEND GROUP MESSAGE</b>	<b>38</b>
◆	<b>DM APP INTERFACE</b>	<b>38</b>
1-	HEALTHCARE PROFESSIONAL FUNCTIONALITIES	38
2-	PATIENT FUNCTIONALITIES	38
4.	<b>GLOSSARY</b>	<b>39</b>
5.	<b>DATE OF PRINTING</b>	<b>40</b>
6.	<b>USER ASSISTANCE INFORMATION</b>	<b>40</b>

## 1. DEFINITIONS

<i>3D Model</i>	3D intraoral dental model
<i>Dashboard</i>	Web-based interface for the <i>Healthcare Professional</i>
<i>Data Analysis Platform</i>	Platform where <i>Scans</i> taken with the <i>DM App</i> are received before being reviewed by the <i>Healthcare Professional</i> through the <i>Dashboard</i>
<i>DentalMonitoring (Software as a Service)</i>	Software allowing patients to take pictures of their intraoral cavity using the <i>DM App</i> , and <i>Healthcare Professionals</i> to review these pictures via the <i>Dashboard</i> . This product comprises a mobile application ( <i>DM App</i> ), a web-based interface ( <i>Dashboard</i> ), and a <i>Data Analysis Platform</i> .
<i>DM App</i>	<i>DentalMonitoring</i> mobile application
<i>DM Cheek Retractor</i>	Cheek retractor sold by Dental Monitoring under DentalMind branding
<i>DM ScanBox</i>	Product accessory sold by Dental Monitoring under DentalMind branding
<i>Observation</i>	Finding amongst the possible outputs for observed <i>Parameters</i>
<i>Healthcare Professional</i>	Licensed or non-licensed healthcare professional exercising in a healthcare facility with proficient skills
<i>Instruction</i>	Sent to <i>Healthcare Professional</i> through the <i>Dashboard</i> and/or to patient through the <i>DM App</i>
<i>Parameter</i>	Parameter the <i>Healthcare Professional</i> will observe remotely by reviewing <i>Scans</i> through the use of <i>DentalMonitoring (Software as a Service)</i>
<i>Scan</i>	Set of intraoral pictures taken with the <i>DM App</i>
<i>ScanBox pro</i>	Product accessory sold by Dental Monitoring under DentalMind branding

## 2. DESCRIPTIVE INFORMATION

### ❖ INTENDED USE

*DentalMonitoring (Software as a Service)* is a software intended to be used as a communication tool between *Healthcare Professionals* and their patients. The product allows patients to take a set of pictures of their oral cavity (hereinafter *Scan*) by using a mobile application (*DM App*) installed on a smartphone. The *Scan* is taken by the patient, a non-healthcare professional, or a *Healthcare Professional*. The *Scan* is taken in healthcare facilities, such as a dental practice, or in a non-healthcare environment, such as the patient's own home.

*DentalMonitoring (Software as a Service)* enables *DM App* users to transfer the *Scan* to *Healthcare Professionals*. The latter receive the *Scan* for review and can share results with their patients.

*DentalMonitoring (Software as a Service)* does not drive clinical management; rather, it informs *Healthcare Professionals* through pictures of the patient's oral cavity. Specific treatments or treatment suggestions remain the sole responsibility of *Healthcare Professionals*.

*DentalMonitoring (Software as a Service)* is indicated for use for patients over the age of 6.

### ❖ DESCRIPTION



\*optional

*DentalMonitoring* is composed of a mobile application (*DM App*), a website (*Dashboard*) accessible at [www.dental-monitoring.com/doctor](http://www.dental-monitoring.com/doctor) and a *Data Analysis Platform*.

1. The *Dashboard* is where *Healthcare Professionals* can:

- a. Manage and set up patient profiles (*Patient Cards*)
- b. Set *Protocols* by choosing the frequency at which patients should take *Scans* (*Scan Interval*), preselect the *Parameters* they wish to observe and the related actions to be triggered when an *Observation* occurs:
  - i. Send an automated message to the patient (*Patient Instructions*)
  - ii. Display instructions to the *Healthcare Professionals* (*Team Instructions*)
  - iii. Display detected *Observations* in the 'Notifications' tab
  - iv. Adapt the *Protocol* (e.g. *Scan Interval*)
2. Each time a *Scan* is due, the patient can take it directly or with the help of a third party. Once complete, it is sent through an internet connection to the *Data Analysis Platform*.
3. *Scans* are reviewed by the *Healthcare Professional* to see if any *Observations* are present within the *Parameters* the *Healthcare Professional* has set up to observe in the *Protocol* and the associated *Instruction* is triggered.
4. *Instructions* triggered are displayed as follows:
  - a. For the *Healthcare Professional*:
    - i. On the *Dashboard*, *Observations* and the associated *Team Instructions* are displayed in the 'Notifications' tab.
    - ii. In the *DM App*, *Patient Instructions* are displayed in the feed. Of note, *Healthcare Professionals* can also access the *DM App*.
  - b. For the patient: *Patient Instructions* are displayed in the feed of the *DM App*.

## ❖ CONTRAINDICATIONS

*DentalMonitoring* (Software as a Service) should not be used on patients under the age of 6.

## ❖ GENERAL WARNINGS AND PRECAUTIONS

The following population should be assisted by a third party to perform *Scans*:

- children up to 12;
- adults or children visually impaired;
- adults or children hearing impaired;
- or any condition that might prevent the patient from adopting the right position to take a *Scan*.

*DentalMonitoring* (Software as a Service) is not intended to replace standard practices for diagnosis or treatment.

In the event of pain, discomfort, or any other symptom during treatment, the patient should refer to their *Healthcare Professional* since the latter has the ultimate responsibility for making medical decisions.

Review of the *Scans* by the *Healthcare Professional* and provided through *DentalMonitoring (Software as a Service)* are limited only to elements visible on the *Scans*.

Some *Scans* may be rejected if they cannot be processed by *DentalMonitoring (Software as a Service)*, e.g. insufficient pictures. In such cases, the patient will be informed of the reason for the rejection and given advice on how to take acceptable *Scans*.

## ❖ LIST OF REQUIRED NON-PROVIDED PRODUCTS

- DM Cheek Retractor (REF 002B03004, REF 002B02004, REF 002B01004)
- DM ScanBox (REF 01A08001): optional accessory
- ScanBox pro (optional accessory): 1x ScanBox pro - Phone support (REF 1005-001) + 1x ScanBox pro - Cheek retractor tube in size S (REF 1006-001), M (REF 1007-001) or L (REF 1008-001)
- A device allowing web access compatible with the *Dashboard* (see [Compatibility requirements](#)).
- A smartphone with an internet access (see [Compatibility requirements](#)).

## ❖ COMPATIBILITY REQUIREMENTS

The *Dashboard* must be accessed using a computer that:

- is free of viruses or malware;
- is running the most up-to-date version of the operating system; and
- has a resolution of at least 1920x1080.

All browsers and operating systems listed below should have the latest updates installed:

- Operating Systems: Microsoft Windows (8.1 or newer) or Mac OS (10.13 or newer)
- Web browser: Google Chrome, Mozilla Firefox, Apple Safari, Microsoft Edge.

The *DM App* is compatible with smartphones running either:

- Android 6 and up
- iOS 11 and up.

## ❖ CYBERSECURITY

If you suspect a cybersecurity issue on your device and/or your smartphone, it's recommended that you do not use the *Dashboard* and/or the *DM App*.

It is recommended that your device and your phone run the latest available version of the operating system. To update your operating system, please follow the advice from your device and/or your phone's manufacturer.

The *DM App* and the *Dashboard* do not provide any additional layers of privacy protection beyond the use of:

- a login and password for the *Dashboard*; and



- a login and password OR magic link for the *DM App*.

**Please note:**

- For the *Dashboard* you can log out of your account at any time by clicking on the **logout** button on the top right of your screen.
- For the *DM App* you can log out of your account at any time by tapping **logout** in *Preferences*.

**When you are logged out, you will not receive any notifications on the *DM App*.**

It is strongly advised that your device and your phone have an active lock mechanism in place, such as a passcode or fingerprint. Please see your device and phone manufacturer's guides on how this can be set up.

### 3. OPERATING INFORMATION

#### ❖ REGISTERING TO THE DASHBOARD

Using *DentalMonitoring (Software as a Service)* requires a verified account. Please contact *Customer Support* for more information.

#### ❖ SIGNING IN TO THE DASHBOARD

*DentalMonitoring (Software as a Service)* must be accessed by individuals only using their unique credentials:

1. Visit <https://www.dental-monitoring.com/doctor/>
2. Enter credentials: login and password
3. Click on **Sign in**.

#### ❖ DIFFERENCES BETWEEN DOCTOR AND PRACTICE EMPLOYEE ACCOUNTS

Please note that users with the user role *Practice Employee* will not be able to access certain features described in this guide when logged in. In particular, a *Practice Employee* will not be able to access:

- The 'Protocols' tab and all of the associated features. Please note that a *Practice Employee* can still view and edit *Patient Protocols* through a patient's *Patient Card*.
- The 'Range' sub-tab (under *Resources*)
- The Shop tab and all of the associated features
- The group messaging feature
- All features associated with 'My Account' except for the ability to change their personal information (email, name, phone number, language, password, dental notation)

- The 'Shared With Me' sub-tab (under 'Patients'). This also includes the ability to share patients with other healthcare professionals through the New Action button 'Share Patient' on the *Patient Card*. A user with the user role *Doctor* may not share a patient with a *Practice Employee*.

## ❖ POTENTIAL ERROR MESSAGES

There are two potential types of error messages you may see when navigating the Dashboard. You can identify which type of error has occurred by looking at the error code, which is often a three-digit number beginning with either 4 or 5 (e.g. 404, 503).

### User Errors

Error messages beginning with 4 indicate that there is an error on the user's side. This means either that the user has entered a URL that does not exist, or the user does not have the correct access to view the page (for example, if you are trying to view the profile of a patient that belongs to another doctor). If you receive this error, please double check that the URL is typed in correctly and you are logged in to your DentalMonitoring account.

### Server errors

Error messages beginning with 5 means the error originates from the server. An example of this would be in the case where there is an update in progress. If you see this error, please contact Customer Support details provided in [User Assistance Information](#)).

## ❖ INTERFACE OVERVIEW OF THE DASHBOARD

### Main Menu

NOTIFICATIONS **100** PATIENTS TO-DO LIST PROTOCOLS RESOURCES SHOP

### Top Right Menu

SUPPORT HELP MY ACCOUNT LOGOUT

Please note some of the above menu items may be placed inside a collapsible menu in order to adapt to your screen resolution.

### 1- NOTIFICATIONS

The '*Notifications*' tab contains three sub-tabs: 'To Review', 'Inbox' and 'Additional Scans'.

The 'To Review' tab contains notifications including:

- Actions triggered by the *Patient Protocol* as set up for each patient:
  - Detected *Observations*
  - *Team Instructions*
  - *Patient Instructions*
- *Team Instructions* not generated by a *Protocol*: see '**Send instruction to team**' in [New Action](#)
- Specific actions taken by patients (e.g. aligner number update)

Each *Notification* will stay in the 'Notifications' tab until it is marked as reviewed. It will always be accessible in the *Patient Card*. A *Notification* is composed of:

- *Priority*: Each *Notification* has a priority: Alert, Warning, Information. The *Priority* level can be set in [Protocols](#).
- *Patient Instruction*: A communication received by the patient. Please note the 'To Review' tab displays the *Message Identifier* and not the actual message received by the patient. This can be set in [Patient Instructions](#).
- *Team Instruction*: This is the instruction that the *Healthcare Professional* team should follow in response to the detected *Observation*. This can be set in [Team Instructions](#).

The 'Inbox' tab contains direct messages sent by patients from their *DM App*. Each direct message will stay in the 'Inbox' tab until it is marked as reviewed.

The 'Additional Scans' tab will contain any additional scans from patients. For more information on additional scans please see the [New Action](#).

## 2- PATIENTS

### MONITORED PATIENTS

*Monitored Patients* contains all actively monitored patients. The *Monitored Patients* tab displays:

- The date and description of each monitored patient's latest activity
- The type of treatment
- Their *Monitoring Plan*
- The date of their latest *Scan*

Click on the patient's name to access the patient's detailed *Patient Card*.

### NOT MONITORED

Contains all patients who are not being actively monitored: patients whom have stopped being treated or no longer use *DentalMonitoring (Software as a Service)*.

### SHARED WITH ME

*Shared With Me* contains all of the *Patient Cards* that have been shared by other *Healthcare Professional(s)*. (Sharing a *Patient Card* can be done through the: [New Action](#) button). By default, you will have two patients in this tab: one for aligners and one for braces. Please note these patients are read only and therefore you may not modify their details or communicate with them.

*Patient Cards* that have been sent by another *Healthcare Professional* using *DentalMonitoring (Software as a Service)* will appear here. The *Patient Card* will be accessible in read only mode once **Accept share** is clicked.

You may add a comment to a shared patient's timeline by clicking on 'add a shared comment'. This comment will be visible to the doctor who has shared the patient with you.



### 3- TO-DO-LIST

The *To-Do List* gives the option of creating a list of patients where particular actions are needed. Any patient can be added to the *To-Do List* with an optional comment. When a *To-Do* item is resolved, another comment can be added.

Examples of use:

- remember to call a patient
- reschedule an appointment
- check on a specific tooth movement

A patient can be added to the *To-Do List* through the [New Action](#) button.

### 4- PROTOCOLS

The *Protocols* tab allows the user to manage:

- *Protocols*
- *Quick starts*
- *Patient Instructions*
- *Team Instructions*

### 5- RESOURCES

#### RANGE

This is where all the different services provided by DentalMind are listed with their corresponding price.

#### INTEGRATIONS

This is where the instructions to integrate *DentalMonitoring (Software as a Service)* with 3Shape, Dolphin Imaging, and Invisalign ClinCheck can be found. These instructions are also documented hereinafter.

##### 1. Dolphin imaging

The integration allows you to launch *DentalMonitoring (Software as a Service)* from Dolphin and open existing patients or add new patients to *DentalMonitoring (Software as a Service)*, auto-filling the new patient information from Dolphin.

*Note: Dolphin Imaging 11.9 or above required. If you don't have these versions, email [support@dolphinimaging.com](mailto:support@dolphinimaging.com) to request these versions.*

##### a. Create a DM button

- Open Dolphin Imaging v.11.9 or above
- Click on **Edit > Edit custom toolbar**
- Click on "Add"
-

- Fill in **Keyname** with “DM”
- Fill in **Button Text** with “DM”
- Fill in **Tooltip Text** with “Dental Monitoring”
- Fill in **Command** with “explorer”
- Go to <https://dental-monitoring.com/doctor/resources/dolphin> and click on “Download DM button bitmap for Dolphin”. Place it in **Button bitmap**. Click on “Copy to clipboard” and paste in Parameters

e) Click on “Apply”, then click on “OK”. Note: This process only needs to be done once. Once you have configured the DM button, you won’t need to do it again.

b. *Create a DentalMonitoring (Software as a Service) patient profile from Dolphin*

- a) Click on “Patients”
- b) Look for your patient using the search bar
- c) Click on the patient in the patient list
- d) Click on “Details”
- e) Check that the email address field is filled out. Email is mandatory and will be used to configure the *DentalMonitoring (Software as a Service)* account of the patient.

c. *Import patients into DentalMonitoring (Software as a Service)*

- a) Select the patient you want to create in *DentalMonitoring (Software as a Service)*.
- b) Click on the DM button. *Your browser will open the DentalMonitoring (Software as a Service) patient creation card with all the information filled from the Dolphin Imaging software.*
- c) Check all the details and click on “Create Patient”

d. *Go to DentalMonitoring (Software as a Service) patient from Dolphin Imaging*


- a) Click on DM button. *Your browser will open the DentalMonitoring (Software as a Service) patient profile.*

## e. Particular cases

a) If the Dolphin email is different of the *DentalMonitoring (Software as a Service)* profile information of an existing patient:

### Patient found in Dental Monitoring


A patient has been found with Dolphin Imaging patient ID DEMO7, but has a different email (dolevayvonne@dental-monitoring.com instead of dolevayvonne2@dental-monitoring.com). Do you want to edit this patient?

PATIENT NAME	PATIENT EMAIL	PATIENT DOLPHIN ID	
 Yvonne Doleva	dolevayvonne@dental-monitoring.com	DEMO7	<a href="#">Edit patient</a>

b) If the Dolphin ID is different of the *DentalMonitoring (Software as a Service)* profile information of an existing patient:

### Patient found in Dental Monitoring


A patient has been found with email dolevayvonne@dental-monitoring.com, but has a different Dolphin Imaging patient ID (DEMO7 instead of DEMO78). Do you want to edit this patient?

PATIENT NAME	PATIENT EMAIL	PATIENT DOLPHIN ID	
 Yvonne Doleva	dolevayvonne@dental-monitoring.com	DEMO7	<a href="#">Edit patient</a>

c) If the Dolphin Name and Last Name are identical on the *DentalMonitoring (Software as a Service)* profile information of an existing patient:

### Patient found in Dental Monitoring

Some patients have been found with a matching firstname and lastname in Dental Monitoring with a different email and Dolphin Imaging patient ID. Do your Dolphin Imaging patient matches with one of them?

PATIENT NAME	PATIENT EMAIL	PATIENT DOLPHIN ID	
 Yvonne Doleva	dolevayvonne@dental-monitoring.com	DEMO7	<a href="#">Edit patient</a>
			<a href="#">Create a new patient</a>

## 2. ClinCheck

If you wish to monitor patients undergoing an Invisalign treatment, you do not need to take a new 3D Model. The steps provided below will guide you through the process of exporting your patient's 3D Model from the ClinCheck software in order to use it with *DentalMonitoring (Software as a Service)*.

1. Enter your ID and password to log in to your Invisalign account.
2. You must have the latest version of the *ClinCheck Pro* software installed (version 3.1 or above). If not, you'll need to download it from the Support tab under Software Download & User Guides.
3. Once the ClinCheck Pro software is downloaded and installed, go to your patient list, and select the right one.
4. On the patient's form, click on ClinCheck. Warning: Please be sure to click on the software version of ClinCheck, and not on the web version (which does not allow the export of 3D Models).
5. Once the ClinCheck software is open, go to the Export menu, and then STL.
6. The STL Export window will open. You can choose to export the 3D Models in their initial position (malocclusion), or in the final position (setup).
  - a. For a treatment monitoring, the initial situation of the patient's teeth is required (choose Initial).
  - b. For a retention monitoring, the final situation of the patient's teeth from the final step of the treatment is needed (choose Final).
7. Save the files in whichever folder you want, for instance on your desktop. The files will be exported in occlusion and in the appropriate 3D format (STL). You will obtain one STL file for each arch. The 'upper' file contains the maxillary arch, while the 'lower' file contains the mandibular arch.
8. You will then have to log in to your *DentalMonitoring (Software as a Service) Dashboard*. Go to your patient's form, click on 'upload a new 3D model'.
9. The next window will appear. Pick the ClinCheck exported file from each arch in its respective field, then click on 'add a new 3D model'.
10. Your patient's monitoring will now begin!

## 3. 3 Shape

This integration allows you to send 3D Models from 3Shape Communicate to *DentalMonitoring (Software as a Service)*.

### a. Setting up and using 3Shape® scanners with *DentalMonitoring (Software as a Service)*

Add *DentalMonitoring (Software as a Service)* to your Communicate account:

1. Login to 3Shape Communicate:
  - For Europe go to: <https://www.3shapecommunicate.com/en/Account/LogOn>
  - For North America: <https://us.3shapecommunicate.com/en/Account/LogOn>
  - For Asia: <https://as1.3shapecommunicate.com/en/Account/LogOn>

If you don't know your password, click on "I forgot my password"

2. Click on "Connections". This step depends on your location.
3. Click on "Find"
4. Click on "Add Connection"
  - For Australia & Asia fill with: [scan\\_asia@dental-monitoring.com](mailto:scan_asia@dental-monitoring.com)
  - For US fill with: [scan\\_us@dental-monitoring.com](mailto:scan_us@dental-monitoring.com)
  - For EU fill with: [scan@dental-monitoring.com](mailto:scan@dental-monitoring.com)
5. Click on "Connect"
6. Check for 'Dental Monitoring' on Connected Sites tab

Note: Your Communicate account can now send your 3D Models to *DentalMonitoring (Software as a Service)*. This process only needs to be done once. Once you have configured 'Dental Monitoring' as a connected site, you won't need to do it again.

How to send a case to *DentalMonitoring (Software as a Service)* with your TRIOS 3Shape scanner after acquiring a 3D Model:

1. Click on "Patients"
2. Search for patient
3. Click on patient
4. Click on the order you want to send
5. Click on "Tools"
6. Click on "Copy" in the dropdown menu
7. Choose "Standard" copy
8. Click on "Study model"
9. Select DM and click "OK"
10. Click on "Change lab"
11. Click on Send icon
12. Click on "Send Order"
13. Wait until the upload is finished

If you want to set the *DentalMonitoring (Software as a Service)* as a default recipient, please follow these steps:

1. Click on Change Lab
2. Click on Set up default template
3. Click the lab you want to set as a default
4. Confirm

## 6- **SHOP**

This tab allows the user to order DentalMind products.

## 7- **SUPPORT**

This is where questions about *DentalMonitoring (Software as a Service)* can be sent to the *Customer Support* team.

[support@dental-monitoring.com](mailto:support@dental-monitoring.com)

<https://dental-monitoring.com/>



## 8- HELP

The *Help Center* gives users access to a range of help articles and walkthroughs. This interactive tool can be accessed any time.

## 9- MY ACCOUNT

*My Account* allows users to:

- Manage their subscriptions to certain DentalMind products
- Download and pay their invoices
- Access and modify their personal information and reset their password
- Manage their dental notation preference
- Manage the language of the interface
- Download the history of *Observations* of all their patients

## 10- LOGOUT

The *Logout* link allows users to disconnect their *DentalMonitoring (Software as a Service)* account from the currently used computer.

# ❖ MONITORING PLANS

## 1- PHOTO MONITORING LIGHT

*Photo Monitoring Light* is the most basic *Monitoring Plan*. It does not have any *Protocols*. Therefore, *Healthcare Professionals* need to review and self-assess all patient *Scans* individually.

In *Photo Monitoring Light*, patients are fixed at a 2-week *Scan Interval* which cannot be changed. However, an immediate *Scan* can be requested at any time through the *Patient Card*.

## 2- PHOTO MONITORING FULL

*Photo Monitoring Full* tracks patients through regular *Scans* of their teeth taken with the *DM App*. *Photo Monitoring Full* is only capable of tracking *Parameters* that can be visually detected. See [Parameter Settings](#).

### PHOTO MONITORING FULL WITH ALIGNERS

#### 1. DYNAMIC ALIGNER CHANGE

The Dynamic Aligner Change functionality is an option within *Photo Monitoring Full* designed for patients treated with aligners.

When the option is activated, each patient's *Scan* will be shared with the *Healthcare Professional* associated to an observation for the aligner fit and then a GO, NO GO or GO BACK notification will be sent to the patient within 12 hours to indicate whether or not they should move to the next set of aligners.

The criteria for sending a GO, a NO GO or a GO BACK is defined within the *Protocol* which is set up by the *Healthcare Professional*.

This option works with any aligner brand and can be activated or deactivated whenever a new *Monitoring Plan* is chosen.

To activate a patient with Dynamic Aligner Change:

- 1) Start a *Monitoring*, choose the *Photo Monitoring Full* plan.
- 2) Set a treatment with aligners
- 3) When choosing the *Protocol* to apply, scroll down the list of *Activated Protocols* and make sure that the **Activate instructions for aligner change (GO/NO-GO)** checkbox is ticked
- 4) Click **Review and start**

## 2. SCAN INTERVAL WITH DYNAMIC ALIGNER CHANGE

With the Dynamic Aligner Change option, the *Scan Interval* must match the frequency of aligner changes intended for the patient.

To change the *Scan Interval* in an *Activated Protocol*, see: [How to create an Activated Protocol in the Protocol library](#). To change the *Scan Interval* for an individual patient only, see: [Edit a Protocol applied to a specific patient \(Patient Protocol\)](#).

## 3. FORCE GO

A user can decide to send a GO to a patient regardless of what is observed on the next *Scan*. A *Force GO* will only apply to the next scheduled *Scan*.

## 4. SET THE ALIGNER NUMBER

When Dynamic Aligner Change is activated, the patient will receive a prompt on their *DM App* as part of the *Scan* process to confirm their aligner number. It is therefore recommended to input the total number of aligners in a set, in order to easily keep track of the patient's treatment progress. This can be done through the *Patient Card*.

1. In the *Patient Card*, click on **New Action** and then **Change Aligner Number**.
2. Select the current aligner number and the total number of aligners and click on **Save**.

Once the aligner number is set, it will be automatically changed every time the patient receives a GO.

## 3- 3D MONITORING: LIGHT AND FULL

There are two options for 3D Monitoring: *3D Monitoring Light* and *3D Monitoring Full*. The only difference is the minimal *Scan Interval* available. For *3D Monitoring Light*, the shortest *Scan Interval* is 30 days. For *3D Monitoring Full*, the shortest *Scan Interval* is 4 days.

3D Monitoring compares the patient's ongoing *Scans* against a 3D Model of their original dentition in order to estimate the average movement of the maxillary and mandibular arch and the movements of each crown including:

- Mesial/distal translation
- Extrusion/intrusion
- Buccal/lingual translation

- Buccal/lingual torque
- Mesial/distal rotation
- Mesial/distal angulation

For more details see [Specific additions to 3D Monitoring](#).

In all cases, these indications cannot be considered as medical information and are provided for information in the context of a global treatment. Diagnosis, monitoring and dental treatment remain under the full and sole responsibility of the treating *Healthcare Professional*.

## STARTING A PATIENT ON 3D MONITORING

To start a new patient on 3D Monitoring, follow the steps for creating a new patient, selecting *3D Monitoring Full* or *3D Monitoring Light* as the *Monitoring Plan*.

Patients starting on 3D Monitoring will need to have a 3D Model of their teeth uploaded (see: [Adding a 3D Model](#)), as well as a *Scan* taken, on the day from which the estimation of tooth movement should commence. It is recommended that the 3D Model and the *Scan* are taken on the same day. If this is not the case, please note that the date of the *Scan* will be used as the reference for the basis of future movement calculations.

As the treatment progresses, the patient will continue to only take *Scans* of their teeth at regular *Scan Intervals*. These *Scans* will be used to calculate movements.

3D Monitoring can be used for any patient and any treatment.

### Please note:

- Dynamic Aligner Change is not compatible with 3D Monitoring. Therefore, the option is not available in the *Patient Protocol*, even for patients with aligners.
- Using the *DM ScanBox* to take the Scans is strongly recommended for 3D Monitoring patients.

## ADDING A 3D MODEL

A 3D Model of the patient needs to be uploaded as two STL files (maxillary and mandibular, in occlusion), exported from an intraoral scanner.

To upload the file into the patient's profile:

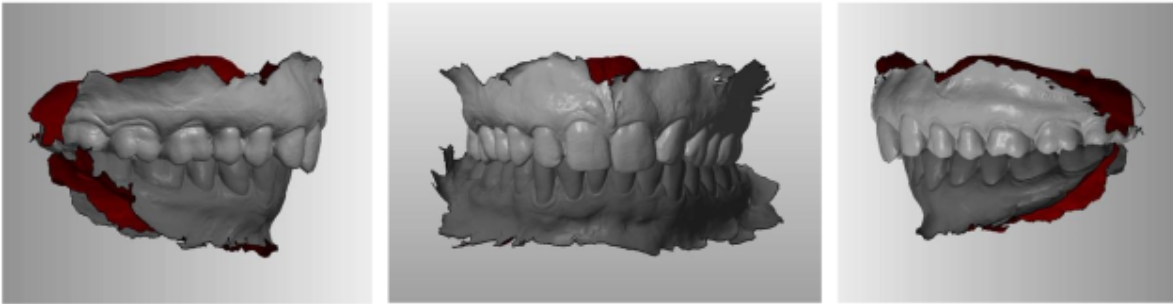
1. From the patient's profile, click **New Action**
2. Click on **Add a New 3D Model**
3. Select the preferred way to add the new 3D Model

**Please note:** The **EXACT DATE OF THE INTRAORAL SCAN** should match the date that the impression or intraoral scan was taken to create the 3D Model.

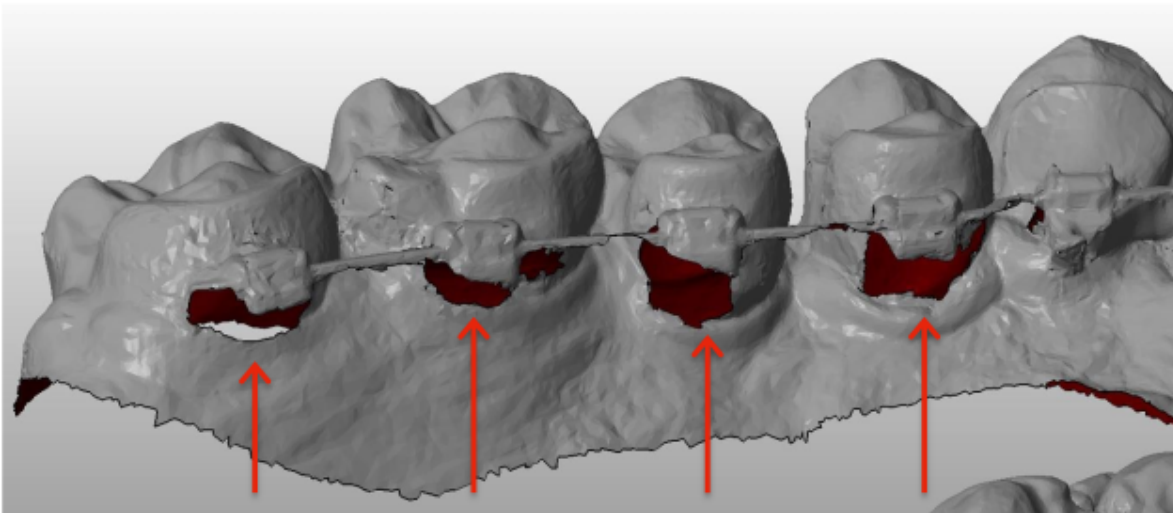
## REQUIREMENTS FOR 3D MODELS

All scanners are compatible with *DentalMonitoring (Software as a Service)*, as long as:

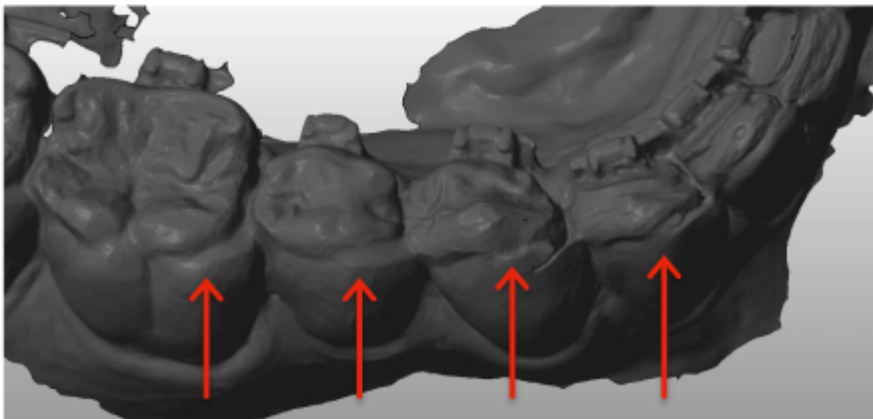
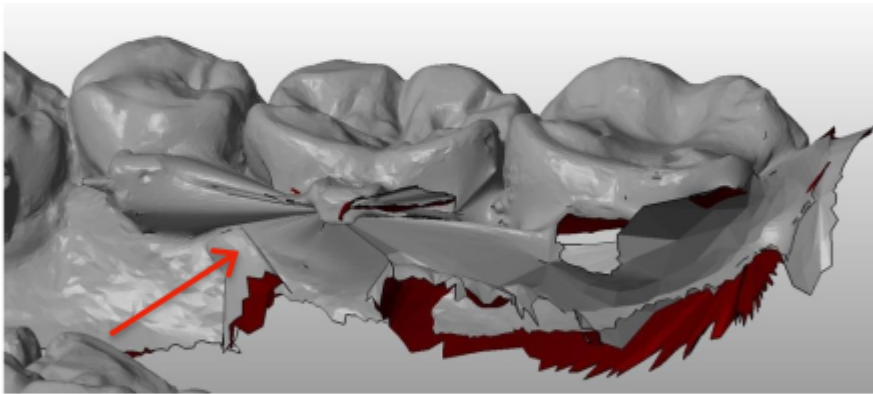
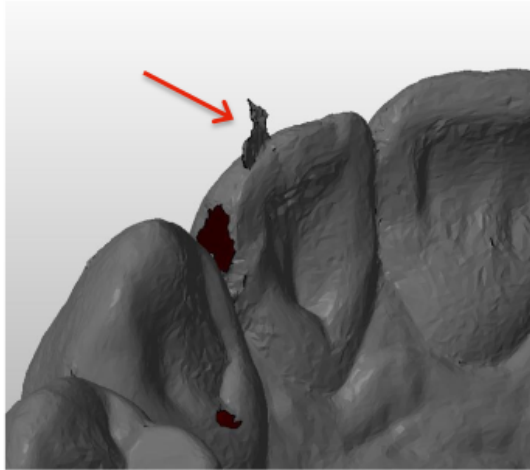
- The files are in STL format.
- Both arches are in 2 separate files and in occlusion.



- The 3D Model can be taken while the patient is wearing braces but the archwire must be removed. The 3D Model must not contain holes.



- The 3D Model must present as few artifacts, defects or distortions as possible.



If an uploaded 3D Model does not meet the requirements, a message will be displayed in the 'Notifications' tab and an email sent to the user's registered email address. A new 3D Model will then need to be uploaded, following the same process as described above.

**Please note:** the quality of the 3D Model will influence the quality of the tooth movement estimations.

## ❖ PROTOCOLS

### 1- WHAT IS A PROTOCOL?

A *Protocol* sets the frequency (*Scan Interval*), the observed *Parameters* and the actions to be triggered once they are detected. A *Protocol* is the automated transcription of *Healthcare Professionals'* reaction/action facing a specific *Observation*. They represent an additional tool to optimize the observation of *Observations* notified by *DentalMonitoring (Software as a Service)* and the associated *Healthcare Professional's* diagnostic conclusion. They fully remain under the *Healthcare Professional's* responsibility.

A user can create multiple *Activated Protocols* that can be applied to any patient and then further fine-tuned (see [Edit a Protocol applied to a specific patient \(Patient Protocol\)](#)). *Protocols* are adapted to the different treatment types within the practice population.

### 2- HOW TO CREATE AN ACTIVATED PROTOCOL IN THE PROTOCOL LIBRARY?

An *Activated Protocol* can only be created:

- from an existing *Activated Protocol* in the user's *Protocol Library*.
- from a *Protocol Template* provided by *DentalMonitoring (Software as a Service)*. These *Protocol Templates* cannot be directly applied to patients: they will need to be reviewed by the *Healthcare Professional* and activated. Once activated, they become *Activated Protocols*.

*Protocols* can be edited at any time. When modifying an *Activated Protocol* that has already been applied to patients, the changes made will not automatically apply to these patients. See [Apply edited protocols to multiple patients at once](#).

A new *Activated Protocol* can be created by clicking on **Create new protocol**.

Select the *Protocol* to copy and click on **Next**.

Review the *Protocol* and modify the settings as needed:

- **Title:** Titles should help users to easily identify the intended purpose of the *Protocol*.
- **Description:** The description should reflect the *Protocol's* intended use.
- **Scan Interval:**
  - *Regular Scan Interval:* The number of days between each request for the patient to take a *Scan* (using the *DM App*).
  - The *follow-up Scan Interval:* This *Scan Interval* will be automatically applied each time a NO GO is triggered. This is only applicable for patients with Dynamic Aligner Change.
- **Observations** are findings within the *Parameters* the *Healthcare Professional* observes on *Scans*. They can trigger a message to the *Healthcare Professional* team and/or the patient. They are organized in Categories and Sub-Categories. Each Category/Sub-category can be expanded by clicking on it. To observe a Sub-Category, it needs to be ticked, as well as the Category. There is a special category of *Observations* named [Goals](#).

<input checked="" type="checkbox"/>	<b>Braces</b> Brackets, ties, archwires, occlusal interference and bracket auxiliaries	^
<input checked="" type="checkbox"/>	<b>Positive notifications for braces</b> Notifications triggered when the braces treatment is in good condition.	^
<input checked="" type="checkbox"/>	<b>1 - Satisfactory condition of the braces</b> The overall aspect of the treatment is satisfactory.	^

If the Category is unticked, then no Sub-Category will be observed.

<input type="checkbox"/>	<b>Braces</b> Brackets, ties, archwires, occlusal interference and bracket auxiliaries
--------------------------	---

## PARAMETER SETTINGS

A *Parameter* is composed of 3 parts: *Analysis Parameters*, *Patient Instructions* and *Team Instructions*.

☒ **6 - Noticeable unseat still present**  
 The noticeable unseats in the previous scan are still present with no improvement or deterioration.

**Clinical analysis parameters**

Priority
 

Silent
 Info
 Warning
 **Alert**

Exclude teeth
 [Change](#)

**Instructions to team**

Copy clinical notification in patient chart.
 [Delete](#)

Schedule an appointment.
 [Delete](#)

Add instruction for team

**Messages to patient**

NO-GO – same aligners
 [Delete](#)

#1 Your teeth need some time to move. Please keep wearing your current aligners.  
 #2 Your tooth movement has not quite finished in the current aligners. Please continue with the same aligners until your next scan.  
 #3 Please continue wearing the current aligners until your next scan.  
 #4 You are not quite ready for your next aligners. Please continue to wear your current aligners every day until your next scan.  
 #5 Please do not change your aligners for now. Your teeth still need some time to move.

UNSEAT – Noticeable unseat still present
 [Delete](#)

#1 Your aligners still aren't seating fully.  
 #2 Unfortunately, the fit of your aligner has not improved.

CALL – call for instructions
 [Delete](#)

#1 Please contact the office at your earliest convenience for further instructions.  
 #2 We need you to contact the office to receive instructions.

Add message for patient

- **Analysis Parameters:** This includes Priority and Excluded Teeth

- Priority levels act as a color-coding system to easily identify the priority of each *Notification*. The 4 levels will determine whether or not it appears in the 'Notifications' tab and the color of the *Notification*:

The definition of each *Priority* is to be determined by each healthcare facility, however some suggestions are as follows:

- **ALERT:** Requires the treating *Healthcare Professional's* attention
- **WARNING:** Might require the treating *Healthcare Professional's* attention depending on the healthcare facility guidelines

Page 24 of 42

Dental Monitoring SAS, 75, rue de Tocqueville, 75017 Paris - +331 86 95 01 01  
 RCS Paris n° B 824 001 259 - N° de TVA intracommunautaire : FR14824001259  
[contact@dental-monitoring.com](mailto:contact@dental-monitoring.com) - [dental-monitoring.com](https://dental-monitoring.com)



- **INFORMATION:** Does not require the treating *Healthcare Professional* 's attention
- **SILENT:** Will not appear in the 'Notifications' tab, however silenced *Parameters* will still be tracked.

Priority	DM App	Notification Center	Daily Monitoring Results
Silent	✓	✗	✗
Info	✓	✓	✓
Warning	✓	✓	✓
Alert	✓	✓	✓

- *Exclude teeth:* For each tracked *Parameter*, there is the option to exclude certain teeth.
- **Team Instructions:** This will determine the instructions to the team that will be displayed in the 'Notifications' tab if the corresponding *Observation* is observed.
- **Patient Instructions:** This will determine the communication that the patient will receive in the *DM App* if the *Observation* is observed.

Changes to the *Activated Protocol* are saved after clicking on **Save** on the top of the screen. Changes are not saved automatically.

### 3- PATIENT INSTRUCTIONS

*Patient Instructions* are sets of personalized messages that are automatically sent to patients via the *DM App* when a certain *Observation* is observed by the *Healthcare Professional*. A *Patient Instruction* is composed of a *Message Identifier* and its *Message Variations*:

- The *Message Identifier* is the title that will help identify the *Patient Instruction* when setting up the *Protocols*
- *Message Variations* are predefined messages scheduled to be sent to the patient one after another. This is so that patients do not receive the same message every time. *Message Variations* will loop back after it reaches the last one in the series.

Setting up a *Message Variation* series is not obligatory but is strongly recommended for an improved patient experience.

Once created, all *Patient Instructions* can be used in any *Protocol*. When a *Patient Instruction* is updated, changes are immediately applied to all *Protocols*.

*Patients Instructions* are organized into the following *Categories*:

- *Goals*

- Timeframe
- Aligners
- Braces
- Intraoral evaluation
- Retention
- General

When creating a *Protocol*, the *Patient Instruction* in “General” can be selected from any *Observation*, whereas the other *Patient Instructions* are only available in the matching *Observation Category*.

### ADDING VARIATIONS TO A PATIENT INSTRUCTION

Variations are different ways of phrasing the same message. For example, the message “Contact the practice” can have several *Variations*, as follows:

- Variation 1: “Please contact the practice at your earliest convenience.”
- Variation 2: “The team at the practice has information for you. Please contact us as soon as possible.”

To add a *Variation*:

1. Click in the field “Add another variation”.
2. Add a text that is coherent with the initial message.
3. Click on the **Save** button on the top of the screen.

### DELETING A VARIATION

Click on the **Delete** button next to the variation that needs to be deleted.

Click on the **Save** button on the top of the screen.

The **Delete** button is hidden when there is only one *Variation* left. At least one *Variation* needs to be in place for the *Patient Instruction* to be saved.

### EDITING A VARIATION

*Variations* can be edited directly in their textbox. When the change is made, click on the **Save** button on the top of the screen.

### Adding a new *Patient Instruction*

1. Click on **Add Message** at the bottom of the category that the new *Patient Instruction* will be part of.
2. Enter the *Message Identifier* and any *Variations* that will compose the *Patient Instruction*.
3. Click on the **Create** button.

**New patient communication set** ✕

MESSAGE IDENTIFIER (THIS IS FOR OFFICE USE ONLY)

CALL – Call for instructions

FIRST VARIATION (THIS IS THE MESSAGE THE PATIENT WILL RECEIVE)

Please contact the office at your earliest convenience for further instructions.

< Cancel Create

#### GREETING AND SIGNATURE OF THE AUTOMATED SCAN REPORT

The *Automated Scan Report* is the text that the patient will receive in the *DM App* providing feedback on their *Scan*. It is composed of a *Greeting*, the *Patient Instruction* corresponding to the *Observation(s)* observed, and a *Signature*.

The *Greeting* and *Signature* (i.e. first and last sentences) of the *Automated Scan Report* can be customized.

Using the {firstname} field in the body of the message will automatically insert the first name of the patient.

#### 4- TEAM INSTRUCTIONS

*Team Instructions* will appear in the 'Notifications' tab when the corresponding *Observation* is observed. For example, "Missing Attachment" can be set to trigger a *Team Instruction* reading "Call patient to schedule an attachment bonding appointment."

Like *Patient Instructions*, *Team Instructions* are organized by *Categories*:

- Goals
- Timeframe
- General
- Aligners
- Intraoral evaluation
- Braces

- Retention

### ADDING A TEAM INSTRUCTION

- 1- Select the category that the *Team Instruction* will be added to
- 2- Click on the text field at the bottom and add the *Team Instruction* directly
- 3- Click on **Save** at the top of the screen to save the *Team Instruction*

### EDITING A TEAM INSTRUCTION

All *Team Instructions* that have been manually added (indicated by a white background) can be edited. Click the text field and change the *Team Instruction* directly and click on **Save**.

*Team Instructions* that are part of any *Activated Protocols* will show an "IN USE" label. Unlike *Activated Protocols*, any changes to *Team Instructions* will be automatically applied to all patients for which they are currently in use.

**Please note:** any *Team Instructions* in grey cannot be edited, as they are part of the *Protocol Templates*.

The screenshot shows a user interface for managing aligners. At the top, there's a header 'Aligners' with a sub-header 'Tracking, bonded unit, auxiliary and damage'. Below this, there's a list of team instructions. The first instruction is 'Call patient to schedule an emergency attachment bonding appointment.' with an 'IN USE' label. Below it is a text field labeled 'Add a team instruction'.

### EDIT A PROTOCOL APPLIED TO A SPECIFIC PATIENT (PATIENT PROTOCOL)

After an *Activated Protocol* is applied to a patient, it becomes their *Patient Protocol* and the parameters can be fine-tuned to match their individual needs.

To edit a patient's *Patient Protocol*, go to the *Patient Protocol* tab in their *Patient Card*. Any changes or modifications made on this page will only be applied to the patient.

When the change is made, click on the **Save** button on the top of the screen.

**Please note:** Applying an *Activated Protocol* to a patient will erase any changes made to their *Patient Protocol*.

### APPLY AN ACTIVATED PROTOCOL TO MULTIPLE PATIENTS AT ONCE

*Activated Protocols* can be edited at any time. When modifying an *Activated Protocol* that has already been applied to patients, the changes made will not automatically apply to these patients.

1. Open the *Activated Protocol* and click on **Select patients to update with this version** displayed below the *Protocol* title. Please note that if there are any unsaved changes to the *Activated Protocol*, this message will not be displayed.
2. Select the patients to apply this *Activated Protocol* to. Filters are available to help find patients according to various criteria.

**Please note:** Applying another *Activated Protocol* to a patient will erase any changes made to their *Patient Protocol*.

## 5- QUICKSTARTS

A Quickstart is a pre-set combination of *Monitoring Plan*, treatment and *Activated Protocol*, which can be applied to a patient in one click when you activate their monitoring. You do not need to set up a quickstart in order to start a patient's monitoring, however this can help you save time.

To set up a quickstart:

1. Go to **Protocols Quickstarts** and select **New Quickstart**
2. Select the **Monitoring Plan**
3. Select the **Activated Protocol**, indicating if you wish to activate **Dynamic Aligner Change** for aligner patients
4. Select the **treatment phase**
5. Select the **type of treatment** and **manufacturer** if applicable. Please note that any selection for the upper arch (MD) will automatically be applied to the lower arch (MD). If you wish to select them separately you can do so by ticking "set MD/MX options separately"
6. Click **Save** to save your quickstart

Your quickstart will appear under the quickstart menu with the title "**Quickstart for (name of the Activated Protocol selected)**". It will display the *Monitoring Plan*, *Scan* frequency, treatment type and manufacturer selected.

To apply a quickstart to a patient:

Start from the patient's *Patient Card*.

If they are not currently being monitored, click on 'Start Monitoring'. If they are currently being monitored, you will need to click on New Actions Change Monitoring.

You will see a list of your available quickstarts. Simply find the quickstart you wish to apply and click 'Quickstart'.

Your patient will now have the associated *Monitoring Plan*, *Activated Protocol*, treatment type and manufacturer applied to them. You should be able to see these details in the patient profile.

## ❖ PATIENT MANAGEMENT

### 1- CREATE A NEW PATIENT

To add a new patient to your account, please follow the steps below:

1. Click on **Patients** in the *Dashboard* header
2. Click on **New patient**
3. Fill in the fields and click **Create patient**. There is the option to add the practice software ID, the patient's medical file number, and a secondary email address that will receive a copy of all communications sent to the patient.

**Please note:**

- Newly created patients automatically have the status 'Not Monitored'. See [Start a Monitoring](#).
- Patients need to get an invite to be able to access the *DM App*. The option to send the invite is selected by default when creating the patient. The invite can be sent anytime, see [New Action](#).

The invite is sent by email and contains:

- A link to download the *DM App*.
- A link to automatically open their account on the *DM App* once downloaded.
- A link to set a password for any connection to an additional device.

### 2- START A MONITORING

To add a new patient to your account, please follow the steps below:

1. From the *Patient Card*, click on **Start Monitoring**
2. **If you have any Quickstarts set up, you can select the Quickstart that applies to this patient from the list and skip Steps 3-5. If you do not have any Quickstarts set up, or you wish to customize your patient's Monitoring Plan, proceed to Steps 3 to 5.**
3. Choose a *Monitoring Plan* for the patient. See [Monitoring Plans](#).
4. Select the details of their orthodontic treatment including treatment type and manufacturer type
5. Choose an *Activated Protocol* to apply to the patient, then click **Review & Start**

### 3- PATIENT CARD OVERVIEW

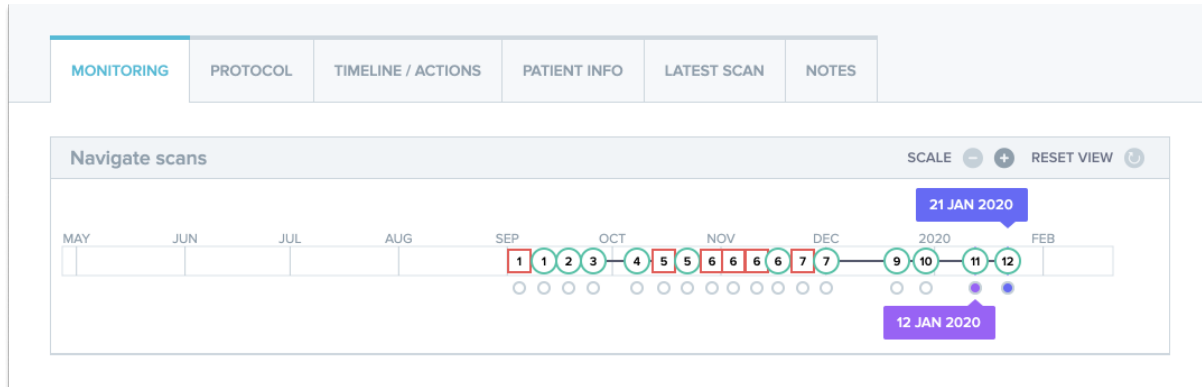
#### PATIENT CARD SUMMARY

The *Patient Card* summary contains a quick overview of the patient's information, including treatment and *Monitoring* status. It allows the user to:

- View the ScanBox model the patient has (if applicable)
- View the aligner number, including the total number of aligners in a set (only when the Dynamic Aligner Change option is activated)
- View the patient's Before/After morphing video

- Conduct a variety of tasks through the **New Action** button

## MONITORING TAB



The *Monitoring* tab shows the following:

- *Navigate Scans* section: it presents a timeline of the patient's *Scans* to date. If the Dynamic Aligner Change option is activated, the timeline will display aligner number as well as the following:
  - A green circle for a GO.
  - A red square for a NO GO or GO BACK.
  - The aligner number the patient was wearing during the *Scan* (displayed as a number inside the shape). If no number is associated with the *Scan*, the shape is empty.
- The *Photo Gallery*: There are two *Photo Galleries* allowing a comparison of the different *Scans* taken by the patient on different dates. Clicking on a *Scan* date in the timeline will display the *Scan* pictures for that date in the left *Gallery*. The right *Gallery* will always display the latest *Scan*.
- *Scan Report*: The *Scan Report* will display any *Observations* that were observed on the *Scan* on the given date.

**Note:** For patients who are on 3D Monitoring the *Monitoring* tab contains more information. See: [Specific additions to 3D Monitoring](#).

## TIMELINE/ACTIONS

The *Timeline / Actions* tab lists every *Observation* associated with a patient. The filters can be used to isolate specific actions such as *Patient Instructions* sent to patients.

## PATIENT INFO TAB

The *Patient Info* tab provides an overview of the patient's details. The patient's details can also be edited with the **Edit patient info** button.

**Please note:** changing the patient's primary email address will change the *DM App* login ID.

## SCANS

Once uploaded by the patient from the *DM App*, a *Scan* is immediately accessible in the *Scans* tab.

### Please note:

- The *Scan* will be available even before being processed by the *Data Analysis Platform*.
- This tab will only show the raw, unprocessed pictures of the latest *Scan* taken by the patient.
- The pictures will appear here as soon as they are uploaded. Be aware that the pictures from the *Scan* may appear incomplete before the upload is done.

## NOTES

Under this tab, notes can be added for each patient. Once the note is added, a message icon is added to the patient's picture to indicate the presence of the note. Hold the mouse over the message icon to see the note.

## SCHEDULED ACTIONS

The Scheduled Actions tab contains information on all of the scheduled messages concerning the patient. This includes:

- Scheduled team instructions
- Scheduled direct patient messages (including annotations of pictures)

You will see a list of all of the scheduled actions that are pending for this patient. You can edit any pending scheduled actions by clicking on 'edit' next to the scheduled action.

You can also access a list of triggered and cancelled actions, and filter the list of scheduled actions by type of message.

## SEND ANNOTATED PHOTOS TO THE PATIENT

Healthcare Professionals can annotate any photo from a patient's gallery and send it to the patient with an accompanying message.

1. From the patient's gallery, select the photo you wish to annotate. Click on **'Send with a note'**
2. A new window will open displaying the photo you have selected, along with a textbox. If you wish to draw on the picture, click on **'Draw on picture'**. A new window will open with a menu bar allowing you to draw freehand, create shapes or write text.
3. When you are done annotating the photo, click **'Done'** to save your changes. You will be taken back to the first window, where you will see the photo with your changes applied. You can add a message to accompany the annotated photo if you so wish. This message can be sent immediately or scheduled to be sent at a later time.
4. Click **'Send message'** to send the annotated photo to your patient along with your message. This will appear on the patient's *DM App*.

## NOTIFICATIONS PANEL

The Notifications panel shows all of the unmarked notifications that the patient has. You can mark the notification as read by clicking on the tick next to each notification.





From the Notification panel you can also access the following actions:


- Force GO
- Send an *Instruction* to the team
- Add patient to the TODO list

## COMMUNICATION

On the right side of the *Patient Card*, you can access the Communication panel. This section displays the communications exchanged with the patient and allows you to send a direct message to the patient.

From this section, you can review your communication history with the patient. Please note this section may contain:

- *Automated Scan Reports*
- Any direct messages sent to and from the patient, including group messages
- Any annotated pictures and associated messages
- Any messages that are attached to a particular action, such as *Scan* schedule resets, additional Scan requests, or a paused monitoring.

Please note, if your screen resolution is less than 1920 wide, the communication section will automatically be hidden. You can make it appear by clicking on the  icon.


## GOALS

A *Goal* is a special type of *Observation* that represents a treatment objective or milestone that can trigger *Team Instructions* and/or *Patient Instructions*. They differ from other *Observations* in that you can choose to delay the sending of any *Instruction* if the *Goal* is reached before the **Notification Delay Period**, as well as be alerted if the *Goal* is not reached after the deadline. Both of these can be configured from the *Patient Card*.

*Goals* are accessible on the left side of the *Patient Card*, below the patient information.

### 1. Configuring and tracking Goals

You can configure the *Goal* you wish to track for each patient from their *Patient Card*. To track a *Goal*, you will need to:

1. Find the *Goal* you wish to track and click on the  button. This will open up a sub-menu.
2. Choose the **Notification Delay Period**. This is the earliest time, in weeks, at which *Patient Instructions* and *Team Instructions* will be triggered if the *Goal* has been achieved. This period is calculated **from the date the Goal is started**.
3. Choose the *Goal* deadline. If the *Goal* is not achieved after the deadline, you will receive a notification informing you of such. This period is calculated **from the date the Goal is started**.
4. Choose whether to notify the patient when the *Goal* is reached.
5. Start tracking the *Goal* by pressing 'Start'.

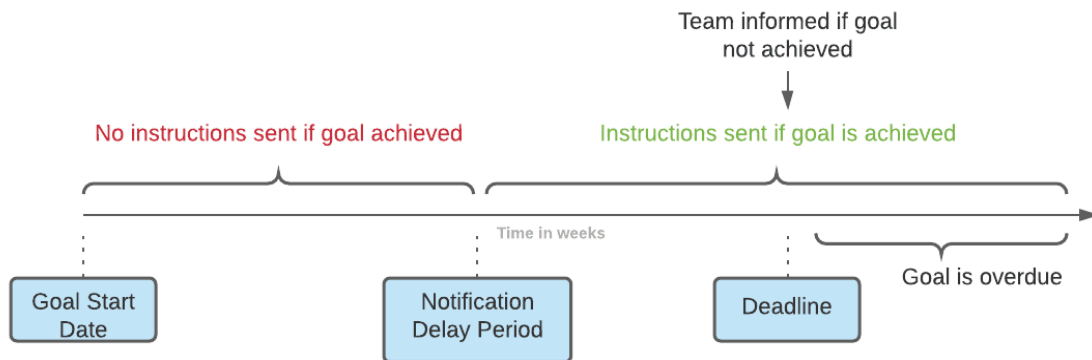
You have the ability to make a *Goal* visible or invisible on the *Patient Card*, by ticking or unticking the specific *Goal* from the Patient Protocol. **Please note this will not start the *Goal* - *Goals* can only be started from the *Patient Card*.** Unticking a *Goal* that is being actively tracked will automatically stop it.

## 2. Messaging behaviors for Goals

The *Team Instructions* and *Patient Instructions* sent when a *Goal* is reached can be modified by clicking 'View Message' in the *Goals* panel of the *Patient Card*. This will open up the patient's Protocol. In the Patient Protocol tab, you will be able to:

- Change the *Patient Instructions* to be triggered when a specific *Goal* is reached after the **Notification Delay Period** (please refer to the [Patient Instructions](#) section under *Protocols*)
- Change the *Team Instructions* to be triggered when a specific *Goal* is reached after the **Notification Delay Period** (please refer to the [Team Instructions](#) section under *Protocols*)

The messaging behavior of a tracked *Goal* can be summarized below:



Please note you cannot configure the *Team Instructions* sent when a *Goal* has passed its deadline (*i.e.* becomes overdue). When this happens, you will simply see the message 'this goal is overdue' in your Notification Center. Overdue *Goals* do not trigger *Patient Instructions*.

If a *Goal* is achieved before the **Notification Delay Period**, it will still appear with the status "achieved" in the *Patient Card* and *Scan* timeline, but the *Instructions* will not be triggered until the **Notification Delay Period** has passed.

## 3. Goal statuses

Once a *Goal* has been started, the *Patient Card* will display how much time is remaining before the deadline is reached, or if the deadline has already passed, by how long the *Goal* is overdue. At any time, you have the ability to stop a *Goal*, to modify the chosen **Notification Delay Period** or deadline, or to reset it after it has been achieved.

Color codes provide indications regarding the *Goals'* status:

- Grey (default): The *Goal* is not being tracked
- Green: The tracked *Goal* has been achieved (please note this is not affected by the **Notification Delay Period**)
- Blue: A tracked *Goal* has not yet been achieved, and is not overdue
- Red: A tracked *Goal* has not yet been achieved and is overdue

## 4. Parameter definition with Goals

	Goal definition	Associated value
Canine Class	Patient attains a canine class I	[-1mm; 1mm]
Molar Class	Patient attains a molar class I	[-1mm; 1mm]
Overbite	Patient attains a normal overbite	[1.0mm; 3.0mm]
Overjet	Patient attains a normal overjet	[1.0mm; 3.0mm]
Midline deviation	Patient midline deviation is corrected	[-0.5mm; 0.5mm]

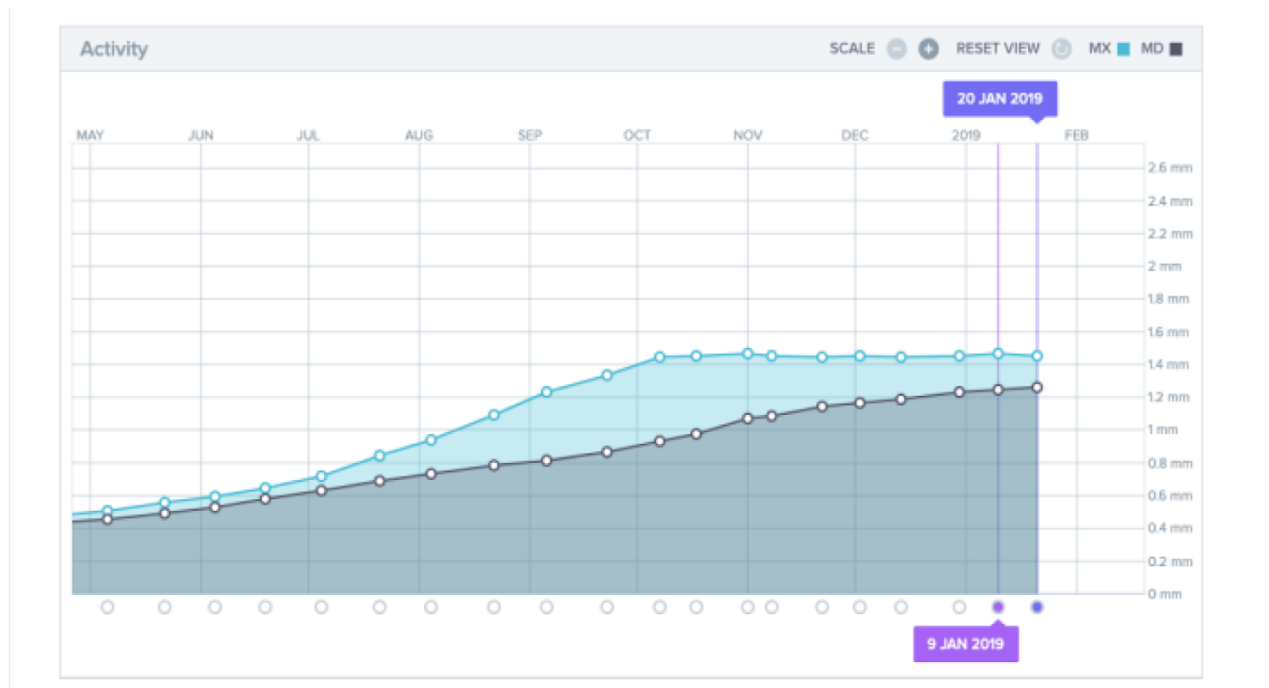
## 4- SPECIFIC ADDITIONS TO 3D MONITORING

For patients on 3D Monitoring, additional tabs are accessible along with features not available for *Photo Monitoring Full* and *Photo Monitoring Light* patients.

### ACTIVITY GRAPH

The *Activity Graph* shows the average movement of all the patient's teeth, compared to their position on the first *Scan*.

The average movement for the upper arch (MX) and the lower arch (MD) are represented as two different lines. The Y axis shows the distance of movement in millimeters.



### TOOTH STATUS INDICATOR

The tooth status indicator is composed of two graphs: The *Crown Translation Graph* and the *Crown Rotation Graph*. Selecting a tooth in the top bar will automatically display results in both graphs. Results

are expressed as an estimation per tooth. Each point on the graphs corresponds to a *Scan* taken by the patient, with the date displayed when clicked.

The *Crown Translation Graph* shows tooth movement in millimeters compared to the position on the first *Scan*.

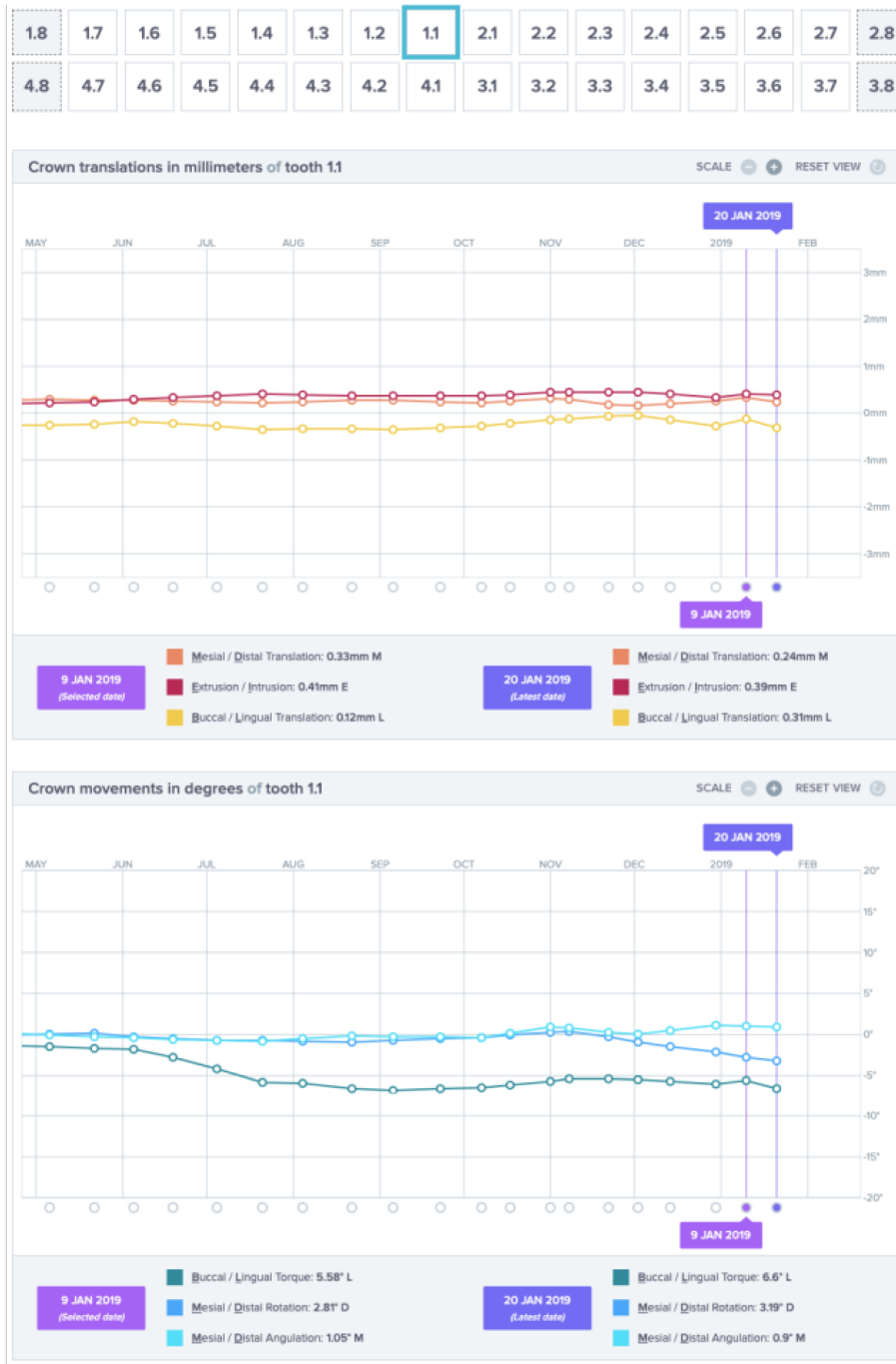
Estimations are expressed according to the following parameters:

- Mesial/distal translation
- Extrusion/intrusion
- Buccal/lingual translation

The *Crown Rotation Graph* shows tooth movement in degrees compared to the position on the first *Scan*. Estimations are expressed according to the following parameters:

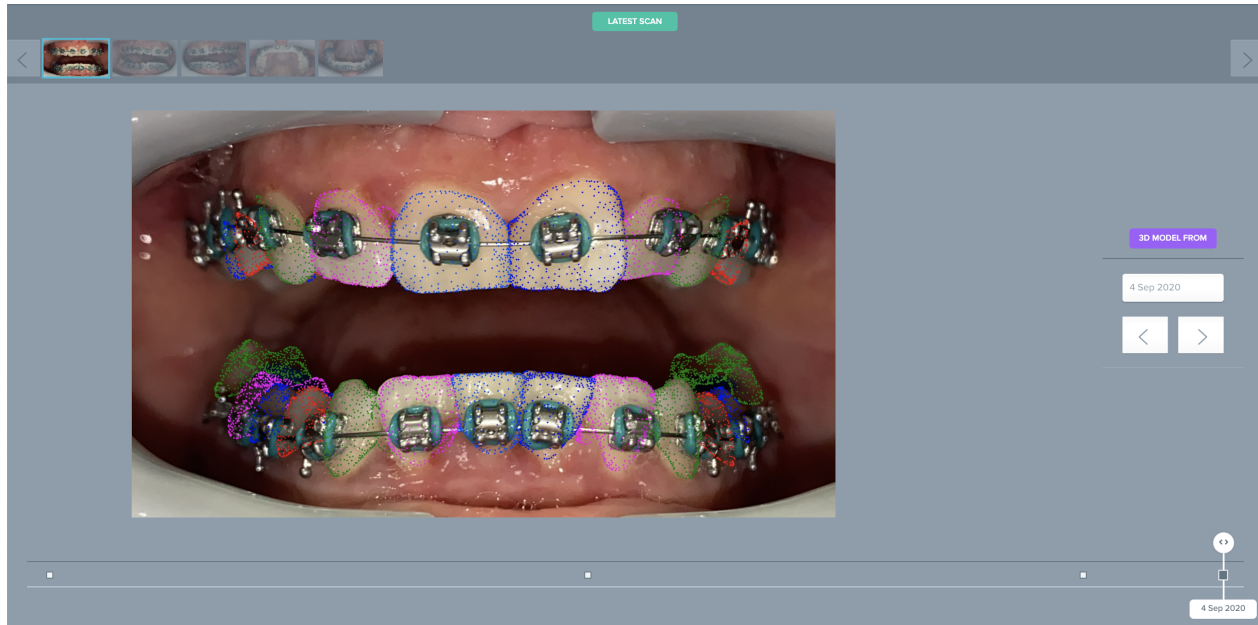
- Buccal/lingual torque
- Mesial/distal rotation
- Mesial/distal angulation

**Please note:** due to poor quality *Scans*, movements cannot always be calculated. These *Scans* are represented by a square rather than a circle on the graph.



## 3D MATCHING

3D Matching is a tool to help visualize the movements of the patient's teeth in 3D. Teeth positions from previous *Scans* are superimposed on the set of pictures from the most recent *Scan* and appear as colored dots. The user can choose to superimpose teeth positions from any previous *Scan* on the most recent *Scan*.



## NEW ACTION

The **New Action** button allows users to do the following:

- **Send a clinical instruction to *DentalMonitoring (Software as a Service)*:** Any specific instructions to the *Healthcare Professional* team can be sent here. This includes tracking specific treatment objectives, especially in 3D Monitoring (for example, transitioning from molar class II to molar class I).
- **Add a new 3D Model** allows the user to upload a new 3D Model. Please note that a 3D Model is not required in *Photo Monitoring Light* and *Photo Monitoring Full*. See [Adding a 3D Model](#).
- **Get a login link to copy:** Generates a login link that the patient can copy and paste into their browser in order to login to their *DM App*. You will need to copy this link (by clicking on '**Click here to copy to clipboard**') and send it to the patient (for example, via email or text message). This is useful if the patient changes phone or deletes and re-installs the *DM App*.
- **Send an instruction to the team:** Sends an instruction to the clinical team regarding the patient that will appear as a new notification in the 'Notifications' tab. This message can be sent immediately or scheduled to be sent at a later time.
- **Pause monitoring:** Temporarily puts a pause on the patient's current monitoring until a chosen date. Details such as *Patient Protocol*, *Monitoring Plan*, treatment type and *Scan* schedule are retained.
- **Change aligner number:** The *Healthcare Professional* can set or change the total number of aligners in the patient's set, as well as the patient's current aligner.

- **Send a message to patient:** allows the user to communicate directly with the patient. Messages will be sent directly to the patient's *DM App*. This message can be sent immediately or scheduled to be sent at a later time.
- **Pause/Stop monitoring:** stops or restarts a patient's monitoring. When a monitoring is stopped, all data pertaining to the patient is retained and the patient will not be able to send *Scans* anymore. The patient will appear in the *Not Monitored* tab.
- **Change monitoring plan:** immediately apply a Quickstart of your choice to a currently monitored patient. This is especially useful for patients changing treatment phases, for example from active treatment to retention.
- **Add to the *To-Do list*:** adds the patient to the *To-Do List*. See [To-Do List](#).
- **Send activation email to patient:** sends an email to the registered email address of the patient. See [Create a new Patient](#).
- **Reset *Scan Schedule to today*:** This will reset the patient's *Scan* schedule so that their next *Scan* will be due today, and all subsequent *Scans* will be calculated from today's date. Your patient will immediately receive a request on their *DM App* to take a *Scan*.
- **Ask patient for an Additional *Scan*:** This will request an additional *Scan* from the patient, outside of their regular *Scan* schedule. This *Scan* will not be treated by the *Patient's Protocol* (i.e. will not trigger any *Patient Instructions*, *Team Instructions*, *GO/NOGOs*, etc) and will not reset the patient's *Scan* schedule. As there is no automated analysis, you will need to review these *Scans* manually: once you patient takes the *Scan* using their *DM App*, the *Scan* will appear under the tab 'Additional Scans' in your Notifications tab.
- **Share Patient:** allows *Patient Cards* to be shared in "read-only" mode between *Healthcare Professionals* using *DentalMonitoring (Software as a Service)*.
- **Start a video consultation** (Note: this option is only available to *Healthcare Professionals* who have an active subscription to the video consultation feature): Send the patient a message on their *DM App* with a link to your virtual waiting room, which will allow them to start a video consultation with you.

## ❖ VIDEO CONSULTATION

You can invite your patients for a teleconferencing session through the *DentalMonitoring (Software as a Service) Dashboard* thanks to integration with doxy.me – a third-party HIPAA-compliant telemedicine solution. This feature needs to be activated in your *DentalMonitoring (Software as a Service) Dashboard* before you can access it. **For more information regarding the features of doxy.me, please consult the [doxy.me help center](#).**

### How to activate video consultation:

Under '**My Account**' you will find the option to subscribe to teleconferencing. Click on '**Subscribe**' and confirm your subscription.



It will take roughly 24 hours for this feature to be activated. You will receive an email when this is ready. Once your account is activated, your new credentials will appear on the same page where you subscribed.

To go to the teleconferencing website you will need to click '**Click here to enter your Virtual Waiting Room**' and enter the credentials (login/password) as they appear on your *DentalMonitoring (Software as a Service)* account.

#### **How to invite a patient to teleconferencing:**

From your *DentalMonitoring (Software as a Service) Dashboard*, go to your patient's profile and click '**New action request a video consultation**'. You may modify the message before sending it to your patient (for example, adding a time and a date for the video consultation) but please do not change the URL link as this is what the patient will need to click on to start the teleconference with you. Once you click '**Send the request**' your patient will receive this message in an email and also on their *DM App*.

### ❖ **SEND GROUP MESSAGE**

Users with *Doctor* user role have the ability to send a direct patient message to more than one patient at a time (group message).

- a. Go to your 'Notifications' tab and click on 'Send group message'. You will be taken to a new page.
- b. Write your message, then select the patients to whom you want to send the message to in the list below your message box. You can filter your list of patients by *Protocol* type, monitoring, treatment type, treatment phase, practice (this will only appear if the account is associated with multiple practices), compliance or patient language, and then choose which patients you want to receive your message.
- c. Confirm that you would like to send the message to the selected patients by indicating your consent and click send.

Your patients will receive the message on their *DM App*.

### ❖ **DM APP INTERFACE**

*Healthcare Professionals* can have access to the *DM App* by logging in using their *Dashboard* credentials.

#### **1- HEALTHCARE PROFESSIONAL FUNCTIONALITIES**

*Healthcare Professionals* can access a list of their patients on the *DM App*. When accessing a specific patient profile, they can login as the patient and take an immediate *Scan*. This feature is to be used when the patient is within the healthcare facility. *Healthcare Professionals* will be able to view and operate the *DM App* with the same view and functionalities as the patient.

Writing a message from the patient's account will send the message directly to the patient.

#### **2- PATIENT FUNCTIONALITIES**



For detailed instructions on the *DM App*, please refer to the *DentalMonitoring* Patient Instructions for Use provided to you in a separate document.

## 4. GLOSSARY



Manufacturer



Caution: consult the instructions for use for important cautionary information



Consult instructions for use



Batch code (software version number)



Catalog number



Caution: Federal law restricts this device to sale by or on the order of a physician

## 5. DATE OF PRINTING

August 2021

## 6. USER ASSISTANCE INFORMATION

[support@dental-monitoring.com](mailto:support@dental-monitoring.com)

<https://dental-monitoring.com>



Dental Monitoring  
75 rue de Tocqueville  
75017 Paris  
France