




Schedule a Clear Aligner Consultation Appointment



1. When scheduling the patient's initial consultation appointment, select the **GP Aligner Consultation** visit type.
 - a. When a GP appointment (e.g., CCX) turns into an aligner consultation, adjust the length of both the original appointment and the aligner consultation appointment to 15 minutes.

Create an Orthodontic Guarantor Account

1. In the  **Encounter Guarantor and Coverages** section of Registration, click  **Add New Guarantor**.
2. In the **Guarantor Search/Create** window, click the **magnifying glass** () icon in the **Account Type** field and select **Orthodontic**.







If an orthodontic guarantor is not created and selected for the patient's aligner appointment, team members will be met with a hard stop error until an orthodontic guarantor is selected for the visit.

3. In the **Relationship to Patient** field, select the person (e.g., self, spouse, father) responsible for the guarantor account.
4. Click  **Search/Create > Create** to proceed with creating an orthodontic guarantor account for the patient.
5. Click the **close** () icon to close the **Guarantor Edit** tab and return to the **Interactive Face Sheet**.

Add a Coverage to an Orthodontic Guarantor Account

If the patient wants to use their existing coverage:

1. Click the **pencil** () icon in the  **Encounter Guarantor and Coverages** section to open it.
2. Click  **Add Coverage**.
3. In the **Add a New or Existing Coverage** window, select the patient's existing coverage tile and click  **Accept**.



If the patient does not have existing coverage or wants to add a new coverage, refer to the *Create and Verify Coverages* Tip Sheet for information on how to create coverage.

Attach the Orthodontic Account and Coverage to the Appointment

1. In the  **Encounter Guarantor and Coverages** section, ensure that the orthodontic guarantor is selected and the coverage is attached under the Visit Coverages heading.
2. Click  **Finish** to close Registration.


Schedule Subsequent Clear Aligner Appointments

When the initial clear aligner treatment plan is set up with visits and scheduling information is entered for those visits, subsequent appointments can be scheduled using the Scheduling Depot. Subsequent appointments that were not included as a visit with scheduling information in the original treatment plan (e.g., GP Aligner Delivery-Routine) need to be scheduled by double-clicking on the Snapboard.

Schedule Clear Aligner Appointments Included in the Treatment Plan






1. Open the Snapboard and use the date shortcut (e.g., w+5) to jump to the desired date on the dentist's schedule (typically in 4-5 weeks).
2. Locate the patient's treatment order in the Scheduling Depot and drag it to an open spot on the schedule.
3. On the **Appointment Review** window, verify the appointment information and instructions with the patient, and then click **Accept** to finish scheduling the appointment.

Schedule Clear Aligner Appointments Not Included in the Treatment Plan


1. Open the Snapboard and use the date shortcut (e.g., w+5) to jump to the desired date on the dentist's schedule (typically in 4-5 weeks).
2. Double-click on an open spot on the schedule.
3. In the **Patient Lookup** window, search for and select the patient needing to be scheduled.
4. In the **New Appointment** window:
 - a. Choose the appropriate visit type (e.g., GP Aligner Delivery-Routine).
 - b. Enter notes about the appointment.
 - c. Click **Accept**.
5. On the **Appointment Review** window, verify the appointment information and instructions with the patient, and then click  **Schedule** to finish scheduling the appointment.

Deactivate an Orthodontic Guarantor Account

Orthodontic guarantor accounts should be deactivated once the patient has completed treatment.

1. Open the patient's  **Registration**.
2. Click  **Patient Guar and Cvg** on the activity toolbar.
3. Under the **Patient Guarantor Accounts** section, click the  **Active** checkbox to remove the check mark for the guarantor account that is no longer valid.
 - a. If the **Break Address Link** window appears, click  **Yes**.
4. Click the close () icon to close the **Patient Guarantor and Coverages** tab and return to the Interactive Face Sheet.



To see deactivated guarantor accounts, select the **Show Inactive Guarantors** checkbox. You can tell inactive accounts apart from active ones by looking at the  **Active** checkbox. The checkbox is not selected for inactive accounts.