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CLEAR ALIGNERS

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DENTAL WAREHOUSE

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**How To Guide**  
**Check on the Status**  
**of Existing Cases**

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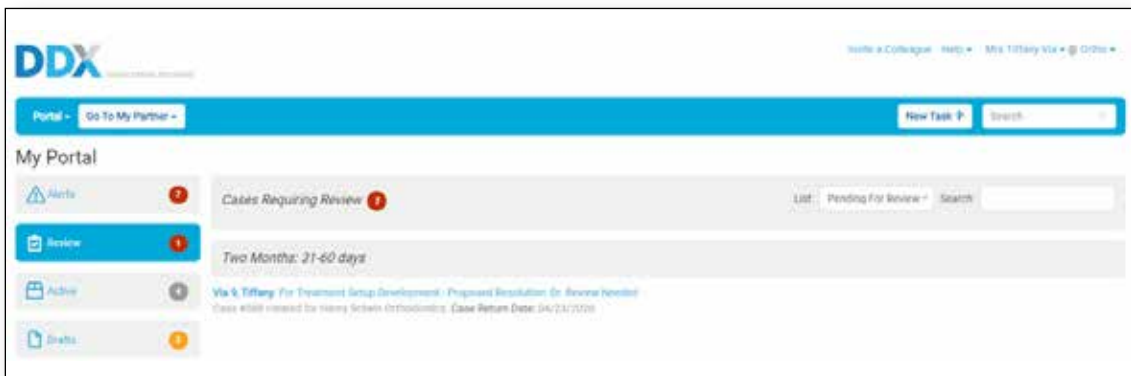
[reveal@henryschein.co.za](mailto:reveal@henryschein.co.za)

**Step 1** There are multiple ways to manage cases.

**Step 2** You can always use the search bar at the top of the page to locate a particular patient.



**Step 3** From the DDX Portal click on the menu item “Review”. You will then find cases that need the dentist’s attention.



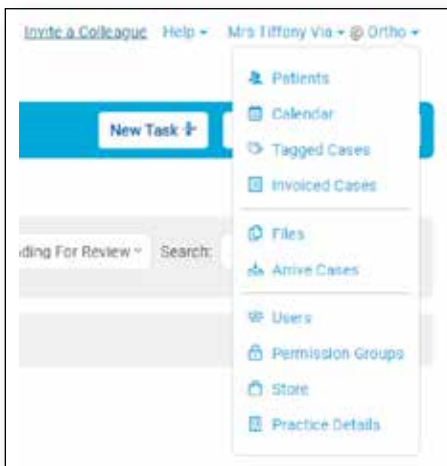
**Step 4** You can go to your Aligner Lab page and select Open Cases to view all cases that are in varying status.



## How To Guide Check on the Status of Existing Cases



**Step 5** Use the drop-down menu at the top right-hand side of the page under your practice name to choose Patients to view a full list of patients that have aligner cases. Click on any patient name to see their case history.

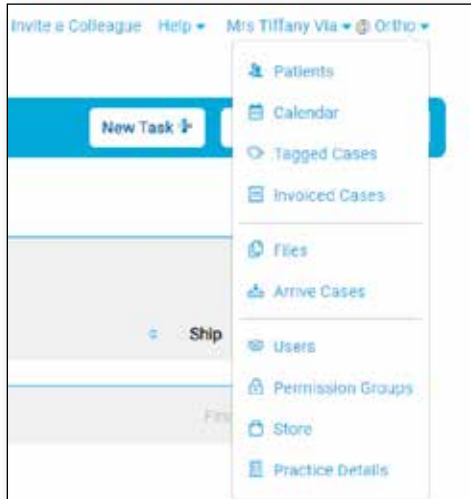


**Step 6** The Patient list allows you to browse or search for Patients and view the details.

**Step 7** Actions allow you to perform tasks on multiple patients at a time.



**Step 8** Use the drop-down menu at the top right-hand side of the page to choose tagged cases. You will then be able to see any case that you have designated as needing special attention.



**Step 9** To check the status of the case, first you can look at the “On Hold” status. This means that the aligners are not being manufactured yet and there are a few steps of communication with your practice still needed. There are a few different messages to look out for:



## How To Guide **Check on the Status of Existing Cases**

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- a. **On Hold – For Treatment Setup Development** - the lab is working on the Treatment Setup.  
No action is needed.
- b. **On Hold – For Treatment Setup Development - Dr. Review Needed** - the Treatment Setup is ready for dentist review. Action needed.
- c. **On Hold – For Treatment Setup Development - Modification in Process** - a modification to the treatment plan has been requested by the dentist and the lab technicians are working on it.  
No action is needed.
- d. **On Hold – For Treatment Setup Development Customer Service Contact is Required** - please call in to customer service. Action needed.
- e. **On Hold – Under Development** - this is for a refinement or replacement aligner orders when there will be no actions needed from the practice.
- f. **On Hold – Need Updated Records** - one of the following will be indicated as needed.
  - Missing Digital Impressions
  - Missing PVS Impressions
  - Missing Patient Photos
  - New Impressions Requested
- g. **On Hold – Practice Request** - only if requested, our customer service team will place a case on hold for an practice for the following reasons;
  - 1. Pending Patient Agreement
  - 2. Pending Patient Payment
  - 3. For Motion 3D Treatment
- h. **DDX Case in Process** - if the case is in manufacturing.
- i. **Closed** - if the case has been shipped to the practice.

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