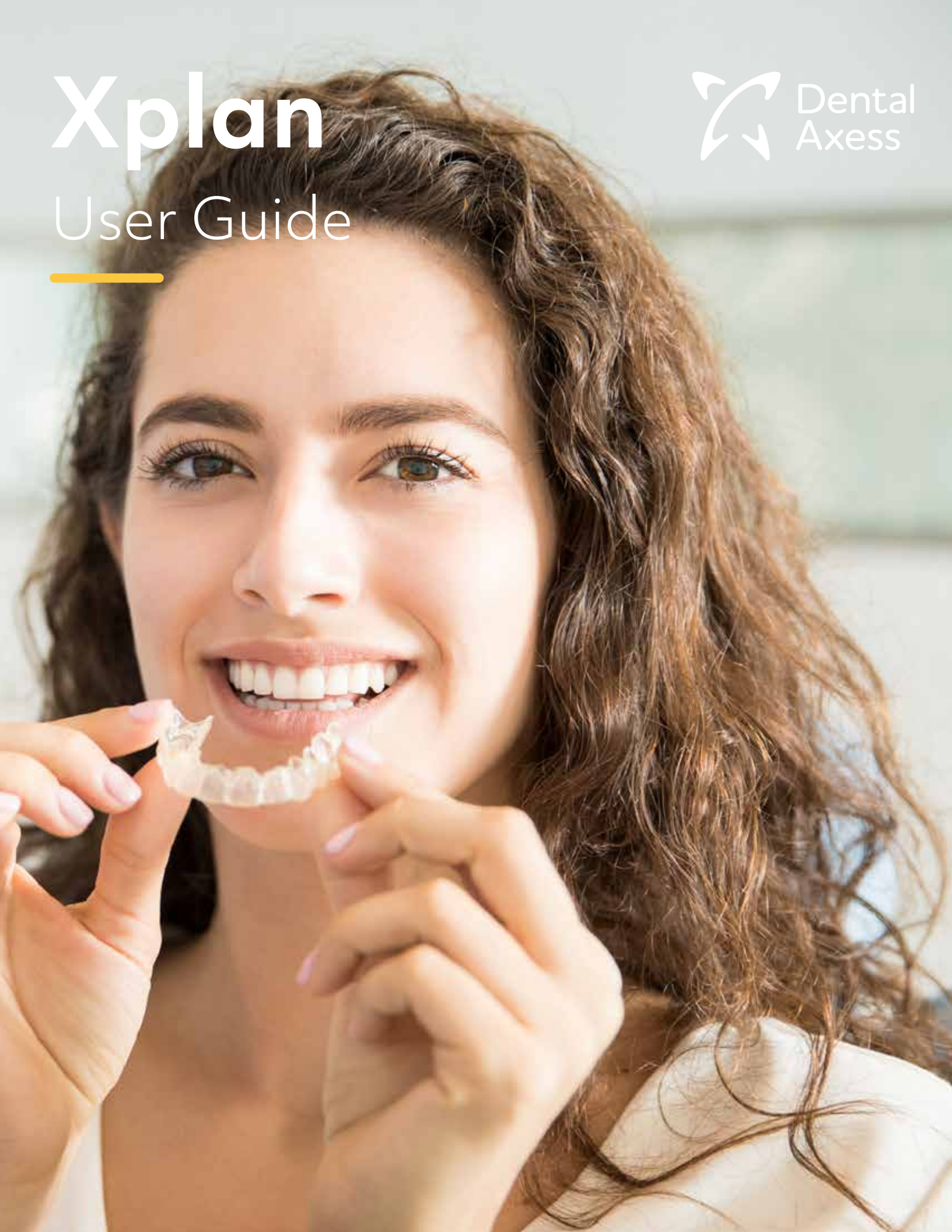


Xplan

User Guide



Welcome to Dental Axess Xplan

Xplan, the design service from Dental Axess, gives you full flexibility and allows you to outsource time-consuming design steps whilst keeping control over costs and treatment quality at all times.

As for manufacturing, you can choose to do this in-house or outsource to third-party manufacturers as required.

This manual will help you getting started and gives you all the information you will need to:

- Create an account
- Submit orders
- Review treatment plan
- Modify treatment plan
- Approve treatment plan

Lets get started!

Register / Sign up

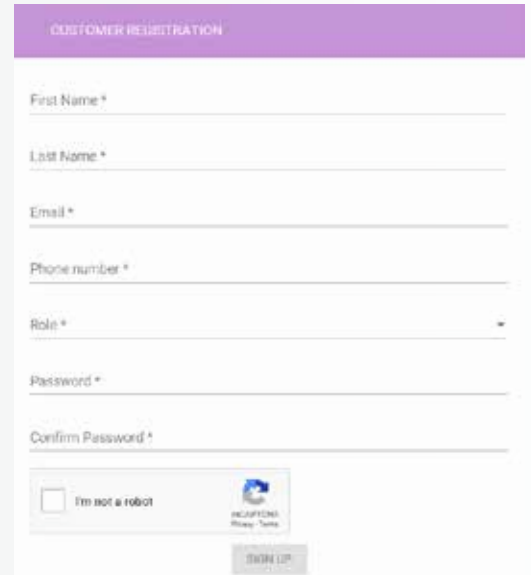
Create Username and Password | Update Profile | Add Offices and Members

To sign up for a new account, go to <https://xplan.dentalaxess.com/signup> and complete the sign up steps below.

1 ENTER CUSTOMER INFORMATION

- Enter customer name, email, password and all required fields marked with an *.
- Click on SignUp to save customer information.

Note: Sign Up button will become active, once all customer information is entered.



The screenshot shows a 'CUSTOMER REGISTRATION' form with the following fields: First Name *, Last Name *, Email *, Phone number *, Role *, Password *, and Confirm Password *. At the bottom, there is a checkbox for 'I'm not a robot' and a CAPTCHA image. A 'SIGN UP' button is located at the bottom right of the form.

2 COMPLETE CUSTOMER REGISTRATION

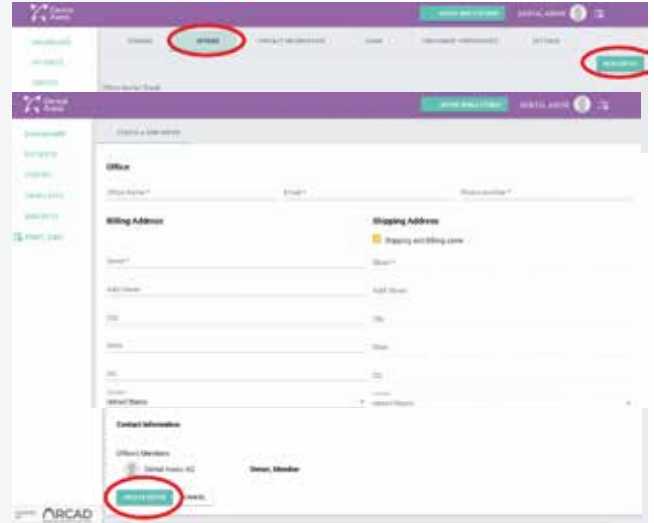
- Click on **Profile Picture** to open customer profile menu tab.
- Complete general information by entering all required fields marked with an *.
- Click on **Update Profile** button to save profile information.



The screenshot shows a customer profile page with a navigation menu at the top: GENERAL, OFFICE, CONTACT INFORMATION, LOGIN, MY DENTAL PRACTICES, and SETTINGS. The main content area includes a profile picture placeholder, a 'Customer First Name *' field, a 'Phone number *' field, a 'Customer Last Name *' field, and an 'Email *' field. A 'UPDATE PROFILE' button is circled in red at the bottom left of the form.

3 ADD AN OFFICE TO YOUR ACCOUNT PROFILE

- A. Click on the **Offices** tab to open customer office menu page.
- B. Click on **Create an office** link text or **New office** button to open office menu tab.
 - Enter office name, email, address, phone number and select shipping address option if same as billing.
- C. Click on **Create office** button to save office information.



CREATE OFFICE

Note: You can add multiple office locations by clicking on the New office button and follow the same steps above for each office created.

NEW OFFICE

4 ADDING MEMBERS TO YOUR ACCOUNT

- From your office page, click on the **Add Member** button to open new member menu.
- Enter new member email address and select role from drop down menu.
- Click on **Yes** button to send an invitation to new member to join.

Note: New member will receive an email invite to create password and gain access to the account.

Add Member

Email

Role



NO

YES

Submit Patient / Order

Create Patient | Update Digital Impressions | Complete Treatment Rx

Once your account is active, go to <https://xplan.dentalaxess.com/patients> and log in to begin the new case registration.

1 START A NEW CASE RECORD

- **Click on** new patient button

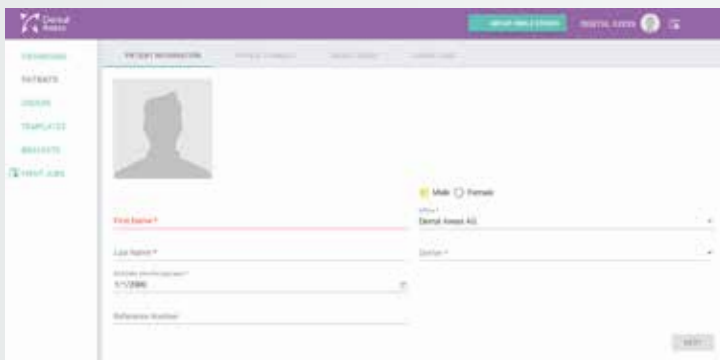


NEW PATIENT

2 ENTER PATIENT INFORMATION

- Enter patient name, date of birth and gender.
- Default doctor's office and name should appear automatically in drop down menu.
- Select an associated lab if you have selected one for 3rd party manufacturing.
- Click on Next to save patient information.

Note: The **NEXT** button will navigate to the patient image page.



The screenshot shows a web application interface for entering patient information. On the left is a navigation menu with options like PATIENTS, ORDERS, TEMPLATES, and RESULTS. The main area is titled 'PATIENT INFORMATION' and contains a form with fields for 'First Name', 'Last Name', 'Date of Birth', and 'Reference Number'. There are also dropdown menus for 'Gender' (set to Male) and 'Office' (set to Dental Axess AZ). A 'NEXT' button is visible at the bottom right of the form area.



NEXT

3 LOAD RECOMMENDED PATIENT IMAGES

- Click the **Add Images** button and find image files to upload (recommended images: All intra-oral and a panorex). You can select multiple images at once.

Note: File directory window will open for you to find the image files.



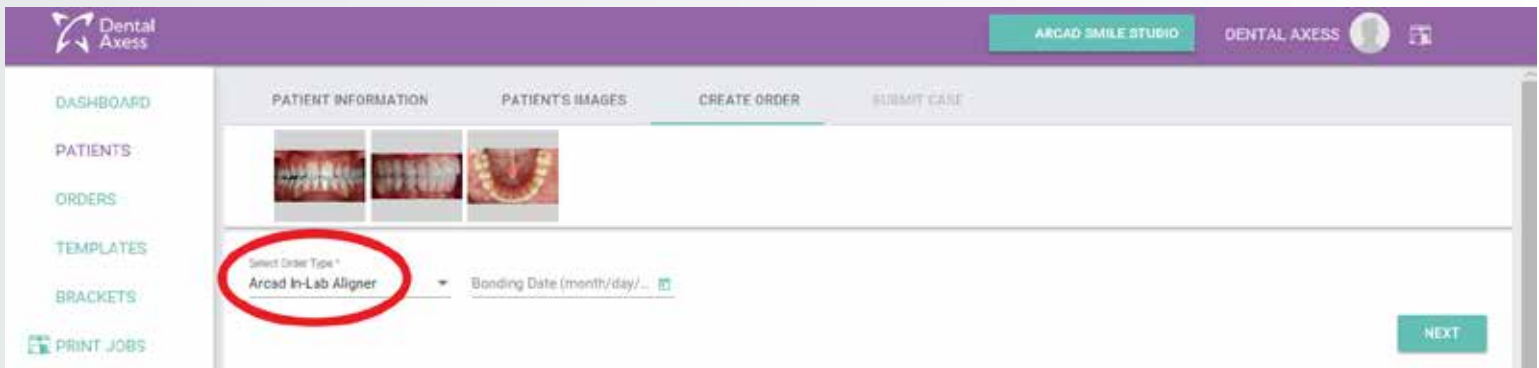
Note: All images loaded on portal will automatically be available to view in Xplan SmileStudio software.

- Click on Next button to save to our cloud based portal and navigate to the **Order Creation** tab.

NEXT

4 OPEN ORDER TAB TO CREATE/ADD AN ORDER TO THE PATIENT

- Select **Order Type** from menu options



5 SELECT ORDER TYPE

- Answer a few questions to create the appropriate order type and add-on services.
- Click **NEXT** to save your order type and navigate to the order Rx page.

NEXT

6 CREATE CUSTOM ORDER PRESCRIPTION

- Complete the Order Rx page entering all required fields marked with an *. We highly recommend you provide us with as much end-of-treatment goals as possible, when requesting Xplan to design the treatment plan.

Click **NEXT** to navigate through Rx wizard

NEXT

Aligners

- Select Treatment Type from drop down menu (*required field)
 - Xpress (light tooth movement)
 - Limited (moderate tooth movement)
 - Unlimited (complex full tooth movement)
 - Refinement (mid course correction)
- Select **Arches** to be treated (*required field)
 - Class relationship (*required field)
 - Midline, overbite & overjet
 - Spacing
 - Arch width
 - Crossbite
 - Crowding

7 UPLOAD PATIENT IMPRESSIONS

Patient impression

- Under the impressions field, please select the type of impressions you are sending (Physical or Digital. If digital, you can manually upload them to the order).
- A. Click on **Upper or Lower STL** buttons and find files to upload. (Recommended file types: .STL for any open export scanners)

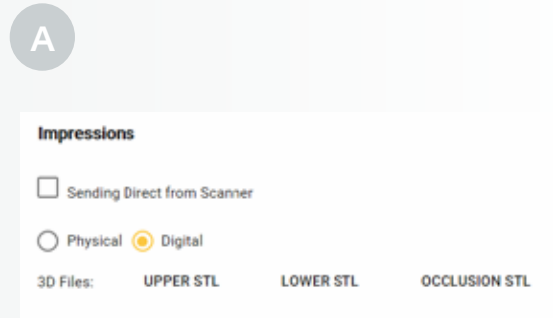
Note: Allow for each file to reach 100% upload before continuing to submit order.

- B. Should you choose to send the patients scan directly from the available list of scanners which have a direct connect gateway, please select accordingly.

Note: You must create the connection between Xplan and your scanner service to allow the automatic transfer of the scans from your scanner to Xplan.

For 3Shape - You can add us to your scanner lab connections under our lab email xplan@dentalaxess.com.

For iTero - You will need to contact Aligntech support and ask them to add Xplan to your Itero scanner as one of your labs.



8 MORE TOOTH SPECIFIC PRESCRIPTION FIELDS

- Indicate IPR instructions

IPR Instructions *

No IPR Required IPR Required (Indicate in the diagram) Reduce Teeth as Needed in Lab

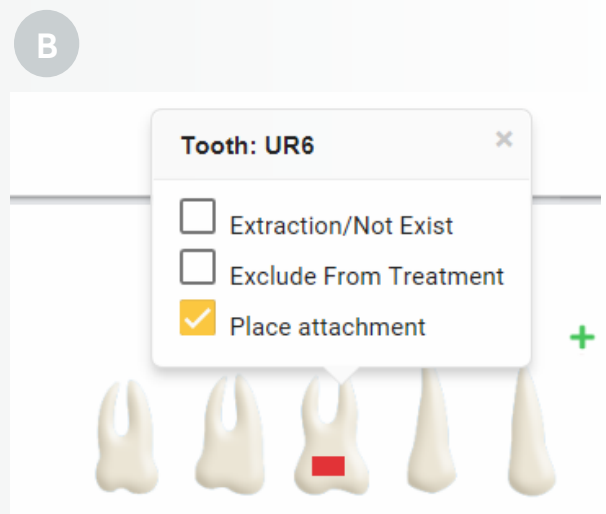
NEXT

*Required field

- If IPR is required as per your indications, use the diagram to indicate.



- Click on the green plus sign in between the teeth you are indicating IPR. The IPR dialog window will open.
 - Type the amount of IPR you are indicating.
 - To provide tooth specific instructions use the same tooth diagram.
 - Click on the tooth you are providing instructions for, to open the tooth instructions window.
 - Select instruction. A marker icon will appear on tooth selected.
- C. Once the Rx is completed, you can save as a draft to submit at a later time or click next to submit.



C

This form and subsequent approval constitute final and complete prescription to ARCADLAB. Diagnosis and prescription are the decision and sole responsibility of the doctor ordering the service who waives any and all claims against ARCADLAB and employees of ARCADLAB based on the failure of ARCADLAB to achieve a successful outcome, either alone or in combination with other treatment modalities.

BACK

SAVE AS DRAFT

NEXT

9

SELECT ORDER DUE DATE

- Click Next to submit and select a date when your order should be delivered.

Note: Date selection is blocked out according to each order type specific turnaround time.

Contact us at support@dentalaxess.com for more information on all services turnaround times.

Order needed by

Order needed by *

1/10/2019

SKIP YES

10

SUBMIT ORDER

- Click **Submit** button to complete order creation and for Xplan to start processing order accordingly.

This form and subsequent approval constitute final and complete prescription to ARCADLAB. Diagnosis and prescription are the decision and sole responsibility of the doctor ordering the service who waives any and all claims against ARCADLAB and employees of ARCADLAB based on the failure of ARCADLAB to achieve a successful outcome, either alone or in combination with other treatment modalities.

SUBMIT

- Submitting will move the case status to record review and we will begin processing the case.
- You should receive an email notification within 2-3 business days to review the setup.
- Once you approve the setup, we will fabricate the trays to your specification and ship them to your office within 5-6 business days from your approval date.
- If you selected In-Office printing as additional service the exported files will be available for you to download in 1 to 2 business days.

Navigate 3D Model

Preset View Controls | Free Navigation Commands | Model View Reset

1 ARCH SELECTION

- Hide and/or show an individual arch by clicking on any of the two half sections on the navigation wheel.



2 VIEW CONTROL WHEEL

- A. Use the view control wheel for a variety of set view angles for individual or both arches.

Note: Mouse over any section on the wheel to display tool tip with view title.

- B. Additional pre-set views

- FREE MODE 3D MODEL MANIPULATION CONTROLS

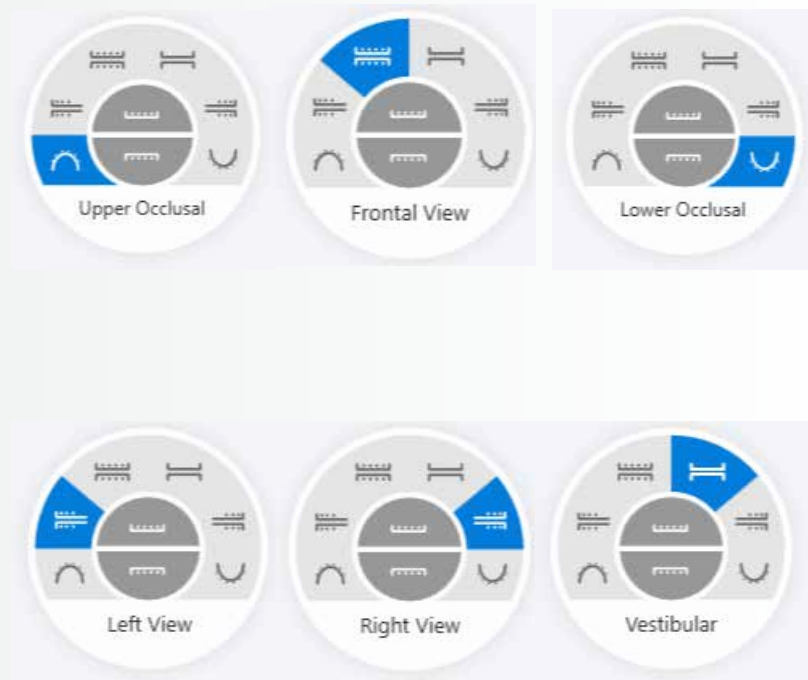
Using your mouse, you can freely manipulate the 3D model to the view of your choice.

Left Click and Hold - to rotate the 3D model.

Press and Hold Mouse wheel - to pan and drag 3D model.

Scroll Mouse wheel forward - to zoom in.

Scroll Mouse wheel backwards - to zoom out.

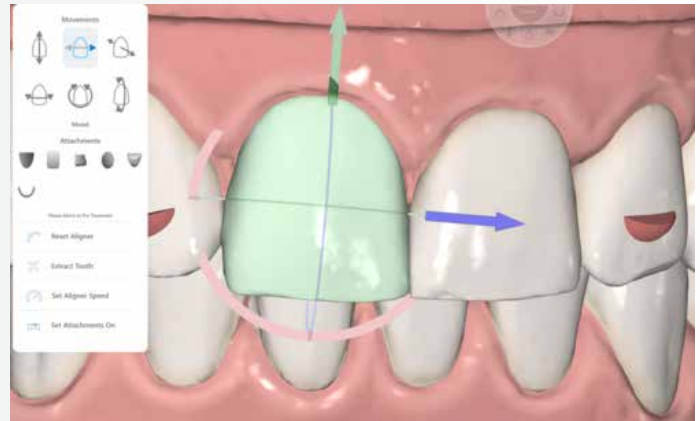


Aligner Setup Adjustments

Set Attachments | Edit Tooth Speed | Auto Aligner Staging

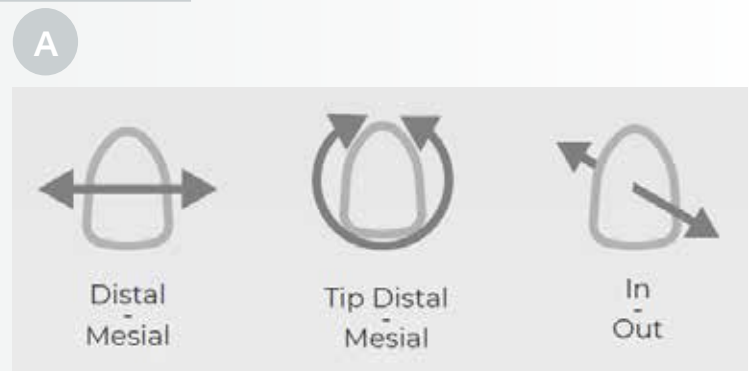
1 TOOTH SELECTION

- To make individual tooth adjustments, place mouse pointer over tooth you wish to adjust and then right click to select. The selected tooth should turn green once selected.



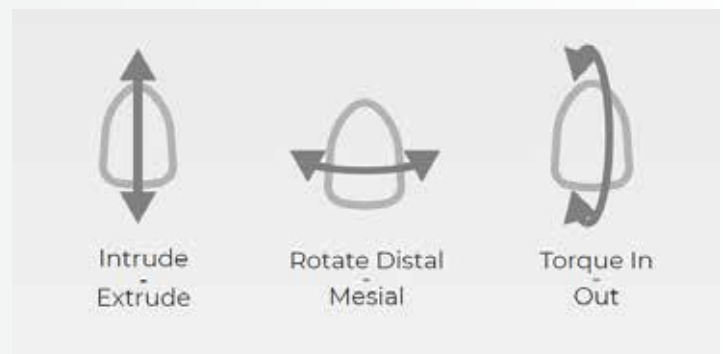
2 TOOTH ADJUSTMENT TOOLS

- The software allows you to make minor tooth position changes, and automatically calculate the number of sequences needed for each movement, based on a standard tooth speed of .25 mm per sequence.



- A. Go to the necessary tooth movement icon and mouse over the grey arrows to display the tooth movement action. Once you determine the correct action, go ahead and **click on the blue arrow**.

- To modify tooth position using the free navigation tools directly on the teeth, right Click on desired tooth and the coordinate manipulation wheel will display around the tooth.



Note: The manipulation wheel follows the tooth axis for center of rotation and translation, as well as the camera angles.

B. Rotate Mesial / Distal - **Right Click, Hold + drag Green** axis wheel in the direction you want the tooth to be rotated.

- Translate Mesial / Distal - **Right Click, Hold + drag Blue** arrow in the direction you want the tooth to be translated.

- Translate Lingual / Buccal - **Right Click, Hold + drag Red** arrow in the direction you want the tooth to be translated.

C. Crown Tip Mesial / Distal - **Right Click, Hold + drag Red** axis wheel in the direction you want the tooth to be tipped.

- Translate Intrude / Extrude - **Right Click, Hold + drag Green** arrow in the direction you want the tooth to be translated.

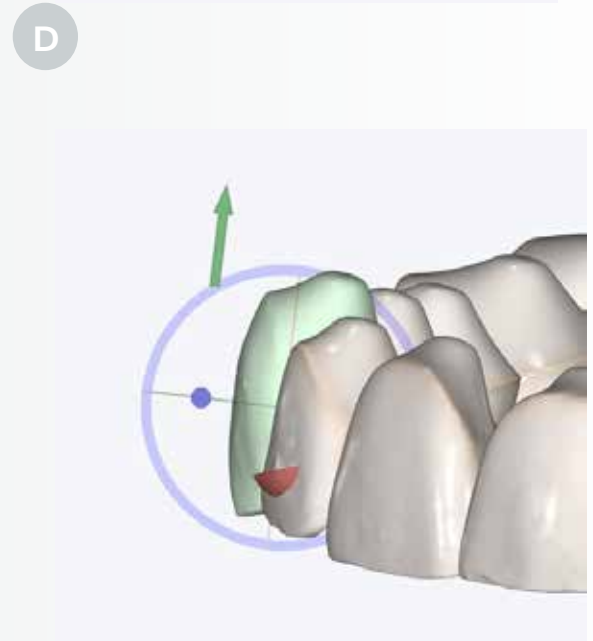
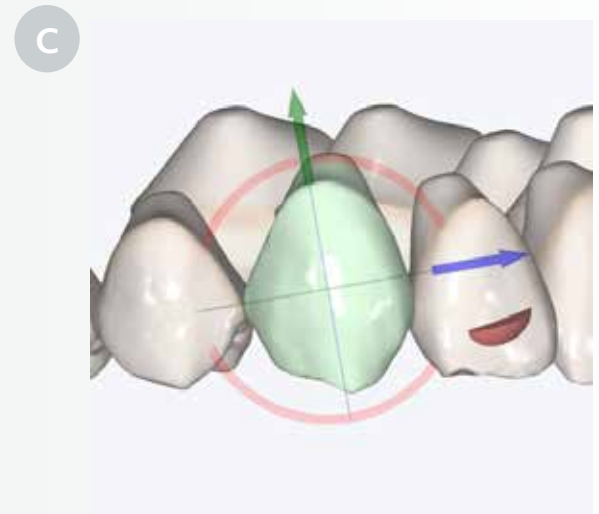
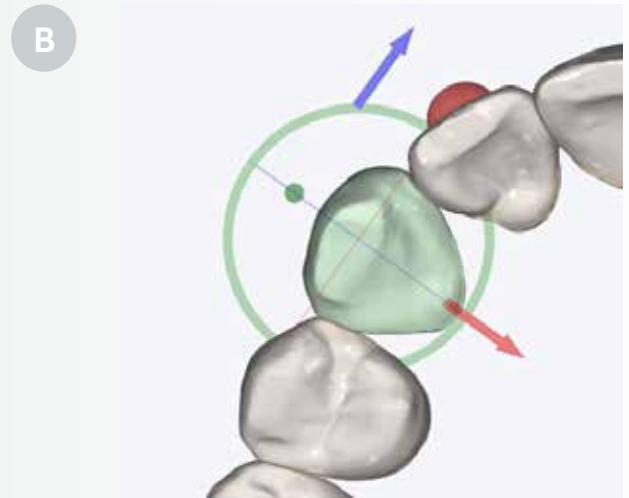
- Translate Mesial / Distal - **Right Click, Hold + drag Blue** arrow in the direction you want the tooth to be translated.

D. Torque Lingual / Buccal - **Right Click, Hold + drag Blue** axis wheel in the direction you want the tooth to be torqued.

- Translate Intrude / Extrude - **Right Click, Hold + drag Green** arrow in the direction you want the tooth to be translated.

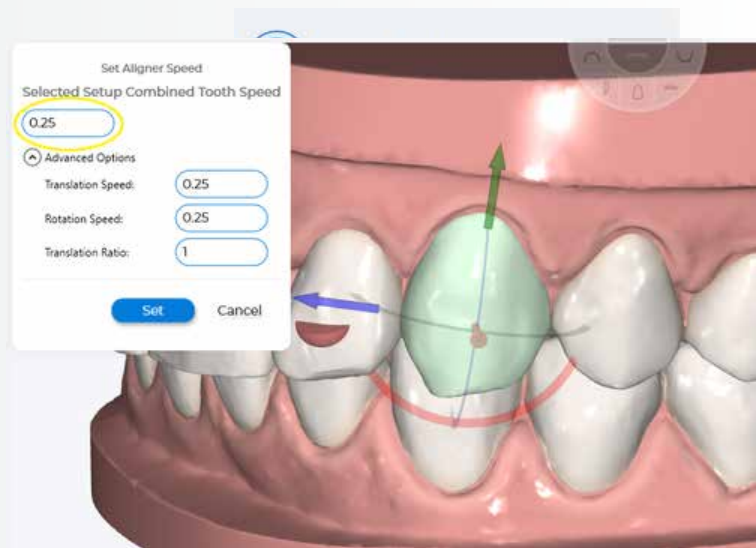
- Translate Lingual / Buccal - **Right Click, Hold + drag Red** arrow in the direction you want the tooth to be translated.

Note: To reset a tooth all the way back to its original pre-treatment position, right Click to select tooth. Then, click the **Reset Aligner** option.



3 ADVANCED TOOLS (TOOTH SPEED)

- Edit Aligner Speed to multiple or individual teeth. **Right Click** on desired tooth to select and click on **Set Aligner Speed** option to open tooth speed editor.
- Modify overall tooth speed accordingly by entering the amount desired in millimeters. (Xplan default tooth speed is .25mm). Adjusting tooth speed will automatically adjust the velocity of movement per each sequence and may also adjust the number of total sequences.
- Open Advanced Options to adjust speed to a specific movement.



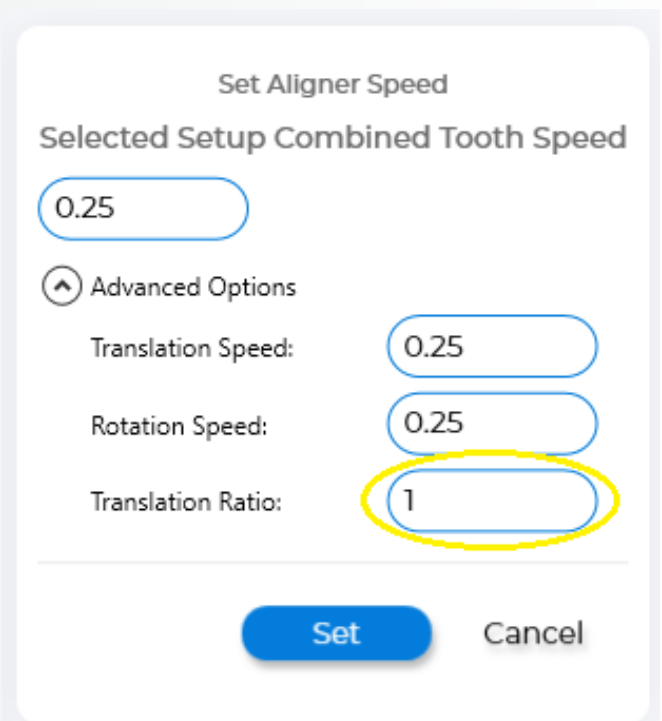
Here you have the option to slow down and/or speed up translation or rotation movement individually within the overall sequence of movements. Example. When a tooth has both a translation and rotation combined movement. Extruding can be slowed down to increase predictability in the movement while maintaining the standard speed for the rotation.

4 ADVANCED TOOLS (TRANSLATION RATIO)

Edit translation to rotation ratio.

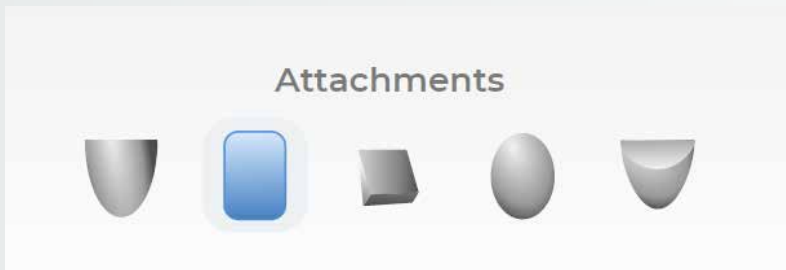
- Change the ratio of translation from the Xplan standard of 1 to 1 to the desired ratio by entering the ratio in translation ratio field.

This option is helpful when required to complete a movement type before another. Example: when looking to expand with a translation movement before starting a rotation for a tooth. Therefore opening a space to avoid a collision between two teeth.



5 ADDING ATTACHMENTS

- A. To add attachments to an individual tooth, move sequence to pre-treatment or Zero, place mouse pointer over tooth you wish to add attachment to, then **Right Click** to select. The selected tooth should turn green once selected.
- Next, **Left Click** on attachment image to select desired attachment from library.



- B. Go back to the tooth selected and **Right Click** to drop attachment in desired location.

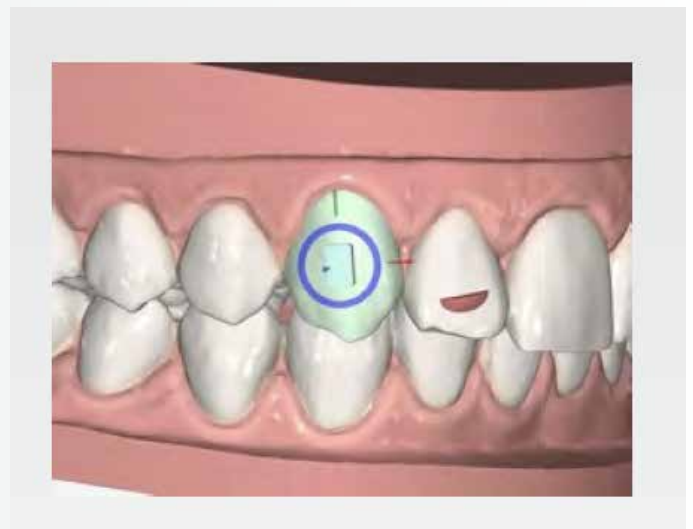


A

B

6 ADJUSTING ATTACHMENTS

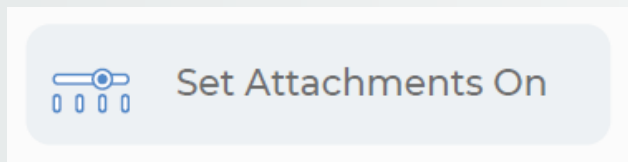
- To adjust attachment position, **Right Click** on attachment to select. The selected attachment should turn green and the attachment manipulation tool will display around the attachment.
- Right Click and Hold** attachment to drag it around selected tooth surface. Release the right click to set the attachment new position.
- Right Click, Hold and drag** mouse around blue wheel to rotate attachment. Release the right click to set new attachment orientation.
- Right Click, Hold and drag** arrows to modify attachment size in the direction of the arrow.



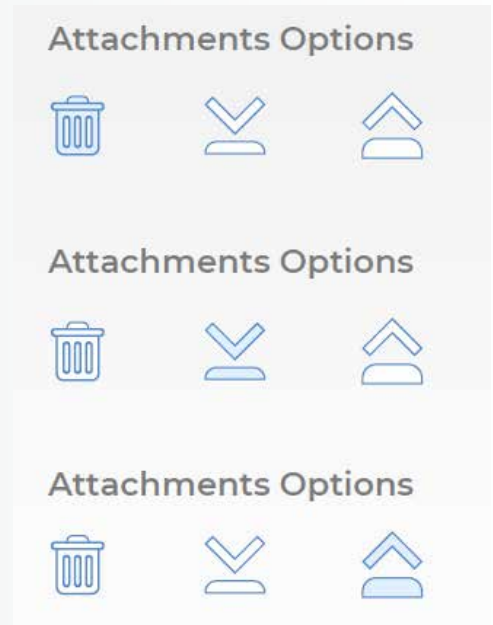
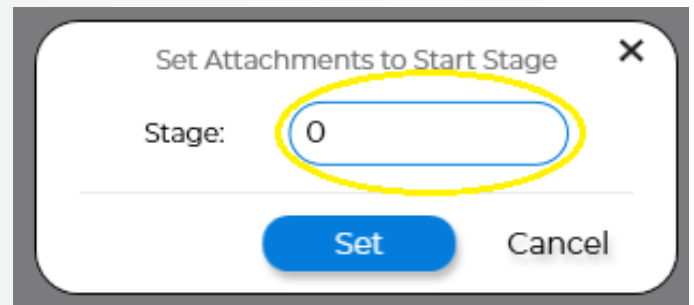
ATTACHMENT OPTIONS

- A. Delete attachment.
- B. Sink attachment on tooth surface.
- C. Rise attachment from tooth surface.

Note: To set the attachments on a particular aligner session click **Set Attachment On** editor to open.

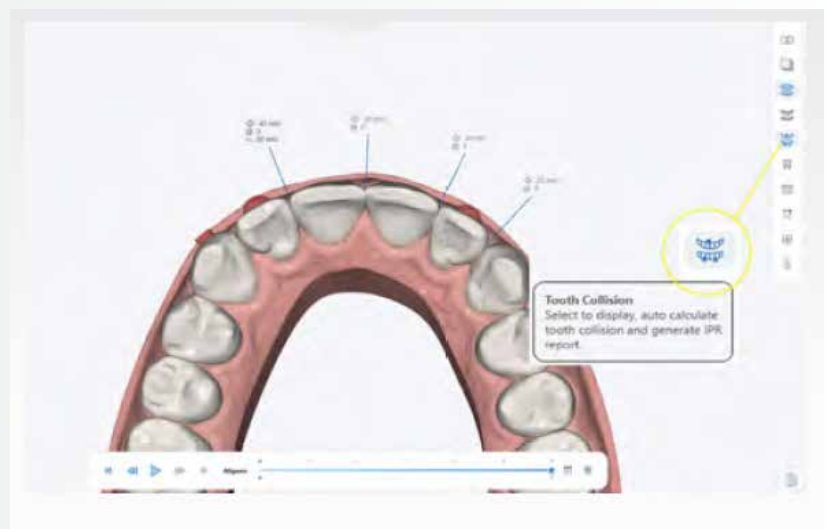


- Set the attachment stage to when the attachment is to appear for placement, by entering the preferred stage number on the editor.



7 REVIEW IPR

To view the recommended IPR amount, move sequence to post-treatment or last aligner stage. The amount, stage and left over spacing is automatically calculated on the last stage.



Indirect Bonding Setup Adjustments

Bracket Movement Controls | Tooth Movement Controls | Arch / Wire Modification

1 TOOTH SELECTION

- A. To make individual tooth or bracket adjustments, place mouse pointer over tooth you wish to adjust and then **right click** to select. The selected tooth should turn green once selected.
- B. To make multiple teeth adjustments at the same time, place mouse pointer over tooth you wish to adjust, **Hold down CTRL + ALT** and **right click** on each tooth individually. The selected teeth should turn green once they are selected.



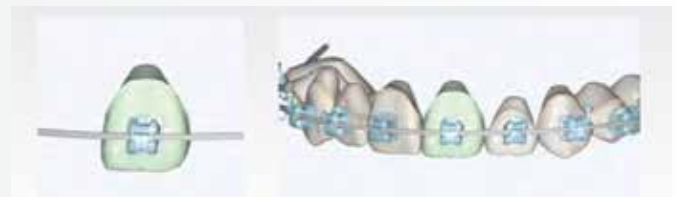
A



B

2 TOOTH AND BRACKET ISOLATION

- A. To isolate an individual tooth or bracket, select the tooth and **press the Space bar on the keyboard**.
- B. To bring full model back, **press the Space bar on the keyboard once again**.



A



B

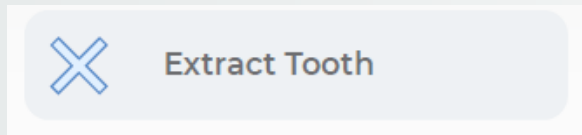
3 IDB TOOTH ADJUSTMENT TOOLS

- The software allows you to visualize how changing bracket placement in pre-treatment affects the tooth position outcome, as well as how changes made to the tooth position affect the bracket placement in pre-treatment.



- Go to the necessary tooth movement icon and mouse over the grey arrows to display the tooth movement action. Once you determine the correct action, go ahead and **click on the blue arrow**.

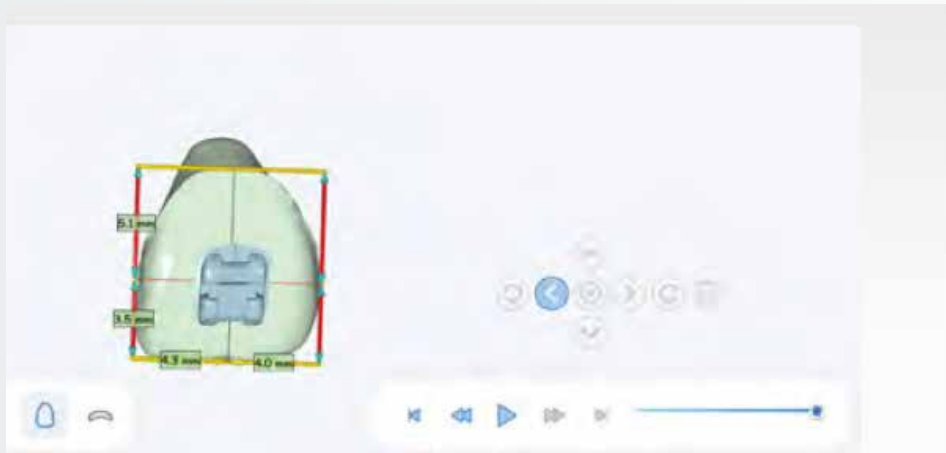
Note: To extract tooth, **right click** on tooth to select and **click the Extract Tooth** button



4 BRACKET ADJUSTMENT TOOLS

- Go to the necessary bracket movement icon and mouse over the arrows to display the bracket movement action. Once you determine the correct action, go ahead and **click on the arrow**.

Note: To remove bracket, **right click** on bracket to select and **click the Delete Bracket** button.

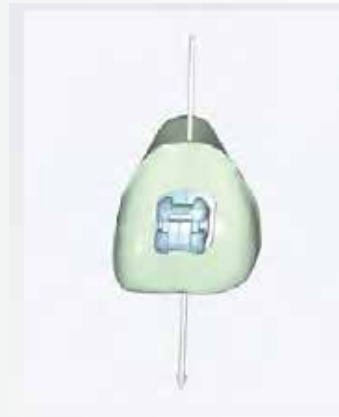


5 ADDITIONAL BRACKET ADJUSTMENT OPTIONS



6 SHOW AND ADJUST TOOTH AXIS

- A.  To show tooth axis **Click on Tooth Axis** icon on main tool bar.
- To adjust tooth axis, **Right click** on selected tooth to activate axis manipulation tool.
 - Once the axis wheel appears, you can continue to make the necessary adjustments to the tooth axis.
- B. Right Click, Hold + Drag** axis wheel in the direction desired to set center of rotation.
- **Right Click, Hold + Drag**, axis arrows in the direction desired to set center of tooth.
 -  To save new axis **Click the Save Axis** icon on main tool bar




A



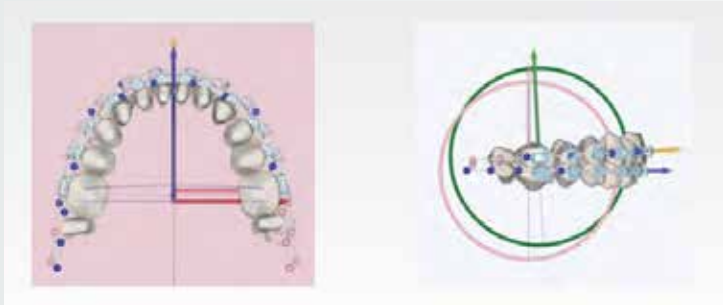
B

7 MODIFY ARCH FORM/PLANE

-  Click on Modify Arch Form to activate arch form manipulation tools.
- Once the manipulation tools are active, **right click + hold** on blue circles around the wire, drag to desired position to reshape arch form.

Note: Arch form has a mirror effect, changes made to one side of arch is identically replicated to opposite side.

- B. To modify arch wire height, turn the model to a right view. **Right click, hold and drag** the arrow corresponding to the arch being modified.
- To modify angulation **Right click, hold and drag** wheel corresponding to the arch being modified.

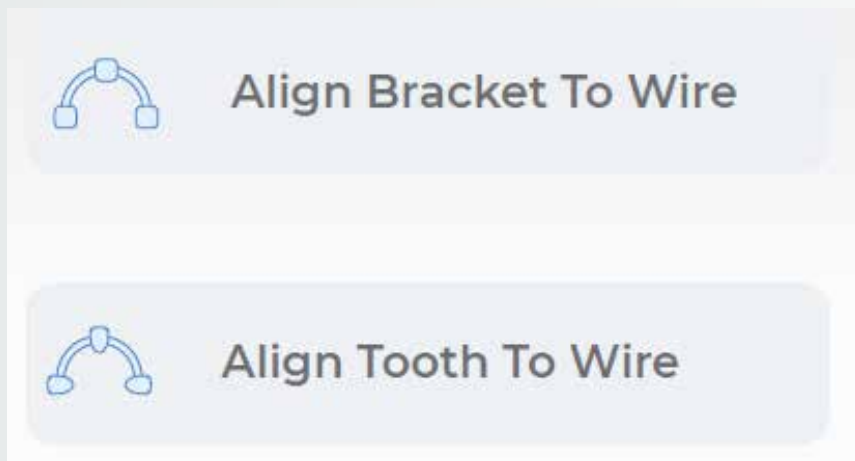


A

B

8 BRACKET ADJUSTMENT TOOLS

- A. Use this option to adjust brackets only to new modified arch wire plane.
- B. Use this option to adjust selected tooth with brackets to new modified arch wire form and plane.



A

B

Interactive Tools

View / Hide Model Base | View / Hide Superimpose | Calculate Occlusogram

1 ARCH SELECTION AND TRANSPARENCY TOOL

- Slide Upper Arch bar to desired transparency state.
- Slide Lower Arch bar to desired transparency state.
- Slide Attachment bar to desired transparency state.

Note: Slide all the way to the left for 100% transparency.



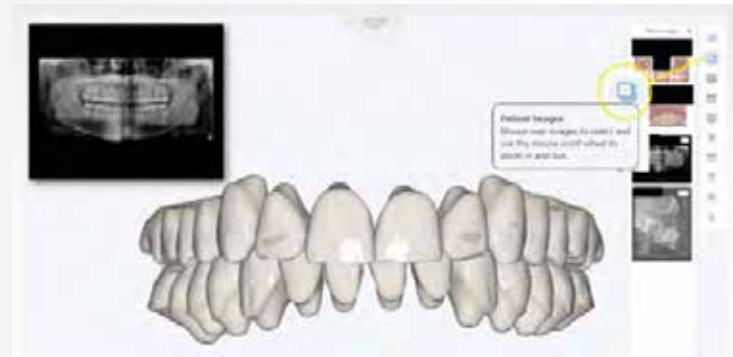
A

B

C

2 PATIENT IMAGES

- Images loaded on the portal at time of order creation will automatically display in Xplan SmileStudio software.




3 MODEL WITH BASE SELECTION

- Select** GUM tool to view model with base.
Note: Base Morphing calculation will automatically take place the moment you select to show base.



4 VIEW / HIDE ARCH FORM / WIRE

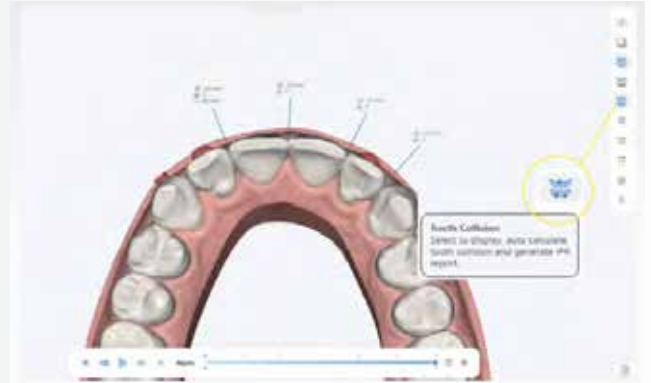
- **Select Arch form tool** to show arch form.

-  Note: Archform can be modified with the arch modify tool.



5 VIEW / HIDE TOOTH COLLISION / IPR REPORT

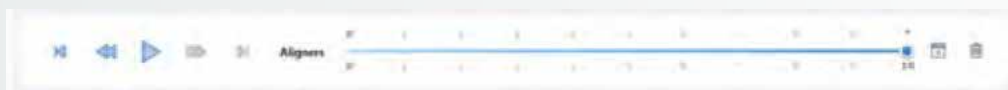
- **Select tooth collision** tool to view or hide IPR report.
Note: By default tool collision tool is active. Make sure to keep active when reviewing IPR report.



7

6 HOW TO SUPERIMPOSE PRE-TREATMENT MODEL

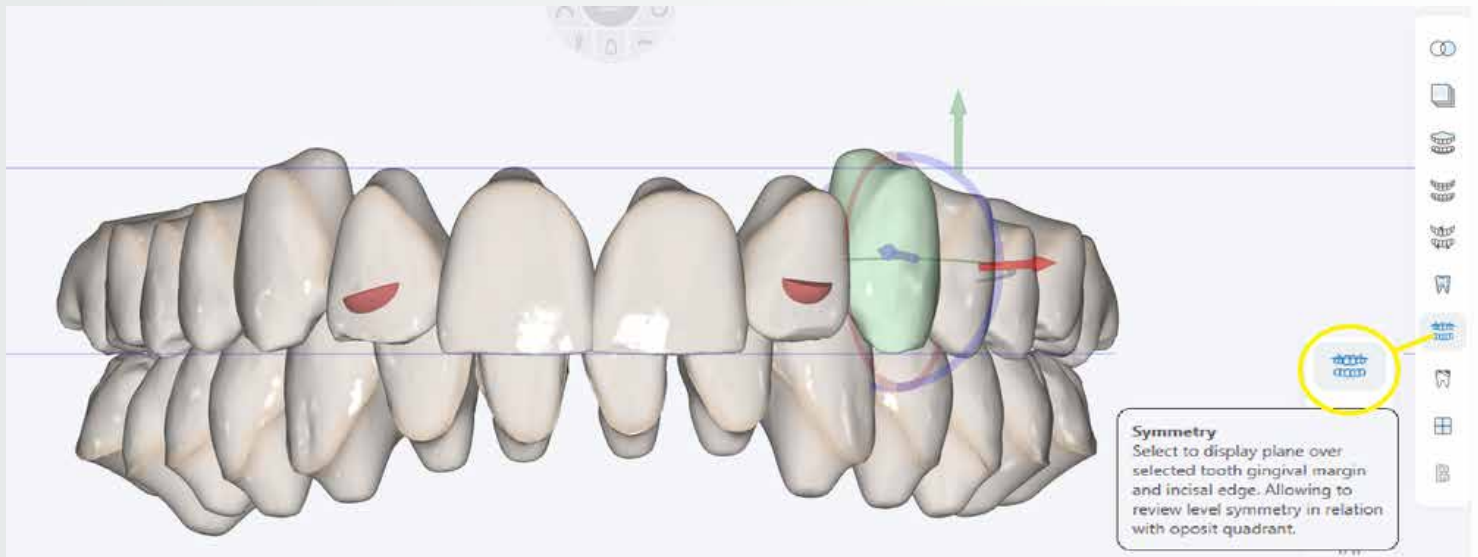
- **Select Superimpose tool** to view or hide pre-treatment model over post-treatment model.
Note: CLICK Play button or Drag the pre to post slider bar to show the movement between the two models.



7 ACTIVATE TOOTH SYMMETRY MODE

- **Select Tooth Symmetry tool** to activate Tooth Symmetry Mode. Then, **right click** on a tooth and two planes will display at both the gingival margin and occlusal edge of selected tooth, which allows you to view if the select tooth is levelled to the opposite quadrant tooth.

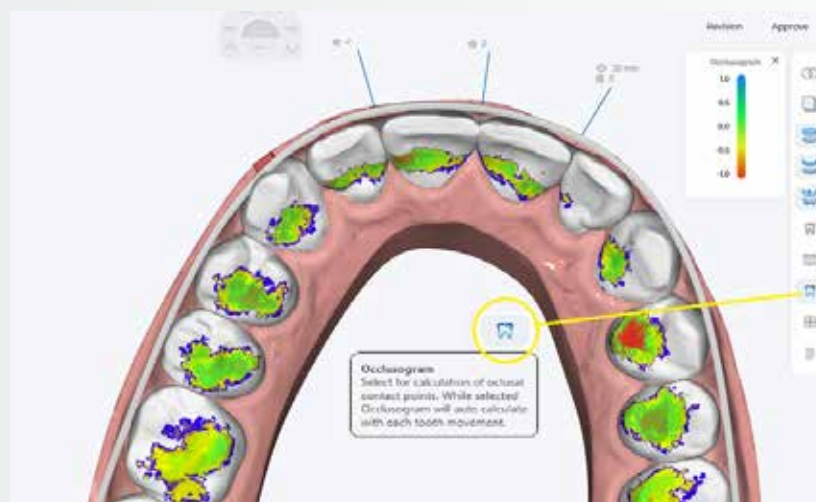
Note: Planes will travel as you move the teeth directly with the tooth manipulation tool or controlled tooth movement tools.



8 CALCULATE OCCLUSOGRAM

Select Occlusogram tool to initiate the calculation of occlusion contact points.

Note: Depth chart is measured in mm.

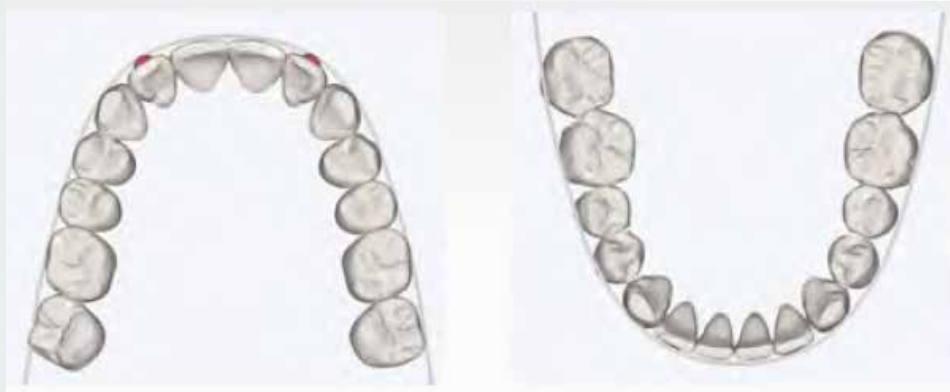


Review and Approve

Setup QC Protocol | Request a Setup Revision | Approve Setup for Fabrication

1 ARCH FORM

- Check the archform for accuracy.



2 OCCLUSAL PLANE

- Check that the occlusal plane has been levelled.



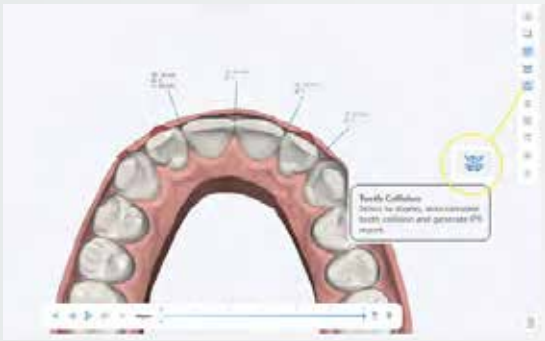
3 MARGINAL RIDGES

- Start with a view from the terminal molars looking towards the canines.
- Inspect that the marginal ridges line up from the molars, bi-cuspids and cuspids on both sides of the arch.



4 FOR ALIGNER REVIEW IPR RECOMMENDATIONS AND ATTACHMENTS

- A. Review that the IPR recommended has eliminated all collisions.
- B. Review Attachment allocation for rotation, extrusion and retention.



A



B

5 FOR INDIRECT BONDING REVIEW BRACKET HEIGHTS

- Review that the bracket heights are acceptable.



Sign

6 APPROVING THE SETUP

- Once you are satisfied with the setup, **Click Approve** button to open approval dialog window.

APPROVE

- Approval dialog window will automatically appear with your user name. To complete the process, enter your password and **Click Sign**.

Sign Order

User Name:

Password:

Sign Cancel

7 REQUESTING SETUP REVISIONS

- To request for an Xplan technician to perform a revision to the setup, **Click on Revision button**

REVISION

A. Enter revision notes in the revision comments box.

- Next, **Click Send Comments** button to open revision request sign dialog window.

SEND COMMENTS

B. Revision dialog window will automatically appear with your user name. To complete the revision request, enter your password and **Click Sign**.

Note: Revision requests are given high priority and we will try and get the revised setup back to you within one business day.

The image contains two screenshots of a software interface. The first screenshot, labeled 'A', shows a dialog box titled 'Revisions' with a close button (X) in the top right corner. Inside the dialog is a large text area labeled 'Revision Comments'. The second screenshot, labeled 'B', shows a dialog box titled 'Sign Order' with a close button (X) in the top right corner. It contains two input fields: 'User Name:' and 'Password:'. Below the input fields are two buttons: 'Sign' and 'Cancel'.

Any questions?

Should you require assistance with Xplan our dedicated service team is always here to help.

Contact us at support@dentalexess.com.

**Perfect digital workflows
the Dental Axess way**