

# Simbaligner®

## How to Launch Your First Simbaligner® Case

A practical first-case guide for partner clinics

- ✓ This guide walks you through the key steps required to submit your first Simbaligner case - from patient selection and consent to portal submission, simulation review, quotation acceptance, deposit, and production.

### Before you start

Before submitting your first case, please ensure that:

- Your clinic has completed the partnership agreement.
- You have received access details for the aligner portal.
- You understand the quotation and invoicing process.
- You have access to the patient consent form.
- You know who to contact for first-case support.

### Core principle

The treating dentist remains responsible for diagnosis, treatment decisions, patient consent, clinical monitoring, attachments, IPR, reviews, and retention.

Simbadent/Simbaligner supports the digital workflow, planning coordination, aligner production, partner support, and patient education materials.

### First-case pathway

1	Select	2	Consent	3	Records	4	Portal
5	Review	6	Approve	7	Quote + deposit	8	Produce + deliver

- ! Use this guide as a reference. You do not need to complete everything at once - but each step should be completed carefully before production begins.

## Steps 1-4: Patient readiness and records

### STEP 1 - Select the right patient

Your first case is best kept simple. Choose a patient who is motivated, clinically suitable, and likely to comply with aligner wear.

- Confirm suitability after clinical assessment.
- Explain clear aligner therapy and alternatives.
- Avoid complex cases for your first submission.

#### Often suitable for first-case review

- Mild to moderate crowding
- Mild spacing
- Relapse after previous orthodontic treatment
- Minor alignment and aesthetic improvements

#### Use caution / avoid as first case

- Severe skeletal discrepancy
- Complex bite correction
- Extraction-based or surgical cases
- Poor oral hygiene, active disease, or doubtful compliance

### STEP 2 - Talk to the patient

Keep patient communication simple, honest, and dentist-led.

- Explain that Simbaligner is delivered through trained partner clinics.
- Clarify that the dentist assesses, approves, and monitors treatment.
- Explain wear time, reviews, attachments, IPR where required, and retention.
- Avoid promising perfect results, guaranteed timelines, or suitability before assessment.

### STEP 3 - Obtain patient consent

Before any data is uploaded, complete and file the Simbaligner Patient Consent Form in the patient record.

- Review treatment options and alternatives.
- Explain patient responsibilities and aligner wear.
- Ensure consent is signed and filed before case submission.

### STEP 4 - Capture accurate records

Record quality directly affects planning quality, aligner fit, and turnaround time.

- Intraoral scan preferred, or PVS impressions where applicable.
- Intraoral and extraoral photos.
- Bite registration.
- X-rays where clinically required.
- Clear clinical notes and treatment goals.

**i** If records are incomplete, distorted, or unclear, treatment planning may be delayed or the case may need to be resubmitted.

## Steps 5-8: Portal, planning, quotation and production

### STEP 5 - Upload the case to the portal

Submit the case through the aligner portal using the credentials shared after onboarding.

- Create a new patient case.
- Upload scans/impressions, photos, bite records, and supporting records.
- Add clinical notes and treatment goals clearly.
- Monitor portal and email updates for questions or clarification.

### STEP 7 - Approve, accept quotation and pay deposit

Once the plan is approved, the system issues the quotation/invoice workflow for the case.

- Review the quotation details.
- Accept the quotation to confirm intent to proceed.
- Invoice/payment details are shared with the billing contact.
- A 50% deposit is required before production begins.

### STEP 6 - Review the treatment simulation

Partners typically receive a treatment plan and simulation within approximately 48 hours where records are complete and the case is straightforward.

- Check whether the proposed outcome matches your clinical goals.
- Review staging, attachments, IPR, movement sequence, and patient communication points.
- Approve only once the setup is clinically acceptable.

### STEP 8 - Production and delivery

Production begins once quotation approval and deposit confirmation are complete.

- First 3 stages are produced locally in Kenya.
- First 3 stages are usually delivered to the partner clinic within 3-5 working days after deposit confirmation.
- Stages 4 onwards are produced through the extended lab network in Egypt.
- Remaining stages are typically available within 10-15 working days.

✓ Tip: You may request adjustments before approval. Keep requests specific and clinically clear.

#### Adjustment request examples

Instead of	Use specific instructions
Make it better	Reduce proclination of upper incisors and maintain current midline.
Change the bite	Review posterior contacts and avoid opening the bite further.
Move lower teeth more	Resolve lower anterior crowding with staged alignment; advise if IPR is required.

! Timelines depend on complete records, confirmed approvals, deposit confirmation, and normal operating conditions. Delays may occur if records require correction or additional review.

## Final first-case checklist

- Partnership agreement completed
- Portal access received
- Patient selected after clinical assessment
- Patient informed that dentist remains responsible for clinical care
- Simbaligner Patient Consent Form completed and filed
- Records captured: scan/impression, photos, bite, and X-rays where needed
- Case uploaded through portal with clear clinical notes and treatment goals
- Treatment simulation reviewed carefully
- Adjustments requested where needed before approval
- Treatment plan approved once clinically acceptable
- Quotation reviewed and accepted
- Invoice reviewed and 50% deposit paid
- Production initiated after deposit confirmation
- First 3 stages received, checked, and issued to patient with instructions
- Review schedule and patient compliance instructions confirmed
- Retention discussed early with the patient

## Support contacts

Support area	Use for	Contact
<b>Clinical &amp; case support</b>	Case workflow, treatment planning clarification, and first-case support coordination.	Use designated Simbaligner support channel
<b>Partnership &amp; onboarding</b>	Onboarding questions, partner resources, Form A/Form C, and portal access follow-up.	WhatsApp: +254 745 184 187
<b>General support</b>	Quotations, invoicing, documentation, and general partner support.	Email: info@simbadent.com

✓ Final note: Your first case sets the foundation for future cases. Taking time to follow each step carefully helps ensure a smoother workflow and a better experience for both the clinic and the patient.

This guide supports first-case readiness. It does not replace clinical judgement, informed consent, or dentist-led treatment planning and monitoring.