

# Checklist for clear aligner success

Here's an outline of the steps covered in this checklist:

1. Register as a provider
2. Prepare your practice
3. Treat your first patient
4. Prioritize aligners in your practice
5. Assign team responsibilities
6. Market your services to the public

If you're brand-new to ClearCorrect, just start at the beginning and work your way down. If you've already treated a few cases, you may be able to skip ahead. Don't be overwhelmed! You can do this. Just take it one step at a time. Wherever you're at in the process, we hope that this guide helps you take your practice to the next level.

## 1. REGISTER AS A PROVIDER

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- Register** at [clearcorrect.com/doctors](https://clearcorrect.com/doctors).
- Log in to the doctor's portal** at [dr.clearcorrect.com](https://dr.clearcorrect.com) and familiarize yourself.
- Watch** the *Basics of ClearCorrect* playlist on YouTube.
  - If you're new to orthodontics, also watch *Basics of Orthodontics*.
- Visit our Help Center** at [support.clearcorrect.com](https://support.clearcorrect.com) and take a look around. This should be your first stop whenever you have questions.
- Get acquainted with your account rep.** Tell your receptionist to expect a call from a ClearCorrect representative within a day or two of registration. You can also call us at the phone number listed in the sidebar of the doctor's portal.

## 2. PREPARE YOUR PRACTICE

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- Gather supplies.** You'll need a way to take and upload high-quality photos:
  - Digital camera or smartphone
- To capture your patients' dentition, you'll also need an intraoral scanner or:
  - PVS impression material
  - Plastic impression trays

*We don't accept alginate impressions, stone models, or metal impression trays.*
- Prepare to place engagers.** You might not need this immediately, but as you move into more complex cases, you'll probably need to place [engagers](#). You can get supplies from [store.clearcorrect.com](https://store.clearcorrect.com) or another vendor. See [How to Place Engagers](#).

- Prepare to perform IPR.** You'll also probably eventually need supplies for [IPR](#), available from [store.clearcorrect.com](https://store.clearcorrect.com) and other vendors. See [How to Perform IPR](#).
- Set pricing.** Typical patient costs for aligner treatment range from \$1,500 to \$8,000, depending on the complexity of treatment and what's typical in the local market. Be sure to allow yourself a sustainable profit margin.

**Register for an e-course or live workshop** at [store.clearcorrect.com](https://store.clearcorrect.com). This isn't required, but we highly recommend it. ClearCorrect offers CE credit for a range of courses on topics related to clear aligners. These

- courses answer many of the most common questions that our support staff receives. Your staff can take any e-course you take at no additional cost, and they can accompany you to live workshops at a reduced rate.

### 3. TREAT YOUR FIRST PATIENT

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- Start with a simple case.** Look for a minor issue that can be corrected in less than a dozen steps, without major crowding that might require [interproximal reduction \(IPR\)](#) or difficult movements that might require [engagers](#). Anterior teeth are easier to correct than posterior teeth, and tipping is easier than extrusion or rotation. You may find it convenient to start with a staff member, a family member, or even yourself.
  - Get informed consent.** Every patient should read and sign an [informed consent form](#). Make sure they understand these key points:
    - You, the doctor, are responsible for their care.
    - ClearCorrect manufactures aligners based on your prescription.
    - Patients should contact you if they have any questions or concerns.
    - Any orthodontic treatment carries some risks.
    - No one can guarantee a successful outcome.
    - Aligners need to be worn consistently—22 hours a day, every day.
    - Most people will need retainers after completing treatment.
    - There may be additional costs for revisions, replacements, or retainers.
  - Take photos and impressions or scans.** See [How to Take Photos & X-Rays](#) and [How to Take One-Step Impressions](#).
  - Submit your prescription.** See [How to Submit a Case](#).
  - Review & approve the treatment setup.** See [Treatment Setups](#).
  - Teach your patient** how to wear & care for their aligners. Instructions are printed on the back of each aligner bag. It is absolutely essential for your patient to understand the importance of wearing aligners consistently. This is the single most important factor in treatment success.
  - Give your patient two sets of aligners and check their progress at each appointment.** See [During Treatment](#).
- Follow up with retainers** after treatment. See [Finishing a Case](#).

- Don't be afraid to ask for help.** From the doctor's portal ([dr.clearcorrect.com](https://dr.clearcorrect.com)) or the Help Center ([support.clearcorrect.com](https://support.clearcorrect.com)), click the green Help button in the lower-right corner to chat with a support rep.
- You can also call us or email [support@clearcorrect.com](mailto:support@clearcorrect.com). Be prepared with your office email or phone number, and (if applicable) the case number.

#### 4. PRIORITIZE ALIGNERS IN YOUR PRACTICE

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Unfortunately, you probably can't just sit back and wait for patients to walk in to your practice asking for clear aligners. That might happen occasionally, but most people don't consider correcting malocclusion until the benefits are presented to them. Here are some of the actions that set successful practices apart:

- Ask every patient whether they're happy with their smile.** Give every new patient a smile survey with questions like:
  - How would you rate your smile from 1 to 10?
  - What would you change about your teeth?
  - Does it feel like your teeth fit together properly when you bite down?
- Talk to every patient about clear aligners,** regardless of what they come in for. Even if a patient isn't a good candidate, they may know someone else who is. If they are a good candidate, include aligners in their treatment plan and make sure they have a copy when they leave.
- Play videos for patients** in the waiting and exam rooms to introduce them to the [benefits of orthodontics](#) and [how clear aligners work](#). There's even a [waiting room video playlist](#) that can be played on a loop.
- Tell patients about the benefits of correcting malocclusion.** We offer a [chart of conditions & benefits](#) that you may want to laminate and keep on hand.
- Put out promotional materials.** Make sure ClearCorrect is visible in every part of your practice. You can order promotional materials from your rep or [store.clearcorrect.com](https://store.clearcorrect.com).
  - Display brochures in your waiting room and exam rooms
  - Hang posters throughout the office
  - Attach a window cling by your front door
  - Stock your front desk with ClearCorrect pens
  - Teach patients about aligners with a flipbook and before & after photos
  - Let patients get hands-on with a typodont and sample aligners
- Update your website.** Add information about ClearCorrect to your practice's website. You can find logos, images, and sample copy at [support.clearcorrect.com](https://support.clearcorrect.com).
- Set achievable treatment goals.** Start simple and work your way up to treating more difficult malocclusion as you gain experience and confidence with aligners. Even minor anterior corrections can make a big difference in a patient's self-confidence.

## 5. ASSIGN TEAM RESPONSIBILITIES

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- Get the whole team on board.** Make sure every member of your staff understands their role in the successful implementation of clear aligner treatment. Everyone should be prepared to promote clear aligners to any patient that could benefit from them.
- Educate your staff.** Every staff member should understand the basics of clear aligners, and where to get help. They can:
  - Watch Basics of ClearCorrect
  - Learn more and chat with support on the Help Center
  - Manage case information on the doctor's portal
  - Take an e-course or attend a workshop
- Conduct regular staff meetings** to review the effectiveness of each individual, and the successful growth of the practice thanks to clear aligners.
- Distribute laminated cards** to your staff outlining roles and responsibilities.

*Here are some examples of specific duties you might assign to staff members:*

**Receptionists** are usually the first people to welcome new patients, so they must be prepared to discuss clear aligners. They can:

- Promote your practice as a provider of clear aligners
- Identify potential clear aligner patients
- Get patients to fill out a new patient survey/questionnaire
- Note any interested patients watching videos in waiting room

**Dental hygienists** are in a unique position to identify potential clear aligner patients and initiate a conversation about clear aligners before turning things over to the doctor. A hygienist that's educated thoroughly on the numerous benefits of orthodontics can do a lot of the sales work. They can:

- Identify conditions that may benefit from orthodontic correction
- Identify symptoms of occlusal disease
- Educate patients about how correcting malocclusion can improve oral health

Dental assistants play a key role in patient education and promotion of aligners because of their direct, frequent contact with patients. They can:

- Identify potential patients by asking if there's anything that they want to change about their smile
- Perform an initial workup:
- Confirm that the informed consent form has been signed
- Take impressions/scans
- Take photos
- Conduct a chairside examination

- Fill out an online prescription or [pre-submission worksheet](#)
- Educate the patient about clear aligners:
  - How to wear aligners
  - The importance of following the wear schedule
  - How to clean and care for aligners
  - What to expect regarding engagers and IPR
- Assist with checkup appointments:
  - Retrieve the next set of aligners for distribution
  - Review the treatment plan
  - Determine whether engager or IPR procedures are scheduled, and if so, ready the required materials and inform the doctor
  - Ask the patient whether they are wearing their aligners 22 hours a day, and whether they are they experiencing any discomfort
  - Document the treatment notes and progress
  - Encourage existing patients to tell their friends about ClearCorrect
  - Enroll in [continuing education](#) for clear aligner treatment

**Treatment coordinators** (or office managers) can have an important role in getting new clear aligner patients. In many practices, the treatment coordinator discusses pricing and financing with patients. A treatment coordinator that is comfortable discussing these topics can really help to seal the deal. They can:

- Discuss clear aligners with patients to identify prospects for the doctor
- Show patients their treatment plans when needed
- Discuss insurance, pricing, payment, and financing options
- Inform patient of their responsibilities with regards to payments, appointments, etc.
- Follow up with potential patients that were interested in clear aligner treatment

**A Clear aligner manager** is not a necessary role for every practice, but some practices find it helpful to dedicate a team member specifically to managing the clear aligner workflow. This could mean additional responsibilities for an existing employee, or a dedicated staff member in a high-volume practice. They can:

- Work with the doctor to submit clear aligner prescriptions online
- Alert the doctor when treatment setups are available for review
- Store and organize boxes of aligners
- Schedule patients for the delivery of their aligners
- Order and track revisions
- Order retainers and replacements
- Organize marketing and promotion of clear aligners

- Coordinate with a ClearCorrect representative to get promotional materials and resolve support issues
- Act as a team leader in motivating other staff members (and the doctor) to make the practice a community leader in clear aligners
- Work with the practice's financial manager to administer the costs and fees related to clear aligner treatment
- Coordinate with the finance company to verify qualified patients and promote to them

## 6. MARKET YOUR SERVICES TO THE PUBLIC

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- Create an on-hold message** promoting clear aligners.
- Send postcards and emails** to current and potential patients announcing that you offer ClearCorrect, and promoting specials.
- Run promotions** such as:
  - Free whitening with clear aligner treatment
  - Free initial consultation and treatment setup
  - Free starter kit items (OAP cleaner, Outie tool, Chewies, aligner case)
  - Discounts on aligners or retainers
- Generate good word of mouth.** Hold a staff meeting to get everyone on board identifying actions to create positive referrals.
- Print referral cards.** These can offer services such as free x-rays, exam, and a consultation, and should be distributed to every patient that comes into your office. Be sure to mention the typical cost of these services, to increase the perceived value of the offer.
- Send bouquets** of flowers, cookies, or balloons to patients starting treatment. These can include referral cards along with gifts such as a branded mug, toothbrush, or gift card. Send to the patient's place of work to create buzz with their co-workers.
- Always have a staff member in treatment.** It's a great conversation starter, and they'll be able to speak from personal experience.
- Make sure your website is up to date** and optimized for search engines. You can also invest in paid search results and email marketing. [S3SB](#) offers discounted website design and internet marketing services to ClearCorrect providers.
- Manage your presence on social media.** Stay in touch with patients and prospects on Facebook, Twitter, and Instagram, and keep up your reputation on review sites like [Yelp](#), [HealthGrades](#), [RealSelf](#), and [Google My Business](#).
- Send monthly newsletters** promoting current specials and services.
- Establish a practice mission statement** and regular goals.
- Consider traditional advertising** like TV, newspaper, radio, and billboards if they fit your budget and location.

- Conduct “Lunch and Learn” sessions** with other interested professionals.
- Speak about clear aligners** at community meetings, school programs, and other events.
- Ask your patient financing service** to conduct a “soft hit” to identify pre-qualified prospects in your patient database, and target them in your marketing.
- Schedule a “ClearCorrect Day”** promoting clear aligners and offering discounts for anyone who signs up that day.
- Hold contests and giveaways** to gather leads for potential patients.
- Give back to the community.** Select a cause that will position you better with your targeted audience.