

FRESH HEALTH INC.

Proclaim™

# Proclaim Connect Training

Proclaim Marketing and Product - March 2023



# Overview

- What is Proclaim Connect?
- Account Creation/Onboarding
- Trial Mode - Team Setup and Trial Cases
- Patient Management
- Scanning for Proclaim
- Case Management and Scan Upload Process
- Patient Checkout
- Getting Help

## A New Standard in Oral Health Care

An advanced custom-jet oral irrigator,  
offering the first and only  
*7-second* at-home treatment

Utilizing an intraoral scan, a custom  
mouthpiece is created with up to 60 jets  
targeted interproximally to provide a 360  
degree deep cleaning with every use



# What is Proclaim Connect?

[Proclaim Connect](#) is an **all-in-one platform** where dental professionals can manage Proclaim patients, upload 3D intraoral scans, submit mouthpiece cases, and set up practice team members.

Our goal is to create an **easy-to use** bridge between your practice, patients, and Proclaim, ultimately creating improved oral health and patient outcomes while creating a new revenue stream for your practice.



# Proclaim Connect - Setting up your Account

## Step 1: Receive Invite Email



Hi Amy Brown,

**Smile More Dental - Mountain View** has been invited to join **Proclaim** Connect, an all-in-one platform where you can manage your **Proclaim** patients, upload 3D intraoral scans, submit mouthpiece cases, and setup practice team members. This is a trial account where we'd like to invite you to explore various features of **Proclaim** Connect.

You can access your account [here](#).

If you have any questions, please reach out to [customercare@proclaimhealth.com](mailto:customercare@proclaimhealth.com).

We look forward to a long-lasting partnership!

- The **Proclaim** Team



## Step 2: Create Password



Use the form below to finish creating your account.

Smile More Dental - Mountain View

Joe

Brown

9192221234

josh+610@freshhealth.com

Password \*

I agree to have read and understood the [Fresh Privacy Policy](#) and [Terms & Conditions](#)

Submit

© 2023 Fresh Health Inc. All Rights Reserved.



- You'll only need to create a password once; you can change it later
- Need to accept terms and conditions
- After first login, you'll only need to enter your email address and password

# Proclaim Connect - Getting Started

**Proclaim** Smile More Dental - ... Trial Amy Brown ▾

**Hello, Amy Brown!**  
Welcome to your Proclaim Dashboard.  
Getting started with your trial is as easy as 1, 2, 3.  
We want you to be a believer in Proclaim. **Create cases** for yourself and your team to **personally try the product** and gain confidence in recommending Proclaim to your patients.

**Partner Agreement Status**  
Contract Pending

**1 Build Your Team**  
Add your team members to your account get started with your trial.  
[Build Team](#)

**2 Submit Trial Cases**  
To create a trial case, click the **create team case** icon for that team member.  
[Submit Case](#)

**3 Practice Resources**  
Browse our resources to help you educate your team on the benefits of Proclaim.  
[View Resources](#)

2 Trial cases Allowed

0 Trial Cases Used

2 Trial Cases Remaining

Get started with 3 easy steps

# Proclaim Connect - Building Your Team

## Step 1: Add a Team Member

The screenshot shows the 'Team' management interface for 'Smile More Dental'. The page includes a sidebar with navigation options: Home, Patients, Team (selected), and Help. The main content area features a search bar, a '+ Team Member' button, and a table listing team members.

NAME	EMAIL	ROLE	ACCESS	STATUS	CREATE CASE	ACTIONS
Amy Brown	josh+604@freshhealth...	Admin		Active		

1 to 1 of 1 items

## Step 2: Add Details and Invite

The screenshot shows the 'Team' management interface with an 'Invite Team Member' modal form open. The form contains the following fields:

- Name: John
- Surname: Brown
- Email: josh+605@freshhealth.com
- Phone: 4085556363
- Role: General Dentist
- Access: Admin

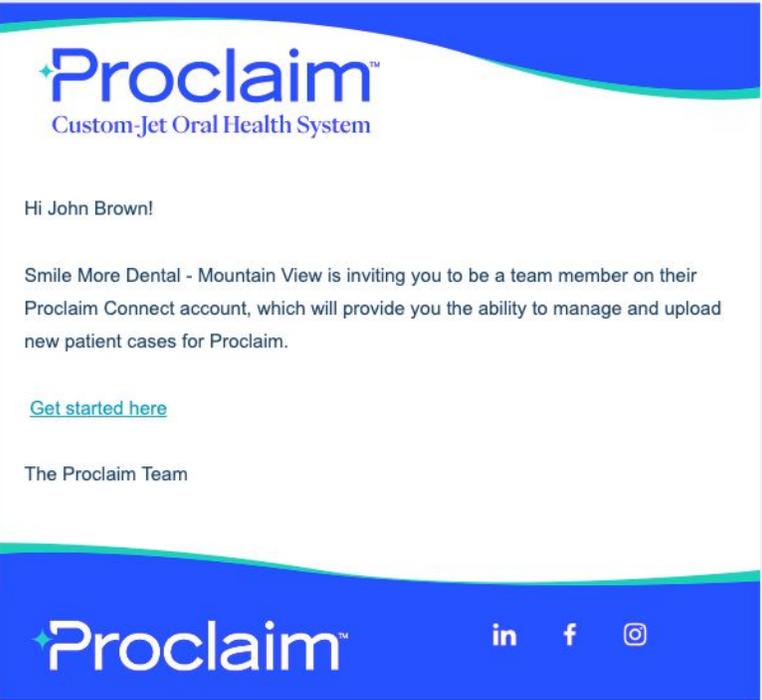
Buttons: Cancel, Send Invite

### Things to know:

- Remember to select a practice role
- Access levels
  - Admin or Team Member
  - You can have more than one admin per account
  - Admins can edit team members and account settings
  - Standard team members cannot

# Proclaim Connect - Building Your Team

## Step 3: Team Member Receives Invite Email



## Step 4: Team Member finishes account creation

The screenshot shows the Proclaim Connect account creation form. At the top is the Proclaim Connect logo. Below it is the instruction: "Use the form below to finish creating your account." The form contains several input fields: "Smile More Dental - Mountain View", "Joe", "Brown", "9192221234", "josh+610@freshhealth.com", and "Password \*". There is a checkbox for "I agree to have read and understood the Fresh Privacy Policy and Terms & Conditions" and a green "Submit" button. At the bottom, it says "© 2023 Fresh Health Inc. All Rights Reserved."



# Proclaim Connect - Trial Mouthpiece Case Creation

Step 1: Click Create Case Button from Team Section

Smile More Dental - ... Trial John Brown

Team + Team Member

Search Show All

NAME	EMAIL	ROLE	ACCESS	STATUS	CREATE CASE	ACTIONS
Amy Brown	josh+604@freshhealt...	General Dentist	Admin	Active		
John Brown	josh+608@freshhealt...	General Dentist	Admin	Active		

1 to 2 of 2 items

Step 2: Add location, scanner type, conditions

Search

NAME EMAIL ROLE ACCESS STATUS CREATE CASE

### Create Team Member Case

Creating a case will create a patient record for the selected team member.

Location: Smile More Dental - Mountain View

Scanner: 3Shape

Existing Conditions: Fixed Bridge - Lower

Cancel Save

## Things to know:

- Choose the practice location where this case/scan is being completed
- We currently support 3Shape, iTero, Medit, Primescan, Caresteam, and VirtuoVivo scanners.
- Along with 3D scans, “Existing Conditions” help us ensure an accurate mouthpiece design and fit

# Proclaim Connect - Trial Mouthpiece Case Creation

Step 3: Patient record auto-created for the team member

Smile More Dental - ... Trial John Brown

← Back

NAME  
**Amy Brown**  
F-000918

CASE ID  
**C-000457**

CREATED  
16 Feb 2023

EXPIRES  
-

CASE STATUS  
**New**

TRACKING #  
-

NEW SCANNED SUBMITTED SHIPPED

Location  
Smile More Dental - Mountain View

Scanner  
3Shape

Existing Conditions  
Fixed Bridge - Lower

Upper Arch Lower Arch Bite

Drop Scan File to Upload or Browse

required required preferred

Step 4: Upload scans and submit!

Smile More Dental - ... Trial John Brown

CREATED  
16 Feb 2023

EXPIRES  
-

CASE STATUS  
**New**

TRACKING #  
-

NEW SCANNED SUBMITTED SHIPPED

Location  
Smile More Dental - Mountain View

Scanner  
3Shape

Existing Conditions  
Fixed Bridge - Lower

Remove All

Upper Arch Lower Arch Bite

Drop Scan File to Upload or Browse

Drop Scan File to Upload or Browse

Drop Scan File to Upload or Browse

preferred

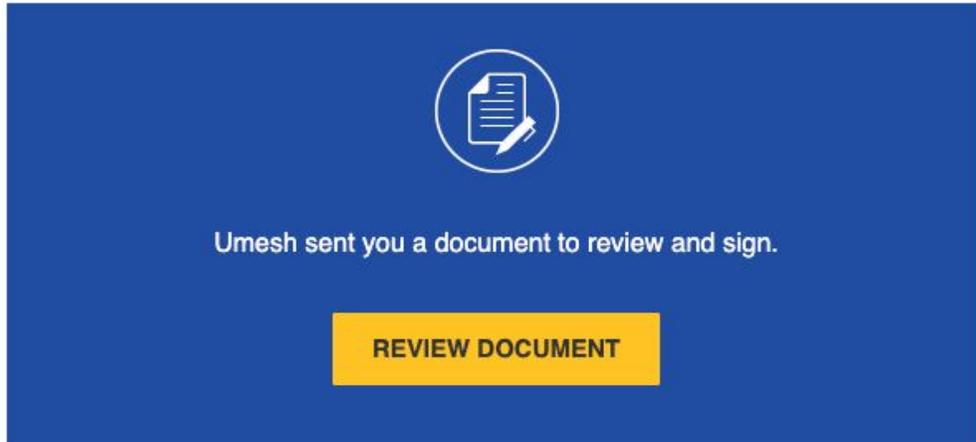
Submit

## Helpful Tips:

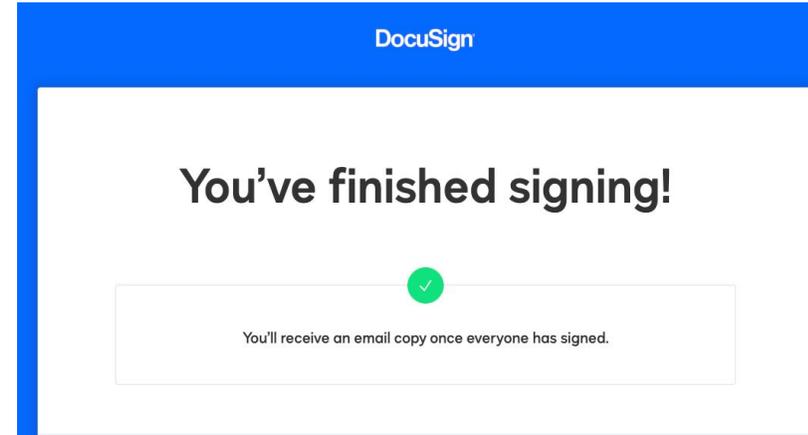
- You'll need to export the 3D intraoral scans in .STL format from your scanner to your desktop prior to uploading
- There are two upload methods for scans - drag and drop or browse files
- Scan images can be inspected in 3D once you have uploaded into the case to help prevent incorrect uploads or to review

# Proclaim Connect - Partner Agreement - E-Signature

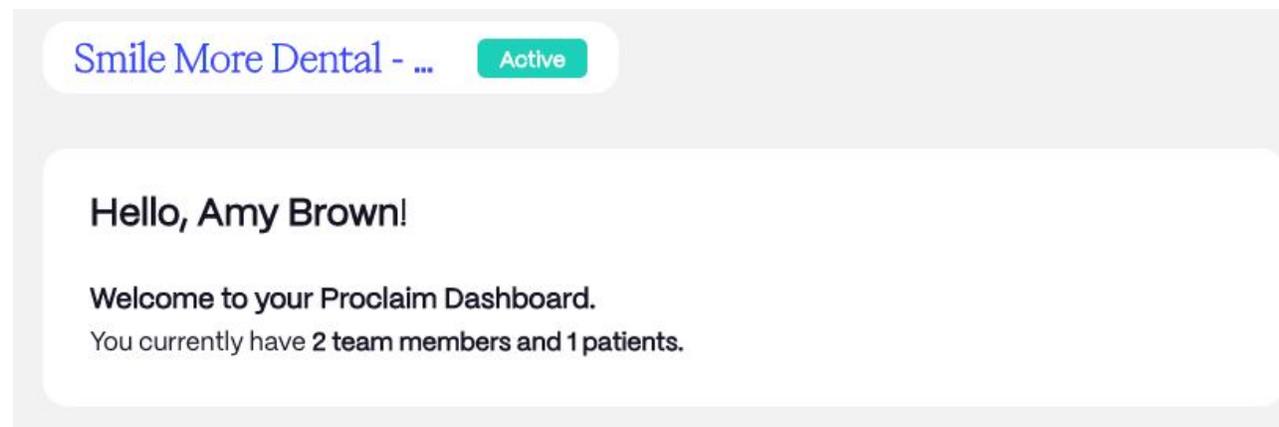
Step 1: Receive agreement via email from DocuSign - sales will initiate



Step 2: Review and Sign Agreement



Step 3: Congrats! You're a Proclaim Partner! Our team will move your Proclaim Connect access from **Trial** to **Active**



# Proclaim Connect - Homepage - Active View

**Proclaim Connect**

Smile More Dental - Mountain View Active

**1) Add Patients** Amy Brown ▾

**Add Patient**

**Hello, Amy Brown!**

Welcome to your Proclaim Dashboard.  
You currently have **3 team members** and **2 patients**.

**2) Case Dashboard**

1 Scans Pending

0 Cases Rejected

0 Cases Accepted

**3) Quick links**

**Manage Patients**

Add new patients, create cases, submit scans and view the case status from your patient overview.

**Manage Your Team**

Add and manage your team members and create team member cases all from your team page.

**Practice Resources**

Browse our resources to help you educate your team on the benefits of Proclaim.

# Proclaim Connect - Patients List

Proclaim Connect

Smile More Dental - Mountain View Active Amy Brown

## Patients

+ Add Patient

Search a patient Show All

PROCLAIM ID	PATIENT NAME	EMAIL	CASE	PAYMENT
<a href="#">F-000970</a>	John Brown	josh+608@freshhealth.co...	Not Scanned	Unpaid
<a href="#">F-001472</a>	Josh Smith	josh+592@freshhealth.com	Not Scanned	Unpaid
<a href="#">F-000918</a>	Amy Brown	josh+604@freshhealth.co...	Scanned	Unpaid

1 to 3 of 3 items

Icon for team members

- The Proclaim ID is a clickable link that will drill into the patient details for the corresponding Proclaim patient. This ID is unique to each Proclaim patient.
- The case status and payment status are both displayed for each patient to quickly provide a way to understand the status or action that is needed for each patient. The primary action for your practice will be “Not Scanned” which means that scans need to be uploaded and submitted for the patient in order for us to produce their custom mouthpiece.
- Patients must also complete checkout via the Proclaim e-commerce process in order for us to produce their mouthpiece. This can be done prior to their scan visit or after the scans are uploaded and case submitted. Payment is made directly from the patient to Proclaim and your practice is compensated for the scan and patient education on a monthly basis after the case ships.

# Proclaim Connect - Adding a Patient (QR Code/SMS)

The screenshot shows the Proclaim Connect interface for 'Smile More Dental - Mountain View'. A modal window titled 'Learn More About Proclaim' is open, offering to send information via QR code or SMS. The modal includes a QR code and a link to create a patient record manually. A teal arrow points from a text box to the QR code, and another teal box points to the manual creation link.

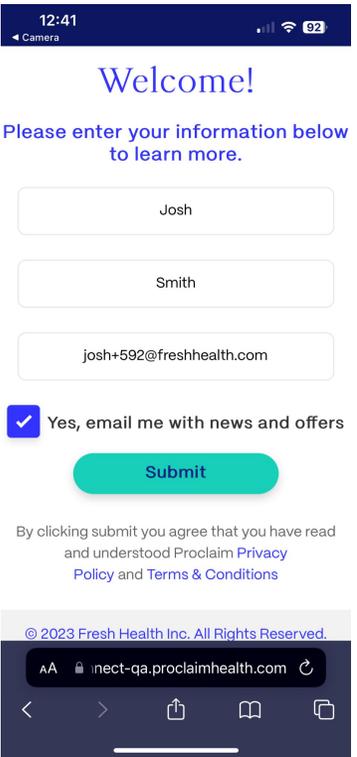
**Default - Have patient scan QR code or provide SMS**

**Backup option: Create manually (see next slide)**

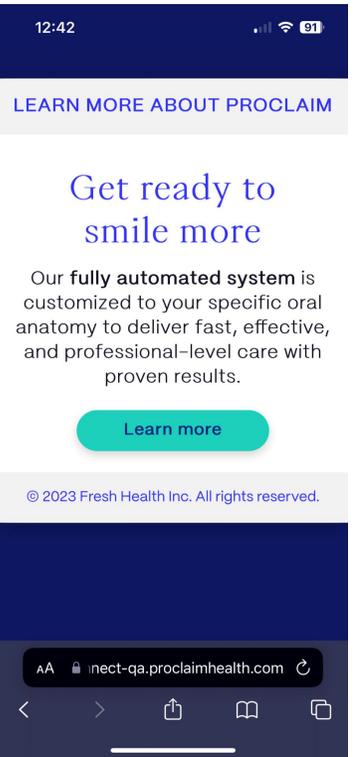
PROCLAIM ID	PAT	CASE	PAYMENT
F-000970	Joh	Not Scanned	Unpaid
F-000918	Am	Scanned	Unpaid

# Proclaim Connect - Adding a Patient (QR Code/SMS)

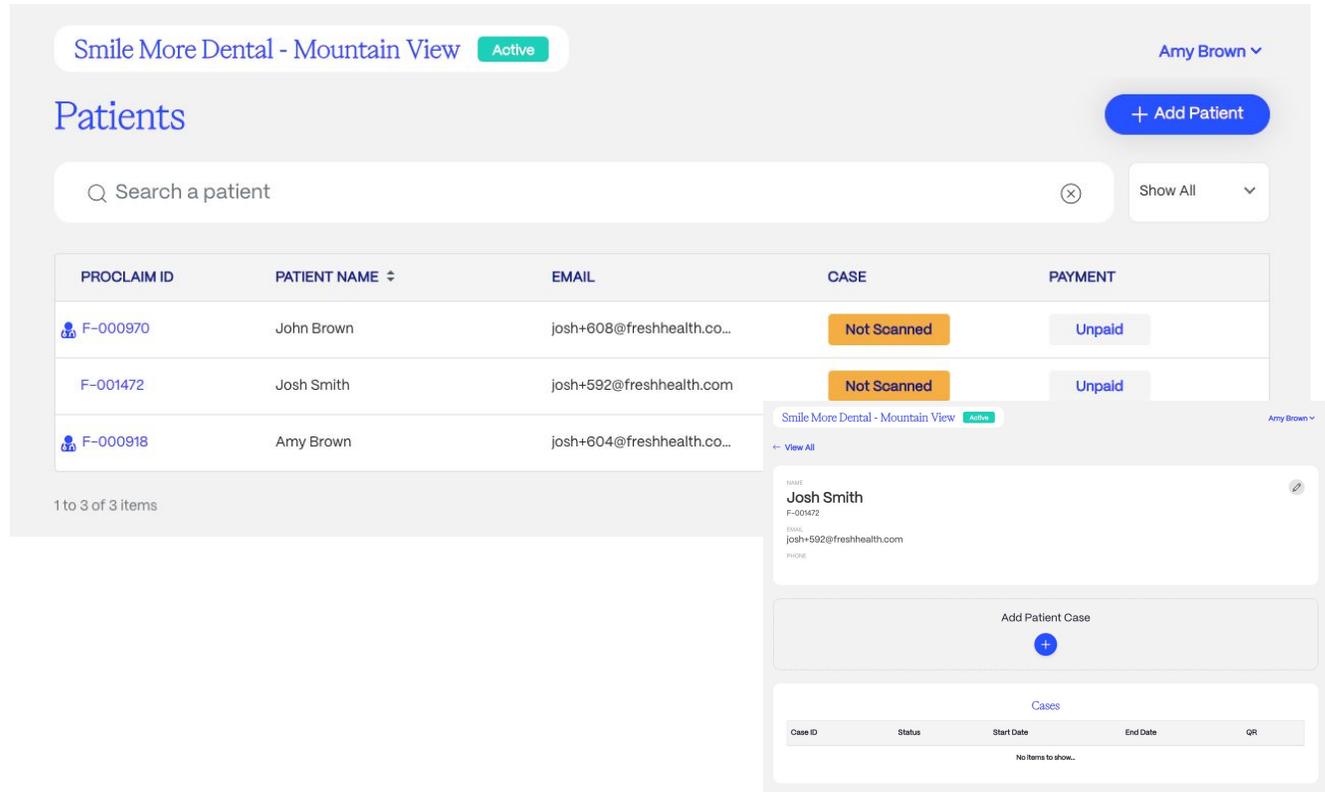
## Patient Experience + Automatic Patient Record Creation



Step 1: Patient/Consumer fills out form from QR code/SMS



Step 2: Patient submits and sees link to more info on Proclaim



Step 3: DP/Team member refreshes Proclaim Connect. A new patient record is automatically created. Click the user's Proclaim ID to get started on creating a case and uploading scans!

# Proclaim Connect - Adding a Patient (Manual by Team)

Smile More Dental - Mountain View Active Amy Brown

## Patients

+ Add Patient

Q Search

PROCLAIM

F-000970

F-001472

F-000915

1 to 3 of 3 items

×

Show All

PAYMENT

Unpaid

Unpaid

Unpaid

### CREATE PATIENT

Enter the patient details below then click the create new patient button to create the new patient record.

First Name \*

Middle Name

Last Name \*

Email Address \*

Phone Number

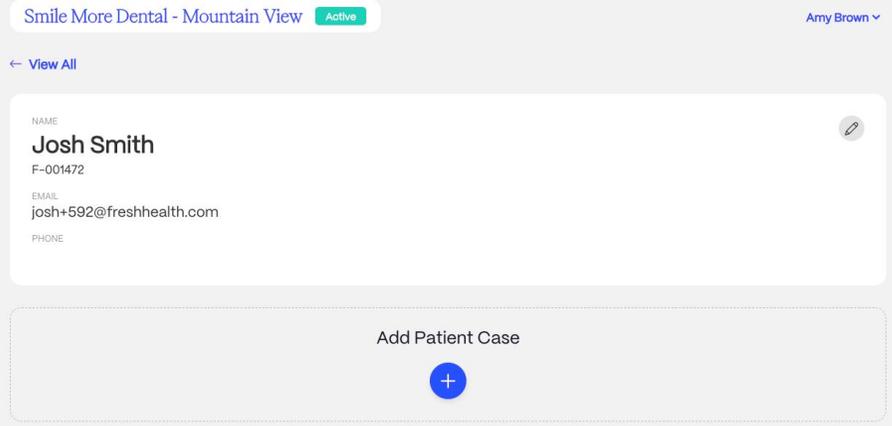
Cancel

Create Patient

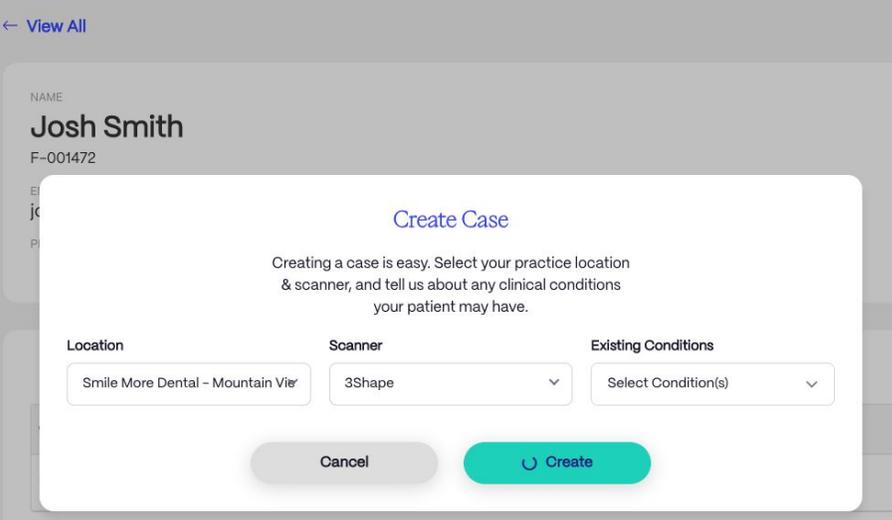
- If a patient does not have a mobile device or does not want to scan the QR code or provide their mobile number for SMS, the practice has the option to create the patient manually via the form above.
- Once the “Create Patient” button is clicked, the patient record will be created on Proclaim Connect.

# Proclaim Connect - Case Creation, Scan Upload, Submit

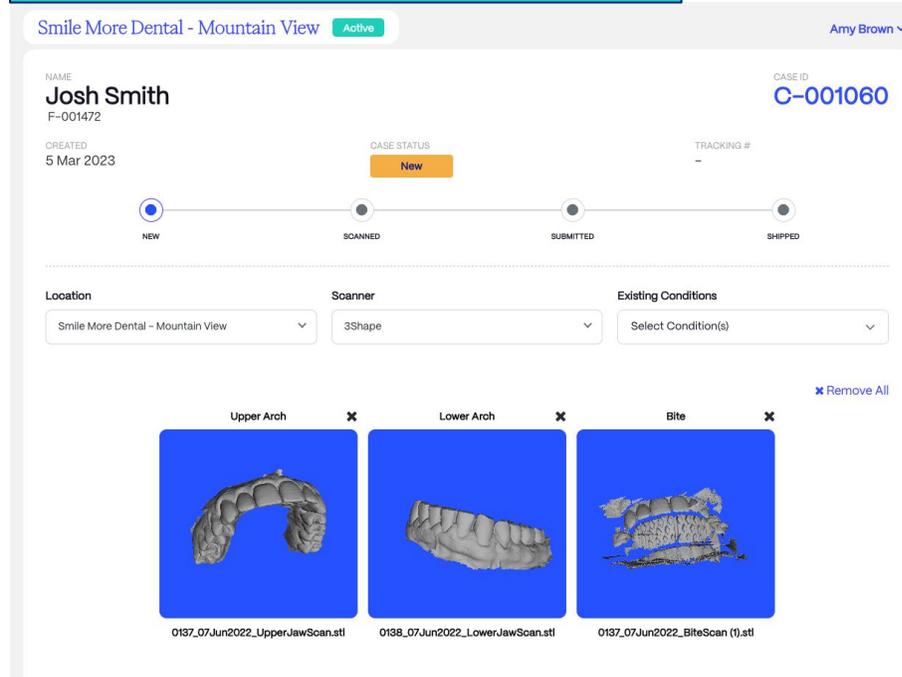
1) Click to open Patient Record from Patient List



2) Create new case, select location, scanner, conditions



3) Upload scans, review case, submit

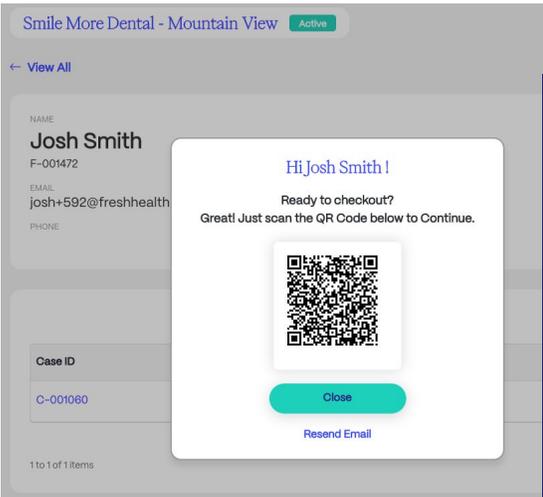


4) Case ID created with status and checkout QR code

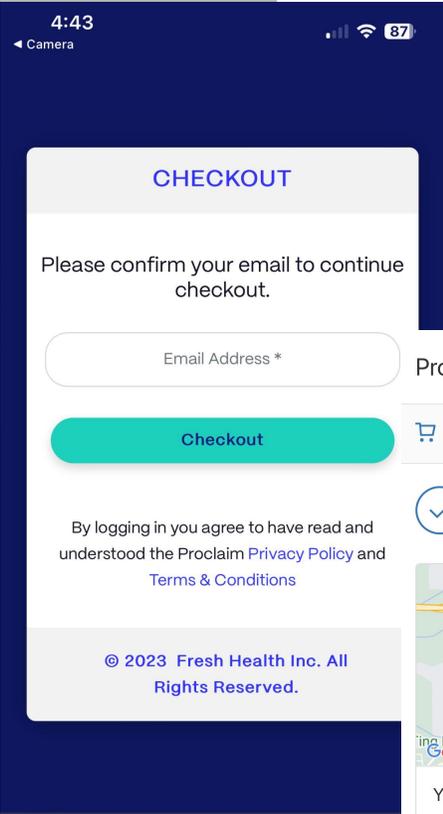
Cases

Case ID	Status	Start Date	End Date	QR
C-000457	Scanned	16 Feb 2023	-	

# Proclaim Connect - Patient Checkout (if not completed prior to scan)

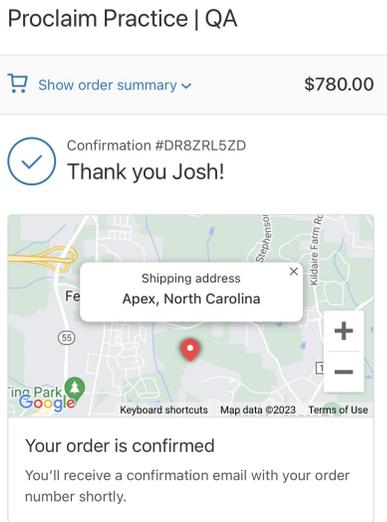


Patient scans QR code

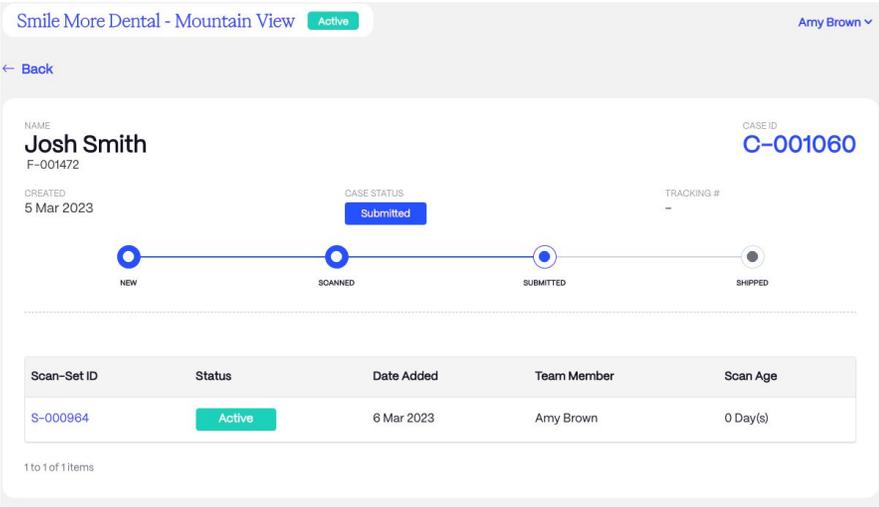


Patient verifies email address

Note: Email address must match patient record



Patient completes checkout



Case details/status updated

# Proclaim Connect - Tracking Case Status/Details

1) Case status and payment status updated in Patient List

Patients

Search a patient

+ Add Patient

PROCLAIM ID	PATIENT NAME	EMAIL	CASE	PAYMENT
F-000970	John Brown	josh+608@freshhealth.co...	Not Scanned	Unpaid
F-000918	Amy Brown	josh+604@freshhealth.co...	Scanned	Unpaid
F-001472	Josh Smith	josh+592@freshhealth.com	Submitted	Paid

1 to 3 of 3 items

2) Open patient details to see case/order status, tracking, actions

Smile More Dental - Mountain View Active

Back

NAME: Josh Smith  
F-001472

CASE ID: C-001060

CREATED: 5 Mar 2023

CASE STATUS: Submitted

TRACKING #: -

NEW SCANNED SUBMITTED SHIPPED

Scan-Set ID	Status	Date Added	Team Member	Scan Age
S-000964	Active	6 Mar 2023	Amy Brown	0 Day(s)

1 to 1 of 1 items

Scan-Set ID: S-000964

File Name	Date
SCB_C-001060_S-000964_0137_07Jun2022_BiteScan (1).stl	2023-03-06
SCL_C-001060_S-000964_0138_07Jun2022_LowerJawScan.stl	2023-03-06
SCU_C-001060_S-000964_0137_07Jun2022_UpperJawScan.stl	2023-03-06

Close

3) See scan set/file details

# Proclaim Connect - Getting Help



Home



Patients



Team



Help

Click "Help" from any screen

Proclaim Custom Jet Oral Health System Help Center View website Contact Us

Hello. How can we help you?

Search for answers

Getting Started  
New to Proclaim? Learn how to get your custom clean in just 7 seconds

Product Knowledge  
Learn all about Proclaim, how to use, and how the product works

Dental Professionals  
Are you a dental professional or practice team member? This section is for you.

Search the knowledge base for FAQ, scan guides, and more

Proclaim Custom Jet Oral Health System Help Center View website Contact Us

Search for answers

- Getting Started
- Product Knowledge >
- Dental Professionals >

### Contact Us

Need help? Tell us more.

First name\*

Last name\*

Email\*

Subject\*

How can we help you?\*

Can't find what you need? Submit a help ticket or call 888.576.3756.

Questions?

