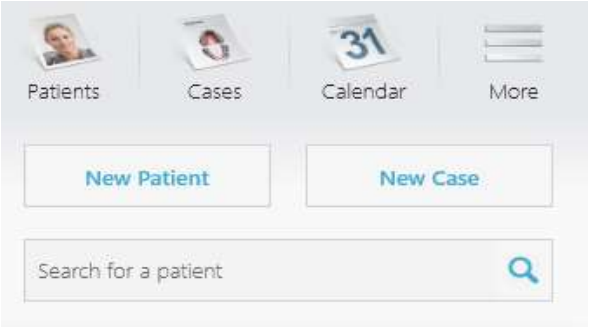
3shape

How to
Add a New Patient and Set Up Case Details.

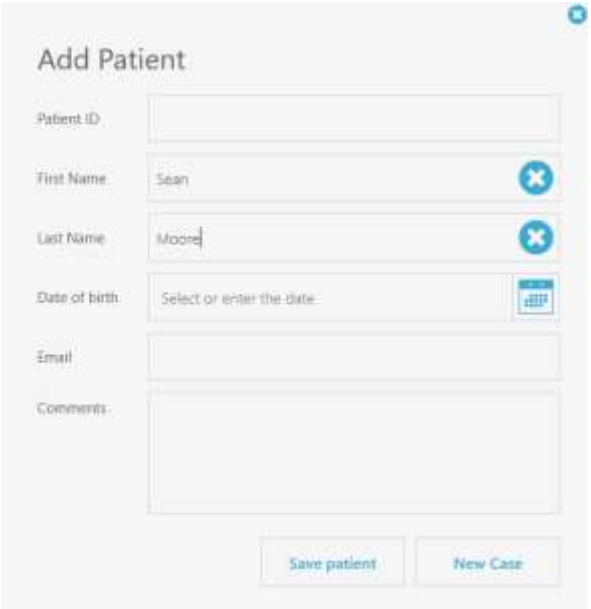
Every new patient and new case must be entered into TRIOS. To do this you must follow these simple steps:

Step 1. Click the **New Patient** icon.

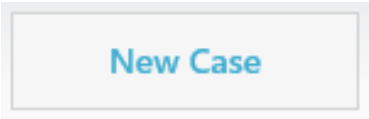


Step 2. Fill in patient ID, first name, last name (which is mandatory), date of birth and any notes if necessary.

Note: Leaving out details may save you time in the short run, however, more details make it easier to search for the patient and cases later on.

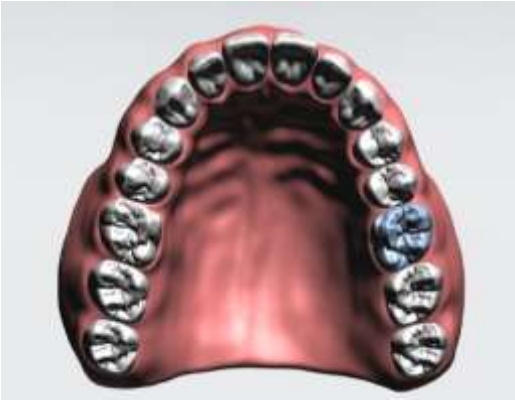


Step 3. Click **New Case** when you are finished.

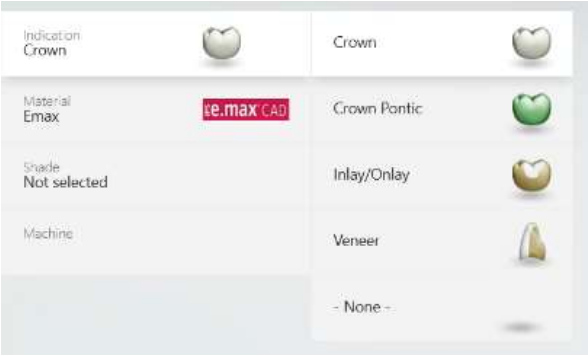


Step 4. You will be taken to the **Send to** page where you can select where the case will be sent.

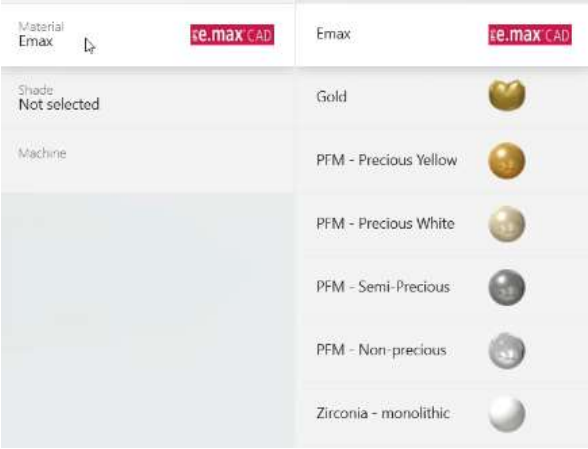
Step 5. Select the tooth you wish to prepare by holding the cursor over the desired tooth and left click.



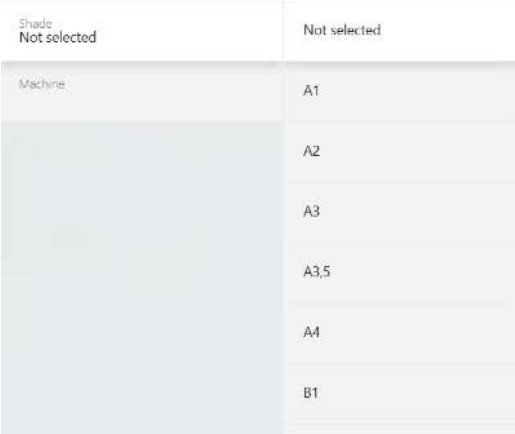
Step 6. Now select **Anatomy** and choose an indication from the drop down list. In this case, we performing the workflow for a single molar crown, so select crown from the list of indications.



Step 7. Next select **Material** and choose from the drop down menu.



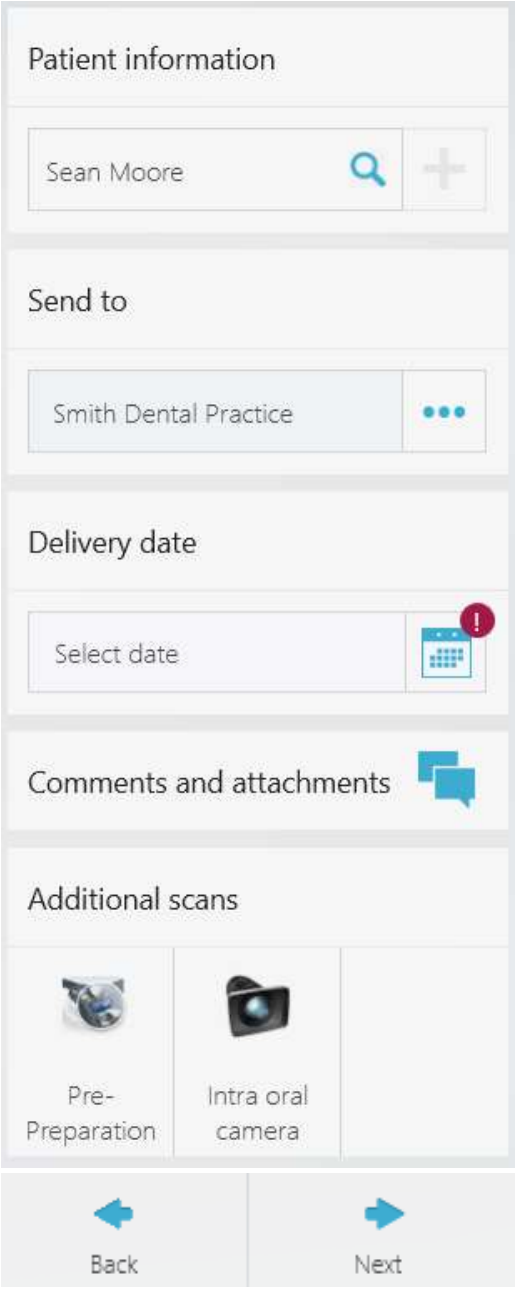
Step 8. Next select **Shade** and choose from the drop down menu. This selection can be changed later after taking shade measurement.



Step 9. On the right-hand side of the screen you can view and edit the case details.

You must add a desired delivery date. During **In-house** production this option is unnecessary.

At this stage you can add comments, attachments and additional scans, for example your clinical photos. Additionally, you can add a video or a photo to the workflow.



Step 10. Click **Next** to move on to the scanning stage.