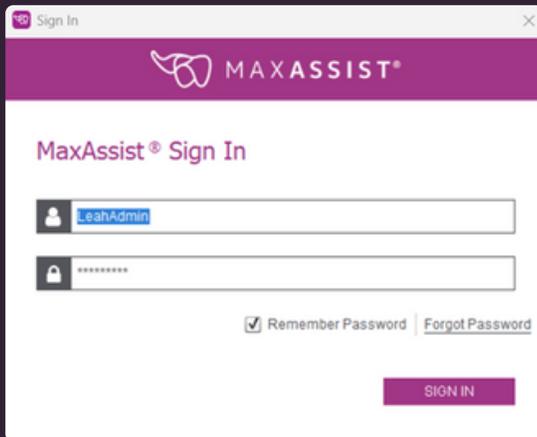


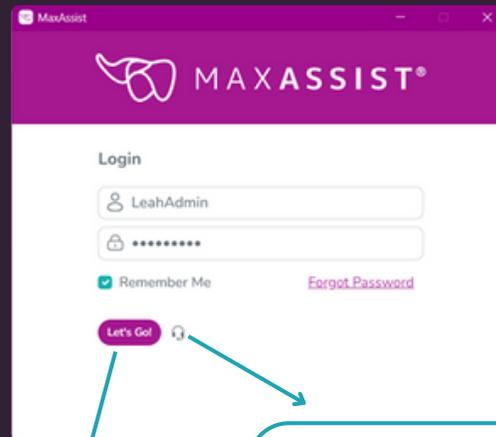
Existing User

Basic Toolbar to MaxAi Toolbar Training

Basic Login



MaxAi Login



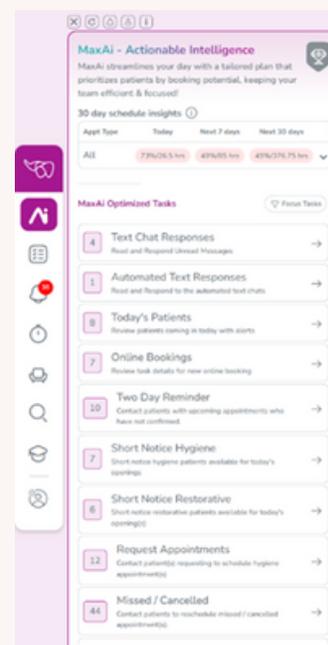
Click to connect with Support

New sign in button/language

MaxAi Feature Logic

MaxAi's Actionable Intelligence is designed to enhance your practice's efficiency by meticulously analyzing your schedule for both hygiene and restorative openings. This page provides a comprehensive understanding of your daily operations and generates a tailored action plan to effectively manage patient engagement.

The main objective of the Optimized Tasks Page is to empower your team with actionable insights that prioritize patient communications and appointment bookings. By evaluating various factors, MaxAi identifies, sorts, and prioritizes patients based on their likelihood of successful booking.



Existing User

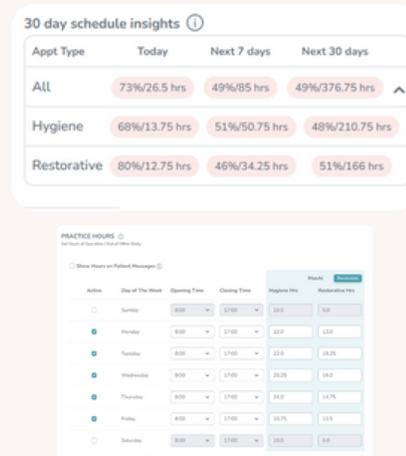
Basic Toolbar to MaxAi Toolbar Training

How MaxAi Works

✔ Schedule Analysis

Schedule Openings: This feature shows the number of Hygiene and Restorative opening available for the next 30 days based on your practices operating hours. At the start of each day, the system updates these openings, providing a clear view of your current schedule.

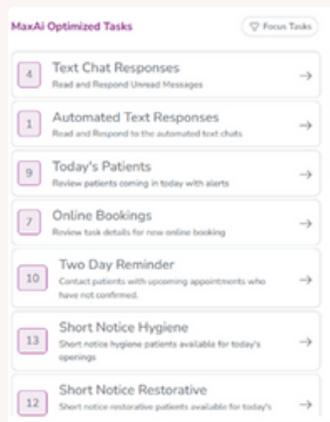
*Practice Administrators can override/customize what MaxAi is reading via the dashboard → Practice Hours



✔ Task Prioritization

Task Type: Tasks are prioritized based on their type, focusing on patient communication methods such as text messages, chats, and calls. This ensures that the most effective communication channels are utilized for outreach.

Scheduling Needs: The system considers the immediate scheduling needs of the practice, ensuring that urgent appointments are addressed first.



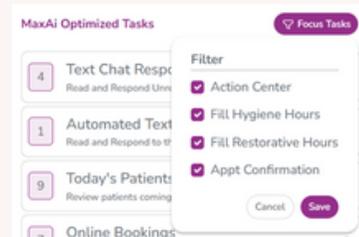
Existing User

Basic Toolbar to MaxAi Toolbar Training

How MaxAi Works

✔ Focus Tasks

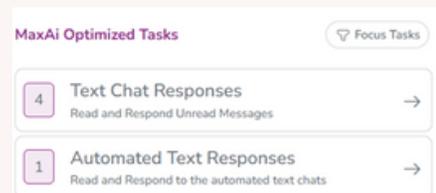
Focus your Optimized Tasks by the following areas for specific dental admin roles.



✔ Volume of Task Work

Patient Engagement: The volume of task work is determined by the number of patients due for engagement. This helps in managing the workload effectively.

Schedule Openings Volume: The availability of open slots in the schedule influences the prioritization of tasks, allowing the team to focus on filling those openings.



Historical Appointment Booking Success Rate: MaxAi evaluates historical data regarding appointment booking success rates. It knows how many patients you need to connect with to fill the openings it is observing.

Existing User

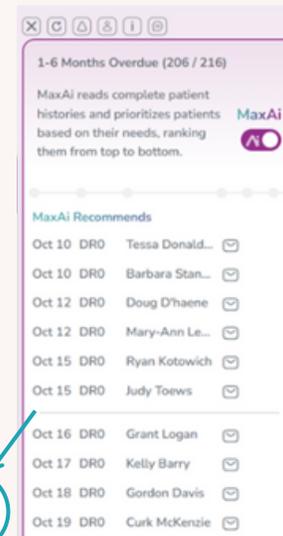
Basic Toolbar to MaxAi Toolbar Training

How MaxAi Works

✔ Select Task from List

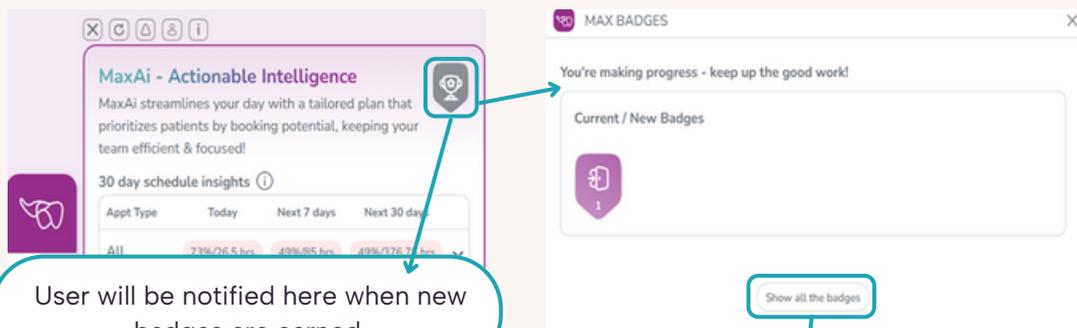
Click the task you would like to work. This will bring you to that task list and display in the “MaxAi” list format. “MaxAi recommends” displays the top priority patients as well as the recommended volume of patients (Above the line) to complete for that specific task.

Should you want to continue with the task, you may with the patients displayed below the line. More on lists and working lists/tasks shortly.



Line to carry on beyond recommended

✔ MaxBadges



User will be notified here when new badges are earned.

Click to view all badges earned/can be earned

The MaxBadges report displays badges you have earned by completing various tasks while using MaxAssist. Track progress, celebrate your achievements.

Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Lists

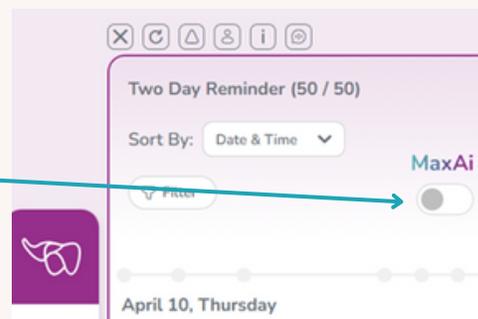
Basic

Patient Lists	
Reminder List	37
One Week Unconfirmed	70
Two Week Confirmations	96
<hr/>	
Missed Pre-Appointed	15
Missed / Cancelled	34
Unscheduled Treatment	335
<hr/>	
Due and Unscheduled	52
Late 1-6 Mths	156
Overdue 7-12 Mths	156
Past Due 13-18 Mths	100
Reactivate 19-24 Mths	80

MaxAi

Confirmations		Wording Changes
Two Day Reminder	50	
One Week	35	
Two Week	81	Section titles added
Missing Appointments		
Missed Pre-Appointed	30	
Missed / Cancelled	45	Wording Changes
Unscheduled Treatment	500	
Due & Late Hyg/Recall		
Month Before Due Date	66	
1-6 Months Overdue	216	
7-12 Months Overdue	158	
13-18 Months Overdue	143	
19-24 Months Overdue	84	

Work any list in basic or MaxAi mode with toggle button



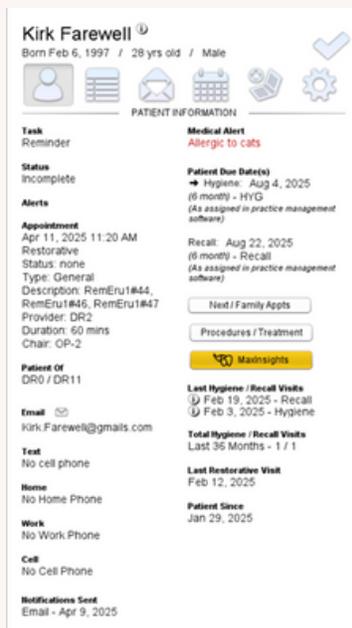
Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Task Icon

✓ Basic



Kirk Farewell
Born Feb 6, 1997 / 28 yrs old / Male

Task
Reminder

Status
Incomplete

Alerts

Appointment
Apr 11, 2025 11:20 AM
Restorative
Status: none
Type: General
Description: RemEru1#44, RemEru1#46, RemEru1#47
Provider: DR2
Duration: 60 mins
Chair: OP-2

Patient Of
DR0 / DR11

Email
Kirk.Farewell@gmail.com

Text
No cell phone

Home
No Home Phone

Work
No Work Phone

Cell
No Cell Phone

Notifications Sent
Email - Apr 9, 2025

Medical Alert
Allergic to cats

Patient Due Date(s)
Hygiene: Aug 4, 2025 (6 months) - HYG (As assigned in practice management software)

Recall
Aug 22, 2025 (6 months) - Recall (As assigned in practice management software)

Last Hygiene / Recall Visits
Feb 19, 2025 - Recall
Feb 3, 2025 - Hygiene

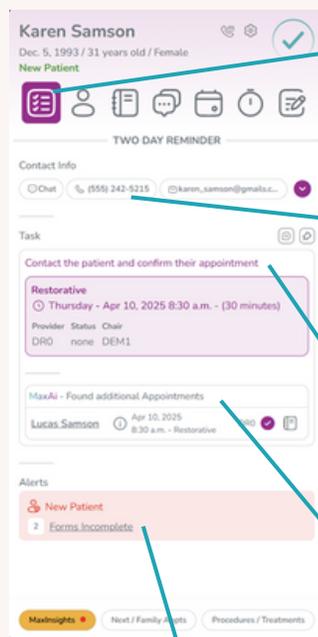
Total Hygiene / Recall Visits
Last 36 Months - 1 / 1

Last Restorative Visit
Feb 12, 2025

Patient Since
Jan 29, 2025

Buttons: Next / Family Appts, Procedures / Treatment, Maxsights

✓ MaxAi



Karen Samson
Dec. 5, 1993 / 31 years old / Female
New Patient

Task
Contact the patient and confirm their appointment

Restorative
Thursday - Apr 10, 2025 8:30 a.m. - (30 minutes)
Provider Status Chair
DR0 none DEM1

MaxAi - Found additional Appointments
Lucas Samson Apr 10, 2025 8:30 a.m. - Restorative

Alerts
New Patient
2 Forms Incomplete

Buttons: Maxsights, Next / Family Appts, Procedures / Treatments

New Task Icon to separate patient info from the task

One click contact info. Click to dial (VoIP), Click to text and click to email.

Easy to understand task directions. All details to complete task visible.

MaxAi Found – ensures task optimization by bringing forward all family members associated with that task.

Today's patient alerts now on all confirmation lists!

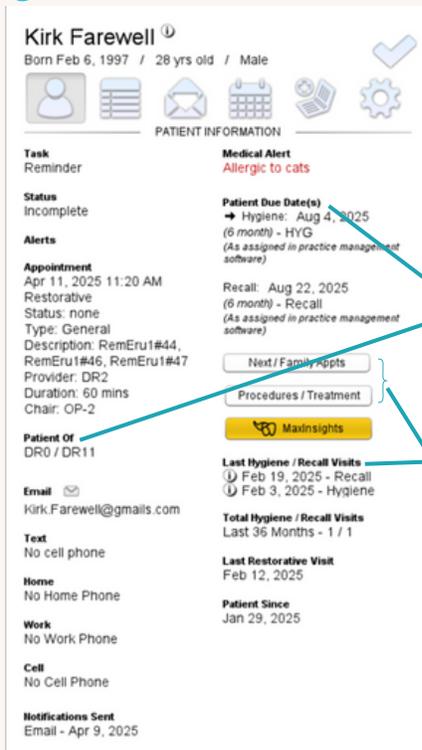
Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Patient Information

✓ **Basic**



Kirk Farewell
Born Feb 6, 1997 / 28 yrs old / Male

PATIENT INFORMATION

Task
Reminder

Status
Incomplete

Alerts

Appointment
Apr 11, 2025 11:20 AM
Restorative
Status: none
Type: General
Description: RemEru1#44, RemEru1#46, RemEru1#47
Provider: DR2
Duration: 60 mins
Chair: OP-2

Patient Of
DR0 / DR11

Email
Kirk.Farewell@gmail.com

Text
No cell phone

Home
No Home Phone

Work
No Work Phone

Cell
No Cell Phone

Notifications Sent
Email - Apr 9, 2025

Medical Alert
Allergic to cats

Patient Due Date(s)
→ Hygiene: Aug 4, 2025
(6 month) - HYG
(As assigned in practice management software)

Recall: Aug 22, 2025
(6 month) - Recall
(As assigned in practice management software)

Last Hygiene / Recall Visits
🕒 Feb 19, 2025 - Recall
🕒 Feb 3, 2025 - Hygiene

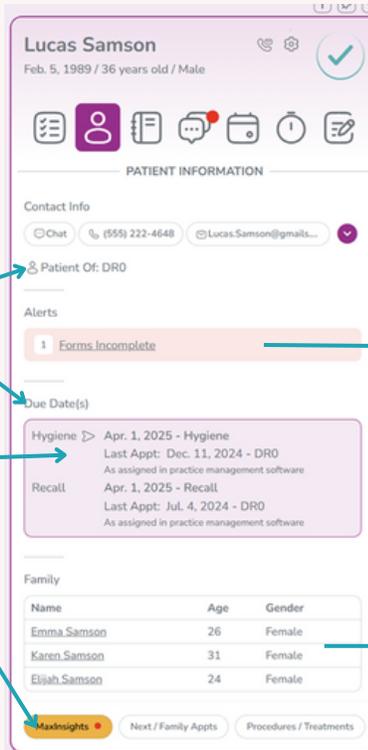
Total Hygiene / Recall Visits
Last 36 Months - 1 / 1

Last Restorative Visit
Feb 12, 2025

Patient Since
Jan 29, 2025

Buttons: Next / Family Appts, Procedures / Treatment, Maxinsights

✓ **MaxAi**



Lucas Samson
Feb. 5, 1989 / 36 years old / Male

PATIENT INFORMATION

Contact Info
Chat (555) 222-4648 Lucas.Samson@gmail.com

Patient Of: DR0

Alerts
1 Forms Incomplete

Due Date(s)

Hygiene ▷ Apr. 1, 2025 - Hygiene
Last Appt: Dec. 11, 2024 - DR0
As assigned in practice management software

Recall
Apr. 1, 2025 - Recall
Last Appt: Jul. 4, 2024 - DR0
As assigned in practice management software

Family

Name	Age	Gender
Emma Samson	26	Female
Karen Samson	31	Female
Elijah Samson	24	Female

Buttons: Maxinsights, Next / Family Appts, Procedures / Treatments

Alerts added

Easy view/access to all family members

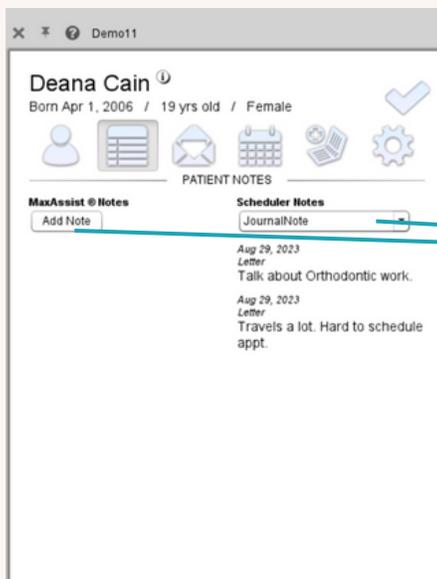
Existing User

Basic Toolbar to MaxAi Toolbar Training

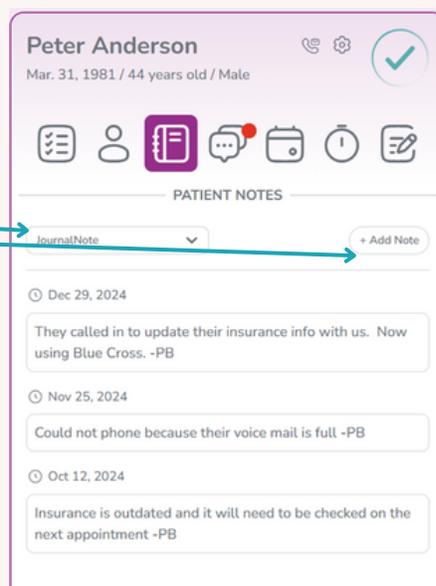
Patient Panel

Patient Panel – Notes

✓ Basic



✓ MaxAi



All notes show in full screen vs half MaxAssist and half scheduler.
Newest note to oldest.

Existing User

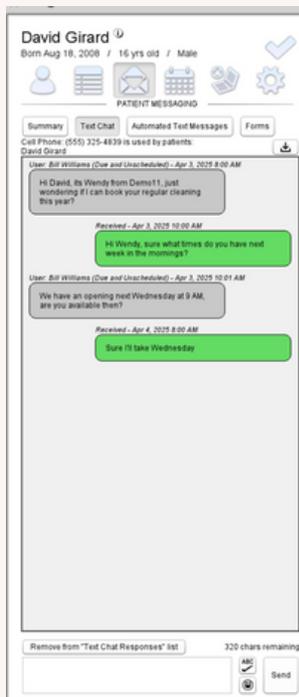
Basic Toolbar to MaxAi Toolbar Training

Patient Panel

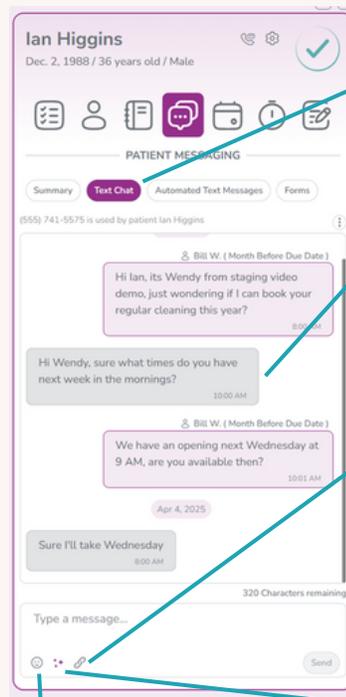
Patient Panel – Messaging



Basic



MaxAi



Default opens to text chat not Summary

Sent & responded messages now on the correct sides (like cell text chats appear)

New: Insert links button. Insert links for any website, OLB link, payment links etc

New: Text Prompts. Auto pop text scripts. *Comes with 3 default scripts but these can be edited or create your own via dashboard.

No longer need Spell check as this is done automatically via windows.

Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Follow Up

✓ Basic

Connie Dubien ¹
Born Mar 17, 2020 / 5 yrs old / Female

PATIENT FOLLOW UP

Schedule a Follow Up

Follow Up Date	Reason	Notes
Mar 10, 2025 (edit) (delete)	Recall	Patient needs a followup please

✓ MaxAi

Cynthia Watts
Jan. 19, 1965 / 60 years old / Female

PATIENT FOLLOW UP

+ Schedule a Follow Up

Dr. D

Mar 22, 2025 - Restorative Appointment

Patient needs a followup please

Patient Panel – Short Notice

✓ Basic

Brendan Lefthand ¹
Born May 25, 1994 / 30 yrs old / Male

PATIENT SHORT NOTICE

Add to Short Notice List

Date Added	Type	Availability	Notes
Feb 24, 2024 (edit) (delete)	Restorative	Mon 12:00 PM - 4:00 PM Tue 12:00 PM - 4:00 PM Wed 12:00 PM - 4:00 PM	Patient needs an appt ASAP

No Preferred Provider
Appt Length: 1 Units
Start Date: Feb 24, 2024

✓ MaxAi

Colleen Nikonchuk
Mar. 25, 2008 / 17 years old / Female

PATIENT SHORT NOTICE

Short Notice

+ Add Short Notice

Restorative - Normal

Available dates and time
Monday, Dec 30, 2024

Thu: 12:00 PM - 04:00 PM	Appt Length: 1 Unit
Fri: 12:00 PM - 04:00 PM	Preferred Provider: None
Sat: 12:00 PM - 04:00 PM	

Note
Patient needs an appt ASAP

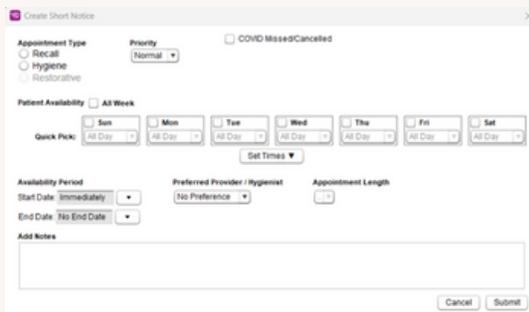
Existing User

Basic Toolbar to MaxAi Toolbar Training

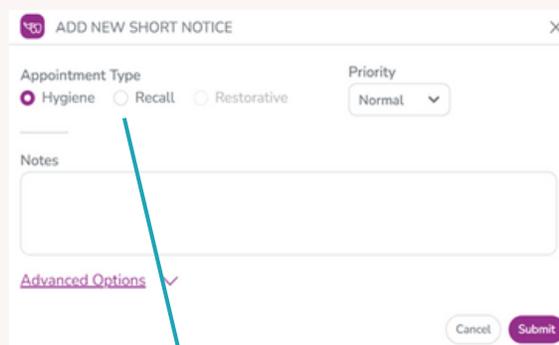
Patient Panel

Patient Panel – Short Notice

✓ Basic



✓ MaxAi



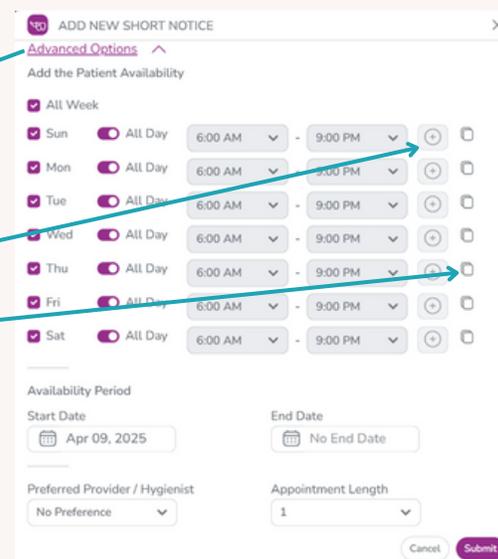
Default is in "quick add" mode for easier/fast additions to SNL

✓ Basic

New Advanced options has the following enhancements:

- Easy add additional ranges
- Copy button to add times to other days with one click

✓ MaxAi



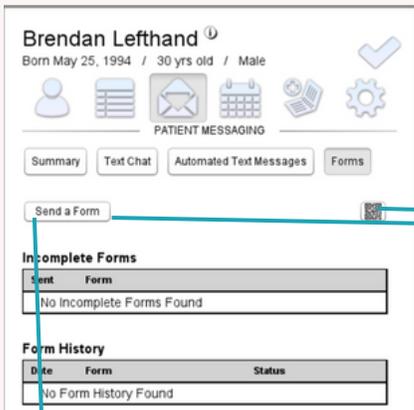
Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Forms

Basic



Brendan Lefthand
Born May 25, 1994 / 30 yrs old / Male

PATIENT MESSAGING

Summary Text Chat Automated Text Messages Forms

Send a Form

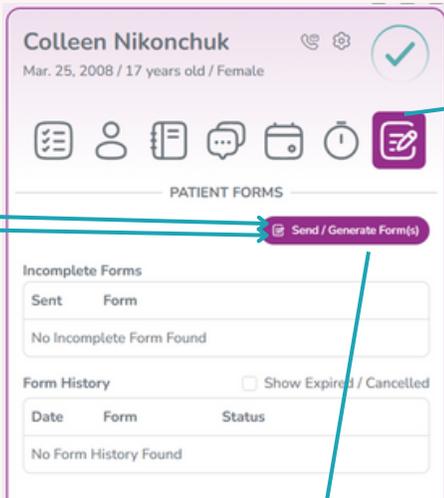
Incomplete Forms

Sent	Form
No Incomplete Forms Found	

Form History

Date	Form	Status
No Form History Found		

MaxAi



Colleen Nikonchuk
Mar. 25, 2008 / 17 years old / Female

PATIENT FORMS

Send / Generate Form(s)

Incomplete Forms

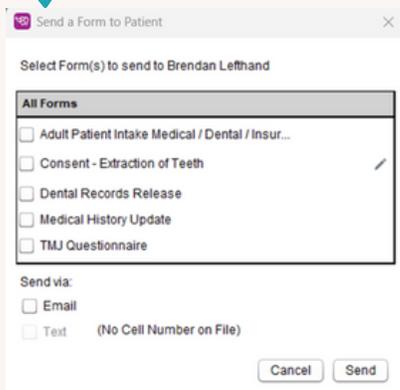
Sent	Form
No Incomplete Form Found	

Form History Show Expired / Cancelled

Date	Form	Status
No Form History Found		

New Forms Icon!

Basic



Send a Form to Patient

Select Form(s) to send to Brendan Lefthand

All Forms

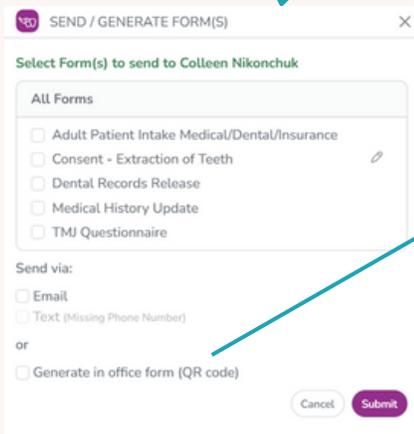
- Adult Patient Intake Medical / Dental / Insur...
- Consent - Extraction of Teeth
- Dental Records Release
- Medical History Update
- TMJ Questionnaire

Send via:

- Email
- Text (No Cell Number on File)

Cancel Send

MaxAi



SEND / GENERATE FORM(S)

Select Form(s) to send to Colleen Nikonchuk

All Forms

- Adult Patient Intake Medical/Dental/Insurance
- Consent - Extraction of Teeth
- Dental Records Release
- Medical History Update
- TMJ Questionnaire

Send via:

- Email
- Text (Missing Phone Number)

or

- Generate in office form (QR code)

Cancel Submit

Combined Send and QR Code buttons

Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Patient Preferences

✓ Basic



Brendan Lefthand
Born May 25, 1994 / 30 yrs old / Male

Call Options
Home:
Work:
Cell:

Continuing Care
Hygiene / Recall Patient:
Hygiene: 6 month HYG
Recall: 12 month Recall

Email
Last Updated: May 17, 2021
Activated:
Declined:
Unsubscribable:
Undeliverable:
Not activated:

Contact Preferences

Type	Email	Text
Save the Date	<input type="checkbox"/>	<input type="checkbox"/>
Day of Appointment	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointment Reminders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Short Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Due / Late	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Survey	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Birthdays	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Announcements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Broadcast Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Due/Late List Options
 Do Not Call/Message
Until:

Messaging Language
English

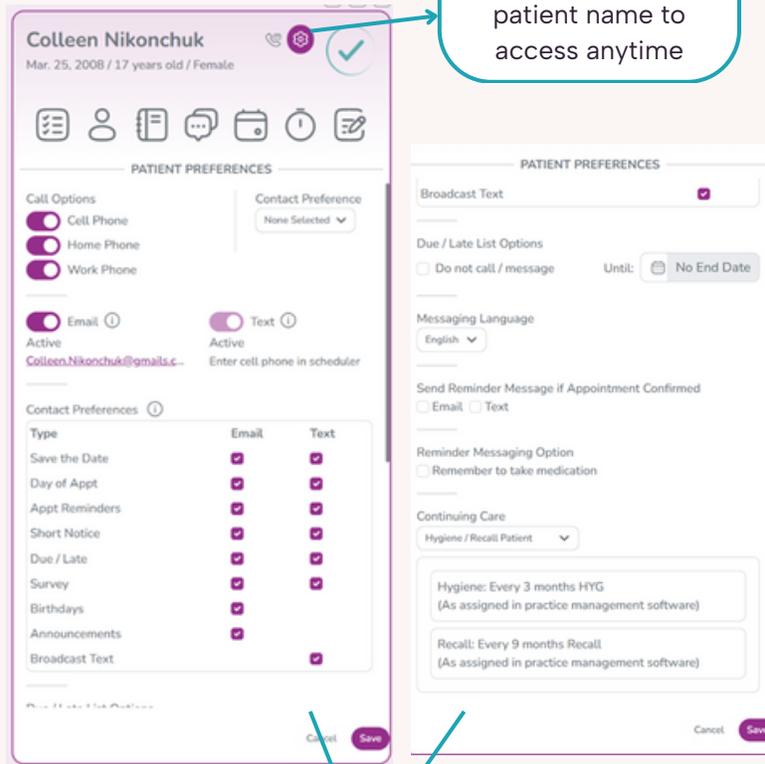
Send Reminder Message if Appointment Confirmed
 Email Text

Reminder Messaging Options
 Remember to take medication

Continuing Care
Hygiene / Recall Patient:
Hygiene: Every 3 months HYG
Recall: Every 9 months Recall

Buttons: Cancel, Save

✓ MaxAi



Colleen Nikonchuk
Mar. 25, 2008 / 17 years old / Female

Call Options
 Cell Phone
 Home Phone
 Work Phone

Contact Preference
None Selected

Email
Active:
Colleen.Nikonchuk@gmail.c...

Text
Active:
Enter cell phone in scheduler

Contact Preferences

Type	Email	Text
Save the Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Day of Appt	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appt Reminders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Short Notice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Due / Late	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Survey	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Birthdays	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Announcements	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Broadcast Text	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Broadcast Text

Due / Late List Options
 Do not call / message
Until:

Messaging Language
English

Send Reminder Message if Appointment Confirmed
 Email Text

Reminder Messaging Option
 Remember to take medication

Continuing Care
Hygiene / Recall Patient:
Hygiene: Every 3 months HYG
Recall: Every 9 months Recall

Buttons: Cancel, Save

Icon always next to patient name to access anytime

All preference info/options the same but is now laid out top-down vs side by side.

Existing User

Basic Toolbar to MaxAi Toolbar Training

Action Center

✓ Basic

Action Center	
Requested Appointments	9 11
Online Bookings	5 5
Text Chat Responses	3
Invalid Auto Text Responses	3
Follow Up List	36 246

✓ MaxAi

Action Center	
Requested Appointments	11 12
Online Bookings	2 7
Text Chat Responses	2 5
Automated Text Responses	1 4
Follow Up	12 37

Wording Change

Short Notice List

✓ Basic

Short Notice List	
Short Notice Recall	22
Short Notice Hygiene	20
Short Notice Restorative	23

✓ MaxAi

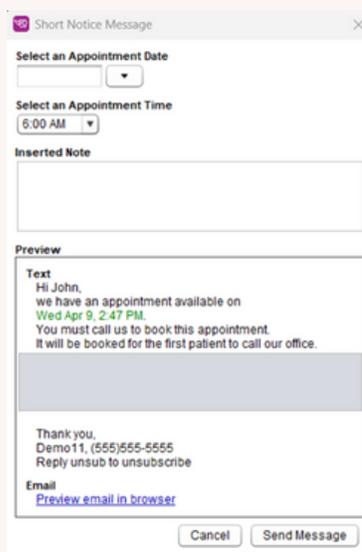
Short Notice List	
Recall	24
Hygiene	25
Restorative	24

Existing User

Basic Toolbar to MaxAi Toolbar Training

Short Notice List

Basic



Short Notice Message

Select an Appointment Date

Select an Appointment Time

6:00 AM

Inserted Note

Preview

Text

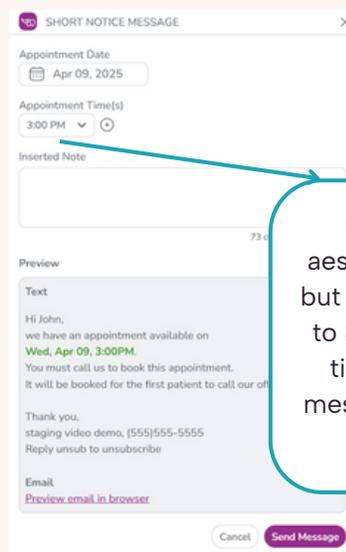
Hi John,
we have an appointment available on
Wed Apr 9, 2:47 PM.
You must call us to book this appointment.
It will be booked for the first patient to call our office.

Thank you,
Demo11, (555)555-5555
Reply unsub to unsubscribe

Email
[Preview email in browser](#)

Cancel Send Message

MaxAi



SHORT NOTICE MESSAGE

Appointment Date

Apr 09, 2025

Appointment Time(s)

3:00 PM

Inserted Note

Preview

Text

Hi John,
we have an appointment available on
Wed, Apr 09, 3:00PM.
You must call us to book this appointment.
It will be booked for the first patient to call our office.

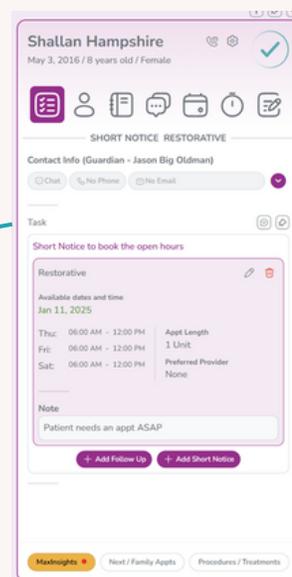
Thank you,
staging video demo, (555)555-5555
Reply unsub to unsubscribe

Email
[Preview email in browser](#)

Cancel Send Message

Overall, just aesthetic changes but you can add up to 3 appointment times to a SNL message on MaxAi Toolbar

New task page with added shortcut buttons



Shallan Hampshire

May 3, 2016 / 8 years old / Female

SHORT NOTICE RESTORATIVE

Contact Info (Guardian - Jason Big Oldman)

Task

Short Notice to book the open hours

Restorative

Available dates and time

Jan 11, 2025

Thu:	06:00 AM - 12:00 PM	Appt Length	1 Unit
Fri:	06:00 AM - 12:00 PM	Preferred Provider	None
Sat:	06:00 AM - 12:00 PM		

Note

Patient needs an appt ASAP

+ Add Follow Up + Add Short Notice

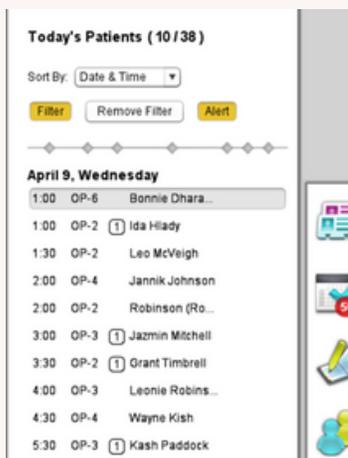
Max Insights Next / Family Appts Procedures / Treatments

Existing User

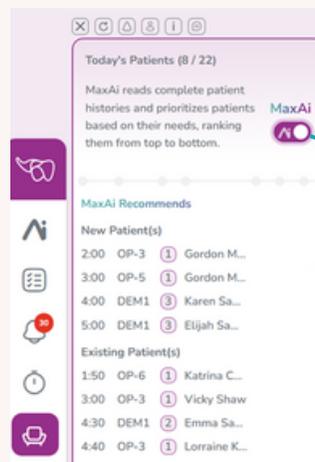
Basic Toolbar to MaxAi Toolbar Training

Today's Patients

Basic



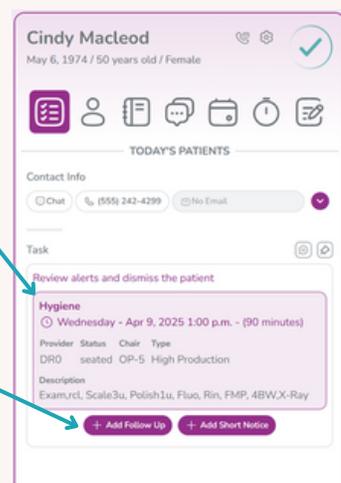
MaxAi



In MaxAi mode, organizes patients into new vs existing and will sort by volume of alerts.

New task page to dismiss patient

New shortcuts to add patient to Follow ups or Short notice

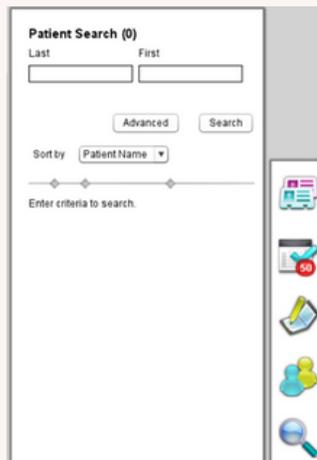


Existing User

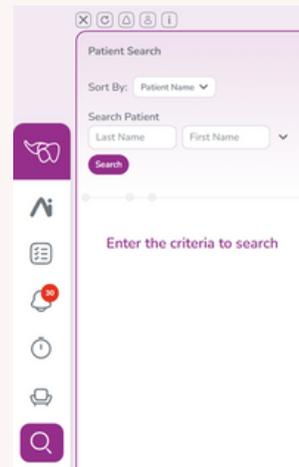
Basic Toolbar to MaxAi Toolbar Training

Patient Search

✓ Basic



✓ MaxAi



No function changes, updated look

MaxAssist Academy

✓ Basic



✓ MaxAi



Icon change only

Existing User

Basic Toolbar to MaxAi Toolbar Training

Settings & Support

The image compares the 'Settings and Support' sections of the 'Basic' and 'MaxAi' versions of the software. The 'Basic' version on the left shows a list of settings and a vertical toolbar with multiple icons. The 'MaxAi' version on the right shows a more streamlined toolbar with a dropdown menu for the settings icon. Callouts explain the changes: 'Combined both icons into one' points to the new settings icon; 'New home for change practice' points to the 'Change Practice' option in the dropdown; 'Was MaxAssist messages icon' points to the 'Update(s)' option; and 'Newly added log out button' points to the 'Log Out' option.

Basic

Settings and Support

- Toolbar
- Profile
- Notifications
- Custom Settings
- Select Providers
- Support
- Messaging Summary
- Print Mailing Labels
- Practice Management

MaxAi

- Change Practice
- Update(s)
- Settings & Support >
- Log Out

Callouts:

- Combined both icons into one
- New home for change practice
- Was MaxAssist messages icon
- Newly added log out button

Existing User

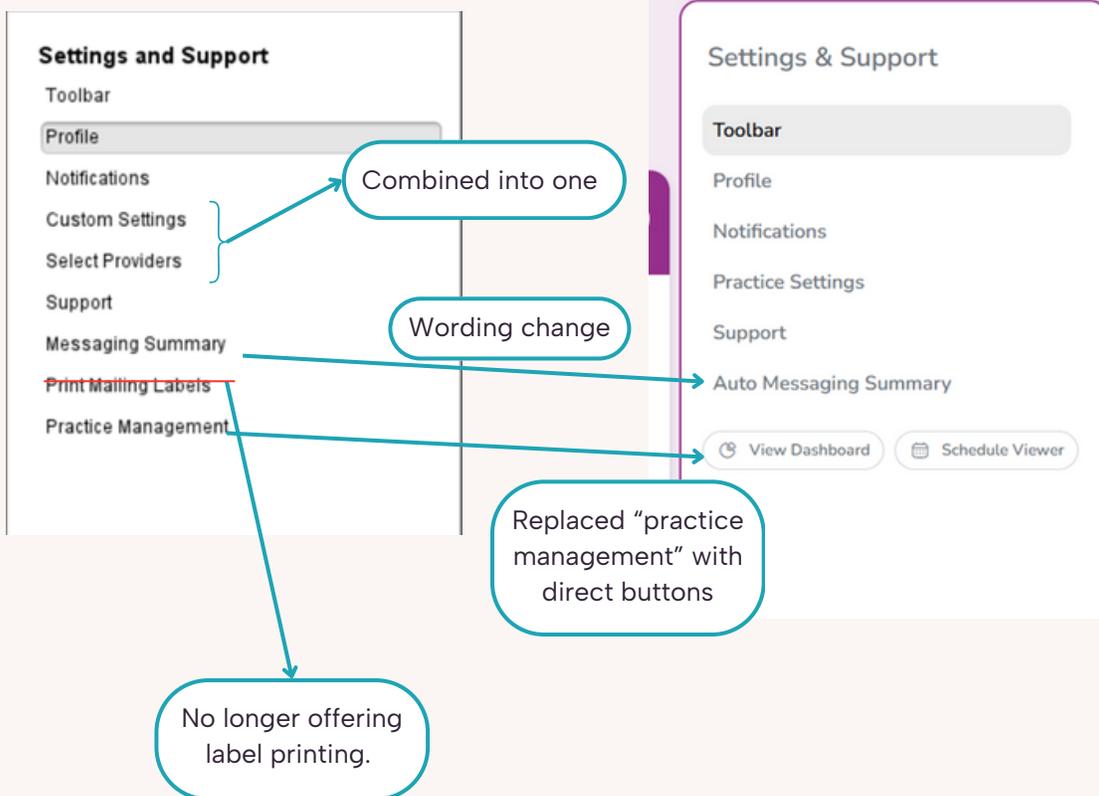
Basic Toolbar to MaxAi Toolbar Training

Settings & Support

Patient Panel – Patient Preferences

✓ Basic

✓ MaxAi



Existing User

Basic Toolbar to MaxAi Toolbar Training

Settings & Support

Settings & Support – Profile

✓ Basic

Profile

Username
LeahAdmin

Practice
Demo11 (69386)

Account
Demo11 (18999)

Password

✓ MaxAi

Profile

Username: LeahAdmin

Practice Name: Demo11

Password:

MaxBadges

Daily Logins - 0
Individual days you've logged in to your toolbar

MaxAi Usage - 0
Number of times you've used MaxAi icon

Replaced "practice management" with direct buttons

Existing User

Basic Toolbar to MaxAi Toolbar Training

Settings & Support

Settings & Support – Notifications

✓ Basic

Messaging Summary

Contact MaxAssist @ support to change settings

Appointment Reminders	Email	Text	Send Time
Day of Appointment	✓	✓	2:00 hours before appt
Two Days Before	✓	✓	8:00 AM
One Week Unconfirmed	✓	✓	8:00 AM
Two Week Confirmations	✓	✓	8:00 AM
New Patient	✓	✓	01:00 hours after appt created
Due and Unscheduled	Email	Text	
Month Before Due Date	✓	✓	10:00 AM
Late List	Email	Text	
1 Month Late	✓	✓	10:00 AM
2 Months Late	✓	✓	10:00 AM
3 Months Late	✓	✓	10:00 AM
4 Months Late	✓	✓	10:00 AM
5 Months Late	✓	✓	10:00 AM
6 Months Late	✓	✓	10:00 AM
Overdue List	Email	Text	
7 Months Overdue	✓	✓	10:00 AM
8 Months Overdue	✓	✓	10:00 AM

✓ MaxAi

Auto Messaging Summary [Change Settings](#)

Practice Text Chat Number: 1-800-651-8603

Practice Auto Text Message Number: 1-800-651-8603

Appt Reminders

Message Type	Email	Text	Send Time
New Patient	✓	✓	1:00 hr after appt created
Today's Patients	✓	✓	2:00 hrs before appt (Email) 2:00 hrs before appt (Text)
Two Day Reminder	✓	✓	8:00 AM
One Week	✓	✓	8:00 AM
Two Week	✓	✓	8:00 AM
Save the Date	-	-	3:00 PM

Due & Overdue Hygiene/Recall

Message Type	Email	Text	Send Time
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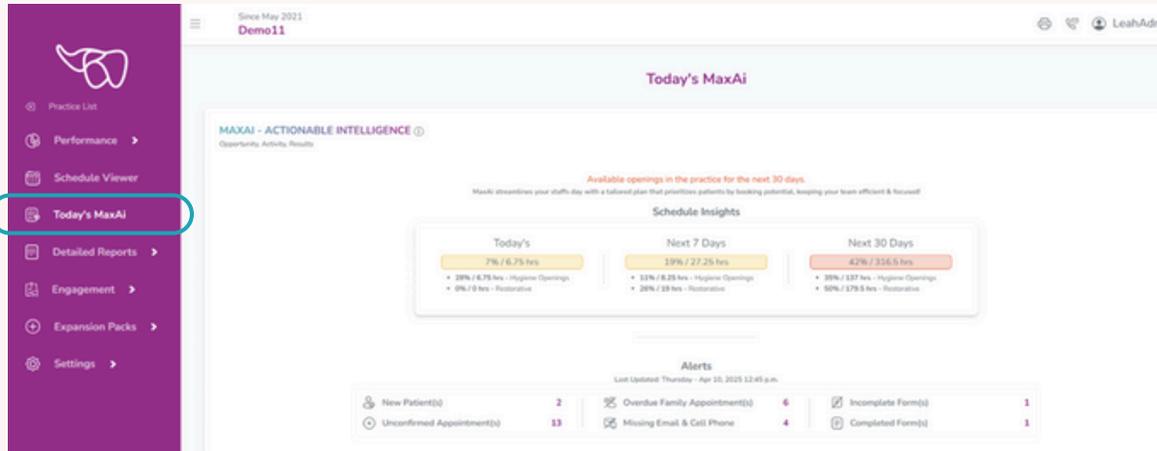
Shortcut added for Practice Administrators to jump to Patient Messages on the Dashboard

Existing User

Basic Toolbar to MaxAi Toolbar Training

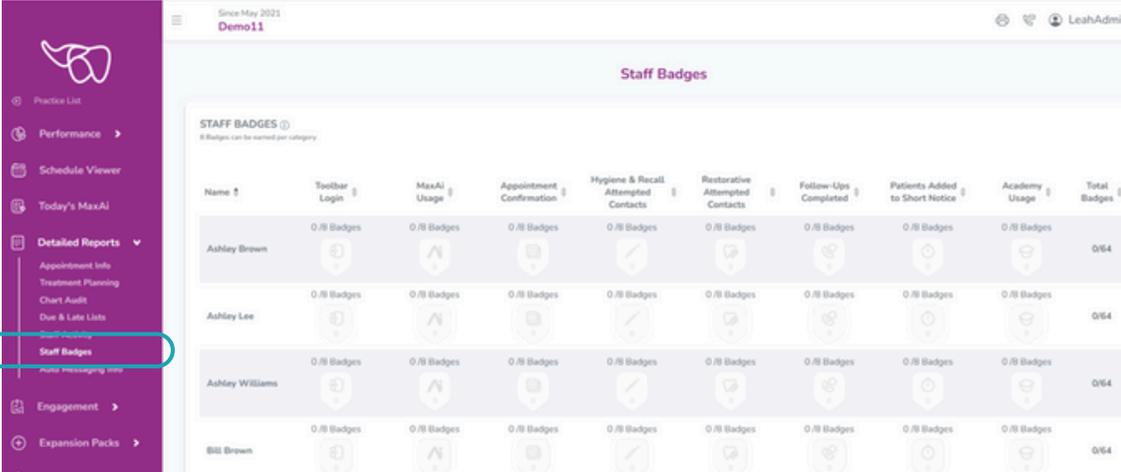
Dashboard

Today's MaxAi



Today's MaxAi replaced "Today's Tasks" report and provides the Office Manager or Owner with the same level of detail as the admins receive with the MaxAi feature on the toolbar.

Staff Badges Report



STAFF BADGES

8 Badges can be earned per category.

Name	Toolbar Login	MaxAi Usage	Appointment Confirmation	Hygiene & Recall Attempted Contacts	Restorative Attempted Contacts	Follow-Ups Completed	Patients Added to Short Notice	Academy Usage	Total Badges
Ashley Brown	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0/64
Ashley Lee	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0/64
Ashley Williams	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0/64
Bill Brown	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0 / 8 Badges	0/64

Staff Badges is a new report located under the Detailed Reports tab. This shows all badges that can be earned, who has earned them and how far till the next earned badge by staff member.