Existing User
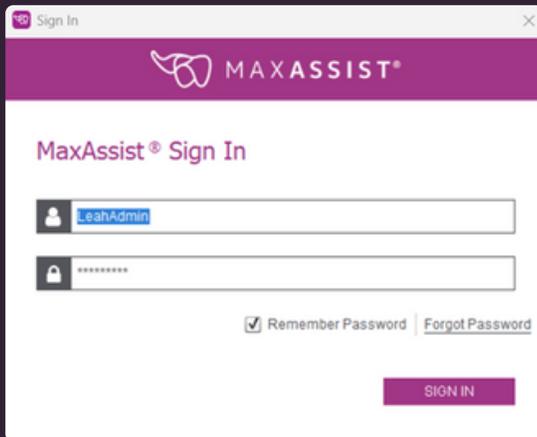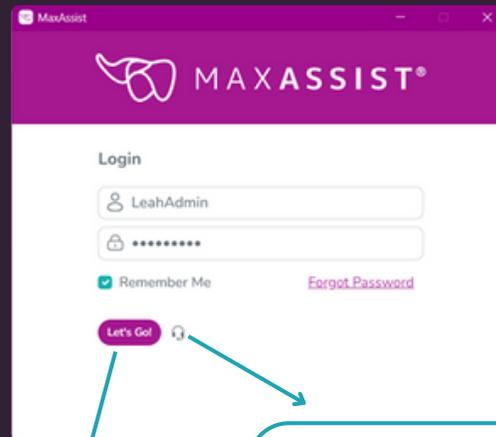
Basic Toolbar to MaxAi Toolbar Training

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.
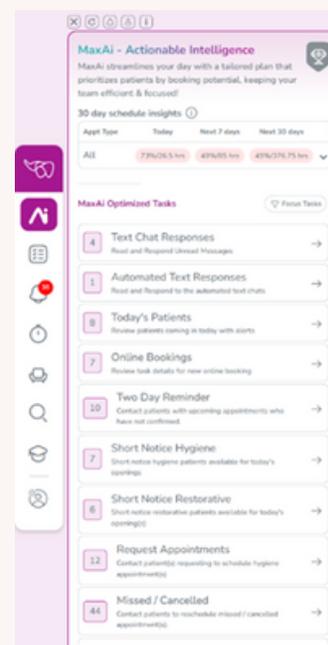
# Basic Toolbar to MaxAi Toolbar Training

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
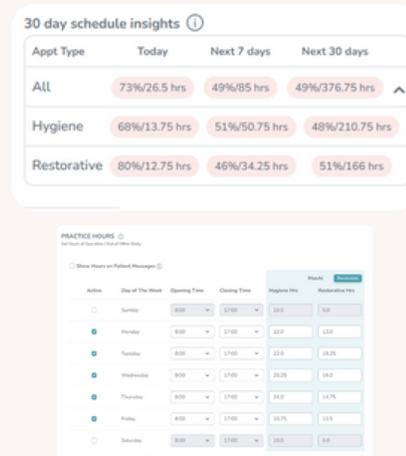
✓ Task Prioritization

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.
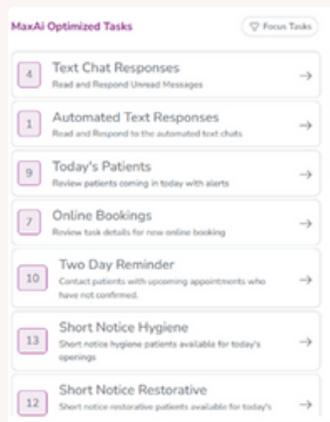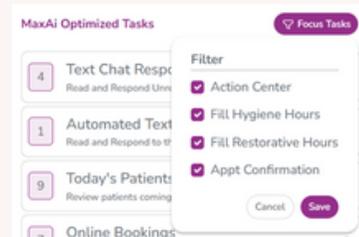
Existing User

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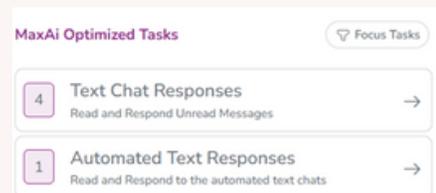
Historical Appointment Booking Success Rate: MaxAi evaluates historical data regarding appointment booking success rates. It knows how many patients you need to connect with to fill the openings it is observing.

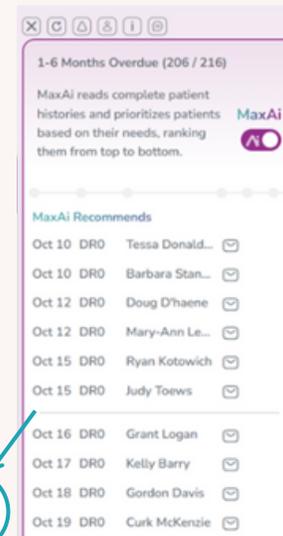# Basic Toolbar to MaxAi Toolbar Training
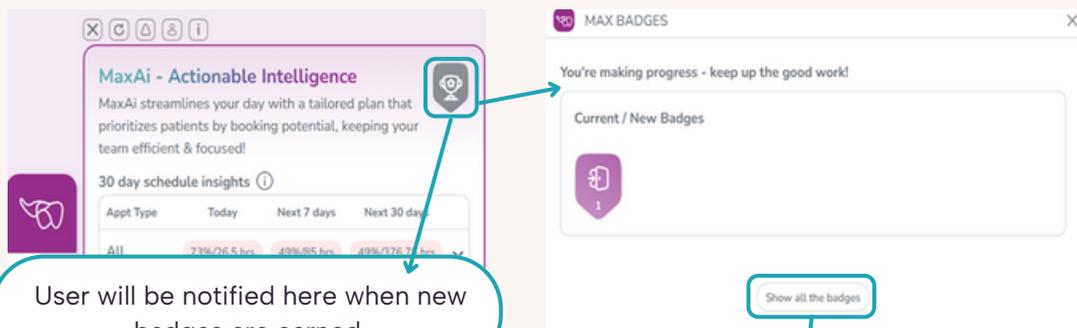
How MaxAi Works

✓ 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

1-6 Months Overdue (206 / 216)

MaxAi reads complete patient histories and prioritizes patients based on their needs, ranking them from top to bottom.

MaxAi

MaxAi Recommends

Oct 10	DR0	Tessa Donald...
Oct 10	DR0	Barbara Stan...
Oct 12	DR0	Doug D'haene
Oct 12	DR0	Mary-Ann Le...
Oct 15	DR0	Ryan Kotowich
Oct 15	DR0	Judy Toews
Oct 16	DR0	Grant Logan
Oct 17	DR0	Kelly Barry
Oct 18	DR0	Gordon Davis
Oct 19	DR0	Curk McKenzie

✓ MaxBadges

MaxAi - Actionable Intelligence

MaxAi streamlines your day with a tailored plan that prioritizes patients by booking potential, keeping your team efficient & focused!

30 day schedule insights ⓘ

Appt Type	Today	Next 7 days	Next 30 day
All	73%/26.5 hrs	49%/85 hrs	49%/376.7...

User will be notified here when new badges are earned.

MAX BADGES

You're making progress - keep up the good work!

Current / New Badges

Show all the badges

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

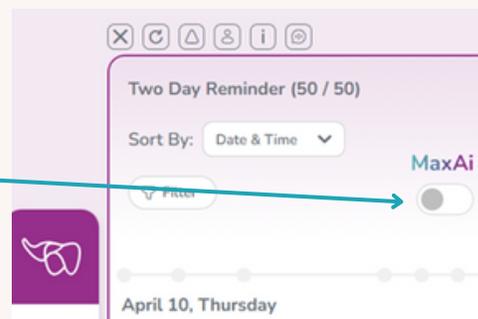# Basic Toolbar to MaxAi Toolbar Training

Patient Lists

☑**Basic**   ☑**MaxAi**

Patient Lists

Reminder List	37
One Week Unconfirmed	70
Two Week Confirmations	96
Missed Pre-Appointed	15
Missed / Cancelled	34
Unscheduled Treatment	335
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

Confirmations

Two Day Reminder	50
One Week	55
Two Week	81

Missing Appointments

Missed Pre-Appointed	30
Missed / Cancelled	45
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

Wording Changes

Section titles added

Wording Changes

Work any list in basic or MaxAi mode with toggle button

Two Day Reminder (50 / 50)

Sort By: Date & Time ⌄

MaxAi

Filter

April 10, Thursday

Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Task Icon

☑ **Basic**　　　☑ **MaxAi**

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.
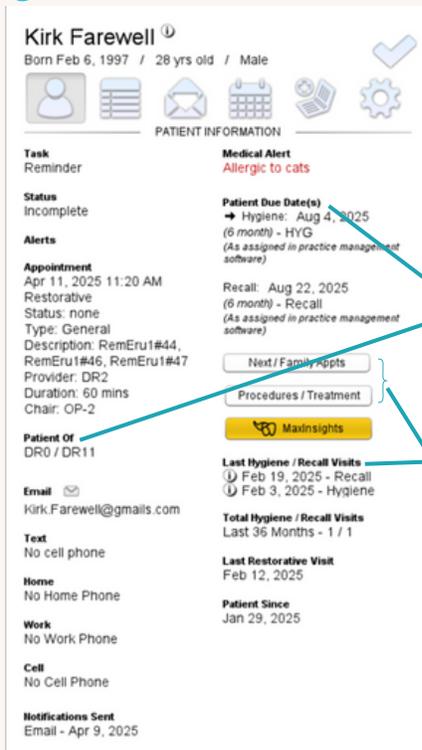
Today's patient alerts now on all confirmation lists!

Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Patient Information

Basic

MaxAi

Alerts added

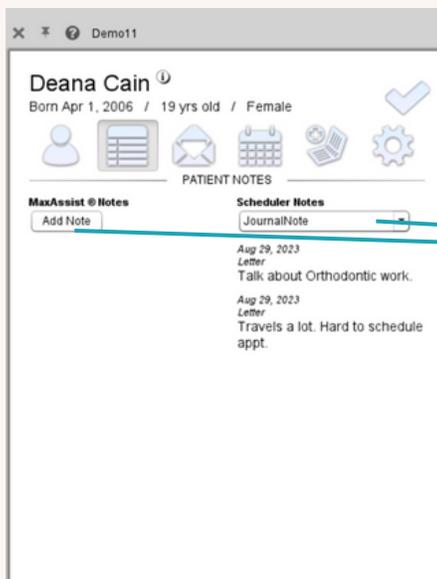Easy view/access to all family members

Existing User

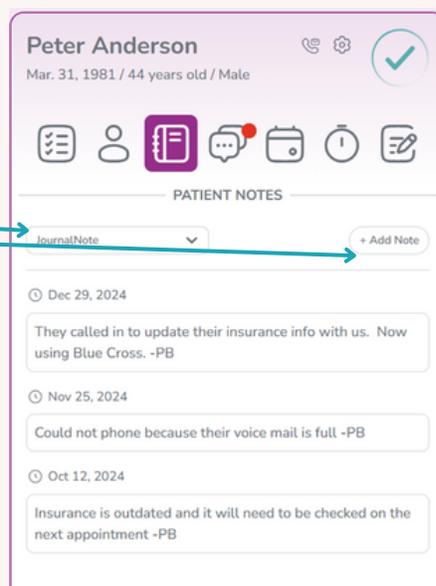# Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Notes

✓ **Basic**   ✓ **MaxAi**

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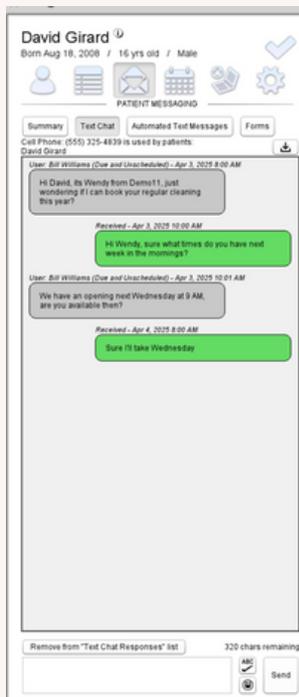MaxAssist and half scheduler.
Newest note to oldest.

Basic Toolbar to MaxAi Toolbar Training
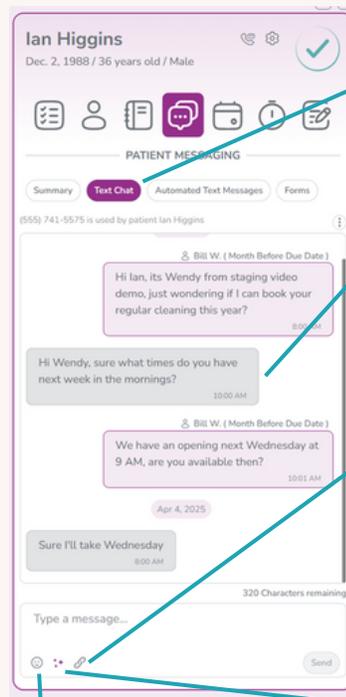
Patient Panel

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.

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel — Follow Up

☑ Basic

Connie Dubien ⓘ
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 ⓘ
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

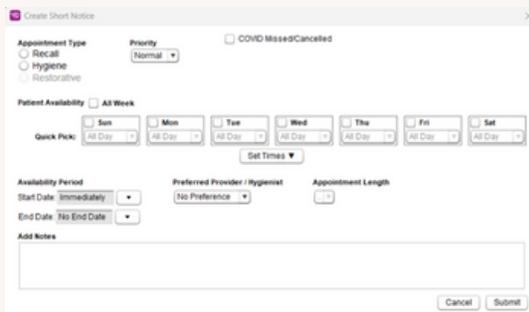|		Appt Length
Thu:	12:00 PM - 04:00 PM	1 Unit
Fri:	12:00 PM - 04:00 PM	Preferred Provider
Sat:	12:00 PM - 04:00 PM	None

Note
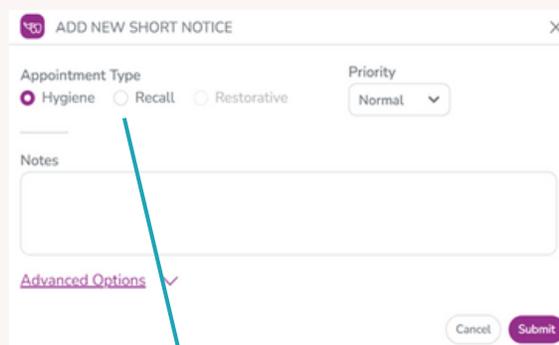Patient needs an appt ASAP

Basic Toolbar to MaxAi Toolbar Training

Patient Panel

Patient Panel – Short Notice

✅ Basic
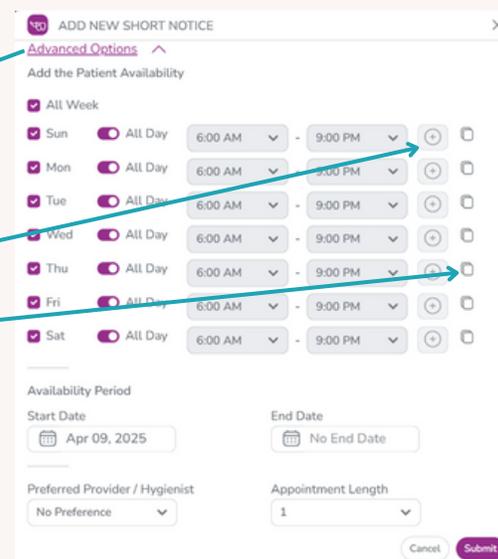

✅ MaxAi

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

✅ Basic

✅ MaxAi

New Advanced options has the following enhancements:

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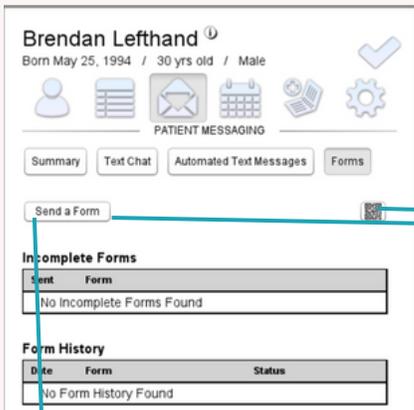- Copy button to add times to other days with one click

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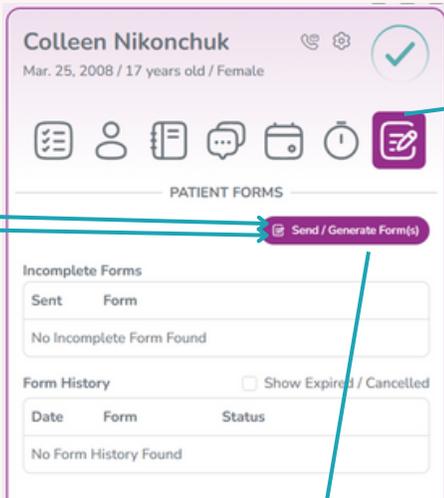
Colleen Nikonchuk
Mar. 25, 2008 / 17 years old / Female

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**
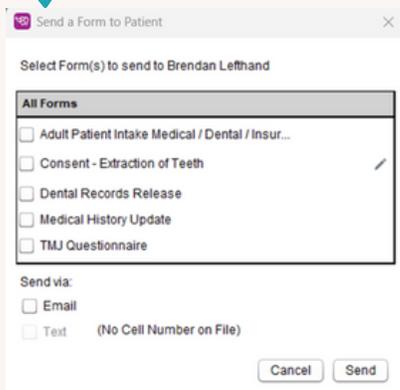
Send a Form to Patient

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**
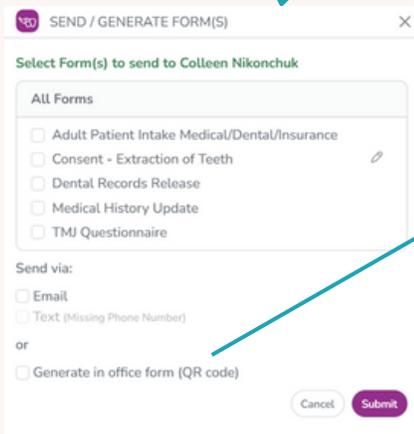
SEND / GENERATE FORM(S)

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**   ✅ **MaxAi**

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

Wording Change

✓ 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

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**

✅ **MaxAi**

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

Existing User

Basic Toolbar to MaxAi Toolbar Training

Today's Patients

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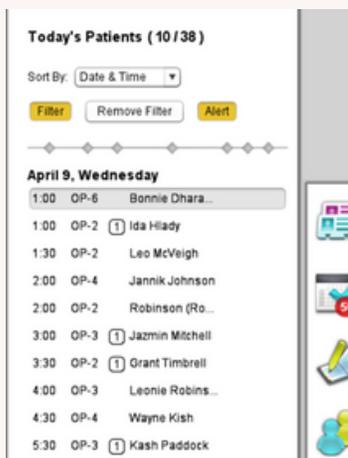
✓ MaxAi
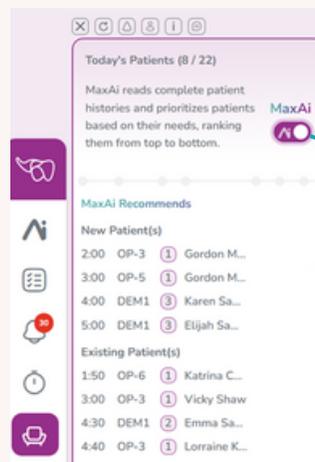
In MaxAi mode, organizes patients into new vs existing and will sort by volume of alerts.

New task page to dismiss patient

New shortcuts to add patient to Follow ups or Short notice
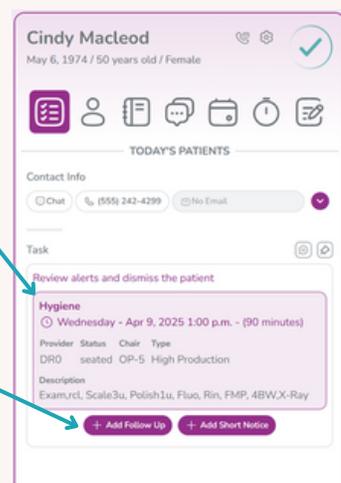
Existing User

Basic Toolbar to MaxAi Toolbar Training

Patient Search
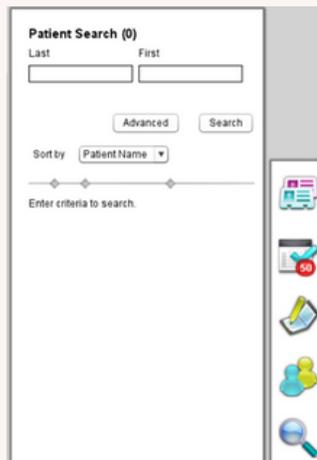
☑ **Basic**   ☑ **MaxAi**
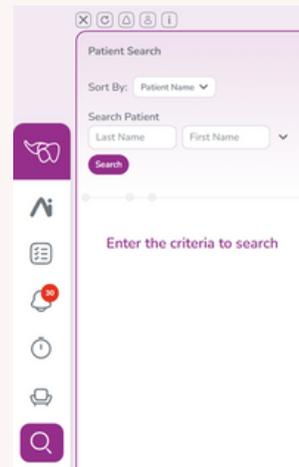
No function changes, updated look

MaxAssist Academy

☑ **Basic**   ☑ **MaxAi**

Icon change only

Existing User

Basic Toolbar to MaxAi Toolbar Training

Settings & Support

✅ **Basic**

✅ **MaxAi**

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

New home for change practice

⌂ Change Practice

📢 Update(s)

Was MaxAssist messages icon

⚙ Settings & Support ›

🚪 Log Out

Newly added log out button

Combined both icons into one

Existing User

Basic Toolbar to MaxAi Toolbar Training

Settings & Support

Patient Panel – Patient Preferences
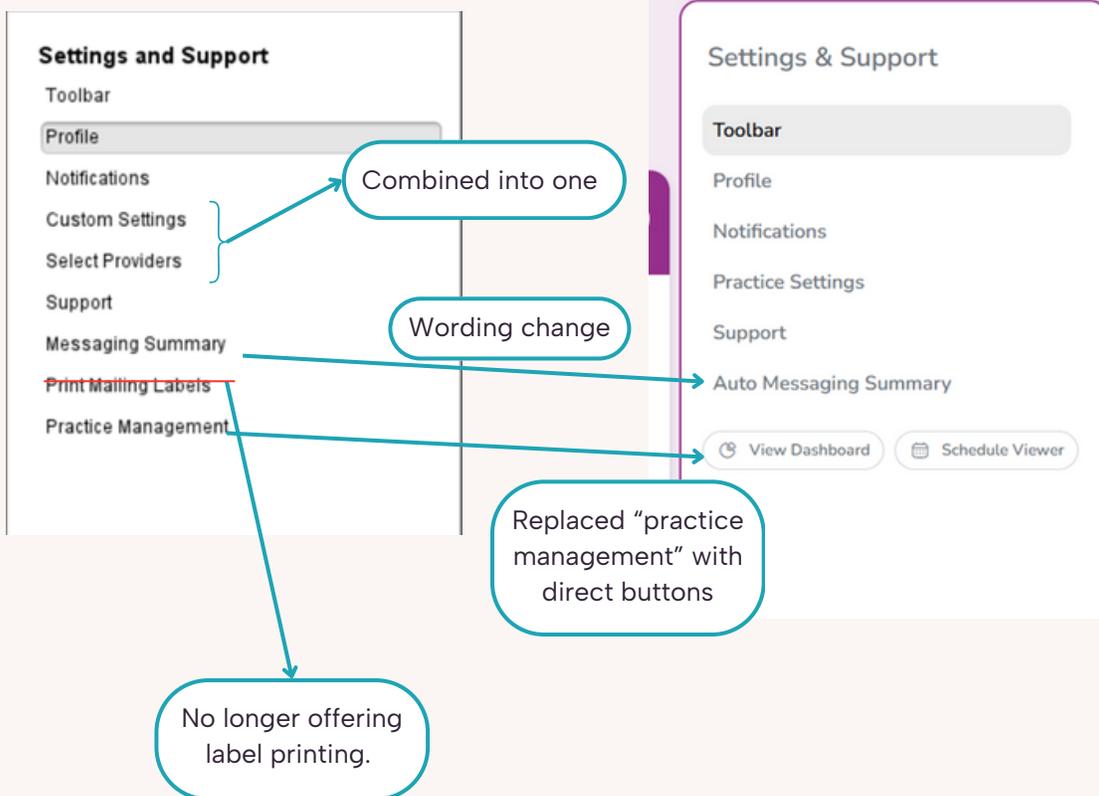
✔ Basic

Settings and Support

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

Combined into one

Wording change

No longer offering label printing.

✔ MaxAi

Settings & Support

Toolbar
Profile
Notifications
Practice Settings
Support
Auto Messaging Summary

🕐 View Dashboard   📅 Schedule Viewer

Replaced "practice management" with direct buttons

Basic Toolbar to MaxAi Toolbar Training

Settings & Support

Settings & Support – Profile

☑ **Basic**   ☑ **MaxAi**

Profile

Username
LeahAdmin

Practice
Demo11   (69386)

Account
Demo11   (18999)

Password
Change Password

Reset Demo

Profile

Username: LeahAdmin

Practice Name: Demo11

Password: Change Password

Reset Demo

MaxBadges

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

1   50   150   300   500   750   1000   1250

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

Replaced "practice management" with direct buttons

Basic Toolbar to MaxAi Toolbar Training

Settings & Support

Settings & Support — Notifications

☑ **Basic**

☑ **MaxAi**

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

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
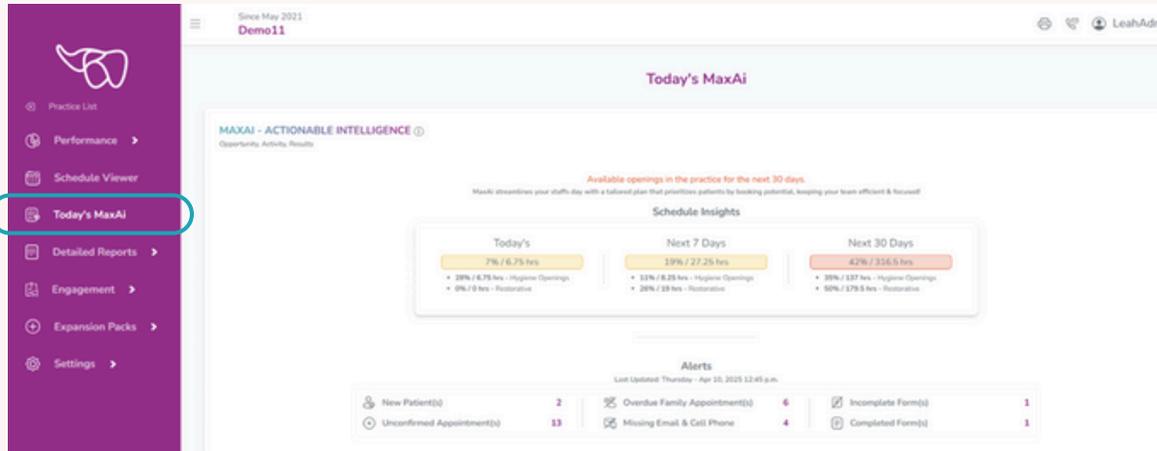
Message Type	Email	Text	Send Time

Shortcut added for Practice Administrators to jump to Patient Messages on the Dashboard

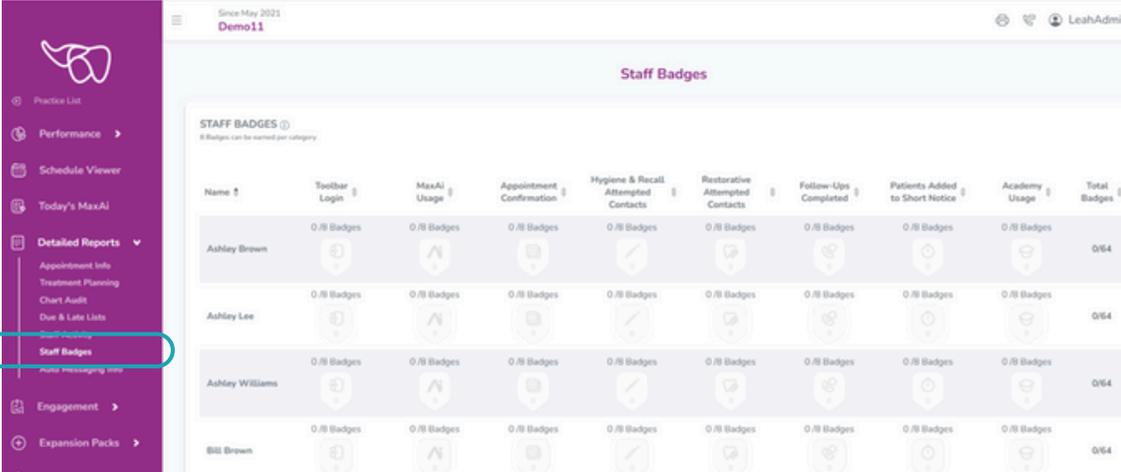# Basic Toolbar to MaxAi Toolbar Training

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 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.