

WORKFLOW OVERVIEW

Email intake automation

See how two different email requests—an ICBC occupational therapy referral from an adjuster and a client’s private-pay physiotherapy inquiry—become structured client and referral records.

1 · RECEIVE

Referral and inquiry emails arrive in one shared intake inbox.

2 · INTERPRET

An email-specific automation extracts the person, service, and payer context.

3 · CREATE

The applied plan creates both the client record and the referral.

4 · CONTINUE

Staff choose a manual or automated candidate and assignment strategy.

1

Start from the referrals inbox

Sunrise Referrals Intake keeps incoming requests together. The ICBC OT referral for Sofia Martinez and the physiotherapy request from Ethan Wong are both visible and remain available for staff review after processing.

The screenshot displays the 'Sunrise Referrals Intake' inbox within the InToday web app. The interface includes a top navigation bar with a search bar, a user profile for Jordan Avery, and a notification badge showing 99+ alerts. A left sidebar contains navigation icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area is titled 'Email Accounts / Sunrise Referrals Intake' and shows an 'Inbox' view. A search bar for messages is present, along with 'View: Focus' and 'Filters' options. The inbox list contains several messages, each with a circular icon, a subject line, a preview, and a timestamp. A 'Feedback' button is visible on the right side of the inbox list.

Icon	Subject	Preview	Time
SR	Dr. Nadia Kwon, me	GP referral — MVA, OT assessment Received — we will open the chart and send available times today.	Just now
LM	Leah Morin	New patient intake — please create a chart Hello, I was told to email my completed intake packet so you can open a chart. Intake form attached. Date of birth 14 Mar 1988. Family doct...	22m ago
OB	Olivia Bennett, ICBC Adjuster	ICBC OT referral — Sofia Martinez Hello Sunrise team, Please accept this occupational therapy referral for Sofia Martinez following a motor vehicle collision. Sofia can be ...	25m ago
EW	Ethan Wong	Physiotherapy request — Ethan Wong Hi Sunrise, I would like to start physiotherapy for a knee injury and prefer appointments at your clinic. My name is Ethan Wong, my phone ...	45m ago
AS	Anita Singh	Parent requesting pediatric OT for Maya Singh, age 6 Hi, I would like to register my daughter Maya Singh as a new client for pediatric occupational therapy. School is asking for an assessment ...	46m ago
NV	North Vancouver SD44 Inclusive Ed	School district SLP referral — speech assessment Referring a grade-2 student for speech-language assessment. Consent and teacher checklist attached. Please create the client record and con...	58m ago
AA	Adobe Acrobat	Signed consent form for new client All parties have signed. The completed consent agreement is attached for your records — please attach it to the client chart.	3h ago
GO	Grace Okafor	I would like to become a client Hi, a friend referred me. Do you offer direct billing for Pacific Blue Cross? I would like to book an initial OT assessment and get set up ...	3h ago
SR	North Shore Health Intake, me	New client referral — home care nursing Received, thank you — we will confirm scheduling by end of day tomorrow.	Mon waiting 3d
SR	Robert Johnson, me	Question about extended health coverage We do — happy to set that up before your next visit, just need your policy number.	Sep 23 waiting 8d
PD	Practice Digest	Your weekly practice digest Here is your summary for the week. Do not reply to this message.	Sep 18

Review the adjuster's OT referral

Olivia Bennett's email identifies Sofia Martinez, the authorized in-home OT assessment, travel approval, and the ICBC claim number—the information needed to create a structured intake.

The screenshot displays the InToday web app interface. The top navigation bar includes a search bar, a notification bell with 99+ alerts, and a user profile for Jordan Avery. The left sidebar contains navigation icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area is divided into three sections:

- Email Accounts:** A list of accounts including Sarah Thompson, Jennifer Thompson, Sunrise Front Desk, Sunrise Referrals Intake, and Sunrise Billing.
- Inbox:** A list of messages with headers showing sender names and initials (SR, LM, OB, EW, AS, NV, AA) and timestamps. The selected message is from Olivia Bennett, ICBC Adjuster, titled "ICBC OT referral — Sofia Martinez".
- CONTEXT:** A detailed view of the selected email, showing the body text and a right-hand sidebar with contact information, an AI summary, and tags.

Email Body Content:

ICBC OT referral — Sofia Martinez
OB Olivia Bennett, ICBC Adjuster Oct 1

Hello Sunrise team,

Please accept this occupational therapy referral for Sofia Martinez following a motor vehicle collision. Sofia can be reached at sofia.martinez@sunrise-demo.example or 604-555-0192. The approved service is an in-home OT assessment, and travel is authorized. Claim number ICBC-SM-48271. The referral form and authorization are attached.

Thank you,
Olivia Bennett
ICBC Claims Adjuster

CONTEXT Sidebar:

- Contact:** Unable to identify contact (olivia.bennett@icbc.example). Buttons: Manually Log Time, Create New Contact.
- AI Summary:** Generate a summary when you need a quick overview. Button: Generate summary.
- Tags:** + Tag

Confirm what the automation created

The applied “Create ICBC OT referral from adjuster email” plan records two completed actions: create the client and create the referral. The source email remains linked for verification.

The screenshot displays the InToday web app interface. The left sidebar contains navigation options: Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area shows the automation plan for 'ICBC OT referral from adjuster email' (Suggestion #5682). The plan is marked as 'Applied' and includes a 'New chat' button. The 'What it did' section lists two actions: 'create client' and 'create referral'. The 'Details' section provides a summary of the automation, including the rule, subject, suggested time, and decided time.

Automations > Rules > Create ICBC OT referral from adjuster email > Suggestion #5682

Applied Open Email

ICBC OT referral — Sofia Martinez

Suggested 1 Oct 2026, 5:41 PM

What it did
These actions were applied. Reversing unwinds them.

ICBC OT referral — Sofia Martinez

- 2 actions: create client, create referral
- Olivia Bennett, ICBC Adjuster <olivia.bennett@icbc.example> · 23m ago

[Reverse](#) [Hide plan](#)

VERIFICATION

✉ ICBC OT referral — Sofia Martinez

Olivia Bennett, ICBC Adjuster <olivia.bennett@icbc.example> · Oct 1, 2026

[View full email](#)

- Step 0 Create client — Email → sofia.martinez@sunrise-demo.example, Last name → Martinez, First name → Sofia
- Step 1 Create referral

Details

Rule	Create ICBC OT referral from adjuster email
Subject	Email
Suggested	1 Oct 2026, 5:41 PM
Decided	1 Oct 2026, 5:43 PM

Jordan Avery
Sunrise Healthcare · Admin

[Feedback](#)

4

● ICBC ADJUSTER REFERRAL

Open the new ICBC client record

Sofia's client record is ready with contact details, an ICBC payer and billing record, and an open referral. Staff can review and complete any remaining chart information before care begins.

The screenshot displays the InToday web app interface for a client record. The top navigation bar includes a search bar, a notification bell with 99+ alerts, and a user profile for Jordan Avery. The left sidebar contains icons for Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area shows the client record for Sofia Martinez, with a claim number of DEMO-001673. The record is categorized as ICBC and includes a billing record for DEMO-001673. The record is tagged with 'No tags'. The record is divided into sections: Contact, Details, Summary, and Addresses. The Contact section shows Sofia Martinez's contact information. The Details section shows her client type as ICBC, billing number as DEMO-001673, date of injury as July 1, 2026, and meet type as Community. The Summary section shows an 'Open' status and '1 open referral'. The Addresses section is currently empty, with a 'New Task' button and a 'Nothing on the list for this client.' message. A 'Feedback' button is visible on the right side of the record.

Sofia Martinez
Claim #: DEMO-001673

ICBC Billing #DEMO-001673

TAGS: No tags

Contact

Firstname	Lastname	Email
Sofia	Martinez	sofia.martinez@sunrise-demo.example

Details

Client Type	Billing Number	Date of Injury	Meet Type
ICBC	DEMO-001673	July 1, 2026	Community

Summary

Open 1 open referral

New Task

Nothing on the list for this client.

Addresses + ADD

Review the OT referral before assignment

The referral carries the occupational therapist requirement, ICBC payer, source contact, authorized travel, and claim context. It is ready for candidate selection or referral automation—but no provider has been assigned and no appointment has been booked yet.

The screenshot displays the InToday web app interface for reviewing an ICBC OT referral. The top navigation bar includes a search bar, a notification bell with 99+ alerts, and a user profile for Jordan Avery. The main header shows the referral title "ICBC OT — In-home ass..." with a yellow "REFERRAL" tag and a grey "APPROVAL CONFIRMED" tag. Below this, a breadcrumb trail indicates the referral was created on Oct 1, 2026, and updated 1 minute ago. The interface is divided into two main sections: a left sidebar with navigation icons for Work, Money, Inbox, Reports, Team, Tools, and Settings, and a right sidebar with a "Feedback" button. The central content area is organized into several panels. On the left, there is an "Automation" toggle set to "Off", a "Candidates" section with a "Manage Candidates" button, a "Description" section with an "Edit" button, a "Consult Responses" section with an "Add Response" button, an "Attachments" section with an "Add Files" button, and "Activity" and "AI Conversations" sections. On the right, there is a "Client" section for Sofia Martinez (sofia.martinez@sunrise-demo.example) with a "PAYER" field set to "ICBC", a "Source" section with a "CONTACT" field set to the same email, an "Assigned Provider" section with an "Assign" button, a "Referral Automation" section, and a "Details" section showing "PROFESSIONS" as "Occupational Therapist" and "ROLE" as "Service Provider".

ICBC OT — In-home ass... REFERRAL APPROVAL CONFIRMED

#371 - Occupational Therapist - Created Oct 1, 2026 - Updated 1 min ago

ALL REFERRALS EDIT MORE ACTIONS

Automation
Off

Candidates
No candidates invited yet [Manage Candidates](#)

Description [Edit](#)
Created from Olivia Bennett's ICBC referral email. In-home occupational therapy assessment with authorized travel. Claim ICBC-SM-48271.

Consult Responses [Add Response](#)
No specialist response recorded yet [Add Response](#)

Attachments 0 [Add Files](#)

Activity

AI Conversations

Client
Sofia Martinez
sofia.martinez@sunrise-demo.example
PAYER ICBC

Source
CONTACT sofia.martinez@sunrise-demo.example

Assigned Provider
Not assigned yet [Assign](#)

Referral Automation

Details
PROFESSIONS Occupational Therapist
ROLE Service Provider

Feedback

Review the client's in-clinic PT request

Ethan Wong asks for physiotherapy for a knee injury, prefers appointments at the clinic, and identifies private payment. His contact details and care request are contained in the email.

The screenshot displays the InToday web app interface. The top navigation bar includes a search bar, a notification bell with 99+ alerts, and a user profile for Jordan Avery. The main content area is divided into three sections:

- Email Accounts:** A sidebar on the left lists various email accounts, including Sarah Thompson, Jennifer Thompson, Sunrise Front Desk, Sunrise Referrals Intake, and Sunrise Billing.
- Inbox:** A central list of emails. The selected email is from Ethan Wong (EW) titled "Physiotherapy request — Ethan Wong", dated Oct 1. The email content reads: "Hi Sunrise, I would like to start physiotherapy for a knee injury and prefer appointments at your clinic....".
- CONTEXT:** A right-hand panel providing additional information about the contact, including a "Log Time" button, an "AI Summary" section with a "Generate summary" button, and a "Tags" section with a "+ Tag" button.

A vertical "Feedback" button is visible on the far right edge of the interface.

Confirm the PT intake automation

The applied “Create PT referral from client email” plan creates Ethan’s client record and referral, while retaining a direct verification link to the original message.

The screenshot displays the InToday web app interface. On the left is a sidebar with navigation options: Work, Money, Inbox, Reports, Team, Tools, and Settings. The main content area shows the 'Automations' section, specifically the 'Create PT referral from client email' plan, which is marked as 'Applied'. The automation details for 'Physiotherapy request — Ethan Wong' are shown, including the actions taken (create client, create referral) and the verification link. A 'Details' section at the bottom provides further information about the rule, subject, suggested time, and decided time.

Automations > Rules > Create PT referral from client email > Suggestion #5685

Applied [Open Email](#)

Physiotherapy request — Ethan Wong

Suggested 1 Oct 2026, 5:21 PM

What it did
These actions were applied. Reversing unwinds them.

Physiotherapy request — Ethan Wong

- 2 actions: create client, create referral
- Ethan Wong <ethan.wong@sunrise-demo.example> · 44m ago

[Reverse](#) [Hide plan](#)

VERIFICATION

✉ **Physiotherapy request — Ethan Wong**
Ethan Wong <ethan.wong@sunrise-demo.example> · Oct 1, 2026

[View full email](#)

- Step 0 Create client — Email → ethan.wong@sunrise-demo.example, Last name → Wong, First name → Ethan
- Step 1 Create referral

Details

Rule	Create PT referral from client email
Subject	Email
Suggested	1 Oct 2026, 5:21 PM
Decided	1 Oct 2026, 5:23 PM

Jordan Avery
Sunrise Healthcare · Admin

[Feedback](#)

Review the ready physiotherapy referral

Ethan's referral identifies physiotherapy, an in-clinic knee assessment, and private pay. As with Sofia's referral, it is ready for the next operational step but is not yet assigned or scheduled.

The screenshot displays the InToday web app interface for reviewing a physiotherapy referral. The top navigation bar includes a search bar, a user profile for Jordan Avery, and a notification bell with 99+ alerts. The main header shows the referral title "Physiotherapy — Knee a..." with a yellow "REFERRAL" tag and a grey "APPROVAL CONFIRMED" tag. Below the header, the referral details are organized into a grid of sections:

- AUTOMATION**: Off
- Candidates**: No candidates invited yet. A "Manage Candidates" button is available.
- Description**: Created from Ethan Wong's email request for an in-clinic physiotherapy assessment for a knee injury. An "Edit" button is present.
- Consult Responses**: No specialist response recorded yet. An "Add Response" button is available.
- Attachments**: 0 files. An "Add files" button is available.
- Activity**: A section for tracking activity.
- AI Conversations**: A section for AI-generated conversations.
- Client**: Ethan Wong, ethan.wong@sunrise-demo.example, PAYER, Private Pay.
- Source**: CONTACT, ethan.wong@sunrise-demo.example.
- Assigned Provider**: Not assigned yet. An "Assign" button is available.
- Referral Automation**: A section for automation settings.
- Details**: PROFESSIONS: Physiotherapist, ROLE: Service Provider.

A vertical "Feedback" button is located on the right side of the interface.

AFTER THE PROFILE AND REFERRAL ARE CREATED

Choose how the referral continues

A tenant owner or authorized administrator can keep the referral staff-controlled, enable the built-in referral automation, or configure a clinic-specific automation for a unique operating model.

Manual candidate management

Staff stay in control of each decision.

- Invite selected candidates and compare their travel, fit, priority and capacity.
- Send another reminder to candidates who have not responded.
- Assign one of the providers who accepted.

Automated outreach

The referral can run a configured response cycle.

- Invite notifiable candidates immediately.
- Nudge non-responders using the clinic's reminder cadence.
- Apply the chosen timeout action if nobody accepts by the final deadline.

Automated provider selection

Once an eligible provider accepts, the selected strategy can assign them and grant access to the client file.

- **Best match with early assignment:** favour the strongest match while preserving a response window.
- **Highest priority score:** choose the accepted candidate with the highest score.
- **First to accept:** prioritize speed for urgent referrals.

Clinic-specific automation

Owners and authorized admins can configure the prompt, rules and autonomy level to match the clinic's workflow.

- Stage suggestions for review and approval while the workflow is being proven.
- Promote a trusted rule to auto-apply when the clinic is comfortable with its track record.
- Create a tailored strategy when the standard options do not fit the use case.

Assignment and calendar booking are different steps. Referral auto-assignment chooses an accepted provider; it does not itself place an appointment on that provider's calendar. Calendar booking can remain manual or use a separate booking automation that respects the clinic's availability, service and scheduling rules.

Two email paths, two referrals ready for the team



The original email remains visible.

Staff can trace each created record back to its source message.



The automation's actions are reviewable.

Each applied plan shows the client and referral it created.



Payer and service context carry forward.

ICBC OT and private-pay PT become distinct, structured referrals.



The clinic chooses how work continues.

Use manual candidate management, referral automation, or a tailored rule. Calendar booking remains a separate manual or automated workflow.

Explore InToday

Bring email intake, referrals, scheduling, client care, billing, and team workflows together in one platform.

Assignment flexibility: Clinics can let therapists choose from referral opportunities, have coordinators select and assign, or enable rule-based auto-assignment using configured availability and capacity. The clinic chooses the strategy, and it can be tailored.

This guide ends when each referral is ready; the scheduling guide continues the journey onto a practitioner's calendar.

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